

# Nonprofit education and information organization manages foundation, corporate approaches with ClearView CRM

A leading organization for nonprofit education and information gained the ability to track grant proposals to donors and make easy work of distinguishing requests for different grants years and fund types—all with ClearView CRM.

When the organization researched fundraising software, it quickly realized ClearView CRM was the only system that would enable it to track proposals by grant year—a key requirement to conduct its fundraising efforts.

With more than 600 active foundation and corporate donors, the organization needed a tool that records the status of all grant proposals—accepted, declined, under review or yet to be sent.

ClearView CRM's major gift tracking feature is now the core of the organization's fundraising and information tracking system. The tracking feature allows development staff to track every donor grant proposal and distinguish requests for different grant years and fund types. The feature offers staff the flexibility to use one proposal record over multiple years to send letters requesting support from major donors. In addition, staffers can distinguish between more than a dozen fund types, including annual support, regional funding and special fundraising projects.



*"ClearView CRM helps us plan, track and evaluate our approach to foundation and corporate funders."*

*Vice president of development  
Nonprofit Education and Information Org.*

## Tracking made simple

Contact history records, which link directly to a proposal tracking record, allow development staff to track follow-up contacts with foundation and corporate donors. Contact history records also help staffers monitor and plan correspondence, phone calls, meetings, and other obligations associated with a given funding request. ClearView CRM's user-friendly tracking screen allows staff to quickly view the status of proposals sent to a particular donor over various years and fund types. The ability to link each gift record to a proposal record also allows staff to determine which gifts are made in response to certain proposals.

Today, the organization's fundraising efforts are considerably more efficient and streamlined as a direct result of using ClearView CRM.



### Contact SofTrek

Learn how your nonprofit can increase productivity and save money with ClearView CRM.

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