

The Navigators use technology to support ministry of thousands

If you think that supporting the efforts of a dozen or even two dozen fundraisers is difficult, try nearly 4,000.

That's the charge of the Accounting Process Center at The Navigators, an international, interdenominational Christian ministry established in 1933. Navigator staff members are deputized fundraisers who work around the world on a range of religious and humanitarian efforts and number some 3,600. Each staff member maintains a portfolio of donors who support his or her projects. In turn, they rely on the center to handle all accounting for donor income and project expenses.

Derrick Swihart is manager of the Accounting Process Center, seasoned with more than 14 years with the organization. His department's mission is to accurately and efficiently process all donation income to the projects that staff run.

With 3,600 staff and, conservatively, double that number of projects, the Accounting Process Center handles a hefty volume of transactions. Arguably the most important part of its job is precisely allocating donor gifts to the correct staff project or fund, as well as to report on that activity. That's the "key for us," says Swihart. "Our business model relies on accurately allocating the funds where they're supposed to go."

And that's where the cloud-based ClearView CRM System's tools comes in, helping The Navigators with a powerful core donor database, gift processing, reporting and analytics, and more.

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Naturally, handling the sheer volume of mail, phone and online gifts coming into the organization is a huge challenge. The volume changes significantly at different times of the year, with November through January typically seeing the biggest influx of donations.

Swihart's department processes many thousands of dollars that come into the organization via mail and online each month, an amount that can swell significantly at busy times. The Navigators organization also raises many millions of dollars worldwide through major, annual and planned giving operations, all of which make use of ClearView CRM to handle gift processing and other key administrative and operational activities.



Streamlining complex work

Today, ClearView helps The Navigators accomplish a number of essential fundraising operational, administrative and marketing activities:

Gift processing

Center staffers scan all remittance forms and checks that come into the organization with a scanner attached to their workstation. The scanned data is automatically loaded into the core donor database, a process that eliminates data entry mistakes. The core donor database is connected directly to The Navigators' accounting system and automatically posts the gifts to the general ledger.

Credit card and recurring payment processing

When donors call to make gifts via a credit card, customer service reps process the transactions in ClearView, which batches and loads them into the core database. The Navigators also schedules recurring credit card and EFT payments to run automatically in ClearView, without anyone having to pull the information from the database.

Online giving

The organization uses ClearView's Online Marketing Suite for its donor portal. There, donors make gifts, get receipts and see their payment history. An API connects the site with ClearView, so any transaction data is updated in real time. Having the data from the donor portal in the core donor database also provides The Navigators with the added benefit of more closely integrating online and offline fundraising efforts.

Handling gifts and support

The Navigators' Accounting Process Center consists of two processors who handle all mailed gifts, a process lead, two verifiers, one main database administrator and three customer service representatives. Through their efforts, the center

- Receives, opens and processes all mailed gifts.
- Takes donations via credit card over the phone.
- Processes gifts that come through the organization's donor portal.
- Verifies that gifts are allocated correctly, either to an individual project of a staff member or to a larger, organization-wide project.

List maintenance

ClearView handles all changes to donor records in the core database. A processor can input changes to a donor record directly into the database, as can a customer service rep who takes a call from a donor about, for instance, receiving duplicate mailings. (Large-scale duplicate resolution through ClearView is the responsibility of the center's DBA.) As well, ClearView accepts files back from The Navigators' direct mail service with information on any name, address or email changes, returned or bounced mail and more. The system stores the information and ensures the data is clean by deleting duplicate records and applying correct donor codes.

Donor thanks

The Navigators also uses ClearView to generate gift acknowledgements. Because individual staff build and maintain close relationships with their donors, promptly acknowledging and thanking donors for gifts is vital.

Reporting

Reporting back out to staff worldwide and to donors is a vital complement to the work that the center and ClearView handle. The task is complicated by the multiplicity of staff and their projects (which, conservatively, are double the number of staff). "A donor might give to 10 different projects," Swihart says.

The center's customer service reps also field inquiries, both from donors who want to change account information or ask a question and from staff worldwide who have questions about their projects' accounting.

"Staff keep a close eye on the data, and if they see something that doesn't look quite right, they get in touch with us," Swihart explains. "With donors, we occasionally have to try to interpret where they want their funds to go. They might send in an envelope with no stub or designation, so we just need to clarify their wishes."

The Accounting Process Center began using the cloud-based ClearView CRM (formerly PledgeMaker) about six years ago. Before The Navigators chose ClearView, the organization worked with a system that did “similar things,” Swihart recalls. “But it was installed, and we had to modify it and have IT people who knew it. ClearView brought us the software as a service—it’s web-based and SofTrek keeps it up to date. We also maintain our data on secure SofTrek servers.”



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Deepening donor relationships

To maintain and strengthen its relationships with donors, The Navigators stores and makes strategic use of information on donor giving. The data, including when and to which staff or fund donors give, is valuable in various ways:

- The organization provides gift notifications electronically to donors or provides lists to the vendor that prints and mails donor receipts. Donors look for this information to confirm their gifts, to remind them of the date of their next gift and to use at tax time.
- Navigator staff also make use of customized reports, updated nightly in ClearView. One such report, for example, is a monthly summary of giving. Staff can log in to a website to view the status of funding for any of their projects. They also can use a “donor lookup” function to check on who gave to their projects, the donors’ giving history, address and other information. Other available reports include a 12-month giving summary and list of lapsed donors. The importance of those reports is underscored by the number of staff who check certain reports “nearly every day,” according to Swihart.

A relatively new way that The Navigators uses ClearView is by integrating data on customers of NavPress, the organization’s publishing arm, and its Glen Eyrie Conference Center. Each of these divisions processes its own income, whether from book purchases or conference center visits, in its own accounting system. However, explains Swihart, the Accounting Process Center now gets transaction files nightly from them and loads all the data into ClearView’s core donor database.

The benefits are clearly visible. Bringing in the data from the publishing side alone almost doubled the number of people in The Navigators’ database. “We had lots of people buying books who knew the publishing side of The Navigators but didn’t know the ministry side. We want to build better relationships with our constituents, whether by suggesting a book to a donor or by bringing on a book customer as a donor. To be able to send targeted information to them based on the books they purchased is very powerful,” Swihart says. Having the integrated data allows The Navigators to grow the awareness of its mission and offerings to anyone who has contact with the organization.



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