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Environmental Law Firm Leverages the Power of Click & Pledge to Manage Events, Revenue, and Donor Relations

The Environmental Defense Center (EDC) is the only nonprofit environmental law firm working in the public interest to protect the environment between Los Angeles and San Francisco. Founded in 1977 and serving California's Central Coast, EDC has a long track record of educating the community, successfully advocating for the environment, and working with other nonprofits to protect open space, wildlife, public health, clean air, and clean water. Their efforts have resulted in the retirement of 40 offshore oil leases, the permanent preservation of more than 100,000 acres of open space, and a settlement requiring the first ever environmental review of fracking in federal waters off the coast of California.

EDC manages to take on these important and influential legal cases—approximately 35 per year—while operating with a staff of 10 employees and a modest yearly budget of $1.1 million. But to keep up their track record of success, EDC must continue to bring in revenue from a variety of sources without taxing their already busy staff.

"As a non-profit law firm we depend upon contributions from hundreds of individuals to carry out this work," says Beth Pitton-August, Development Director for the Environmental Defense Center. "Salesforce and Click & Pledge have made it easier for us to track and target communications with our supporters."

The Challenge of Multiple Payment-Processing Systems

To support their essential work, EDC runs an annual membership campaign and holds five large-scale events per year—four that draw 200 to 300 people each and one annual fundraiser that draws 400-500 guests. Before and during each event, EDC employees handle a variety of revenue streams including ticket sales, sponsorship solicitations, live and silent auctions, and raffle sales—meaning EDC employees process payments and donations over the phone, online, and on-site.

The trouble EDC faced was that they couldn't find one payment-processing system that could handle these multiple methods of payment, leading to several data entry and management processes that wasted precious staff time. To process most one-time and recurring donations, EDC used a combination of Network for Good, PayPal, and manual credit card processing, which required calling donations and sales into the bank. For on-site processing at events, EDC used Square and manual credit card imprinters to handle in-person ticket sales and other event-related payments. After each event, EDC staff would spend hours processing payments, reconciling accounts, and matching up any data collected with what was already in the database.

In fact, data collection presented yet another problem. In addition to time spent processing payments, EDC staff used a separate system—Raiser's Edge—to manage their donor data. "It was a terminal-based system that lived only on one computer and that was mine," explains Pitton-August. This created a bottleneck in data entry and obstacles for general access to donor data, as Raiser's Edge was somewhat clunky and not cloud-based. The lack of flexibility they were experiencing combined with the inefficiencies of working with multiple payment-processing platforms led EDC to look for a seemingly elusive solution: a CRM and payment-processing platform that could work together.

Click & Pledge and Salesforce: A Streamlined Process
Pitton-August was tasked with researching a solution and had some very specific criteria in mind: she wanted to find a cloud-based system that can fully integrate donations, data, and email, has a low price-point, and allows for EDC to take payments online and on-site. After evaluating several systems, including DonorPerfect and eTapestry, EDC settled on using Salesforce for CRM and turned to the experts at Urgensee—a nonprofit consultant firm—to begin the migration process from Raiser's Edge. It was the experts at Urgensee who introduced Pitton-August to the solution to EDC's payment-processing problems: Click & Pledge.

"EDC needed not only a new CRM but also a new donation processor to be able to handle their multiple models around contributions," says Dan Woodward, CEO of Urgensee. "They have multiple large-scale events, traditional online donation capture, and then they had the need for specific appeals as well as the flexibility to have separate donation pages for those specific appeals. Click & Pledge was the only single-payment suite with the functionality to meet all of their needs."

There were many benefits to using Click & Pledge integrated with Salesforce. Pitton-August noted a higher capacity for year-end reporting as well as the benefit of real-time data capture. "With Click & Pledge and the Swiper1 function," explains Pitton-August, "we have been able to collect payment and contact information attached to a donor record with the swipe of a card. In the past, we would have to enter all of this information by hand. It literally saves us weeks of data entry after each event."

Productive Results: Higher Efficiency and Improved Donor Relations
Pitton-August estimates that moving from several different credit card payment processing systems to Click & Pledge has resulted in staff time savings ranging from 10% to 35%, depending upon the campaign or event. "It has streamlined and simplified our internal procedures," she explains. "We were able to redirect staff to other tasks and avoid burnout. We definitely improved efficiency."

Another important benefit for the redirection of staff time is an increased ability to build revenue. Before, the data necessary for fundraising was buried in the complex interface of the Raiser's Edge platform. Now, **thanks to the integration of Click & Pledge with Salesforce, the information is readily available for staff to access. Less time hunting for information translates to more time engaging in the real work of the organization.** "The fact that I have an easier time getting real-time information and reporting, and that donor information is accessible to other staff on this cloud-based platform, has freed up our Executive Director and me to be more engaged in the donor relations piece, which is all-important," explains Pitton-August. "I think this a component of our success."