



Environmental Preservation Nonprofit Saves Time and Money Using Click & Pledge and Salesforce

The Tahoe Fund, founded in 2010, is a nonprofit organization focused on the preservation and beautification of Lake Tahoe and its natural environment. Powered by the efforts of just two employees, the Tahoe Fund works hard to raise money for and implement projects focused on improving the environment, recreational opportunities, and beauty of the Lake Tahoe Basin. In a time of declining public funding for natural resources, the Tahoe Fund has stepped in to fill the gap.

“We are dedicated to inspiring the private community to support environmental improvement projects in the Tahoe Basin,” explains Diana Dorman, Coordinator of the Tahoe Fund. These projects—which in recent years have included watershed restoration, recreation improvement, and aquatic invasive species removal—are aimed at ensuring that Lake Tahoe can remain accessible for and be enjoyed by residents and visitors for years to come.

Because their overall mission is carried out through individual projects, it is absolutely paramount that Tahoe Fund employees are able to raise funds via targeted campaigns. Early on, they realized that being able to track these project donations and ensure they are credited to the proper accounts would be an important part of their fundraising, donor recognition, and management processes. In addition, they wanted to avoid a pitfall commonly experienced by new nonprofits: the time-consuming use and maintenance of several different payment processing and data management systems that would require handling the same data multiple times.

Fortunately, the Tahoe Fund found a solution in Click & Pledge and Salesforce.

Click & Pledge: A Customizable, Project-based Solution

When looking for a way to manage all of their data, Tahoe Fund staff sought a cloud-based solution that would continually evolve and adapt. Affordability was also a concern. “As a small organization, we did not want to bear the expense of a large software-based legacy system,” explains Amy Berry, CEO of the Tahoe Fund. “In addition, Paypal’s fees were large, which is part of the reason why we were looking for something new. We wanted to be able to better capture data from our donors and to have an affordable, streamlined online donation solution.”

After settling on Salesforce as their CRM, Berry enlisted the help and expertise of KELL Partners, a consulting firm specializing in nonprofit Salesforce implementations. Simon Jensen, Senior Developer at KELL Partners, helped Berry get started with Salesforce. When he saw that the Tahoe Fund was sustained by donations to individual projects, he

recognized the need for a solution that would allow them to easily track these donations. He instantly knew that the flexibility and customizability of Click & Pledge was the perfect solution for them.

“Click & Pledge offers the best all-around solution that I’ve run across,” explains Jensen. “It just checks so many boxes for so many people.” Most notably, Click & Pledge’s flexible platform allows developers like Jensen to create a donation platform customized to the nonprofit’s needs. And for the Tahoe Fund, this was crucial.

“In our current environment, if you don’t have a donation form on your website, you’re really at a loss for fundraising,” explains Dorman. But Tahoe Fund staff didn’t need just a simple donation form; they needed to have a donation form that could direct funds to specific projects and was integrated visually into the Tahoe Fund website. With Click & Pledge—and Jensen’s expertise—they were able to create a donation form that was aesthetically pleasing and exceptionally efficient.

“What seems to really set Click & Pledge apart from the competition is the ability to ask custom questions and the flexibility of what we can do with a donation page,” says Jensen. He also notes that the customer service at Click & Pledge helps substantially with the customization process. “Click & Pledge has great customer support on a daily basis,” he says. “I have literally heard a sigh of relief from people who are working with Click & Pledge.”

Improved Donation Tracking and Payroll Savings

Dorman and Berry are especially pleased with the ability to acquire important details from online donations while funneling those donations to the proper fund. “Because we raise money for various projects, having a donation structure that tracks the donations for each project is extremely helpful,” explains Dorman. “Click & Pledge allows donors to specify the campaign to donate to, so there’s no post-transaction organizing we have to do on our end.”

Having all of this data in one place certainly saves the Tahoe Fund time and money. With Paypal, Tahoe Fund staff had to enter donations manually. With the fluid integration of Click & Pledge and Salesforce, however, they were able to eliminate manual data entry, which helps the Tahoe Fund keep their operational expenses low. In fact, Dorman estimates that their current setup fulfills the same duties as a part-time employee—creating valuable payroll savings.

“If we didn’t have Click & Pledge and Salesforce, fundraising would be significantly harder because we wouldn’t have everything in one place that is easily accessible,” Dorman explains.

“Having something that will do the detailed work for you is a lifesaver.”