

Contributions Pledging

The pledging process is used by many organizations as a financial forecasting tool. Since the process often involves more members than any other one event of the year, it is important that each aspect be handled efficiently and accurately. CDM+ Contributions provides many resources to support this important endeavor.

Things to do before starting the pledge process:

- Update Address and Individual records with the most accurate information.
- Set up a Group for the committee/team responsible for the pledging process to facilitate easy communication with the group members; update members Other Phones and Emails information.
- Review and analyze past years pledge information by printing pledge reports.
- Set Pledge term preference in CDM+ System Preferences.

Pledge Preferences

CDM+ provides the option of defining the terminology an organization uses for Pledges. Some organizations refer to pledges as Estimates, Promises, or Faith Commitments. Your choice will be set up under System Preferences.

►CDM+ (macOS)/File (Windows) ►Preferences ►CDM+ System ►General tab ►Terms icon



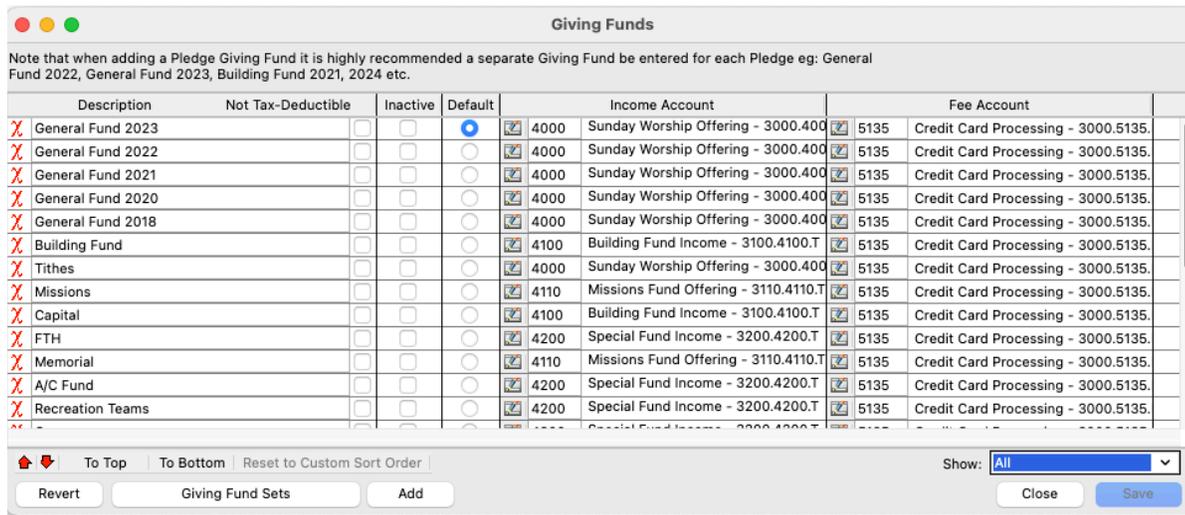
Enter the appropriate singular and plural terms to use when referring to a pledge.

We use the Default Term Pledge in this class and the CDM+ Contributions online manual.

Giving Funds

Setting up Giving Funds in Contributions

► Program ► Contributions ► Giving Funds

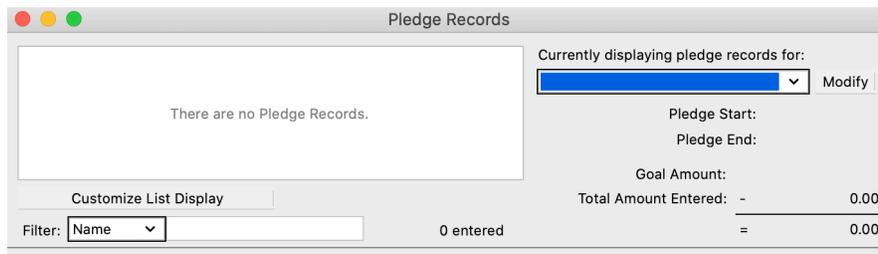


If you are entering pledged funds, you must create separate Giving Fund for each pledge period. For example, if people make pledges for the 2023 General Fund and may also make pledges for the 2024 General Fund, you should create a 2023 General Fund and a 2024 General Fund. Likewise, if there is a building campaign that people pledged to give to over a three year period, you might have a Building 2023-2025 Fund. It is important to credit donations again the pledge made.

Pledges

Establishing Pledge Funds

► Program ► Contributions ► Pledge Records ► Modify button



To set up a pledge for the first time, click on the Modify button and enter the pledge starting and ending dates on the Pledge Setup window. The Pledge Description will auto-fill with the Giving Fund description or it can be changed. The Goal Amount is the total amount that you have forecasted for the pledge campaign, and can be left blank.

Pledge Setup

Enter Pledge Description, Start Date, and End Date to define a Pledge Fund

Giving Fund	Pledge Description	Start Date	End Date	Goal Amount
General Fund 2023	Pledge 2023	Jan 1 2023	Dec 31 2023	
General Fund 2022	Pledge 2022	Jan 1 2022	Dec 31 2022	
General Fund 2021	Pledge 2021	Jan 1 2021	Dec 31 2021	
General Fund 2020	Pledge 2020	Jan 1 2020	Dec 31 2020	10000.00
General Fund 2018				
Building Fund	Building Fund	Jul 1 2022	Jun 30 2025	
Tithes				
Missions				
Capital				

Show Set:

Entering Pledges

►Program ►Contributions ►Pledge Records

Pledge entry works like Batch Contributions Entry. To enter pledge information, select the desired Pledge Fund from the "Currently displaying pledge records for:" drop list; click either Add or Multi-Add to begin.

Pledge Records

Giving Unit	Pledge Amount
Alex and Abby Adams	3180.00
Mike Disney	4800.00

Currently displaying pledge records for:

Pledge Start: Jan 1 2023
Pledge End: Dec 31 2023

Goal Amount: 0.00
Total Amount Entered: - 7980.00
= -7980.00

Filter: 2 entered

Code: 200 Total: 3180.00 - initial amt.: 0.00 = 3180.00 remaining

Name: Mr. and Mrs. Alexander Adams
823 Carrick Lane
Big City, KY 40123

Start Date: Jan 1 2023
End Date: Dec 31 2023
Date Received: Aug 28 2023

Freq.	Period Amount	Date Range (Start - End)
W	60.00	Jan 1 2023 - Dec 31 2023

Calc YTD: Start End

Projected 3180.00

 A Filter option on the Pledge Record allows you to find specific pledges without scrolling a list. With Name chosen from the drop list, type part of a giver's name and the list above will change dynamically. To view all records, remove any filter information that has been entered.

Data entry options are controlled by the Batch Contributions Entry default preferences. Enter the Giving Unit Code or giver's Name and tab to the Total amount. Enter the total amount of the pledge. **NOTE:** Enter an amount in the "initial amt." field only if the giver is planning on giving an initial amount before the periodic pledges begin.

For example, if a three-year total pledge is for \$10,000 and the giver is planning to give \$4,000 initially and then the remainder over the next 36 months, enter \$10,000 in the Total box and \$4,000 in the initial amt. field. The program will calculate the Period Amount on the remaining \$6,000. If dividing the remaining balance by the frequency results in an unequal amount, CDM+ will enter two breakdown lines showing the monthly amount and then a final amount to accommodate the rounded difference.

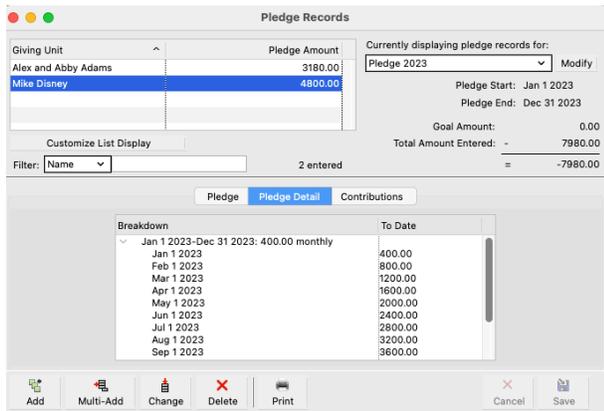
When entering pledges with a Monthly, Quarterly, Semi-Annual, Annual, or One-Time frequency, you can specify whether the year-to-date calculation should occur at the Start Date or the End Date. CDM+ defaults to the Start Date. For example, an annual pledge of \$520 is entered with the “Calc YTD” set to the Start Date. The Pledge Records window will show a Pledge-to-Date amount of \$520 on January 1st on the Pledge Detail tab and an over/under status of under on the Contributions tab until they contribute \$520. If this same pledge is entered with “Calc YTD” set to End, the giving unit will show a Pledge-to-Date of December 31 and will show the status as over if they contribute prior to December 31. You may change this setting at any time, as needed.

If pledges need to be entered by a periodic amount, leave the total amount 0.00 and enter the frequency and periodic amount. CDM+ will calculate the total amount of the pledge.

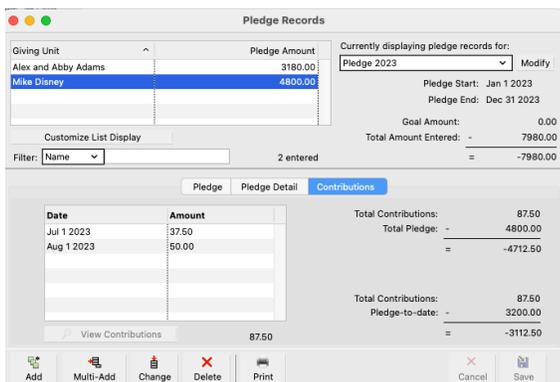
Additional pledge breakdowns can be entered to accurately reflect the anticipated giving. If the pledge needs to be changed before the end of the pledge period, change the ending date on the last line and then add a new pledge breakdown that shows the anticipated change. CDM+ will start the new line with the day following the ending date of the line above it. For example, if someone pledges \$100 a month and then indicates that for six months they will not be able to meet that, an entry can be made for that six months with a zero amount and an additional line which shows when the pledge will resume and the amount and duration of the remaining pledge commitment. The Pledge frequency O means a one-time entry and never indicates no pledge has been received.

 **Projected pledges** are estimates for those who do not provide a pledge, but faithfully give. Pledge reports will separate actual pledges from projected. This assists in forecasting the financial support of the church for the upcoming year. Only Actual Pledges are included on Giving Statements.

The Pledge Detail tab shows the year-to-date calculations that CDM+ will use in reporting.



The Contributions tab shows each gift given to the pledged fund and a summary of pledge-to-giving totals.



Pledge Example

The following example highlights the flexibility of pledging in CDM+ Contributions. Capital Campaigns will frequently result in challenging pledge wishes. For example, a member pledges a Total amount of \$3000.00, including \$25 monthly for the first year, \$500 annually for the second year and \$30 monthly for the third year. Additionally they commit to make a \$500 annual payment at the end of each calendar year.

The illustration below demonstrates how a pledge like this can be handled in CDM+. An initial or down payment of \$420 has been recorded. The first line shows the first year \$25 monthly pledge [Note that the ending date is set back several days prior to the end of the year]. The second line shows the first \$500 annual payment [Note the beginning and ending dates are 2 days apart]. The third line shows the second year \$30 monthly pledge and so on.

Pledge Records

Giving Unit: William & Lucille Allen | Pledge Amount: 3000.00

Currently displaying pledge records for: Building Fund

Pledge Start: Jul 1 2022 | Pledge End: Jun 30 2025

Goal Amount: 0.00

Total Amount Entered: - 3000.00

Filter: Name | 1 entered

Code: ALLE2 | Name: William & Lucille Allen | 1674 Stevens Lane | Big City, KY 40123

Total: 3000.00 - initial amt.: 420.00 = 2580.00 remaining

Freq.	Period	Amount	Date Range (Start - End)
M		25.00	Jan 1 2022 - Dec 29 2022
O		500.00	Dec 30 2022 - Dec 31 2022
M		30.00	Jan 1 2023 - Dec 29 2023

Start Date: Jan 1 2022 | End Date: Dec 31 2024 | Date Received: Oct 4 2022

Buttons: Add, Multi-Add, Change, Delete, Print, Cancel, Save

Pledge Records

Giving Unit: William & Lucille Allen | Pledge Amount: 3000.00

Currently displaying pledge records for: Building Fund

Pledge Start: Jul 1 2022 | Pledge End: Jun 30 2025

Goal Amount: 0.00

Total Amount Entered: - 3000.00

Filter: Name | 1 entered

Code: ALLE2 | Name: William & Lucille Allen | 1674 Stevens Lane | Big City, KY 40123

Total: 3000.00 - initial amt.: 420.00 = 2580.00 remaining

Start Date: Jan 1 2022 | End Date: Dec 31 2024 | Date Received: Oct 4 2022

Buttons: Add, Multi-Add, Change, Delete, Print, Cancel, Save

Breakdown

Description	To Date
420.00 pre-paid	420.00
Start of pledge	420.00
Jan 1 2022-Dec 29 2022: 25.00 monthly	
Jan 1 2022	445.00
Feb 1 2022	470.00
Mar 1 2022	495.00
Apr 1 2022	520.00
May 1 2022	545.00
Jun 1 2022	570.00
Jul 1 2022	595.00
Aug 1 2022	620.00
Sep 1 2022	645.00
Oct 1 2022	670.00
Nov 1 2022	695.00
Dec 1 2022	720.00
Dec 30 2022-Dec 31 2022: 500.00 one time	
Dec 30 2022	1220.00
Jan 1 2023-Dec 29 2023: 30.00 monthly	
Jan 1 2023	1250.00

The Pledge Detail tab of the Pledge Entry screen presents a chronological display of how these various pledge frequencies and dates will actually calculate.

NOTE:

- The *Initial Amount* is an amount already given or to be given prior to the incremental pledge begin date. The actual contribution entry of this Initial Amount **MUST BE** entered via the Contribution Entry process, just as all other contributions are entered. Failure to enter the Initial Amount in Contribution Entry will result in a pledge status as unpaid for the amount, and could result in a Pledge Status of UNDER.
- Each detail line's date range begins one day after the prior detail line's date range ends. If the first detail line's date range ends on Dec. 31, the next detail line's date range MUST begin with Jan. 1. If you wish to "skip" a date period, you must enter a pledge of \$0 Never [or \$0 Annual, or \$0 Weekly] for the dates of the period to be "skipped".
- Some pledges may require a mix of pledge Frequency Types (Weekly, Monthly, etc.), as well as Calculation modes [Start or End] within a single pledge entry.

Pledge Changes

Pledge changes are often more difficult to interpret than the original pledge, but generally fall into several distinct categories.

- **Simple data entry mistake.** The pledge made was \$5 monthly, but was originally entered as \$5 weekly. The correction is simple: from the pledge entry screen, use the filter line to narrow or "find" the specific giving unit's pledge entry. Then erase the amount in the total pledge and simply change the pledge frequency from weekly to monthly.
- **Change in pledge amount dating back to the start date of the pledge.** Change the pledge amount and/or frequency as required. You may need to erase the amount in the total pledge field.
- **Change in pledge amount at some point after the start of the pledge.** The issue with this type of change is the contributions made prior to the effective date of the pledge change. How these prior contributions are handled effects the Pledge Status since all contributions given prior to the change are included in Pledge Status calculation.

Example: Original pledge is \$10 weekly for 52 weeks – 1/1/23 through 12/31/23. The member indicates a need to change the pledge to \$5 weekly effective 7/1/23. Further, you determine that they have given \$260 through 6/30/23.

Solution: Change the ending date of the first detail line to be the day before the desired effective date of the pledge change. Then, add a second pledge detail line beginning on the effective date of the pledge change and ending at the end of the pledge period. In the example above, the 1st detail line is \$10 weekly from 1/1/23 through 6/30/23 and the 2nd detail line is \$5 weekly from 7/1/23 through 12/31/23. This would result in a total pledge of \$390 (\$10 weekly for the 1st 26 weeks and \$5 weekly for the 2nd 26 weeks). Since they gave \$260 through 6/30, the contributions given are equal to the pledged amount to the 6/30 date and the Pledge Status would now be current (zero)

Pledge Cancellations

Again, there are several methods available to handle pledge cancellations:

- The specific pledge can be deleted. From the pledge entry screen, use the filter line to narrow or "find" the specific giving unit's pledge entry. Select the Delete jump button at the bottom of the window. This will remove any record this pledge existed or was changed.
- An alternative method might be to alter the ending date of the detail line to indicate when the pledge was cancelled. This is especially proper when gifts have been given toward the pledge. A variation of this approach would be to change the pledge detail line to indicate a one-time pledge for whatever amount that may have been given.
- If no gifts have been given, you might enter a pledge periodic amount of \$0 and a pledge frequency of Never, to indicate that they had responded.
- Use the Comments tab on the Giving Unit record to note this change.

Pledge Reports

Pledge Listing

► Reports ► Contribution Reports ► Listings and Exports ► Pledge Listing

List of persons pledging with Total Pledge amount. You may include giving units with Projected Pledges or giving units with no pledge. You may also filter by those who are ahead or behind on their pledge to date.

Pledge Records				
Your Organization 123 Main Street Big City, KY 40123 606/555-1234				
; All Pledge Funds				
Giving Units	Begin	End	Initial Amount	Total Pledge
Mr. and Mrs. Alexander Adams - 200	Jan 1 2023	Dec 31 2023	0.00	3,180.00
William & Lucille Allen - ALLE2	Jan 1 2022	Dec 31 2024	420.00	3,000.00
Charles & Ruby Cook - 108	Jan 1 2022	Dec 31 2022	0.00	300.00
Albert & Camille Delvecchio - DELV21	Jan 1 2022	Dec 31 2022	0.00	2,400.00
Albert & Camille Delvecchio - DELV21	Jan 1 2020	Dec 31 2020	0.00	4,800.00
Michael Disney - MIKED	Mar 30 2017	Mar 29 2020	0.00	3,600.00
Michael Disney - MIKED	Dec 20 2016	Dec 19 2017	0.00	5,000.00
Michael Disney - MIKED	Jan 1 2020	Dec 31 2020	0.00	100.00
Michael Disney - MIKED	Jan 1 2023	Dec 31 2023	0.00	4,800.00
Michael Disney - MIKED	Jan 1 2022	Dec 31 2022	0.00	4,800.00
Mr. and Mrs. Rhett Harvey - HARV43	Dec 29 2021	Dec 28 2022	0.00	8,000.00
Mr. Terry Hatmaker - HATM120	Jun 1 2022	Dec 30 2022	300.00	1,000.00
Mr. and Mrs. Don Strickland - STRI31	Dec 29 2021	Dec 28 2022	0.00	12,000.00
Total Giving Units: 13			Total:	52,980.00

Pledges Custom Listing

► Reports ► Contribution Reports ► Listings and Exports ► Pledge Custom Listing

Custom select fields for a totally user-defined pledge report.

Custom Listing						
Your Organization 123 Main Street Big City, KY 40123 606/555-1234						
; All Pledge Funds						
Giving Unit Salutation Name	Giving Unit Last Name	Giving Unit Code	Total Pledge	Pledge Over/Under	Pledge To Date	Giving To Date
Alex and Abby	Adams	200	3,180.00	(2,100.00)	2,100.00	0.00
William & Lucille	Allen	ALLE2	3,000.00	(810.00)	1,460.00	650.00
Charles & Ruby	Cook	108	300.00	75.00	300.00	375.00
Albert & Camille	Delvecchio	DELV21	4,800.00	(4,725.00)	4,800.00	75.00
Albert & Camille	Delvecchio	DELV21	2,400.00	30.00	2,400.00	2,430.00
Mike	Disney	MIKED	4,800.00	(3,112.50)	3,200.00	87.50
Mike	Disney	MIKED	4,800.00	(4,520.00)	4,800.00	280.00
Mike	Disney	MIKED	100.00	0.00	100.00	100.00
Mike	Disney	MIKED	3,600.00	(3,600.10)	3,600.10	0.00
Mike	Disney	MIKED	5,000.00	(4,900.00)	5,000.00	100.00
Rhett and Margaret	Harvey	HARV43	8,000.00	(7,900.00)	8,000.00	100.00
Terry	Hatmaker	HATM120	1,000.00	(700.00)	1,000.00	300.00

The Pledge Listing and Pledge Custom Listing reports now allow the selection of multiple pledge funds in a single report.

Pledge Letter Notice

►Reports ►Contribution Reports ►Notices ►Pledge Letter Notice



Dear Alex and Abby,

Thank you so much for your pledge of \$3180.00 to our ministry. Thanks to gifts like yours we are able to reach around the world with help for the needy and hope for the oppressed. For your records, your pledge is recorded as follows:

\$60.00 Weekly from Jan 1 2023 to Dec 31 2023

Thank you for your faithfulness to our mission.

Sincerely,

Dean Patterson
Dean

Use this notice to encourage members who have pledged with a personalized thank-you letter. Include the amount of the pledge as a confirmation. Additional fields detailing Pledge information are available to include in pledge letters under the >**Database Fields** option in the **Formatting Palette** when creating the merge letter.

Attend the Users Conference Notices class or see the Notices section of this manual for complete details of creating personalized letter notices.

Pledge Comparison

►Reports ►Contribution Reports ►Comparative ►Pledge Comparison

Report compare up to three pledge years and displays Difference Options of amount and percent for each giver.

Pledge Comparison

Your Organization
123 Main Street
Big City, KY 40123
606/555-1234

Giver	Pledge 2023	Difference	Building Fund
Mr. and Mrs. Alexander Adams - 200	3,180.00 (3,180.00)		0.00
William & Lucille Allen - ALLE2	0.00	3,000.00	3,000.00
Michael Disney - MIKED	4,800.00 (4,800.00)		0.00
Total	7,980.00 (4,980.00)		3,000.00

Actual vs. Pledge

►Reports ►Contribution Reports ►Comparative ►Actual vs. Pledge

Provides detailed analysis of a specific Pledge fund. Shows Total Pledge, Giving to Date, Pledge to Date, and Over/Under amounts.

Actual vs. Pledge

Your Organization
123 Main Street
Big City, KY 40123
606/555-1234

Contribution Date Through Sep 30 2023; Pledge 2023; Jan 1 2023 - Dec 31 2023

Giving Units With a Pledge

Giver	Total Pledge	Giving To Date	Pledge To Date	Over/Under
Mr. and Mrs. Alexander Adams - 200	3,180.00	0.00	2,340.00	(2,340.00)
Michael Disney - MIKED	4,800.00	87.50	3,600.00	(3,512.50)
Total:	7,980.00	87.50	5,940.00	(5,852.50)

Actual vs. Pledge by Month

►Reports ►Contribution Reports ►Comparative ►Actual vs Pledge by Month

Compares monthly totals of Year-to-Date pledging and giving including Over/Under amount.

Actual vs. Pledge By Month

Your Organization
123 Main Street
Big City, KY 40123
606/555-1234

Contribution Date Through Sep 30 2023; Pledge 2023; Jan 1 2023 - Dec 31 2023

Month Ending	Giving To Date	Pledge To Date	Over/Under
Jan 1 2023	30.00	460.00	(430.00)
Jan 31 2023	150.00	700.00	(550.00)
Feb 28 2023	270.00	1,340.00	(1,070.00)
Mar 31 2023	790.00	1,980.00	(1,190.00)
Apr 30 2023	1,290.00	2,680.00	(1,390.00)
May 31 2023	3,910.00	3,320.00	590.00
Jun 30 2023	5,700.00	3,960.00	1,740.00
Jul 31 2023	6,187.50	4,660.00	1,527.50
Aug 31 2023	5,887.50	5,300.00	587.50
Sep 30 2023	5,007.50	5,940.00	(932.50)

Total Pledge	
Pledge	7,980.00
Giving To Date	5,007.50
Over/Under	(2,972.50)

This report can be extremely helpful in determining planned cash flow throughout the pledge period. Lending agencies frequently require this information.

