



**Stewarding Pledges for Success**

# Outcomes and Benefits



Visuals / metrics assisted in rehabilitating past-due pledges → 20% moved to Green Aging Status. Our pledge fulfillment rate increased by 5% from previous fiscal year



300 historical pledges identified for cleanup → improved financial reporting accuracy from 75% to 95%



Quicker identification of data entry anomalies → 10% increase in pledge record accuracy



Conversion of five manual processes into Pledge Management dashboard → cut staff time by 50%

# Pledge Management / Metrics

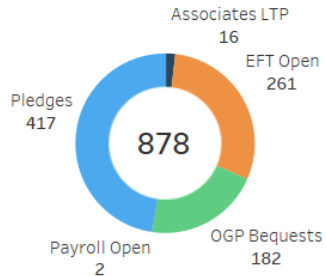
Home | Pledge Summary View

**Caltech** OFFICE OF  
ADVANCEMENT INFORMATION

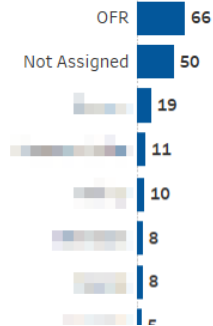
## Pledge Management

Data Refreshed  
3/12/2025 5:02:48 AM

Active Pledges | Click slice to filter



Pledges by Contact | Click a bar to filter



Special Tracking | Click number to filter

Active Pledge w/o Contact (excludes Bequests & EFT Open)	EFT Open Pledges	Deceased Donors with Active Pledge	Sponsored Research Pledges
75	261	27	90



Pledge Status Changes

	FY2023	FY2024	FY2025
Paid	330	171	45
Paid-Partially	49	26	2
Writeoff	18	12	1

- < 1 Month ●
- 2-12 Months ●
- 13-36 Months ●
- Writeoff ●
- Not Applicable ●

All - Pledge Details | Total Pledges: 195

01/01/1891 = Fake Date for Open EFT/Payroll  
Sort on any column

Pledge Number	ID Number	Report Name	Trustee	Pledge Contact	Pledge Type	LTP	Alloc Code	Pymnt Due Date	Pledge Amount	# Over Due Pymnts	Due (less < 30 days)	Sum of Overdue Payments	Aging Status
0001431437			N		Pldg	N	91127	06/30/2025	\$750,000	0	\$0	\$0	●
0001430300			N		Cond Pldg	N	91125	06/30/2025	\$500,000	0	\$0	\$0	●
0001425865			N		Pldg	N	91109	06/30/2025	\$34,000	0	\$0	\$0	●
0001424422			N		Pldg	N	91073	06/30/2025	\$70,000	0	\$0	\$0	●
0001423802			N		Pldg	N	90019C	06/30/2025	\$100,000	0	\$0	\$0	●
0001423320			N		Pldg	N	91033	06/30/2025	\$75,000	0	\$0	\$0	●
0001422760			N		Pldg	N	91006	06/30/2025	\$36,000	0	\$0	\$0	●

Table Filters

- Aging Status Bin**
- (All)
  - < 1 Month
  - 2-12 Months
  - 13-36 Months
  - Writeoff
  - Not Applicable

- Payment Status**  
(excludes Not Applicable)
- All
  - Late
  - Late thru This QTR
  - Late thru Next QTR

**Pledge Number**  
(All) ▼

# View Pledge Details by Logged-in User

Home Pledge Summary View

**Caltech** OFFICE OF ADVANCEMENT INFORMATION

## Pledge Summaries

Pledge Contact: **Bucky Beaver**

Pledge Number  
(All)

Allocation Code  
(All)

Summary Selection (Late thru Next QTR = Summary List)  
Late thru Next QTR

TOTAL Pledges by Pledge Contact

Hierarchy order:  
PM --> QM --> Staff Name linked to Pledge Manager Pledge Code

136
49
48
27
26
23
21
17

Status: **Late through Next Qtr Pledges** | Pledge Count: **5**  
Pledge Contact: **Bucky Beaver**

01/01/1891 = Fake Date for Open EFT/Payroll  
Sort on any column

Pymnt Due Date	ID Number	No RMDR	Report Name	Trustee	Pledge Contact	Pledge Number	Pledge Type	# Over Due Pymnts	Due (less < 30 days)	Sum of Overdue Payments	Alloc Code	Pledge Amount	Aging Status
12/31/2023		Y		N	<b>Bucky Beaver</b>	0001397886	Pldg	1	\$0	\$100,000	90447	\$325,000	●
06/30/2024		Y		N	<b>Bucky Beaver</b>	0001400979	Pldg	3	\$62,500	\$187,500	91054	\$2,000,000	●
10/01/2024				N	<b>Bucky Beaver</b>	0001407732	Pldg	2	\$62,500	\$125,000	90736	\$750,000	●
06/30/2025				N	<b>Bucky Beaver</b>	0001425865	Pldg	0	\$0	\$0	91109	\$34,000	●
				N	<b>Bucky Beaver</b>	0001397304	Pldg	0	\$0	\$0	90400	\$25,000	●

Automatic filtering by Username

DIV

IG

OFR

Data Refreshed  
3/12/2025 5:02:48 AM  
logged in as Tableau User  
**Bucky Beaver**

See Pledge Contact details:

DIV

IG

OFR

Aging Status

< 1 Month

2-12 Months

13-36 Months

Writeoff

Not Applicable

pledge visualization + accountability = improved pledge health