

ADDENDUM TO THE ACCOUNTANT INDEPENDENT CONTRACTOR AGREEMENT

This Addendum to the Contractor Agreement (Agreement) is entered into this ____ day of September by and between the Unitarian Universalist Congregation of Grand Traverse (UUCGT) and David Christenson, an independent contractor (Contractor) in consideration of the mutual promises made below.

Services to be Rendered by Contractor

Contractor agrees to search out and implement new Church Management and Church Accounting Software prior to the expiration of the current Logos system. The UUCGT agrees to compensate the Contractor at a rate of \$20 per hour for up to 75 hours subject to Finance Committee and Board approval. Should these hours prove to be inadequate, this agreement may be revisited.

UUCGT:

CONTRACTOR:

Michael McDonald, Board President

David Christenson

Date: _____

Date: _____

Church Management/Financial Accounting Systems

<u>Monthly Fees</u>	<u>LOGOS</u>	<u>CDM+</u>	
CDM+ Monthly Component Fee		\$ 105.00	
Stewardship Technology (ACH & EFT)		\$ 20.00	Replaces Vanco & NatPay
PCI DSS		7.95	Replaces Vanco & NatPay
Anticipated ACH & EFT Transaction Fees		<u>28.00</u>	
		\$ 160.95	
Logos Accounting and ChMS	\$ 1,441.00		
NatPay (Payroll)	175.00		
Vanco (Pledge Contributions)	<u>365.00</u>		
Annual Total	\$ 1,981.00	\$ 1,931.40	
<u>One Time Fees</u>			
Set up		\$ 600.00	
Stewardship Technology (ACH & EFT)		99.00	
Conversion			
Membership Records		200.00	
Contribution Records		100.00	
Vendor Records		25.00	
Accounting Ledger Records		<u>225.00</u>	
		\$ 1,249.00	
<u>Training Fees to be Determined</u>			
Individual On-line Training		\$ 85.00	Per Hour or 3 Training Credits/Hour
Group On-line Classroom Training		-	No Charge
Note: Includes 6 Training Credits			



August 28, 2018
Pricing good for this proposal through
September 27, 2018

Thank you for your interest in CDM+ software and services. Presented below is a price quote based on your church's request. This quote is good for 30 days from the Proposal Date.

Church Name:	Unitarian Universalist Congregation of Grand Traverse Phones	Primary	(231) 947-3117
Denomination:	Unitarian Universalist	Primary Type:	-
Contact (Position):	Dave Christenson	Other	(231) 632-0679
Church Address:	6726 Center Road	Other Type:	-
City/State/Zip:	Traverse City, MI 49686	UID/PID #:	P21451
Email:	finandmgmtserv@aol.com		

CDM+ SAAS Proposal

Software Components		Included Services
Membership/Attendance	Yes	Includes Windows License
Contributions	Yes	Includes Mac License
Event Registration	No	Includes Data Hosting
Roommate Facilities Manager	No	Includes CDM+ Mobile
Check-in/Check-out	No	Includes Premier Support
Fund Accounting	Yes	Includes All program updates and upgrades
Payroll	Yes	Includes Engage Member
		Includes Engage Giving
Number of Concurrent Users:	2	Includes Payroll Direct Deposit
		Requires 2 year contract
Additional Programs add \$20 ea/month		Requires ACH monthly payment ONLY
Additional Users add \$10 ea/month		

CDM+ Web Ministry Tools

Basic	
CDM+ Engage Member	Yes
CDM+ Engage Giving	Yes
CDM+ Engage Text Giving	No
CDM+ Engage Registrations	No

Total Monthly Cost \$105.00

Conversion	Convert the following from:	LOGOS	\$	600.00
Address	Yes	Vendor	Yes	
Individuals	Yes	Attendance	Yes	
Contributions	Yes	Employee		
		General Ledger	Yes	

Total One-Time Upfront Cost \$600.00

Annual recurring charges NONE

PLUS Gateway Merchant Processing through Stewardship Technology.
if using Online Donations or Online Event Registration with payment processing.
These fees are paid directly to Stewardship Technology, Inc.

One-Time Setup Charge	\$99.00
Monthly Service Charge	\$20.00
PCI DSS monthly fee	\$7.95
Transaction Fees	outlined in Merchant Account application
	(currently 30 cents for ACH transactions; average 2.8% plus 30 cents for credit/debit card transactions)
	(Payroll Direct Deposit fees: \$1.00 per payroll batch plus 30 cents per batch transaction)

CDM+ Training

6 Training credits are included with your CDM+ SAAS Subscription which may be used on any Training opportunity.

CDM+ offers different types of training to its customers.

- * On-site Training
 - \$925.00 1st day, \$600.00 per additional day plus the expenses of trainer.
- * Regional Training
 - Provided when announced.
- * Annual User Conference
 - Provided when announced.
- * Individualized On-line Training
 - \$85.00 per hour (or 3 training credits per hour)
- * Group On-line Classroom Training
 - No Charge, see CDM+ website for full details and schedule

Conversions

Many times churches are using a church management product and they do not want to re-input their data into their new CDM+ product. CDM+ offers conversion services to bring your data into your new CDM+ product. Typical pricing for CDM+ Conversion Services is:

Conversion Pricing	Standard Rate
Membership Records	\$200
Attendance Records	\$50
Contribution Records	\$100
Vendor Records	\$25
Employee Records (if possible)	\$25
Accounting Ledger Records (if possible)	\$225

System Requirements for CDM+ Version 10.x

Please compare your system to these requirements before purchasing.

In common, regardless of OS -

- * 2 GB
- * 500 MB of disk space + free space for data
- * TCP/IP network connection (static TCP/IP if server)
- * Color monitor running 1024 x 768 resolution or larger (not necessary for server not used as workstation)
- * Dual-core CPU recommended for the server

Windows (Server & Client Computers)

- * Windows 7 or later

Macintosh (Server & Client Computers)

- * Mac OS X 10.9 or later

System Requirements for CDM+ Mobile app

CDM+ 9.2.1 or later

CDM+ Data Hosting service enrollment

Any generation iPad®, iPhone® or iPod Touch® running iOS 9 or later or any Android®-based phone or tablet running Android 4.0 or later

Internet connection (WiFi or 3G/4G)

(Note: Check-In feature available on iPad and Android tablets only)



CDM+ SAAS Agreement - Example

By the transmittal of data for conversion and by providing bank direct debit information, client agrees to the terms of this agreement as defined above and with the following points -

- A recurring monthly charge of \$xxx.xx will be automatically debited from bank account specified by client for a period of 24 months, commencing on the date that the database is first placed into service.
- Conversion charges are due in full at time that it is determined that data conversion can be performed.
- Client may opt out of this agreement any time within the 1st 60 days, commencing on the date that the database is first placed into service.
- Data Conversion charges and any monthly fees paid are non-refundable.
- Client's agreement with Stewardship Technology, Inc (merchant account provider) is subject to the conditions contained in the Stewardship Technology, Inc application.
- Client may convert from CDM+ SAAS to CDM+ Traditional at any time
 - within the first or second year of the agreement, the purchase will be at full price
 - after two years, the purchase will be at a 60% discount
- The monthly charge listed on this agreement is guaranteed for 24 months.
- After 24 months, this agreement will continue automatically and may be terminated at any time by written communication.
- Additional program components may be added at any time at a charge of \$15 per month per component.
- After 24 months, the monthly charge may change. Suran Systems, Inc/CDM+ will provide advance notice of the price change.
- At any time within the first 60 days, commencing on the date the database is first placed into service, client may request a complete data extract at no charge.
- After the first 60 days but during the first 12 months commencing on the date the database is first placed into service, a complete data extract may be requested. The fee at this time will be \$500.
- During the second year, a complete data extract may be requested. The fee at this time will be \$300.
- After the second year, a complete data extract may be requested without charge.