

Overall Performance Summary

The **Overall Performance Summary** viewport displays a number of key annual giving performance metrics over a five year period. All metrics are within the context of the selected school/unit giving designations, primary relationship types, measurement and time period.

Key Definitions:

- **Cash:** Includes gift and pledge payment transactions designated to annual giving. This reflects actual dollars received during the period and donors who paid during the period.
- **Commitment:** Includes gift and pledge transactions designated to annual giving. This reflects dollars generated/committed during the period, and donors who made any commitment during the period, whether or not they paid during the period.
- **Pledge:** Includes only pledge transactions designated for annual giving.
- **Total Donors:** The number of unique entities with a donor qualifying transaction (donor indicator is set to true on the transaction) to annual giving.
- **Total Giving:** The total legal amount of annual giving transactions.
- **Average Giving:** Total Giving divided by Total Donors in the given time period.
- **Median Giving:** The median credited annual giving of all donors in the given time period. If all donors in the time period were ordered by credited annual giving, the median donor would be the one in the middle, with half of donors giving less than the median and half of donors giving more than the median.
- **Maximum Contribution:** The largest credited (i.e. soft credit and hard credit) annual giving to the selected school/unit giving designations for a single entity in the given time period.
- **Retained Donors:** Donors who gave to annual giving in the specified time period and were also annual giving donors in the previous fiscal year.
- **Retention Rate:** The number of Retained Donors in the given time period divided by the Total Donors in the entire preceding year period (in the case of fiscal year to date, the number of Retained Donors fiscal year to date divided by the number of Total Donors in the entire preceding year).

Frequently Asked Questions:

Is the Maximum Contribution a single transaction? Not always. The Maximum Contribution is based on the total given by a single entity. So, a single gift from one donor for \$100,000 may not be the Maximum Contribution because another donor gave two gifts of \$75,000 making the Maximum Contribution \$150,000.