

# Retained Donor Migration Comparison

The **Retained Donor Migration Comparison** Viewport categorizes your retained donors by whether they have given at the same amount, an upgraded amount, or a downgraded amount from the preceding fiscal year period.

The **Fiscal Year** can be changed using the drop down at the top of the tab. This drop down will reload all Viewports in the tab with the selected fiscal year.

The dollar and donor **Measurement** can be changed using the drop down at the top of the Viewport. Any changes made to the measurement selection are stored, so the Viewport will display your last selection the next time you log in.

Click on any of the bars in the chart to see a detailed list of entity records.

## Key Definitions Related to this Viewport:

- **Cash:** Includes gift and pledge payment transactions. This reflects actual dollars received during the period, and donors who paid during the period.
- **Commitment:** Includes gift and pledge transactions. This reflects dollars generated / committed during the period, and donors who made some kind of commitment during the period, whether or not they paid during the period.
- **Pledge:** Includes only pledge transactions.
- **Dollars:** The total legal amount of the annual giving transactions.
- **Donors:** The number of unique entities with a donor qualifying transaction (donor indicator is set to true on the transaction) to annual giving.
- **Upgrades:** Retained donors whose credited giving was greater in the selected fiscal year period than in the preceding fiscal year period.
- **Downgrades:** Retained donors whose credited giving was lower in the selected fiscal year period than in the preceding fiscal year period.
- **Same Amount:** Retained donors whose credited giving was the same in the selected fiscal year period as in the preceding fiscal year period.
- **Retained:** Donors who gave in the specified time period and were also donors in the previous fiscal year.