

# Advancement Overall Performance Summary

The **Overall Performance Summary** viewport displays a number of key 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. 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 any commitment during the period, whether or not they paid during the period.
- **Pledge:** Includes only pledge transactions.
- **Total Donors:** The number of unique entities with a donor qualifying transaction (donor indicator is set to true on the transaction).
- **Total Giving:** The total legal amount of the transactions.
- **Average Giving:** Total Giving divided by Total Donors in the given time period.
- **Median Giving:** The median credited giving (i.e. soft credit and hard credit) of all donors in the given time period. If all donors in the time period were ordered by credited 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 giving (i.e. soft credit and hard credit) to the selected school/unit giving designations for a single entity in the given time period.
- **Retained Donors:** The number of entities credited (i.e. soft credit and hard credit) with a donation of the selected measurement (Cash, Commitment, or Pledge) to the selected school/unit giving designations in the given time period and in the entire preceding year period (in the case of fiscal year to date, the number of entities credited in the given period to date, and the entire preceding year period). This includes only transactions designated to one of the selected school/unit giving designations, and from entities with one of the Primary Relationship Types selected. An entity must have given to one of the selected designations in both years to be considered retained.
- **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.