

Advancement Retained Donor Migration Summary

The **Retained Donor Migration Summary** viewport displays dollar and donor performance by retained donor migration 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.
- **Retained:** Donors who were credited (i.e. soft credit and hard credit) with a donation of the selected measurement (Cash, Commitment, or Pledge) to one of 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). An entity must have given to one of the selected designations in both years to be considered retained.
- **Upgrades:** Retained donors whose credited giving to the selected giving designations in the given time period is greater than their credited giving to the selected giving designations in the preceding time period.
- **Downgrades:** Retained donors whose credited giving to the selected giving designations in the given time period is less than their credited giving to the selected giving designations in the preceding time period.
- **Same Amount:** Retained donors whose credited giving to the selected giving designations in the given time period is the same as their credited giving to the selected giving designations in the preceding time period.
- **Dollar Performance:** The total legal amount of the transactions. 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.
- **Donor Performance:** The number of unique entities with a donor qualifying transaction (donor indicator is set to true on the transaction). 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.