

Portfolio Donor Status vs. Peer Group

The **Portfolio Donor Status vs. Peer Group** viewport compares the number of prospect records in an officer's portfolio by donor status, classifications that are based on credited cash giving in current fiscal year. This distribution of prospect records by donor status is compared to the average distribution of the officer's Peer Group.

You can change this distribution to include Primary relationship assignments, Non-Primary (i.e. any secondary assignment type), or All assignment types by choosing the appropriate selection at the top of the viewport. You can also toggle the giving definition between Commitments (i.e. prospects who have pledged or made a gift) and Cash (i.e. prospects who have made a gift or paid on a pledge) by clicking on the appropriate radio button at the top of the viewport.

Hover over the bars in the viewport for additional information or click on the bars to see which prospect records are in each donor status.

Key Definitions Related to this Viewport:

- **Donor Status:** A donor classification based on credited cash giving in current fiscal year.
- **Current FY Donors:** Prospect records whose associated constituent records have been credited with either a cash or commitment transaction (based on what is selected in the radio buttons) in the current FY.
- **LYBUNT:** Acronym for "Last Year But Unfortunately Not This". These are prospect records whose associated constituent records had a donor qualifying commitment transaction (donor indicator is set to true on the transaction) last year, but not this year.
- **1 Year Lapsed:** Prospect records whose associated constituent records had a donor qualifying commitment transaction (donor indicator is set to true on the transaction) two fiscal years ago, but not in the previous FY or current FY.
- **2-4 Years Lapsed:** Prospect records whose associated constituent records had a donor qualifying commitment transaction (donor indicator is set to true on the transaction) 3, 4, or 5 fiscal years ago, but not in the two previous FYs or current FY.
- **5+ Years Lapsed:** Prospect records whose associated constituent records had a donor qualifying commitment transaction (donor indicator is set to true on the transaction) sometime in the past, but not in the current FY or the previous 5 FYs.
- **Never Donor:** Prospect records whose associated constituent records have never had a donor qualifying commitment transaction (donor indicator is set to true on the transaction).
- **Peer Group:** A set of gift officers that have similar roles and should be evaluated as peers. Peer Groups are configured by your institution's system administrator in Fundraiser Performance Management.