

AG Retained Donor Migration Comparison

The **Retained Donor Migration Comparison** viewport displays for those donors that have been retained whether they have given a donation in the same amount, an upgrade amount, or a downgrade amount from the selected fiscal year to the previous fiscal year.

Click in the bar chart to see a list of constituents for each of the categories. You can select a earlier fiscal year at the top of the screen to compare it against its preceding year's performance.

Key Definitions:

- **Cash:** Includes gift and pledge payment transactions designated for annual giving. This reflects actual dollars received during the period, and donors who paid during the period.
 - **Commitment:** Includes gift and pledge transactions designated for 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.
 - **Dollars:** The total legal amount of 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:** Includes retained donors whose credited giving was greater in the selected fiscal year period than in the entire preceding fiscal year period.
 - **Downgrades:** Includes retained donors whose credited giving was lower in the selected fiscal year period than in the entire preceding fiscal year period.
 - **Same Amount:** Includes retained donors whose credited giving was the same in the selected fiscal year period as in the entire preceding fiscal year period.
 - **Retained:** Donors who gave to annual giving in the specified time period and were also annual giving donors in the previous fiscal year.
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Frequently Asked Questions:

How much more or less does the cash gift need to be in order to count as an upgrade or a downgrade?

The change can be as small as \$0.01 to count as an upgrade or downgrade.