

# Portfolio Giving vs. Peer Group

The **Portfolio Giving vs. Peer Group** viewport displays portfolio giving levels of an officer compared to their peer group. The viewport allows you to compare the total Commitments, Cash, or Annual Giving Cash of the officer's assigned prospect in the current fiscal year.

You can display portfolio giving either in terms of **Dollars** or **Donors** by switching the radio button at the top of the viewport. You can also change the **Assignment Type** using the drop down in the upper-right of the viewport.

Clicking on any of the links in the table will bring up the list of donors that make up the results.

## Key Definitions Related to this Viewport:

- **Donors:** Number of constituents of each donor type credited with a transaction of each measurement (Commitment, Cash, and Annual Giving Cash) in the current fiscal year.
- **Dollars:** The total legal amount of the transactions.
- **Donors:** The number of unique entities with a donor qualifying transaction (donor indicator is set to true on the transaction). Donors are counted only in the first month they donated during the fiscal year.
- **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.
- **Cash:** Includes gift and pledge payment transactions. This reflects actual dollars received during the period, and donors that paid during the period.
- **Annual Giving Cash:** Includes gift and pledge payment transactions to the annual giving. The annual giving includes whatever business rules your institution has determined for classifying transactions and annual giving transactions. This reflects actual annual giving dollars received during the period, and annual giving donors that paid during the period.