

Advancement
Functional Dashboard



evisions
Professional Services

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Get all of your Advancement metrics, tracking, and analysis in one place

With the Advancement Functional Dashboard, Advancement executives and team members get a comprehensive management tool to facilitate successful fundraising. The solution features three main components: 1) The Overview section provides immediate, on-demand access to performance dashboards, along with detailed contribution, pledge, and donor/prospect information. 2) The Activity Center equips the team with a command post where next steps and planned solicitations are laid out, and contacts and proposals can be tracked. 3) The Profile Review lets you quickly find a constituent's contact, personal, and demographic information, along with contribution statistics, designation breakdown, and gift, contact, pledge and solicitation history.

Benefits of the Evisions Advancement Functional Dashboard



Convenience

Advancement data is retrieved, measured and presented in a single location. The one-stop constituent profile equates to less time researching and more time communicating & interacting with constituents.



Tracking and evaluation

Use performance indicators and trends to track the effectiveness of fundraising efforts and to monitor progress towards goals. (Then, adjust organizational goals and strategy based on results).



No heavy lifting

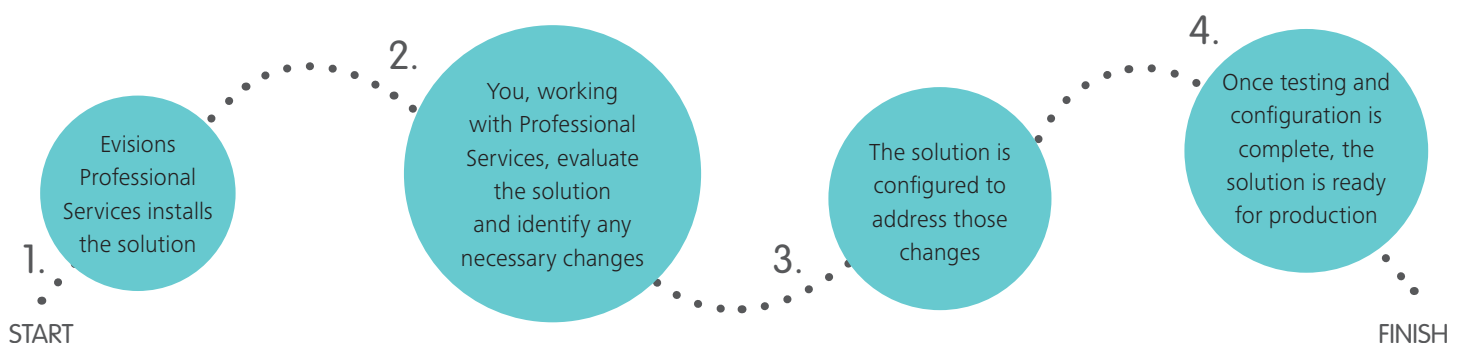
Queries are already built and written for native Banner Advancement, and the solution provides configurable options for your environment and preferences.



Aligns to your business processes

Switch from overall team stats to individual team member stats, and use the drill-down functionality on high-level display and charts to focus on in-depth analysis of data.

Implementation & Delivery



Advancement Functional Dashboard: Sample Views

Overview - Contributions

- All Team Members
- All Team Members
- No Team Member Designated
- Antoine Adams - AA - AKEARNEY
- Angelica Smith - AS - ALUDEMO1
- Chris Eby - CE - CHEBY
- Cynthia Lynn Gordon - CG - CGALLEH2
- David Becker - DB - DBECKER
- Elwood Spencer - ES - ESPENCER
- Jason Buckley - JB - JBUCKLEY
- Jim Druckenmiller - JD - JDRUCKEN
- Justin Wrighter - JW - ADISUSR
- Susan Casey - SC - ADISUSR
- Steve Forman - SF - SFORMAN
- Stuart Meyers - SM - SMEYERS
- Steven Musick - SMU - ADISUSR
- Tracy Brobyn - TB - TBROBYN
- Wendy Davis - WD - WDAVIS



Detail for APR


Team Member	Constituent	Gift Date	Gift Amount	Gift No	Pledge No	Campaign	Campaign Type	Designation	Payment
Chris Eby	Murphy, Justin	04/21/17	\$100.00	0003133	0000696	Annual Fund 2014	Annual Fund	Unrestricted	Check
	Allen, Kathleen	04/21/17	\$25,000.00	0003135	0000000	Excellence Capital Campaign	Capital	Unrestricted	Check
	Daniels, Veronica	04/21/17	\$52,500.00	0003136	0000000	Excellence Capital Campaign	Capital	Unrestricted	Check
	Smith, Angelica	04/21/17	\$10,000.00	0003137	0000000	Excellence Capital Campaign	Capital	Unrestricted	Check
	Johnson, Marcus	04/21/17	\$2,500.00	0003138	0000715	Excellence Capital Campaign	Capital	Unrestricted	Check
Chris Eby	Eubanks, William	04/21/17	\$0.00	0003134	0000000	Annual Fund 2015	Annual Fund	Unrestricted	Charitable Remainder
Chris Eby	Murphy, Justin	04/22/17	\$100.00	0003139	0000000	Annual Fund 2015	Annual Fund	Unrestricted	Check
	Johnson, Marcus	04/22/17	\$50,000.00	0003146	0000000	Excellence Capital Campaign	Capital	Unrestricted	Check
	Fields, Jane	04/22/17	\$100.00	0003141	0000000	Annual Fund 2015	Annual Fund	Unrestricted	Check
	Carter, Felicia	04/22/17	\$50.00	0003142	0000000	Annual Fund 2015	Annual Fund	Unrestricted	Check
14 items									

Close

Activity Center

Profile Review

Advancement Solution



Overview

Activity Center

Profile Review

Constituent Search

Last Name:

First Name:

Email:

For Organization, use Last Name field only

Clear Search Fields

Last Name	First Name	Nickname	Class Yr	College Pref	Team Member
Stockbridge	Miles				
Stocken	James	Jim	1993	College of Engineering	Chris Eby
Stocking	Michael				
Stockley	Roger				
Stocks	Bruce				
Stockton	Ann				
Stockton	Annette				
Stockton	Gary				

16 items, 1 selected

James "Jim" Stocken

PREFERRED CONTACT INFO

Email: jstocken@email.com

Phone #: 900-876-1133

Address: 2322 Tyler Street
Baltimore, MD 21210

Age: 46
DOB: 10/22/1970
Gender: M
Marital Status: M
Deceased Date: N/A

Confidential? N

Relationships			Donor Type(s)		
Type	Household?	Name	Code	Category	Priority
Child	Y	Stocken, Lori	ALUM	Alumna/us	1
Family Foundation	N	The Stocken Family Foundatio...	PRNT	Current Parent	4
Spouse	N	Stocken, Peter			

Education			Employment			
Institution	Degree	Awarded	Employer	Position	Start Date	End Date
Michigan State Univ	Masters Degree in Science	12/13/1996	Electrical Engineering	VP	5/20/2004	
Michigan State Univ	Bachelors Degree in Scie...	6/1/1993	Electrical Engineering	Division Engineer	1/5/1997	5/18/2004

Additional Contact Information
Salutations
Alumni/Volunteer Activities
Projects/Interests
Student Activities
Events

Giving History

Total Commitments: \$187,900.50

Total Cash Gifts: \$187,900.50

Total AF Gifts: \$146,230.00

Fiscal Years of Giving: 16

Consecutive Years of Giving: 9

First Year of Giving: 1998

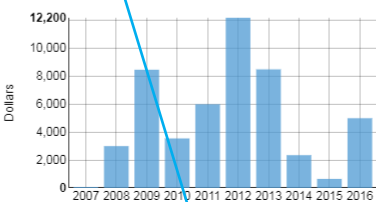
Last Gift: 4/6/2017, \$10,000.00

Last Gift Designation: Eng Entrepreneurs Prog

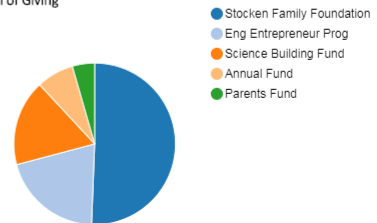
LYBUNT? N

SYBUNT? N


10 Year Giving History



Designation of Giving



Contacts
Pledges
Gifts Detail
Solicitations



All
News
Images
Maps
Videos
More
Settings
Tools

About 226,000 results (0.53 seconds)

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Mr. Oliver Henry **James Stocken**, CBE, serves as Treasurer of Royal College of Art. Mr. **Stocken** served as the Managing Director of Barclays Australia and Barclays Merchant Bank in London. He joined Barclays Merchant Bank in 1979 as head of corporate finance and became managing ...

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What customers are saying about Professional Services



"I found the Evisions Professional Services team to be very helpful and gets to the heart of the matter so that they can help you."

Lynn Kohn

University Registrar

University of New Haven



"Evisions was outstanding with providing great customer service to my District. As the customer, they made us feel like we are truly valued. It is very refreshing to find an organization that demonstrates a 'customer service' dedication to putting the customer first."

Ron Smith

Executive Director of IT

West Valley – Mission Community College District

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07-0018-0817