



DATATEL COLLEAGUE
ADVANCEMENT

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How higher education does business.

A photograph of two men in business suits shaking hands on a staircase. The man on the left is a Black man with a friendly expression, wearing a dark suit jacket over a pink and white striped shirt. He is holding a white laptop. The man on the right is a white man, also smiling, wearing a dark suit jacket. The background shows a modern building interior with a staircase and large windows.

experience | RESULTS

- Increase productivity and collaboration with the Datatel ActiveCampus® Portal
- Identify and cultivate alumni, donors, and friends of your institution
- Plan strategic campaigns and solicitations
- Build and steward meaningful relationships
- Easily monitor progress on goals
- Analyze data and generate powerful reports



Datatel Colleague Advancement

It's never been a more exciting—and challenging—time for advancement leaders in higher education. The opportunities to make an impact on your institution's financial future, and therefore the success of generations of students, are innumerable. The expectations and demands can be equally daunting. Your institution faces increased competition for benefactor funds, and the need to cultivate valuable alumni relationships and strategically build your development plan has never been more critical.

Datatel® Colleague® Advancement is the comprehensive relationship management and reporting solution you need to ensure the future of your institution. From maximizing your fundraising efforts to building your essential alumni relations, Colleague Advancement improves the institutional advancement and marketing of an institution—a vital part of the Strategic Academic Enterprise™ addressing the complete business and academic needs of an institution and its people.

Increase Productivity and Collaboration with the Datatel ActiveCampus Portal

A truly effective advancement solution not only helps your development and alumni staff manage your constituent relationships, but the solution should also increase efficiencies and improve communication within and across all departments. With the Datatel ActiveCampus Portal, you can easily access multiple kinds of information from one location. Whether you want to view your upcoming appointments, examine operational or strategic reports, check your event to-do list, approve your staff leave requests, or plot all of your alumni on a map for a pending trip—it's all done from your personalized page in the Portal. The ActiveCampus Portal also provides a collaborative workspace where your team can access and share information for joint projects.

Identify, and Cultivate Alumni, Donors, and Friends of Your Institution

When managing your alumni, prospects, donors, and major contributors, you want to be responsive to their specific needs and concerns. You must be able to understand the roles they play within their communities, organizations, and foundations. Colleague Advancement captures your institutional memory and combines it with data from multiple sources creating comprehensive profiles for each and every constituent. You can easily manage demographic and key relationship information, maintain detailed histories of giving, determine patterns, and personalize stewardship communications for maximum effect. Equipped with this information, you can effectively recognize donors and successfully move constituents through the cultivation process.

To strengthen your efforts even more, Datatel has created strategic partnerships for exporting and importing data that enhances your Colleague Advancement matching gift information, planned giving information, and wealth screening information. Our partners understand the needs of higher education fundraising and provide specialized services for your institution. Identification, cultivation, and solicitation of your prospects have never been easier.



With the ActiveCampus Portal and Colleague Advancement, your employees will have direct access to all the information they need to be more productive and efficient.

Plan Strategic Campaigns and Solicitations

Approximately 35,000 new non-profits are established nearly every year. Advancement leaders are held accountable to know all activity within the constituent base at all times, and to report your campaign's progress toward goal at a moment's notice. Your success depends on the quality of your strategy and the accuracy of the information you are tracking.

Colleague Advancement enables you to build and manage a sophisticated campaign tree, defining components within the campaign such as multiple appeals with distinctive goals and plans. You can distinguish the effectiveness of your staff and volunteer solicitors based on results, and identify the giving trends within your donor base. Colleague Advancement helps you understand how each campaign is progressing, and makes it possible to relate performance data to particular fundraising activities and associated events.

The information in Colleague Advancement helps you target your constituencies and be more efficient, and therefore more effective, with your solicitation strategies. Multiple rating options enable you to track the ability and affinity of your constituents to give. Moves management helps you easily identify who to ask, at the optimal time, for a particular gift. Deferred gift vehicles are tracked with the critical details you need to sustain long-term relationships with your donors. No campaign would be complete without well-crafted recognition programs, and the options in Colleague Advancement are limitless. The strength of the solution lies in managing all this information for you, automatically.

Build and Steward Meaningful Relationships

Relationships are the foundation of the advancement and alumni offices. Nurturing these relationships with each of your constituents requires strong outreach, specialized services, well planned events, and meaningful communication.

Stewarding donors is particularly critical to your ongoing relationships. Colleague Advancement helps you manage dynamic stewardship programs to ensure that donors are well informed as to the impact their gifts have made. Donors are tied to their endowed funds, and to the recipients of those funds; this, combined with information regarding the health of those funds, results in transparency and improved donor stewardship.

Having comprehensive constituent information at your fingertips means less time searching for data and more time building relationships. Colleague Advancement provides a powerful solution to communicate with your audience through their preferred means, manage your on- and off-campus events, and administer any variety of membership programs you offer. Your prospects will become informed, your donors will remain included, and your alumni will feel as though they have never left campus.

Easily Monitor Progress on Goals

To successfully meet—even surpass—your goals, you need accurate, usable information to drive strategic decisions. With Datatel's Success Dashboards and Performance Analytics for Colleague Advancement, you can easily monitor advancement performance indicators in a graphical format, providing you instant answers to key questions. The days of requesting and waiting for reports are gone. You will know where your fundraising efforts are at a moment's notice.

Recognizing that different leaders in your advancement office require different types of information to make decisions each day, our Success Dashboards provide five different views to meet all your needs. Your Success Dashboards are viewable in the ActiveCampus Portal, can be printed, and easily can be inserted into Microsoft Word, PowerPoint or Excel documents to present to your cabinet and board members.

"Colleague Advancement allows us to communicate with our constituents more effectively, and enables us to easily track and share information. It also gives our development team more time to focus on building relationships that result in increased giving."

Katrina Bradfield
Director of Development Services
Union University

Analyze Data and Generate Powerful Reports

In today's fast-paced world, information should be in the hands of the people who need it, and that means being able to provide reporting options for users of all skill levels. Datatel's powerful business intelligence tools offer highly professional and easy-to-use reports, such as the Success Dashboards, multi-dimensional point and click analytical reports, and standard reports created with your specific selection criteria.

Colleague Advancement makes it easy to analyze fundraising and alumni data. Campaign status, donor and organization profiles, stewardship, and alumni activity reports enable your leaders to evaluate data in real-time to best manage your institution's fundraising efforts.

Leverage Datatel's Experienced Professional Services Team

Datatel's Professional Services Team is comprised of fundraising experts with real-world experience in higher education and the non-profit market. In fact, most of Datatel consultants have spent a considerable portion of their careers working at academic institutions just like yours. They offer the knowledge and methods to implement best practices successfully, with a focus on a high return on your investment. Institutions demanding on-time and within budget implementations select Datatel as their strategic business partner.

With Colleague Advancement, you have a powerful solution that can change and improve your capital campaign, annual fund and alumni relations efforts -- ensuring you meet your goals, drive your success, and experience results.

For more information about Colleague Advancement, or to see a demonstration, please call 1.800.DATATEL or visit www.datatel.com.



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