



Union  
University



## Union University Successfully Implements Colleague Advancement to Simplify Fundraising Efforts and Enhance Alumni Relations

### || SITUATION ||

When Union University in Jackson, TN needed to upgrade its software and database management system, they chose Datatel® Colleague® because it provided a fully integrated and relational database. The University staff liked the security and stability Datatel offered, and they were confident in the company’s dedication to client satisfaction.

They considered the implementation of the institutional advancement component a key factor in their decision. Colleague Advancement — Datatel’s fundraising and alumni relations system — helps colleges and universities strengthen critical relationships, communicate more effectively, and better identify, cultivate, solicit, and steward donors.

Having licensed the complete Colleague suite, including Colleague Advancement, Colleague Student, Colleague Finance, Colleague Financial Aid, and Colleague HR, Union University strategically implemented one system component at a time, concluding with Colleague Advancement.

As a fully integrated component within the Colleague enterprise resource planning (ERP) system or as a standalone institutional advancement solution, Colleague Advancement delivers a powerful solution for today’s fundraising and alumni relations’ teams — combining constituent, contribution, communications, campaign management, analysis, reporting, major donors and moves management, membership, planned giving, and more.

### || SOLUTION ||

Sound planning, employee engagement, and continuous motivation were critical to Union University’s implementation success. The institution solicited team input all the way through the decision-making process and requested staff participation from divisions across campus to form a core team, according to Karen McWherter, director of computing services for Union University. Her group met weekly during the entire implementation life cycle to foster collaboration, dialogue and idea exchange.

Individuals learned how a single change in one process could impact the entire team or department. They also gained insight into the roles and responsibilities of their peers and colleagues. By observing each department’s installation and implementation process, the team also observed how each module worked



## || SOLUTION ||

and determined how they could maximize its capabilities. Motivating staff members, and keeping them motivated, was an ongoing practice. Implementation began in 2004 — the year of the Summer Olympics in Athens, Greece — so Union developed a related theme to maintain momentum throughout the process. As each campus department went live, an Olympic-style torch was lit to celebrate the milestone. In addition, Union awarded gold medals, poems, and souvenirs to recognize achievements. This encouraged others to reach their goals.

Union University's Advancement Office was especially innovative. They held a celebration on the one-year anniversary of Colleague Advancement's "go live" date. Other incentives at the University included a dedicated "Datatel" training room stocked with free snacks and beverages for faculty, staff, and administrators.

"By recognizing the achievements of both teams and individuals, we developed an environment where everyone wanted to persevere and support one another. For example, the university mascot is a bulldog so we had a gold bulldog and tied the Olympic colors around his neck. Every month we chose someone who went the extra mile, as the 'Dynamic Dawg,'" said McWherter. "It didn't have to be someone on the implementation team. It could be any University employee."

### ABOUT UNION UNIVERSITY

Established in 1848

Enrolls more than 3,000 undergraduate and graduate students from 44 states and 36 nations

Offers programs in art, Christian studies, and medical and health sciences from a 290-acre campus

Recognized by *U.S. News & World Report*, America's Best College Buys, and America's Best College Scholarships, among others

## || RESULTS ||

"Colleague Advancement makes our jobs a lot easier," said Katrina Bradfield, director of development services at Union University. "It 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."

"We successfully tested Colleague Advancement and continued performing business processes on the old system," said Bradfield. "In fact, we did both so well that we had the time to expand our capabilities by using Colleague Advancement's tools for our annual phone-a-thon fundraiser, which was something we thought we would have to wait for a while to use."

When university employees choose to make donations to the institution, the money is withdrawn directly from their paychecks. "The integration between HR and CA has made the payroll deduction process much more efficient," said Bradfield. "It makes donating easier for employees and saves the advancement staff approximately six hours a month in gift processing time."

Colleague Advancement has also made it easier and faster to complete the annual Council for Advancement and Support of Education (CASE) survey, which measures, compares, and evaluates funds raised by advancement officers at colleges and universities across the country.

"The yearly CASE survey process used to be tedious and cumbersome, but now with Colleague Advancement, generating necessary survey data takes considerably less time than using our former legacy system," said Bradfield. "The staff is relieved, and they can focus on what they do best — building relationships with current and potential donors."

"Hard work, planning, collaboration, and choosing best-in-class products and services ensured our success," said Bradfield. "As a team, we were able to keep enthusiasm high, and of course, working with Datatel's consultants was incredibly helpful. They are extremely knowledgeable, provided excellent support, and helped navigate us through the entire process. Thanks to Colleague Advancement, we will be able to support our Advancement team more effectively so they can build current relationships and cultivate new ones in the future."

**||| DATATEL**

4375 Fair Lakes Court  
Fairfax, VA 22033

1.800.DATATEL  
703.968.9000  
[www.datatel.com](http://www.datatel.com)