

STEWARDSHIP/DONOR RELATIONS

Start: July 2026

Finish: June 2027

Budget: \$33,000

Actual YTD: \$0

STEWARDSHIP/DONOR RELATIONS WORKFLOW

Task	July	Aug	Sept	Oct	Nov	Dec
Finalize ThankView contract						
Staff Software Onboarding Process						
Creation of Initial Video Content						
Initial Outreach to Donors						

RISK/MITIGATION

There is minimal risk associated with this strategic initiative. The only risk is the University Advancement staff does not utilize the software to its fullest capability. Otherwise, utilization of this product should greatly enhance the ability to engage with prospective donors and steward existing donors.

Q1 OBJECTIVES

- Finalize agreement with EverTrue to obtain the ThankView software.
- Begin onboarding process with key staff who will be the primary users of the ThankView software.
- Begin the process of creating video content for distribution to both prospective and current donors.
- Begin initial outreach to donors and potential donors.

Status:



Lead: Kevin Hughes

Pillars: Engage

Date: 07/30/2026

DESCRIPTION

University Advancement will purchase and utilize the ThankView software to enhance donor outreach efforts and better personalize the way in which the team initially connects with potential prospects and stewards existing donors.

