

**Major and Principal Gifts Track
Successful Fundraising Partnerships Workshop
February 25-26, 2016
UT Southwestern (Dallas, TX)**

Day One (February 25)

10:00 AM – 12:00 PM Morning Sessions

- National Trends - blended gifts; giving vehicles; what donors are saying to their advisers
- Donor Demographics – understanding the motivations and donor behavior for:
 - Baby Boomer Generation
 - Older Generations (Silent Generation and World War II Generation)
 - Younger Generations (Generation X, Millennials)
- Major Gift Decision Cycle

**12:00 PM - 2:00 PM Lunch and Panel Discussion
(Panel to start approx. 12:45pm)**

Panelists: *Wendy Anderson – UT Austin; Kyle Edgington – UT Dallas;
and Amanda Billings – UT Southwestern*

Moderator: *Marcia Inger Navrátil – UT System*

- Best Practices in Solicitation
- Including Family Members in Solicitation Cycle
- Managing the President and other leaders
- High Capacity Stewardship

2:00 PM – 2:15 PM BREAK

2:15 PM – 4:00 PM Afternoon Sessions

- Joint Proposals and interdisciplinary asks
- Institutional culture to create a united donor strategy
- Who Can Be Allies in Gift Discussions – Internal and External
- When to Make the Ask (Cues and Clues)
- Learning How to Discover the Right Gift Amount
- Overcoming Objections

(over)

Day Two (February 26)

9:00 AM - 10:30 AM **Morning Sessions**

- Small Group Exercises

Implementing takeaways from Day One with each participant discussing an individual of their choice with whom they will be working with in the coming months to make a major/principal gift ask, or to move to ask including:

- Overview of relationship with UT institution – involvement and giving
- Current status of move toward a major or principal gift
- Proposed next steps over the next 6 months
- Maximizing the ask with tools learned at the workshop
- Group's reaction/input/comments

10:30 AM – 10:45 AM BREAK

10:45 AM – 11:45 AM **Closing Session**

- Critical Lessons from the Small Group Discussions
- Workshop Questions and Answers
- Summary of Workshop