

**Major and Principal Gifts Track
Strategic Portfolios Workshop – May 21, 2015
Dallas, TX**

DRAFT AGENDA

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|------------------|---|
| 10:00 am | Welcome and Introductions
-Document Personal Goals for Workshop |
| 10:15 – 10:35 am | Create System of Accountability
-On Metrics
-What/How to Measure |
| 10:35 – 10:50 am | Improve Management of Fundraising Portfolios
-Shrink Your Portfolio
-Reduce Collective Portfolio Slack |
| 10:50 – 11:00 am | EXERCISE |
| 11:00 – 11:20 am | Identifying Right Prospects |
| 11:30 – Noon | Solicitation Strategy Map |
| 12:15 – 12:45 pm | Working Lunch: The Anatomy of a Big Gift |
| 1:00 – 1:35 pm | EXERCISE |
| 1:35 – 1:45 pm | Recap of Solicitation Strategy Map, and Questions |
| 1:45 – 2:15 pm | BREAKOUTS EXERCISE: Develop Strategy Plans for Donor Scenarios |
| 2:15 – 2:45 pm | Case Studies and Lessons Learned
-DePaul University
-Northwestern University
-Accountability Grid |
| 2:45 – 3:00 pm | Questions and Wrap Up |