

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

**Presenter - David Lively, Associate Vice President of Alumni Relations & Development,  
Northwestern University**

Join us for an innovative workshop and learn the value of strategic portfolios that produce exceptional results. One institution using these strategies increased fundraising results by more than 20 percent per year for the past three years. Why are strategic portfolios important? What are they? How do I create one? This is a must workshop for all frontline officers (including planned giving and corporate and foundation officers), researchers and prospect managers. Regardless of the size of your program or your current portfolio, you will come away with new strategies for your top prospects and have a path for superior ROI. David Lively has successfully pioneered this innovative strategy. Additional best practices from UT institutions will be incorporated into the program.

*For more information and to Register, [click here.](#)*

10:00 am	<b>Welcome and Introductions</b>
10:15 – 10:35 am	<b>Creating a System of Accountability</b>
10:35 – 10:50 am	<b>Improving Management of Fundraising Portfolios</b>
10:50 – 11:00 am	<b>EXERCISE</b>
11:00 – 11:20 am	<b>Identifying the Right Prospects</b>
11:30 – Noon	<b>Solicitation Strategy Map</b>
12:15 – 12:45 pm	<b>Working Lunch: The Anatomy of a Big Gift</b>
1:00 – 1:35 pm	<b>EXERCISE</b>
1:35 – 1:45 pm	<b>Recap of Solicitation Strategy Map, and Questions</b>
1:45 – 2:15 pm	<b>BREAKOUT EXERCISE: Develop Strategy Plans for Donor Scenarios</b>
2:15 – 2:45 pm	<b>Case Studies and Lessons Learned</b> -DePaul University -Northwestern University -Accountability Grid
2:45 – 3:00 pm	<b>Questions and Wrap Up</b>