**CONFIDENTIAL BRIEFING PAPER**

EVENT TITLE (EX: DINNER WITH DUB & DONOR)

# PREPARED FOR: TITLE, NAME

### Location:

**Address:**

**Phone Number:**

VENUE DETAILS

**Donor Address (if applicable) Parking:**

**ADA Accessibility:**

**Date:**

**Time:**

 **IMPORTANT CELL PHONE NUMBERS**

**Donor/Volunteer Name (206) xxx-xxxx**

**Bob Stacey (206) xxx-xxxx**

**Tracy Ostrem (206) xxx-xxxx**

\*include all CAS Dean’s office attendess **Number**

**Name Number**

# ATTENDEES

Name Name Name

# TIMING

Arrive at 0:00

# PARKING

Example- Valet parking is available at 5th Avenue entrance

# ATTIRE

Information

# STRATEGY

Identify what we are trying to learn from the meeting.

# GOALS

Describe the goals for the meeting.

# CONVERSATION TOPICS

Why are we having this conversation? Include any speaking points, questions or updates for the guest

##  NAME

**UW Affiliation:** Alumnus or Friend, Board Affiliations, Faculty, Former Staff etc. (Example. BA 1973 College of Arts & Sciences (Major: History), Henry Suzzallo Society, UW Foundation Board Member)

**UW Giving History:** Capacity (Example: E - $5M-$9.9M)

**Top Giving Areas:** (Example- can pull this information in ReportWriter using “Capture”)

UW Medicine

Intercollegiate Athletics

$ Amount

$ Amount

Foster School of Business $ Amount

### Total UW Giving: Relationship Manager:

**Endowments:**

**Open Ask: (Current Proposal Asks)**

Include a bio about the donor which can be found under Prospect Notes in Advance, but additional research may be necessary. This area describes the donor’s background, career information, interests and involvement in the UW and community.

List any endowments and related information, for example the description, holder of the endowment if applicable,

their term start and end dates, and research interest.

# CONTACT INFORMATION

### First Last Name

Position Title, Explanation email@uw.edu

(206) 123–4567

\*\*Convert the final version into a PDF. There may be extra information to also convert into a PDF and attached to the final briefing PDF document: driving directions, parking information and event invitations etc.



\*Include driving directions and a map