CONFIDENTIAL BRIEFING (LONG)

# EVENT TITLE (EX: DINNER WITH DUBS & DONOR)

## PREPARED FOR: TITLE, NAME (AUDIENCE: USUALLY A DEAN OR OTHER INTERNAL CONTACT)

## EVENT DETAILS

|  |  |
| --- | --- |
| **Date:** date**Time:** time**Arrive at:** time**Attire:** dress | **Location:** restaurant (directions on last page)**Address:** #### street, city, state zip**Phone Number:** (###) ###-####**Parking:** park**Special Instructions:** ADA, unique features, parking code, etc. |

## CONTACT INFORMATION

|  |  |  |
| --- | --- | --- |
| **Event Lead First & Last Name**Event Lead TitleCollege of Arts and Sciences**Direct Line:** ###**Cell Phone:** ###**Email:** ### | **Key Attendee First & Last Name**Key attendee titleCollege of Arts and Sciences**Direct Line:** ###**Cell Phone:** ###**Email:** ### | **Key Attendee First & Last Name**Key attendee titleCollege of Arts and Sciences**Direct Line:** ###**Cell Phone:** ###**Email:** ### |

## STRATEGY / PURPOSE

Identify the goal of the meeting/event.

Example: As a representative of Arts & Sciences, you are a key member of the stewardship team at this donor event. Please talk with guests and listen for interests and connections that could lead to meaningful support for [Department].

## CONVERSATION TOPICS / SPEAKING POINTS

Include any talking points, questions or updates for the guest, if applicable.

## EVENT SCHEDULE

|  |  |
| --- | --- |
| 0:00 PM | Your arrival |
| 0:00 PM | Reception begins |
| 0:00 PM | Info |
| 0:00 PM | Closing Note |

## KEY NON-PROSPECT PARTICIPANTS

|  |  |  |
| --- | --- | --- |
| **First Last Name**Title, OrganizationPronouns, if applicable | Short biography about this person highlighting their purpose at this event and potential conversation topics. |  |
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PROSPECT PARTICIPANTS

### NAME OR ORGANIZATION

**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)

**Total UW Giving:** $ Amount

**Top Giving Areas**

UW Medicine $ Amount

Intercollegiate Athletics $ Amount

Foster School of Business $ Amount

**Relationship Manager:** Name or N/A

**Endowments:** List here or N/A

**Open Ask:** Current Proposal Asks or N/A

**Biography**

This area describes the donor’s background, career information, interests and involvement in the UW and community. Bios are saved in Prospect Notes in Advance or at the bottom of the Prospect Profile page in Reportal.

**NOTE** additional research may be necessary if little or no bio details are in Advance. Please upload your new bio to Advance, replacing the older version with the newer version. Instructions: [Add Arts & Sciences Bio Notes in Advance](../Canvas%20Files/Advance%20AS%20Bio%20Notes%20Added.pdf).

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***\*\*Add more PROSPECT PARTICIPANTS by copying the section from just above the purple bar to the end of the bio. Paste “keep source formatting”.***

PREPARED BY

**Your Name**

Your title

College of Arts and Sciences

@uw.edu| (206) ###-####

***\*\*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.***

## DIRECTIONS

Parking code: (if applicable)

Special instructions: (if applicable)



