

**Wednesday, May 1, 2024**



8:00 am - 4:30 pm	Registration Desk Open – Floor 2	
8:00 am - 8:45 am	Breakfast Buffet – Chapel	
8:45 am - 9:00 am	Break	
9:00 am - 12:00 pm	<p style="text-align: center;">Pre-Conference Workshop Morning Session</p> <p style="text-align: center;"><b>Research Basics Bootcamp</b>                  Lisa Foster, Phillips Academy                  Dave Owens, Boston Children's Hospital Trust</p> <p style="text-align: center;"><b>Room: George</b></p>	<p style="text-align: center;">Pre-Conference Workshop Morning Session</p> <p style="text-align: center;"><b>High Finance for Prospect Researchers: Private Equity and Hedge Funds</b>                  Valerie Anastasio, Boston Children's Hospital Trust  <i>Minimum 2 years' experience in prospect research required.</i></p> <p style="text-align: center;"><b>Room: York</b></p>
12:00 pm - 1:15 pm	<b>Luncheon</b> – Chapel	
1:15 pm - 1:30 pm	Break	
1:30 pm - 4:30 pm	<p style="text-align: center;">Pre-Conference Workshop Afternoon Session</p> <p style="text-align: center;"><b>Research Basics Bootcamp</b>                  Lisa Foster, Phillips Academy                  Dave Owens, Boston Children's Hospital Trust</p> <p style="text-align: center;"><b>Room: George</b></p>	<p style="text-align: center;">Pre-Conference Workshop Afternoon Session</p> <p style="text-align: center;"><b>High Finance for Prospect Researchers: Private Equity and Hedge Funds</b>                  Valerie Anastasio, Boston Children's Hospital Trust  <i>Minimum 2 years' experience in prospect research required.</i></p> <p style="text-align: center;"><b>Room: York</b></p>
4:30 pm - 5:00 pm	Break	
5:00 pm - 8:30 pm	<b>NEDRAcon2024 Opening Reception - Sponsored by DonorSearch</b> – Harbour Room, Floor 19	

\*Schedule is subject to change.

\*\*For complete session descriptions please refer to the NEDRA website: [www.nedra.org/conference](http://www.nedra.org/conference)





\*\*\*Please see the conference location plan below

Thursday, May 2, 2024

8:00 am - 4:30 pm	Registration Desk Open – Floor 2			
8:00 am - 9:15 am	Breakfast Buffet - Grand Ballroom			
8:45 am - 9:15 am	Welcome & Networking for New Members & First Time Conference Attendees – York, Floor 2			
8:45 am - 9:15 am	Volunteer Orientation – York, Floor 2			
9:30 am - 10:30 am	<p>(A1)  <b>How to Make Your News Digest More Streamlined and Actionable (and have fun while doing it)</b>                      Lauren Casas, Dana-Farber Cancer Institute                      Ryan Frank, Wellesley College                      Christina Priplata, Dana-Farber Cancer Institute</p> <p>Beginner  <b>Room: Temple</b></p>	<p>(A2)  <b>Panel: Advancing in Advancement</b>                      Moderator: Melissa Bank Stepno, Helen Brown Group                      Panelists: Suzy Campos, Amherst College                      Tim Enman, Memorial Sloan Kettering Cancer Center                      Sara Massari, Harvard University</p> <p>All levels  <b>Room: College</b></p>	<p>(A3)  <b>Pipeline Growth With A DXO Program</b>                      Rich Horne, Vassar College                      Karolina Gomez, Vassar College</p> <p>Intermediate  <b>Room: George</b></p>	<p>(A4)  <b>Insights to Planned Giving</b>                      Jill Meister, Yale University</p> <p>Beginner and Intermediate  <b>Room: York</b></p>
10:30 am - 10:40 am	Break			
10:40 am - 11:40 am	Josh Roach, Managing Director at Meritage Group LP - Discussion on Family Offices – Grand Ballroom			
11:40 am - 11:50 am	Break			
<p>Sponsor Presentations                      11:50 am – 12:20 pm</p>	 Room: George	 Room: York	 Room: College	  Room: Temple
12:20 pm - 12:30 pm	Break			
12:30 pm - 2:00 pm	Luncheon, Business Meeting, and Awards – Grand Ballroom			
2:00 pm - 2:15 pm	Break			
2:15 pm - 3:15 pm	<p>(B1)  <b>Data Compliance: The Who, What, Where, When, Why, and How</b>                      Jessica Woodbridge, Helen Brown Group                      Michele Borucki, Helen Brown Group</p> <p>Intermediate  <b>Room: Temple</b></p>	<p>(B2)  <b>Due Diligence: The What, Why, and How of Research Analytics and Risk Assessment</b>                      Krista Pierce, Tufts University</p> <p>All levels  <b>Room: College</b></p>	<p>(B3)  <b>Building an Intentional Prospect Research Program for Operational Efficiency</b>                      Kelley McGeehan, Conduit Philanthropic Intelligence Partner                      Meghan Walsh, Virtua Health</p> <p>Beginner and Intermediate  <b>Room: George</b></p>	<p>(B4)  <b>Measuring Success: Navigating a New Metrics Implementation</b>                      Dan Zarlenga, American Cancer Society                      Michelle Bisbee, American Cancer Society</p> <p>Intermediate  <b>Room: York</b></p>
3:15 pm - 3:30 pm	Break			
3:30 pm - 4:30 pm	<p>(C1)  <b>Partnering Across Advancement and Beyond: The Potential of Prospect Development</b>                      Ashley Bannon, College of the Holy Cross                      Amy Tesoro, Perkins School for the Blind</p> <p>Intermediate  <b>Room: Temple</b></p>	<p>(C2)  <b>How to Automate Rating All Your Finance Prospects by Job Title</b>                      Rachel Davies, Yale University</p> <p>Intermediate  <b>Room: College</b></p>	<p>(C3)  <b>Push It to the Limit! Using Looker Studio as a BI Tool for Resource Challenged Organizations</b>                      John Carasone, Williams College                      Nicholas Hersey, Williams College</p> <p>Beginner  <b>Room: George</b></p>	<p>(C4)  <b>Creating a DEI Data Guide for Prospect Development</b>                      April Genung, Memorial Sloan Kettering Cancer Center                      Brendan O’Hagen, Memorial Sloan Kettering Cancer Center</p> <p>Intermediate  <b>Room: York</b></p>
4:30 pm - 5:00 pm	Break			
5:00 pm - 6:00 pm	Networking Reception at the Omni New Haven - Sponsored by Slate – Pre-Assembly & Ballroom D, Floor 2			
6:00 pm - 8:00 pm	Dinner Break - various locations throughout New Haven			
8:00 pm - 11:00 pm	NEDRA After Dark Trivia at Elm City Social Club - Sponsored by Altrata – 266 College St, New Haven, CT 06510			

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**Friday, May 3, 2024**

6:45 am - 7:30 am	<b>The Walk to Remember</b> - Meet in the hotel lobby			
7:30 am - 2:40 pm	Registration Desk Open – Floor 2			
7:30 am - 8:30 am	Breakfast Buffet - Grand Ballroom			
8:30 am - 9:30 am	<b>Keynote Speaker - Josh Birkholz, CEO, BWF</b> – Grand Ballroom			
9:30 am - 9:40 am	Break			
9:40 am - 10:40 am	<p align="center">(D1)</p> <p align="center"><b>Prospect Management is STILL More Than Data</b> Nicole Fonsh, Harvard Law School</p> <p align="center">All levels <b>Room: Temple</b></p>	<p align="center">(D2)</p> <p align="center"><b>Mining for Gold: The Art and Science of Prospect Identification</b> Sarah Price, BWF</p> <p align="center">All levels <b>Room: College</b></p>	<p align="center">(D3)</p> <p align="center"><b>Bootcamp Refresher/General Q&amp;A Session for “Newbies”</b> Lisa Foster, Phillips Academy Tara McMullen-King, Helen Brown Group Dave Owens, Boston Children's Hospital Trust</p> <p align="center">Beginner <b>Room: George</b></p>	<p align="center">(D4)</p> <p align="center"><b>Pipelines, Proposals, and Portfolios: The Art of Running Highly Effective Meetings</b> Ruthie Giles, University of New Hampshire</p> <p align="center">All levels <b>Room: York</b></p>
10:40 am - 10:50 am	Break			
10:50 am - 11:20 am	 <b>Room: College</b>	 <b>Room: Temple</b>	 <b>Room: George</b>	 <b>Room: York</b>
11:20 am - 11:30 am	Break			
11:30 am - 12:30 pm	<p align="center">(E1)</p> <p align="center"><b>Asia 2024: What's going on?</b> Shauna Meegan, Harvard University Stephanie Snow, Harvard University</p> <p align="center">Intermediate <b>Room: Temple</b></p>	<p align="center">(E2)</p> <p align="center"><b>Protecting Our Institutions: Due Diligence and Risk Management Trends and Insights</b> Josh Birkholz, BWF Chris Green, Xapien</p> <p align="center">Beginner and Intermediate <b>Room: College</b></p>	<p align="center">(E3)</p> <p align="center"><b>We Just Ran a Screening...Now What?</b> Ian Wells, Ian T. Wells &amp; Associates, LLC Dr. Emily O'Brien, Ian T. Wells &amp; Associates, LLC</p> <p align="center">Beginner <b>Room: George</b></p>	<p align="center">(E4)</p> <p align="center"><b>Equitable Hiring: What it takes, why it matters, and who cares?</b> Chandra Montgomery, Lindauer Global Faith Montgomery, Lindauer Global</p> <p align="center">All levels <b>Room: York</b></p>
12:30 pm - 1:30 pm	<b>Lunch and Sponsor Raffles</b> – Grand Ballroom			
1:30 pm - 1:40 pm	Break			
1:40 pm - 2:40 pm	<p align="center">(F1)</p> <p align="center"><b>A Case Study: Generative AI in Due Diligence at Dartmouth College</b> Chris Green, Xapien Michael Foote, Dartmouth College</p> <p align="center">Intermediate and Advanced <b>Room: Temple</b></p>	<p align="center">(F2)</p> <p align="center"><b>The ABCs and 123s of DAFs</b> Melissa Bank Stepno, Helen Brown Group</p> <p align="center">Beginner <b>Room: College</b></p>	<p align="center">(F3)</p> <p align="center"><b>Working With Data Science Interns</b> Hope Boulanger, Brandeis University</p> <p align="center">All levels <b>Room: George</b></p>	<p align="center">(F4)</p> <p align="center"><b>2017: A Portfolio Review Odyssey</b> Jolene Crosby-Jones, Massachusetts General Hospital</p> <p align="center">All levels <b>Room: York</b></p>
2:40 pm	Conference Concludes			

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