

Wednesday, May 1, 2024






8:00 am - 4:30 pm	Registration Desk Open – Floor 2 (Mezzanine Level)	
8:00 am – 8:45 am	Breakfast Buffet – Room: Chapel	
8:45 am - 9:00 am	Break	
9:00 am - 12:00 pm	<p>Pre-Conference Workshop Morning Session</p> <p>Research Basics Bootcamp Lisa Foster, Phillips Academy Dave Owens, Boston Children's Hospital Trust</p> <p>Room: George</p>	<p>Pre-Conference Workshop Morning Session</p> <p>High Finance for Prospect Researchers: Private Equity and Hedge Funds Valerie Anastasio, Boston Children's Hospital Trust</p> <p>Room: York</p>
12:00 pm - 1:15 pm	Luncheon – Room: Chapel	
1:15 pm - 1:30 pm	Break	
1:30 pm - 4:30 pm	<p>Pre-Conference Workshop Afternoon Session</p> <p>Research Basics Bootcamp Lisa Foster, Phillips Academy Dave Owens, Boston Children's Hospital Trust (with one break as time permits)</p> <p>Room: George</p>	<p>Pre-Conference Workshop Afternoon Session</p> <p>High Finance for Prospect Researchers: Private Equity and Hedge Funds Valerie Anastasio, Boston Children's Hospital Trust (with one break as time permits)</p> <p>Room: York</p>
4:30 pm - 5:00 pm	Break	
5:00 pm - 8:30 pm	NEDRAcon2024 Opening Reception - Sponsored by DonorSearch – Harbour Room, Floor 19	

**Schedule is subject to change.*

***For complete session descriptions please refer to the NEDRA website: www.nedra.org/conference*





****Please see accompanying floor map*

Thursday, May 2, 2024

8:00 am - 4:30 pm	Registration Desk Open – Floor 2 (Mezzanine Level)				
8:00 am - 9:30 am	Breakfast Buffet - Grand Ballroom				
8:45 am - 9:15 am	Welcome & Networking for New Members & First Time Conference Attendees – Room: York, Floor 2				
8:45 am - 9:15 am	Volunteer Orientation – Room: Temple, Floor 2				
9:30 am - 10:30 am	<p style="text-align: center;">(A1)</p> <p style="text-align: center;">How to Make Your News Digest More Streamlined and Actionable (and have fun while doing it)</p> <p style="text-align: center;">Lauren Casas, Dana-Farber Cancer Institute Ryan Frank, Wellesley College Christina Priplata, Dana-Farber Cancer Institute</p> <p style="text-align: center;">Beginner Room: Temple</p>	<p style="text-align: center;">(A2)</p> <p style="text-align: center;">Panel: Advancing in Advancement</p> <p style="text-align: center;">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 style="text-align: center;">All levels Room: College</p>	<p style="text-align: center;">(A3)</p> <p style="text-align: center;">Pipeline Growth with A DXO Program</p> <p style="text-align: center;">Rich Horne, Vassar College Karolina Gomez, Vassar College</p> <p style="text-align: center;">Intermediate Room: George</p>	<p style="text-align: center;">(A4)</p> <p style="text-align: center;">Insights to Planned Giving</p> <p style="text-align: center;">Jill Meister, Yale University Mathwon Howard, Yale University</p> <p style="text-align: center;">Beginner and Intermediate Room: York</p>	
10:30 am - 10:40 am	Coffee Break				
10:40 am - 11:40 am	Josh Roach, Managing Director at Meritage Group LP - Discussion on Family Offices – Grand Ballroom, Floor 2				
11:40 am - 11:50 am	Coffee Break				
Sponsor Presentations 11:50 am – 12:20 pm	 <p style="text-align: center;">Room: George</p>	 <p style="text-align: center;">Room: York</p>	 <p style="text-align: center;">Room: College</p>	 <p style="text-align: center;">Room: Temple</p>	 <p style="text-align: center;">Room: Chapel</p>
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 style="text-align: center;">(B1)</p> <p style="text-align: center;">Data Compliance: The Who, What, Where, When, Why, and How</p> <p style="text-align: center;">Jessica Woodbridge, Helen Brown Group Michele Borucki, Helen Brown Group</p> <p style="text-align: center;">Intermediate Room: Temple</p>	<p style="text-align: center;">(B2)</p> <p style="text-align: center;">Due Diligence: The What, Why, and How of Research Analytics and Risk Assessment</p> <p style="text-align: center;">Krista Pierce, Tufts University</p> <p style="text-align: center;">All levels Room: College</p>	<p style="text-align: center;">(B3)</p> <p style="text-align: center;">Building an Intentional Prospect Research Program for Operational Efficiency</p> <p style="text-align: center;">Kelley McGeehan, Conduit Philanthropic Intelligence Partner Meghan Walsh, Virtua Health</p> <p style="text-align: center;">Beginner and Intermediate Room: George</p>	<p style="text-align: center;">(B4)</p> <p style="text-align: center;">Measuring Success: Navigating a New Metrics Implementation</p> <p style="text-align: center;">Dan Zarlenga, American Cancer Society Michelle Bisbee, American Cancer Society</p> <p style="text-align: center;">Intermediate Room: York</p>	
3:15 pm - 3:30 pm	Coffee Break				
3:30 pm - 4:30 pm	<p style="text-align: center;">(C1)</p> <p style="text-align: center;">Partnering Across Advancement and Beyond: The Potential of Prospect Development</p> <p style="text-align: center;">Ashley Bannon, College of the Holy Cross Amy Tesoro, Perkins School for the Blind</p> <p style="text-align: center;">Intermediate Room: Temple</p>	<p style="text-align: center;">(C2)</p> <p style="text-align: center;">How to Automate Rating All Your Finance Prospects by Job Title</p> <p style="text-align: center;">Rachel Davies, Yale University</p> <p style="text-align: center;">Intermediate Room: College</p>	<p style="text-align: center;">(C3)</p> <p style="text-align: center;">Push It to the Limit! Using Looker Studio as a BI Tool for Resource Challenged Organizations</p> <p style="text-align: center;">John Carasone, Williams College Nicholas Hersey, Williams College</p> <p style="text-align: center;">Beginner Room: George</p>	<p style="text-align: center;">(C4)</p> <p style="text-align: center;">Creating a DEI Data Guide for Prospect Development</p> <p style="text-align: center;">April Genung, Memorial Sloan Kettering Cancer Center Brendan O’Hagen, Memorial Sloan Kettering Cancer Center</p> <p style="text-align: center;">Intermediate Room: York</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 Foyer and Ballroom D, Floor 2				
6:00 pm - 8:00 pm	Dinner Break – Independent dinners – see website for local restaurant recommendations				
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	The Walk to Remember - 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	Keynote Speaker - Josh Birkholz, CEO, BWF – Grand Ballroom			
9:30 am - 9:40 am	Break			
9:40 am - 10:40 am	<p align="center">(D1)</p> <p align="center">Prospect Management is STILL More Than Data Nicole Fonsh, Harvard Law School</p> <p align="center">All levels Room: Temple</p>	<p align="center">(D2)</p> <p align="center">Mining for Gold: The Art and Science of Prospect Identification Sarah Price, BWF</p> <p align="center">All levels Room: College</p>	<p align="center">(D3)</p> <p align="center">Bootcamp Refresher/General Q&A Session for “Newbies” Lisa Foster, Phillips Academy Tara McMullen-King, Helen Brown Group Dave Owens, Boston Children's Hospital Trust</p> <p align="center">Beginner Room: George</p>	<p align="center">(D4)</p> <p align="center">Pipelines, Proposals, and Portfolios: The Art of Running Highly Effective Meetings Ruthie Giles, University of New Hampshire</p> <p align="center">All levels Room: York</p>
10:40 am - 10:50 am	Coffee Break			
<p>Sponsor Presentations 10:50 am - 11:20 am</p>	 <p>Room: College</p>	 <p>Room: Temple</p>	 <p>Room: George</p>	 <p>Room: York</p>
11:20 am - 11:30 am	Coffee Break			
11:30 am - 12:30 pm	<p align="center">(E1)</p> <p align="center">Asia 2024: What’s going on? Shauna Meegan, Harvard University Stephanie Snow, Harvard University</p> <p align="center">Intermediate Room: Temple</p>	<p align="center">(E2)</p> <p align="center">Protecting Our Institutions: Due Diligence and Risk Management Trends and Insights Josh Birkholz, BWF Chris Green, Xapien</p> <p align="center">Beginner and Intermediate Room: College</p>	<p align="center">(E3)</p> <p align="center">We Just Ran a Screening...Now What? Ian Wells, Ian T. Wells & Associates, LLC Dr. Emily O'Brien, Ian T. Wells & Associates, LLC</p> <p align="center">Beginner Room: George</p>	<p align="center">(E4)</p> <p align="center">Equitable Hiring: What it takes, why it matters, and who cares? Chandra Montgomery, Lindauer Global Faith Montgomery, Lindauer Global</p> <p align="center">All levels Room: York</p>
12:30 pm - 1:30 pm	Lunch and Sponsor Raffles – Grand Ballroom			
1:30 pm - 1:40 pm	Break			
1:40 pm - 2:40 pm	<p align="center">(F1)</p> <p align="center">A Case Study: Generative AI in Due Diligence at Dartmouth College Chris Green, Xapien Michael Foote, Dartmouth College</p> <p align="center">Intermediate and Advanced Room: Temple</p>	<p align="center">(F2)</p> <p align="center">The ABCs and 123s of DAFs Melissa Bank Stepno, Helen Brown Group</p> <p align="center">Beginner Room: College</p>	<p align="center">(F3)</p> <p align="center">Working With Data Science Interns Hope Boulanger, Brandeis University</p> <p align="center">All levels Room: George</p>	<p align="center">(F4)</p> <p align="center">2017: A Portfolio Review Odyssey Jolene Crosby-Jones, Massachusetts General Hospital</p> <p align="center">All levels Room: York</p>
2:40 pm	Conference Concludes			

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