Thursday, May 2, 2024
9:30 – 10:30 am

(A1) How to Make Your News Digest More Streamlined and Actionable (and have fun while doing it) || Room: Temple ||

Session level: Beginner
9:30 am - 10:30 am
The Dana-Farber Cancer Institute (DFCI) prospect research team provides a daily news digest of articles on prospects, donors, and faculty. After identifying a need to refresh the digest, research team members collaborated on making it more consistent, actionable, and relevant to the Division of Philanthropy as well as easier to compile on a daily basis. Join three members of the DFCI research team as they discuss their internal news process and the recent changes and improvements to the digest. Attendees will gain insight into how DFCI compiles and formats the news to be the most helpful for gift officers, and will take away inspiration for their own teams.

Learning Objectives
Understand DFCI's research news compilation, formatting, and distribution process
Learn how to incorporate inclusion, diversity, and equity content in a news digest
Apply elements of our news process to existing news digests or suggest a daily news digest for your organization to assist gift officers and/or generate leads

Presenters

Lauren Casas, Dana-Farber Cancer Institute
Lauren Casas is Senior Research Analyst II at Dana-Farber Cancer Institute, where she has worked since 2018. A Wellesley College graduate, she was previously a Research Associate at the Museum of Fine Arts, Boston. Lauren serves on NEDRA's Diversity and Inclusion Committee. When she's not researching, Lauren is a circus acrobat.

Ryan Frank, Wellesley College
Ryan Frank is the Associate Director of Prospect Research at Wellesley College. Prior to joining Wellesley, he was a Senior Research Analyst at Dana-Farber Cancer Institute and worked at Brandeis University in both Prospect Research and Annual Giving. Ryan received a BS in Finance from the University of Delaware, and when he's not busy researching prospects, he enjoys running and playing board games with friends."

Christina Priplata, Dana-Farber Cancer Institute
Christina Priplata is a Senior Corporate Analyst, Prospect Researcher, Division of Philanthropy at dana-Farber Cancer Institute. She has over 13 years of experience in philanthropy research at healthcare, human services, and academic non-profit institutions. Christina received a BS in Allied Health Science from the University of Connecticut.

(A2) Panel: Advancing in Advancement || Room: College ||

Session level: All levels
9:30 am - 10:30 am
This session will explore how each of the panelists got started in the prospect development field and their career paths. Additional topics may include: taking risks and making hard decisions, pivoting into a management role, mentors along the way, career advancement on both management and individual contributor tracks, and time for audience questions.

Learning Objectives
Attendees will learn first hand other career paths available to those currently in prospect research and development.

Presenters
Moderator: Melissa Bank Stepno, Helen Brown Group
Panelists: Suzy Campos, Amherst College;
Tim Enman, Memorial Sloan Kettering Cancer Center; and
Sara Massari, Harvard University

Melissa Bank Stepno, DAFinitive (The Helen Brown Group)

Melissa Bank Stepno is the Vice President of Data Insights and Managing Director of DAFinitive® for The Helen Brown Group. Based in NH, Melissa has worked in the non-profit industry for more than two decades, spending the majority of her time consulting with organizations on using wealth screenings, predictive modeling and other analytics to drive prospecting efforts and strategic decision making. As a thought leader, her areas of interest include also include the impact of high-net-worth philanthropy on major giving programs, and developing best practices for prospect research and prospect management. An Ann Castle winner, Melissa is a previous NEDRA and Apra Board member, most recently leading Apra as President from 2021-2022. Melissa has also served on the boards of AFP NNE and the Brandeis University Alumni Association.

Suzy Campos, Amherst College

Suzy Campos is Senior Manager of Principal Gift Strategy at Amherst College. She joined the Amherst team in 2011 as Director of Prospect Research & Management. She previously held prospect development positions at Harvard University and at Children's Memorial Hospital (now Lurie Children's Hospital) in Chicago. Earlier in her career, she was a Peace Corps volunteer in Morocco, a public and corporate librarian, and an Information Specialist at McKinsey & Company. She earned a BA from UMass-Amherst and a degree in Library Studies from the University of Michigan. She has been a proud participant in the Twin Cities to Chicago AIDS Ride, Monte's March for the Food Bank of Western Massachusetts, and the Hot Chocolate Run for Safe Passage. Suzy has been a speaker for organizations including Apra, NEDRA, AFP, and the Planned Giving Group of Central Mass. She serves on the board of the Friends of the Forbes Library, is a NEDRA volunteer and past president, and enjoys cold water plunging and stand up paddle boarding.

Tim Enman, Memorial Sloane Kettering Cancer Center

Tim Enman is a Data Scientist with Memorial Sloan Kettering Cancer Center, where he proudly supports the development team leading the hospital's $6B campaign to End Cancer for Life. He joined MSK as a prospect researcher in 2019, having previously worked in prospect research and reporting roles at Smith College and Clark University. A former NEDRA board member, he is a graduate of Concordia University in Montreal, QC. In his spare time, he enjoys collecting hobbies.

Sara Massari, Harvard University

Sara Massari is a Quality Assurance Analyst for the Alumni Affairs and Development (AA&D) group at Harvard University. Sara joined AA&D in 2018. She has over 15 years of experience in various development roles at the University, including serving as Director of Prospect Research at the Harvard Chan School from 2011 to 2018. She has also worked in prospect research at MIT, Peabody Essex Museum, and Dana-Farber Cancer Institute. Sara received a BFA in Illustration from the Rhode Island School of Design.

(A3) Pipeline Growth With A DXO Program || Room: George ||

Session level: Intermediate
9:30 am - 10:30 am

Among the newer and more innovative strategies that contour with traditional arrangements of individual giving teamwork within higher education is a digital gift officer (DXO) program. A DXO program plugs a gap between annual fund officer activity and major gift officer activity. DXOs at Vassar College manage upwards of 1,000 prospects each and apply a higher-touch approach to their prospects than is possible for annual fund officers. Vassar College will explain its DXO program history, share strategies that have proven successful, discuss portfolio building experiences based on a descriptive scoring model (in-house), and highlight where the school is heading in a competitive field of college and university advancement / development investments for campaign and outside-of-campaign fundraising.

Learning Objectives

Participants will learn the how and why for the emerging value of a digital gift officer component to building and managing a higher education fundraising pipeline based on unique, hybrid (data- and outreach-oriented) activity organized under the auspices of a digital gift officer (DXO) program.

Presenters

Rich Horne, Vassar College

Rich Horne is Director of PDR at Vassar College. He was previously the Director of Prospect Research at Beth Israel Lahey Health, a Boston-area healthcare system of 14 hospitals including Harvard Medical School teaching hospitals, and before BILH he was with Yale Development. He is a co-founder of the Yale Economic Review and studied Ethics, Politics, and Economics at Yale. He is a previous director of NEDRA, a current director of Tilde Cafe (science cafe free and open to the public), and a consultant for the National Institutes of Health.

Karolina Gomez, Vassar College

Karolina Gomez serves as the Assistant Director of Annual Giving and Digital Engagement Officer (DXO), leveraging her extensive experience and expertise in philanthropy. Previously, she distinguished herself as a Student Caller and Student Supervisor at Marist College, where her contributions to the Annual Giving Team resulted in the successful raising of over $50,000 while being a full-time student. With over five years of experience in fundraising, Karolina has cultivated meaningful relationships with a diverse array of stakeholders, ranging from current students to alumni, parents, and past parents of the College. Her deep commitment to philanthropy is exemplified by her founding of "Students Today, Alumni Tomorrow," a student group aimed at promoting engagement and awareness of the significance of giving back within the Marist community. As well as her involvement in the Steering Committee of the Senior Legacy Program, where she actively encourages seniors to contribute to their class gift before graduation, embodying her commitment to nurturing a culture of giving. Through her DXO work Karolina has been able to enage with alumni and past prents of Vassar in meaningful ways allowing for cultivation and pipeline building.

(A4) Insights to Planned Giving || Room: York ||

Session level: Beginner and Intermediate
9:30 am - 10:30 am
This session will go over the various types planned giving vehicles, what they mean for the donor, and ways that Prospect Development professionals can implement a identification program.

Learning Objectives

1. Learn about types of planned gifts
2. Learn how to identify planned giving prospects

Presenters

Jill Meister, Yale University

Jill Meister is the Director, Prospect Development at Yale University. Jill has over 25 years of prospect development experience and she has held director level roles at multiple institutions. Her areas of focus and responsibility have included: advancement services and operations, prospect management, analytics, research, records management, reporting, annual fund, stewardship, and donor relations. Throughout her career she has been a part of eight capital campaigns.
Jill is a former president of Apra, and also a former president of NEDRA. Over the past 15 years, she has been involved with setting best practice and education for the profession. Jill has an MBA from the University of Massachusetts Amherst, and a BS in Management from Franklin Pierce University.

Mathwon Howard, Yale University

Mathwon Howard was appointed Associate Vice President for Development at Yale University in April 2020. Mathwon has oversight responsibility for the following Office of Development teams; Leadership Giving, Major Gifts, Planned Giving, Prospect Development, Reunion Giving, and the Yale Alumni Fund. Prior to Yale, Mathwon came from Emory University where he served as Senior Associate Vice President for Development Programs. Mathwon has over 25 years of advancement, major gifts and alumni experience at various non-profits including Duke University, University of Michigan, Binghamton University and Detroit Zoological Society. He has been involved with campaigns ranging from $7 billion to $49 million. Mathwon has experience in all aspects of institutional advancement including alumni relations, annual giving, board relations, events, research, major gifts, and campaigns. Mathwon holds Bachelor of Arts in both leadership and public administration from Adrian College where he previously served on the Alumni Board.

Thursday, May 2, 2024
2:15 – 3:15 pm

(B1) Data Compliance: The Who, What, Where, When, Why, and How || Room: Temple ||

Session level: Intermediate
2:15 pm - 3:15 pm
In an ever-growing world of data, it has become clear that with this change comes the responsibility to stay apprised of new regulations and laws that affect our work as prospect researchers and nonprofit professionals. Join us as we touch on the current landscape of data privacy laws and provide useful takeaways for how to bring them into the fold of our daily work.

Learning Objectives
- Survey the current landscape of data privacy laws and others that are pending
- Share how to implement best practices today to maintain data compliance
- Provide guidance, tools, and a road map to help set organizations up for future success

Presenters
Jessica Woodbridge, Helen Brown Group
Jessica began her career in development in 2010 as a prospect researcher for the New Jersey Performing Arts Center (NJPAC), culminating her tenure there as manager of prospect management. In 2016, she joined The Juilliard School as associate director of research and prospect management and went on to serve as director of prospect research at Holy Name Medical Center in Teaneck, New Jersey. Jessica received her B.M. with a concentration in the music industry from James Madison University and her MBA from William Paterson University.

Michele Borucki, Helen Brown Group
Michele began her career in development in 2012 as a development analyst with the University of California, Berkeley Corporate and Foundation Relations team. She went on to serve as a prospect analyst at the University of California, Davis and then as a senior prospect analyst at the George Washington University.
Michele has been a member of CARA, NEDRA, Apra Florida, and Apra International, and previously served as the social media chair for Apra Metro DC.
She received her B.A. in creative writing from Florida State University and studied higher education leadership at California State University, Sacramento.
Michele joined The Helen Brown Group as a consultant in 2018.

(B2) Due Diligence: The What, Why, and How of Research Analytics and Risk Assessment || Room: College ||

Session level: All levels
2:15 pm - 3:15 pm
This presentation will provide attendants with the full background and composition of the due diligence program at Tufts University. The presentation will give a detailed overview of how to

develop a due diligence policy and procedure and create reporting templates, as well as offering unique tools, resources, and techniques for use throughout the due diligence review process. The presentation will provide attendants with not only a framework to build a due diligence program at their own organizations, but also a greater understanding of how due diligence research will impact the future of non-profit fundraising.

Presenter

Krista Pierce, Tufts University

Krista Pierce is the Senior Associate Director of Due Diligence Research at Tufts University, where she joined the prospect development team in 2015. Since assuming her current role in 2021, Krista has helped to create the University's first in-house due diligence program, which included developing a new policy and procedure, research reports, and risk analysis scoring.
In addition to managing the due diligence program's day-to-day operations, Krista has also acted as a subject expert to peer institutions and colleagues, and, most recently, gave a comprehensive workshop on due diligence at APRA's Prospect Development 2023.

Prior to her due diligence work, Krista served in a variety of roles at Tufts, where her responsibilities were divided between prospect management and prospect research, with a particular expertise in international prospect research. Krista came to Tufts from Tufts Medical Center, where she helped to develop the fundraising office's first prospect research program. Krista graduated from Saint Anselm College in Manchester, NH with a B.A. in English.

(B3) Building an Intentional Prospect Research Program for Operational Efficiency || Room: George ||

Session level: Beginner and Intermediate
2:15 pm - 3:15 pm

One of the greatest goals of a high performing major gifts program is to have a topnotch prospect research program. But what do you do when starting from scratch? This case study tells the story of our 18 month project to design a program that gave our major gifts team tools for greater efficiency, success, and job satisfaction.

Learning Objectives

Outcome 1: Participants will acquire skills to develop efficiencies with operational functions specific to prospect research, including how to include the major gifts team in the design process.
Outcome 2: Participants will acquire skills to strategize and evaluate their operations and prospect management program, learning key tools and questions to ask.
Outcome 3: Participants will receive a process map that they can adapt for their own organization and follow for prospect management workflow.

Presenters

Kelley McGeehan, Conduit Philanthropic Intelligence Partner

Kelley McGeehan has more than twenty-five years of experience working with nonprofits ranging from small, local groups to regional and international organizations. Prior to starting her own

business in 2011, she was a philanthropy officer with “soup to nuts” experience in small to mid-sized offices focusing her efforts on prospect research, planned giving and major gift programs.
In 2011 Kelley launched Conduit Philanthropic Intelligence Partner to provide prospect research through the eyes of a major gifts officer performing screening segmentation and analysis; In-depth prospect research; audits and training to support philanthropy programs.
Kelley holds an MS in Nonprofit Management and a BA in Economics from the University of Maryland. She is the proud mom of four teenage boys and lives in Baltimore, Maryland.

Meghan Walsh, Virtua Health
Meg Walsh has been the Director of Philanthropy Operations at Virtua Health Foundation in southern New Jersey since 2020. Her team at Virtua oversees database management, prospect research, Moves Management, special purpose fund accounting and distribution, and more. Prior to joining the team at Virtua, Meg worked in the Philadelphia region in nonprofit operational roles at organizations such as The Food Trust, University of the Arts, and Arden Theatre Company in Old City Philadelphia. She holds an MBA in Nonprofit Management from the University of Notre Dame, and a BA in Theatre/Arts Administration from George Mason University.

(B4) Measuring Success: Navigating a New Metrics Implementation || Room: York||

Session level: Intermediate
2:15 pm - 3:15 pm
The American Cancer Society (ACS) underwent a significant revision to major gift fundraiser metrics in 2023, shifting from a revenue-only method to a weighted system measuring six key metrics. This comprehensive session will explore the who, what, why, and how of metrics implementation: why this change needed to happen, what new metrics were created, who needed to be convinced, and how ACS navigated a successful metrics change. We will discuss details on how we overcame department culture challenges, the technical ins and outs of our metrics reporting and dashboards, and a recap of our first-year progress and lessons learned. This session is perfect for any shop thinking of undergoing a similar metrics change, whether a complete overhaul or an incremental upgrade, and are in need of practical solutions based on real-world experience.

Learning Objectives

- Ideas for fundraiser metrics that are key to driving performance.
- How to navigate change management, manage up to department leaders, and influence outcomes.
- Strategies for metrics reporting and dashboard visualizations.
- How to adapt to challenges along the way toward metric implementation and reporting on lessons learned.
- Generating buy-in from fundraisers and department leaders.

Presenters

Dan Zarlenga, American Cancer Society
Dan is the Director of Prospect Development at the American Cancer society where he oversees the prospect research and prospect management functions for ACS's nationwide Philanthropy

team. Prior to ACS, Dan spent nine years at Northwestern University, most recently as the Senior Associate Director of Prospect Research and Management (PRM). In this role, he led the prospect research functions of the PRM team and conducted proactive prospecting for Northwestern's Principal Gifts department and Vice President's office, as well as the Feinberg School of Medicine and Northwestern Pritzker School of Law. Prior to Northwestern, Dan was a Prospect Researcher at Opportunity International, a global microfinance organization that provides loans, savings, and insurance to entrepreneurs in over 20 countries. He received his BS in Finance from Elmhurst University and is located in Chicago, IL.

Michelle Bisbee, American Cancer Society

Michelle received her bachelor's from Virginia Tech in 2011 and went on to complete her Master's in Information Systems at the University of Colorado Denver. She has been with the American Cancer Society for 12 years, having started as a volunteer during college and transitioned to staff shortly after graduation. She currently serves as the Director of Philanthropy Operations, supporting the national teams for major gifts, annual giving, foundations relations and prospect development. She is located in San Diego, CA.

Thursday, May 2, 2024
3:30 – 4:30 pm

(C1) Partnering Across Advancement and Beyond: The Potential of Prospect Development || Room: Temple ||

Session level: Intermediate
3:30 pm - 4:30 pm
We will showcase how the prospect development team at College of the Holy Cross expanded and transformed into leaders and strategic partners for the entire Advancement department. We will highlight how we interact and work with all areas of Advancement, including major gifts, planned giving, annual giving, athletics, principal gifts, parent giving, communications, alumni relations, stewardship, and operations.
We will emphasize our gift officer partnership program and our associations with campus leaders, including the office of the Vice President, President, and Board of Trustees. We will discuss how we work with each area and highlight new ideas and programs that we have implemented. We will talk about how this work has led to positive outcomes and impact, including increased solicitations and fundraising dollars, as well as the building of a solid pipeline of future leadership donors and volunteers.

Learning Objectives

- Learn how to proactively partner with different areas in Advancement and tailor these partnerships to maximize impact.
- Learn how to “get a seat at the table” and not underestimate the power and potential of the prospect development team.
- Glean examples and how-tos regarding portfolio reviews and building partnerships with major and principal gift officers and other frontline fundraising staff.

- Learn how to support organization leaders, including the board, by building a trustee and presidential visit pipeline.
- Learn to support annual giving, athletics, and corporate & foundation relations, including setting a strategy for prospecting and outreach.

Presenters

Amy Tesoro, Perkins School for the Blind

Amy Tesoro recently took on the role of Director of Prospect Development & Research at Perkins School for the Blind in Watertown, MA. Prior to this role, served as the Director of Prospect Development at the College of the Holy Cross (2017-2024), Senior Director of Advancement Services at St. Mark's School (2012-2017), and as Director of Advancement at Saint Bridget School (2011-2012). Amy began her career in Prospect Development in 2000 at Loyola University Maryland. She then went on to implement prospect management systems as the Director of Prospect Management at the University of Chicago and then Boston College. Amy has served on the NEDRA membership committee, as a member of the Board of Trustees at Marian Court College, and as Fundraising Chair for the Board of the Junior League of Worcester. Amy holds a bachelor's degree from Boston College and is currently working toward earning her master's degree in Philanthropic Studies at the Lilly School of Philanthropy at Indiana University.

Ashley Bannon, College of the Holy Cross

Ashley Jahrling Bannon has worked in prospect development at the College of the Holy Cross since 2018, and is currently Associate Director of Prospect Development. Previously, she worked in small nonprofits including the Nichols House Museum in Boston, MA. She holds a master's degree in History Museum Studies from the Cooperstown Graduate Program, and a bachelor's degree from the University of Massachusetts Amherst. She is treasurer of the Northbridge Cultural Council and a member of the NEDRA Conference Committee.

(C2) How to Automate Rating All Your Finance Prospects By Job Title || Room: College ||

Session level: Intermediate
3:30 pm - 4:30 pm

Learn how we at Yale created title-and tenure-based salary charts for finance industry prospects and then used those to automate assigning title-based ratings to all relevant prospects. Starting from research about the finance industries, including salaries and career progressions, we moved on to staff training about the basics of the finance industry, the automation of the data analysis and ratings assignments, and communications protocols to help with departmental adoption.

Learning Objectives

- Learn how you can automate and standardize ratings based on job titles.
- See the possibilities for doing a similar project at your own institution.
- See an example of data analysis that can be done without overly-complex tools and techniques.

Presenter

Rachel Davies, Yale University

Rachel is an assistant director in prospect development at Yale University, where she does data analysis, helps maintain data hygiene, creates visualizations, and trains researchers and other staff to work with data and to use research databases. Rachel started her professional life as a Reference Librarian at a community college, after majoring in history and English literature in college. When she needed new challenges, she went back to college and studied physics and astronomy. She earned a Master's degree in astrophysics, but burned out on the graduate student life before finishing her Ph.D. After graduate school Rachel joined the Office of Development at Yale, where she was happy to rediscover a life that did not involve working on the weekends. She enjoys her current position because it lets her use her library research and organization skills, her science data analysis skills, her love of solving puzzles, and her creativity, all at the same time. Rachel earned an M.S. in Astronomy from Yale University, an M.L.I.S. from the University of Washington, and a B.A. in History and English Literature from Willamette University.

(C3) Push It to the Limit! Using Looker Studio as a BI Tool for Resource Challenged Organizations || Room: George ||

Session level: Beginner
3:30 pm - 4:30 pm

Look, Google Looker Studio is hardly the BI Tool of your dreams, but you can't argue with the price (FREE!) and it's proven to be surprisingly versatile for a variety of dashboard needs. As we prepare to take our Looker Studio dashboards behind the barn, we've decided to pen a final love letter to this frustrating yet functional (and FREE!) product in the hopes that a less financially fortunate organization can benefit from our experience. We will give a glimpse of dashboards we've created for proposal pipelines, portfolio reviews, initiative reports, principal giving profiles, fundraising progress, career center data, etc. in the hopes that those of you with no shortage of sweat equity can push Looker Studio to the limit.

Learning Objectives

* Understand the basics of Looker Studio to create usable and replicable dashboards for prospect management, prospect pipelines, fundraising initiatives, etc.
* Experience the higher end reporting functionality that can be built within the platform
* Learn about the challenges and (many!) quirks of using a free, web based software to do complex business intelligence reporting

Presenters

John Carasone, Williams College

John mixes his extensive higher education/development experience with a desktop publishing background, and forges it together with a passion for graphic design and heavy metal. With those powers combined, he creates actionable insights that are not only strategically sound, but also aesthetically appealing.

Nicholas Hersey, Williams College

Nicholas is our esteemed data analyst who weaves data straw into dashboard gold.

(C4) Creating a DEI Data Guide for Prospect Development

|| Room: York ||

Session level: Intermediate
3:30 pm - 4:30 pm
In 2021 Apra published a DEI Data Guide to serve as a resource for best practices in the ethical collection, storage and usage of Diversity, Equity, and Inclusion (DEI) data. How can you apply this robust document of resources and recommendations to your organization? In this session we will present a case study on how we and other members of the Prospect Development team at Memorial Sloan Kettering Cancer Center created a set of guidelines for managing DEI-related identity data, particularly within a healthcare setting.

Learning Objectives

In this session we plan to discuss:

- What to consider when developing a DEI Data Guide, from the initial data-gathering and question phase to rolling out the completed guidelines to your team and development stakeholders.
- Suggestions for applying APRA's best practice recommendations for DEI data to the specific needs of a healthcare organization.
- How to encourage collaboration and buy-in from colleagues as part of building a DEI program

Presenters

April Genung, Memorial Sloan Kettering Cancer Center

April Genung is a research analyst on the prospect development team at Memorial Sloan Kettering Cancer Center. She joined MSK in 2022 and previously worked in prospect development at Bowdoin College, the University of California, Davis, and Amherst College. April has served on the NEDRA Board of Directors since 2020 and currently co-chairs the Diversity and Inclusion and Advocacy/Professional Development committees. A native of Central California, she has lived in New England for 15 years and has called Maine home since 2018. April holds an MA from UMass Amherst and an undergraduate degree from UC Davis, both in English literature.

Brendan O’Hagen, Memorial Sloan Kettering Cancer Center

Brendan O’Hagen is a research analyst on the prospect development team at Memorial Sloan Kettering Cancer Center. He joined MSK in 2008 and since 2018 has been a member of MSK’s Prospect Identification team. In this role, he particularly enjoys finding new or underutilized sources to help with the work of evaluating prospects, especially international prospects. Since 2023, Brendan has served on the APRA Greater New York chapter’s Diversity, Equity, & Inclusion Committee. Currently based in Jersey City, Brendan has a BA in Anthropology and an MA in History from Hunter College and previously worked in several New York City museums/libraries as a cataloger, researcher and educator.

Friday, May 3, 2024
9:40 – 10:40 am

(D1) Prospect Management is STILL More Than Data || Room: Temple ||

Session level: All levels
9:40 am - 10:40 am
This presentation is an update to my presentation from two years ago that talked about best practices of prospect management vs real life. I'll discuss the mistakes and lessons I've learned from my experience building prospect management programs and how I've learned to adapt these policies to the real-life fundraisers I'm working with.

Learning Objectives
Folks will walk away with tools on how to create their own prospect management procedures along with clear questions to ask about what they are trying to solve and what tools and resources they have to solve those problems.

Presenter
Nicole Fonsh, Harvard Law School
Since 2019, Nicole has held the role of Director of Prospect Development at Harvard Law School. Previously, she spent five years as the director of prospect development at The New School where she was responsible for providing strategic vision, leadership, and planning for the university's prospect development program with an emphasis on major gift development and solicitation. She began her prospect research career over a decade ago at Harvard University. Previously, she worked at Bain Capital in their Research Library providing global staff with industry-specific research and due diligence. Before receiving her master's degree in library and information science from Simmons University, Nicole spent seven years working on the Agency Lending Desk at Goldman Sachs. She holds a bachelor's degree from Northeastern University.

(D2) Mining for Gold: The Art and Science of Prospect Identification || Room: College ||

Session level: All levels
9:40 am - 10:40 am
This session will focus on the ABCs of prospect identification including: different methodologies, the use of prospect identification in a prospect development role, and include case studies.

Learning Objectives
Attendees will learn the basics of prospect identification including external vs. internal prospect identification for all session levels. Different prospect identification methodologies including everyday prospect ID using a flowchart, project-based prospect ID, and prospect ID using statistical modeling.

Presenter

Sarah Price, BWF

Sarah Price is the managing director of research services at BWF and has over 20 years of experience working in fundraising. She leads a team of researchers working on projects including prospect verification, prospect identification, and in-depth profiles.

(D3) Bootcamp Refresher/General Q&A Session for "Newbies" || Room: George ||

Session level: Beginner
9:40 am - 10:40 am

This session is geared towards those who have attended the NEDRA Research Basics Bootcamp within the last few years and/or are newer to the field. The session will serve as a forum for those who are newer to the field to be able to bring general questions, questions about something they learned during the course of the conference or a problem they are struggling with at work. It will serve as a totally safe space to ask any question, no matter how large or small, similar to the Bootcamp environment. Lisa and Tara will also offer advice on how to implement ideas learned during the course of the NEDRA Conference.

Learning Objectives

Attendees will have the opportunity to ask general questions and questions about anything they heard at the conference as well as learn about how to implement ideas from the conference.

Presenters

Lisa Foster, Phillips Academy

Lisa Foster is the Director of Prospect Development at Phillips Academy in Andover, Massachusetts for the past . She is a Phillips Academy alumna and two of her four children are also alumni of the school. Lisa is a former member of the Board of Directors of NEDRA. Over the course of her term, she served as the Treasurer of the Board of Directors, Conference Co-Chair for two NEDRA Conferences, Secretary of the Board, and Co-Chair of various committees, including Scholarship and Programming. Lisa has served as faculty for the NEDRA Research Basics Bootcamp since 2017 and continues to serve as a member on the NEDRA Programming and Nominating Committees. She was also the Co-Chair of the 2022 CASE Prospect Development Conference . Lisa served as a Director of the Haverhill Foundation for Excellence in Education for over twenty years and has also served as a director of the Haverhill Discovery Club Program.

Tara McMullen-King, Helen Brown Group

Tara McMullen-King is Director of Research & Consulting at The Helen Brown Group, where she works with a team of consultants to provide prospect research, prospect management consulting, fundraising analytics, and due diligence research to nonprofits across the country.

Tara began working in the development field in 2002 at Simmons College in Boston, where she ultimately served as Assistant Director of Prospect Research. Later in her career, she worked as a Senior Research Analyst at MIT, as Associate Director of Prospect Management & Research at the Harvard Graduate School of Education, and as Director of Development Research at Combined Jewish Philanthropies.

She has been a member of NEDRA's Research Basics Bootcamp faculty since 2020, and has been involved with NEDRA for many years, previously serving on NEDRA's board of directors from 2010-2016. Tara has also been involved with Apra International, serving stints on the Membership Committee, Chapters Committee, and Bylaws Task Force.A graduate of Smith College, Tara is also a professional wedding officiant and serves on the board of Bridge at 211, a former Universalist Church working to repurpose itself as a self-sustaining arts and culture hub servicing the community of Salem, Massachusetts.

Dave Owens, Boston Children's Hospital Trust

Dave Owens is a Principal Analyst at the Boston Children's Hospital Trust, where he began his development career as a Prospect Researcher in 2001. Prior to his tenure at Boston Children's Hospital, he worked in clinical administration at Beth Israel Deaconess Medical Center in the departments of Pulmonary Care and Oncology. He received his M.A. degree in Political Science from Northeastern University, a B.A. degree in Philosophy and Public Policy from UMass/Boston, as well as an A.A. degree in Mathematics/Science from Cape Cod Community College. Dave has served on several NEDRA Committees, and has been a presenter at past NEDRA Conferences and Seminars in areas ranging from ADV filings to international research. He is currently a member of NEDRA's Programming Committee.

(D4) Pipelines, Proposals, and Portfolios: The Art of Running Highly Effective Meetings || Room: York ||

Session level: All levels
9:40 am - 10:40 am

We've all been to that meeting where our colleagues go around the table and report out on what they've been doing – all the while everyone is thinking "This could have been an email". Rather than using your meetings to look in the rear-view mirror and account for what you've already done, why not change your approach and totally restructure how you are using meetings to help your team reach their annual (and campaign) goals.
Your meetings can become efficient and highly effective – turning them into the meetings that your colleagues actually look forward to attending! Learn how position your meetings to assist your fundraisers in becoming highly focused on the best strategies and tactics for their portfolios and prospects.
Ruthie will teach you how to restructure your meetings and use them to streamline your pipeline, create tactics for your fundraiser's solicitations, and ensure that your portfolios are healthy and on target – with solutions you can take back to your office and begin implementing immediately.

Learning Objectives

- Learn how to get your colleagues excited about your meetings
- Restructure your meetings to meet team goals
- Schedule your meetings without death-by-meeting syndrome
- Create targeted agendas
- Create specific tools for each type of meeting

Presenter

Ruthie Giles, University of New Hampshire

Ruthie Giles is a renowned thought leader in the field of prospect management. With over two decades of experience in prospect management, Ruthie teaches courses on how to develop prospect management systems and offers targeted trainings in various aspects of prospect management work. Ruthie is the Director of Prospect Research and Management at the University of New Hampshire. She is also the Associate for Prospect Development with Staupell Analytics Group. Previously she worked at Westfield State University, Amherst College, Mount Holyoke College, Harold Grinspoon Foundation, The Loomis Chaffee School, and the Williston Northampton School.

Ruthie is a NEDRA board member. She is also a member of the AASP Best Practices - Prospect Development committee. She is the former Board President of the AIDS Foundation of Western Massachusetts and the former Board Vice President for Women in Philanthropy of Western Mass. She has volunteered with the Women's Fund of Western Massachusetts, SABIS International Charter School of Springfield, House Rabbit Connection, and Dakin Pioneer Valley Humane Society. Ruthie holds a BA from Smith College, and MBA from University of Massachusetts at Amherst – Isenberg School of Management, and a MS in Nonprofit Management and Philanthropy from Bay Path University.

Friday, May 3, 2024
11:30 am – 12:30 pm

(E1) Asia 2024: What's going on? || Room: Temple ||

Session level: Intermediate

11:30 am - 12:30 pm

In this follow-up session from 2023's Changing Asia Landscape, participants will receive a general overview of the continuing changing landscape in Asia with a focus on potential philanthropic impact. Topics will include: a review of Asia Pacific's growth; a particular emphasis on China, as well as some focus on Hong Kong, Singapore, Japan and Philippines. Subject areas will include (but are not limited to): economic opportunities and challenges, foreign relations, due diligence, research tips, and a look at Asian philanthropy.

Learning Objectives

Provide a general overview of the changing landscape in Asia with a focus on potential philanthropic impact.

Presenters

Shauna Meegan, Harvard University

Shauna Meegan is a managing director of Research and Prospect Management at Harvard University. In her role, she supports a number of core initiatives including international and due diligence. Shauna has worked at Harvard since 2007.

Stephanie Snow, Harvard University

Stephanie Snow is an assistant director, Due Diligence and Research at Harvard University. In her role, she supports the University's international efforts and due diligence. Stephanie has worked at Harvard since 2008.

(E2) Protecting Our Institutions: Due Diligence and Risk Management Trends and Insights || Room: College ||

Session level: Beginner and Intermediate
11:30 am - 12:30 pm

As philanthropy becomes increasingly complex, the importance of thorough scrutiny and risk management in accepting donations has never been more crucial. This includes nonprofits being ready to address reputation management challenges, legal compliance, high-value global donations, and vulnerable donor populations. So BWF, PyroTalks, and Xapien teamed up to address this critical topic in the market by distributing a comprehensive global survey to assess the strengths and vulnerabilities in the sector. During this presentation of results, we will review key trends, explore the nuance of a robust due diligence program, and provide insight into effective policies, crisis communications, and training, all with a specific focus on ensuring your institution practices dementia-friendly philanthropy.

Learning Objectives

- Understand the critical aspects of due diligence
- Benchmark your organization against global survey results
- Build actionable ideas to protect your organization

Presenters

Josh Birkholz, BWF

Josh Birkholz is the CEO of BWF, the nonprofit service and technology company known for its innovations in elevating philanthropy around the world. Josh is a leader in big philanthropy and an architect of the business of fundraising. He is the author of the books Fundraising Analytics (Wiley, 2008) and Benefactors (Wiley, 2022). Josh is the Chair of the Board of the Giving USA Foundation and an instructor at the Rice University Center for Philanthropy and Nonprofit Leadership.

Chris Green, Xapien

Chris Green was previously CCO at CallCredit prior to its £1bn acquisition by TransUnion; and led BAE Systems Financial Crime and Intelligence divisions. Chris has over 20 years commercial leadership experience, running teams of over 600 staff in 16 offices worldwide.

(E3) We Just Ran a Screening...Now What? || Room: George ||

Session level: Beginner
11:30 am - 12:30 pm

Do your gift officers expect a screening to single-handedly solve all their prospecting concerns? Do you wonder how to effectively prioritize the findings of a screening? Are you not certain what a screening is, and at this point, you're too afraid to ask? This session will answer all of these questions, and many more, as we explore the many advantages and few drawbacks to conducting a screening. Join Ian T. Wells and Dr. Emily L. O'Brien for this informative session to ensure you get the best results from screening your database.

Learning Objectives

The learning objectives for this session include: reviewing what a screening can do and what it cannot do; how to prioritize and validate the results of a screening; and using screening results to support portfolio management and campaign planning. The session will conclude with attendees being encouraged to share their own experiences and participate in an open discussion to help everyone make the most of future screenings.

Presenters

Ian Wells, Ian T. Wells & Associates, LLC

Ian T. Wells is the President of Ian T. Wells & Associates, LLC, a full-service prospect development and campaign planning firm serving nonprofit organizations. He was formerly Vice President of the New England Development Research Association ("NEDRA"), where he served on the organization's Board of Directors for the maximum three terms. Prior to founding his company in 2014, Ian served as Director of Prospect Development at Boston College, where he reformed the department's ratings procedures, restructured the department to focus on campaign priorities, and incorporated data analytics into efforts to prioritize the university's constituents. He was formerly Associate Director of Development, Prospect Research at Massachusetts General Hospital, where he oversaw a team of researchers while directly providing research support to some of the hospital's campaign centers of excellence. Ian was also a lead facilitator in efforts to create comprehensive development plans supporting multiple campaign objectives, and he spearheaded a prospect identification initiative that more than doubled the organization's rate for discovering new prospects. Ian began his career as a Development Associate at the Boston Children's Hospital Trust in 2001.

Dr. Emily O'Brien, Ian T. Wells & Associates, LLC

Dr. Emily L. O'Brien is the Vice President of Ian T. Wells & Associates, LLC. She has expertise in developing organization-wide strategic plans and creating comprehensive systems designed to improve accuracy and efficiency. Emily also serves as a Director of the Salem Academy Charter School Foundation, and she is a former Trustee of the Salem Academy Charter School and the Waring School. She previously worked at Salem State University, where she informed the strategy for the school's Meet the Moment campaign. Emily began her career in development in 2008 when she joined Massachusetts General Hospital to work on its Third Century of MGH Medicine campaign, which raised $1.72 billion on a $1.5 billion goal. She graduated magna cum laude from Wellesley College, where she was elected Phi Beta Kappa, and earned her doctoral degree from the University of Oxford.

(E4) Equitable Hiring: What it takes, why it matters, and who cares?
|| Room: York ||

Session level:
11:30 am - 12:30 pm
Research is clear that diverse teams outperform their peers across several key performance indicators. Diverse teams thrive in equitable workplaces and those environments start with equitable hiring. But how do we best design for equity in the recruitment and hiring process? In this session, Lindauer search consultants Faith Montgomery and Chandra Montgomery will discuss proven practices that lead to equitable recruitment outcomes. From priming for institutional readiness and crafting job descriptions to engaging key stakeholders in the interview process, participants will learn best practice strategies, identify compelling incentives, and how to push forward amidst shifting attitudes toward equity, inclusion, and belonging.

Presenters

Chandra Montgomery, Lindauer Global
Chandra Montgomery is an executive search consultant at Lindauer Global and a certified diversity, equity, and inclusion educator and speaker. Her background in philanthropy spans academic medicine, higher education, public media, and social services. She is an alumna of CASE's Minority Advancement Institute and an Apra volunteer leader currently serving as chair of the Advocacy Committee. She is a founding member of the organization's inaugural DEI Committee and founding co-chair of the Advancement DEI Task Force at the University of Southern California where she was the director of pipeline and prospect development for Health Sciences. Prior to USC, she led prospect development teams at National Public Radio and Virginia Commonwealth University. Chandra holds a BA from Hampton University and is pursuing a master's degree at USC's Gould School of Law.

Faith Montgomery, Lindauer Global
Faith Montgomery has years of varied experience and increased responsibility in non-profit organizational leadership, comprehensive fundraising, staff development, strategic planning, recruiting, coaching and operations management. Passion for engaging and encouraging people of diverse backgrounds (especially women and girls) to engage in meaningful ways with each other to develop professional, social and emotional networks.

Friday, May 3, 2024
1:40 – 2:40 pm

(F1) A Case Study: Generative AI in Due Diligence at Dartmouth College
|| Room: Temple ||

Session level: Intermediate and Advanced
1:40 pm - 2:40 pm
This event will present a high level overview of:
- What we mean when we talk about generative AI, Large Language Models;
- How these can be applied to research and specifically donor or partner due diligence within

development operations.
There will then be a case study presentation with examples of how this works in practice, including a live demonstration of generative AI technologies

Learning Objectives
We've been working with a number of universities and non profit organisations both in the UK and the US to implement Generative AI into their prospect research & due diligence functions. We would present findings and implementation techniques.

Presenters
Chris Green, Xapien
Chris Green was previously CCO at CallCredit prior to its £1bn acquisition by TransUnion; and led BAE Systems Financial Crime and Intelligence divisions. Chris has over 20 years commercial leadership experience, running teams of over 600 staff in 16 offices worldwide.

Michael Foote, Dartmouth College
Michael Foote is an experienced executive director with a demonstrated history of working in the higher education industry. Strong business development professional skilled in nonprofit organizations, philanthropy, fundraising, predictive analytics, and predictive modeling.

(F2) The ABCs and 123s of DAFs || Room: College ||

Session level: Beginner
1:40 pm - 2:40 pm
Donor Advised Funds (DAFs) are transforming the landscape of nonprofit fundraising, influencing donor behavior, shaping studies like Giving USA, drawing attention on Capitol Hill and changing the way that we approach prospect research. But what are they? Why are they growing so quickly? What should we be thinking about when we are researching a prospect with a DAF? We will explore all of these questions in this session.

Learning Objectives
• Fundamentals of DAFs: Gain a comprehensive understanding of Donor Advised Funds, including the mechanics and logistics of how they work.
• The Impact of DAFs Landscape: Explore the dynamic growth of the DAF landscape with facts and figures and better understand how it is impacting philanthropy.
• Understand the DAF Ecosystem: Deep-dive into the varying players, including the donors and advisors, their funds, the sponsors who manage DAFs and the non-profits who receive gifts.

Presenter
Melissa Bank Stepno, DAFinitive (The Helen Brown Group)
Melissa Bank Stepno is the Vice President of Data Insights and Managing Director of DAFinitive® for The Helen Brown Group. Based in NH, Melissa has worked in the non-profit industry for more than two decades, spending the majority of her time consulting with organizations on using wealth screenings, predictive modeling and other analytics to drive prospecting efforts and strategic decision making. As a thought leader, her areas of interest include also include the impact of high-net-worth philanthropy on major giving programs, and developing best practices for prospect research and prospect management. An Ann Castle winner, Melissa is a previous NEDRA and Apra

Board member, most recently leading Apra as President from 2021-2022. Melissa has also served on the boards of AFP NNE and the Brandeis University Alumni Association.

(F3) Working With Data Science Interns || Room: George ||

Session level: All levels
1:40 pm - 2:40 pm
Working with student interns is a fabulous, enriching opportunity for students and mentors alike, but it's hard to understand what can be accomplished in a single semester. Come learn from our lessons learned through the 4 semesters of our experience with Data Science Interns. Topics touched upon may include framing a project, thinking through timelines, engaging stakeholders, mentorship, pivoting, right-sizing expectations, and having difficult conversations with students, their instructors, and internal stakeholders.

Presenter

Hope Boulanger, Brandeis University
Hope Boulanger is the Associate Director of Prospect Management and Pipeline Development at Brandeis University, where she has worked since December 2020. She has been a prospect researcher since 2016 and has a background in Digital Humanities alongside a passion for coding and data analysis.

(F4) 2017: A Portfolio Review Odyssey || Room: York ||

Session level: All levels
1:40 pm - 2:40 pm
In 2018, a new capital campaign at Massachusetts General Hospital created a need for more dynamic and strategic portfolio reviews. What came next was a years-long journey to create new processes and reports. Attendees will learn how the MGH Prospect Management and Research team strengthened buy-in for revamped portfolio reviews and created ever evolving reports and dashboards first in excel and later in Tableau while also navigating shifting obstacles and needs including a database conversion, the COVID-19 pandemic, and new fundraising goals and priorities.

Learning Objectives

- Creating buy-in across your department for a new portfolio review process.
- Creating dynamic and engaging dashboards regardless of budget.
- Building flexibility into portfolio reviews so they can adapt to changing organizational needs.

Presenter

Jolene Crosby-Jones, Massachusetts General Hospital
Jolene Crosby-Jones is the Senior Director of Prospect Management and Research at Massachusetts General Hospital, the current NEDRA treasurer, and the NEDRA president-elect. Prior to joining MGH in 2017, she was a Senior Research Analyst at Dana-Farber Cancer Institute and has held prospect development roles at Teach For America and Facing History & Ourselves. Jolene joined the NEDRA board in 2020. She received a BA in economics and psychology from Wellesley College.