







Thursday – April 27, 2017

7:45 a.m.–4:00 p.m.	Registration & Information Desk Open in Main Lobby; Exhibitor Hall Open in Ballroom Lobby			
7:45 a.m.–8:45 a.m.	Breakfast Buffet			
8:15–8:45 a.m.	Welcome & Networking Event for First-Time Attendees/Members at 250 Market in Main Lobby; Keynote Book Sales in Main Lobby			
8:15–8:45 a.m.	Volunteer Orientation in Harbor's Edge Room			
9:00–10:00 a.m.	Keynote Session: Julissa Arce** (including Q&A)			
10:00–10:30 a.m.	Book Signing with Julissa Arce			
10:35–11:50 a.m.	(A1) City Mouse, Country Mouse: Ownership, Value and Trends from Park Avenue to Waggoner Ranch <i>Kelly Labrecque & Heather Willis</i> The Helen Brown Group LLC Room: Prescott	(A2) Crowd-Based Prospecting: Parents Fund Meets Grateful Patients <i>Bill Gotfredson & Sean Harris</i> Boston Children's Hospital Trust Room: Gardner	(A3) How Do Donors Love Us? Let Us Count the Ways: DIY Affinity Scores <i>Molly Carocci, Meg Cushing & Donna Bursey</i> Beth Israel Deaconess Medical Center Room: Harbor's Edge	(A4) International Fundraising: Cultural Intelligence <i>Jon Garrow</i> Albert Einstein College of Medicine Room: Amphitheater
12:00–1:00 p.m.	Luncheon and Welcome Remarks			
1:15–2:30 p.m.	(B1) Exhilarating Email <i>Sarah Richards</i> Otterbein University Room: Gardner	(B2) New Data = New Prospects <i>Hugh Bennett</i> MIT Room: Prescott	(B3) Don't Just Excel, Pivot!: Data Driven Wealth Analysis from Annual Fund to Major Gift <i>Amy Begg & Meghan Hakanson</i> Harvard University Room: Harbor's Edge	(B4) Risk, Reputation & Research <i>Lori Hood Lawson & David Lawson</i> WorkingPhilanthropy.com, LLC/ NewSci, LLC Room: Amphitheater
2:40–3:10 p.m.	Platinum Sponsor Presentation:  Room: Harbor's Edge	Gold Sponsor Presentation:  Room: Amphitheater	Gold Sponsor Presentation:  Room: Gardner	
3:10–3:20 p.m.	Break			
3:30–4:45 p.m.	(C1) Making Screenings Work for You! <i>Jay Frost</i> DonorSearch and Jerold Panas, Linzy & Partners Room: Amphitheater	(C2) The Next 30: Meeting the Needs of Nonprofits in Decades to Come (Panel) <i>Moderator: Valerie Anastasio</i> Boston Children's Hospital Trust <i>Featuring: Elizabeth Crabtree, James Cheng, Helen Brown & Dina Zelleke</i> Room: Harbor's Edge	(C3) Where Do I Start? Incorporating Data Analysis into your Prospect Development Shop <i>Tory Pedonti</i> Tufts University Room: Prescott	(C4) My Year as a Man in a Women's Prison: Understanding Socioeconomic Influences on Giving & Wealth <i>Mark Vogel</i> Excelsior College Room: Gardner
4:45–7:00 p.m.	Networking Reception sponsored by iWave at Portsmouth Gas Light Co., 64 Market Street, Third Floor; Open to all NEDRA members as well as conference attendees			
7:00–9:00 p.m.	Group Dinners			
9:00–11:00 p.m.	Karaoke Party at Portsmouth Gas Light Co., 64 Market Street, Third Floor			

*Schedule is subject to change.

**Arrangements for the appearance of Julissa Arce made through Greater Talent Network, Inc., New York, NY. Her book will be sold in the Main Lobby beginning at 8:15 a.m. on Thursday.

Friday – April 28, 2017

8:00 a.m.–3:15 p.m.	Registration & Information Desk Open in Main Lobby; Exhibitor Hall Open in Ballroom Lobby			
8:00–9:00 a.m.	Breakfast Buffet			
8:30–9:00 a.m.	Volunteer Orientation in Harbor's Edge			
9:00–10:15 a.m.	<p>(D1)</p> <p>Best Practices for Identifying Top Incoming Parent Prospects</p> <p><i>Rachel Pike-Norton</i> University of Chicago Room: Prescott</p>	<p>(D2)</p> <p>Emotion or Engagement: a Study of Key Drivers for Donor Motivation</p> <p><i>Dan Lowman</i> GG+A Room: Harbor's Edge</p>	<p>(D3)</p> <p>Developing an Interactive Reporting and Prospect Research Tool using R/Shiny</p> <p><i>Rich Majerus</i> Colby College Room: Lear</p>	<p>(D4)</p> <p>The Wealth of New England: an Overview</p> <p><i>Marianne Pelletier</i> Staupell Analytics Group Room: Gardner</p>
10:15 a.m.–10:25 a.m.	Break			
10:30–11:00 a.m.	<p>Platinum Sponsor Presentation:</p>  <p>Room: Harbor's Edge</p>	<p>Gold Sponsor Presentation:</p>  <p>Room: Gardner</p>	<p>Gold Sponsor Presentation:</p>  <p>Room: Lear</p>	
11:10 a.m.–12:25 p.m.	<p>(E1)</p> <p>The Wealth Management Industry</p> <p><i>Valerie Anastasio</i> Boston Children's Hospital Trust Room: Harbor's Edge</p>	<p>(E2)</p> <p>Navigating the Changing Landscape of Philanthropy</p> <p><i>Elizabeth Roma & Rachel Dakarian</i> The Helen Brown Group LLC Room: Gardner</p>	<p>(E3)</p> <p>Digital Advancement Office: How Williams College Is Integrating Best-in-Class Solutions Across Giving Pyramid</p> <p><i>Jesse Bardo/Laura Day</i> Evertrue/Williams College Room: Lear</p>	<p>(E4)</p> <p>Research Renovations</p> <p><i>Victoria Sundgren, Carol Chidley & Cecily Channer-Schmid</i> Brandeis University Room: Prescott</p>
12:30 p.m.–2:00 p.m.	Luncheon, Heather Reisz Memorial Scholarship, The Helen Brown Group-NEDRA Conference Scholarship, Sponsor Raffles, Annual Business Meeting and Ann Castle Award			
2:10–3:25 p.m.	<p>(F1)</p> <p>Research, Riches, and Ratings: Using Wealth Indicators to Determine Gift Capacity (Panel)</p> <p><i>Moderator: Melissa Bank Stepno</i> Target Analytics, a division of Blackbaud Featuring: Ian Wells, Suzy Campos, Erin Dupuis, and Lindsay Brown Room: Harbor's Edge</p>	<p>(F2)</p> <p>Moving Beyond Us vs Them: Embracing Our Fundraiser Role</p> <p><i>Kristen Watson</i> Tufts University Room: Lear</p>	<p>(F3)</p> <p>Predictive Modeling: Using Existing Data to Segment Prospects and Improve Fundraising Results</p> <p><i>Doug Cogswell</i> ADVIZOR Solutions Room: Prescott</p>	<p>(F4)</p> <p>Why the Wealthy Are Wealthy: Understanding the Composition of Wealth</p> <p><i>David Sterling</i> Western New England University Room: Gardner</p>
3:30–4:30 p.m.	<p>Think Tanks - Join one of these informal discussions on various current topics:</p> <p>Prospect Management Room: Ballroom</p> <p>How to Leverage My Conference Experience Room: Gardner</p> <p>Fundraising Data Science Room: Harbor's Edge</p>			
4:30 p.m.	Conference Closes			

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