









Wednesday, May 1, 2024

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

*Schedule is subject to change.

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

Thursday, May 2, 2024

8:00 am - 4:00 pm	Registration Desk Open				
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 - TBD				
9:30 am - 10:30 am	<p>(A1)</p> <p>How to Make Your News Digest More Streamlined and Actionable (and have fun while doing it)</p> <p>Lauren Casas, Dana-Farber Cancer Institute Ryan Frank, Wellesley College Christina Priplata, Dana-Farber Cancer Institute</p> <p>Beginner Room: Temple</p>	<p>(A2)</p> <p>Panel: Advancing in Advancement</p> <p>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 Room: College</p>	<p>(A3)</p> <p>Pipeline Growth With A DXO Program</p> <p>Rich Horne, Vassar College</p> <p>Intermediate Room: George</p>	<p>(A4)</p> <p>Insights to Planned Giving</p> <p>Jill Meister, Yale University</p> <p>Beginner and Intermediate Room: York</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				
11:40 am - 11:50 am	Break				
Sponsor Presentations 11:50 am – 12:20 pm	 <p>Room: George</p>	 <p>Room: York</p>	    <p>Room: College</p>	 <p>Room: Temple</p>	 <p>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>(B1)</p> <p>Data Compliance: The Who, What, Where, When, Why, and How</p> <p>Jessica Woodbridge, Helen Brown Group Michele Borucki, Helen Brown Group</p> <p>Intermediate Room: Temple</p>	<p>(B2)</p> <p>Due Diligence: The What, Why, and How of Prospect Research and Risk Assessment</p> <p>Krista Pierce, Tufts University</p> <p>All levels Room: College</p>	<p>(B3)</p> <p>Building an Intentional Prospect Research Program for Operational Efficiency</p> <p>Kelley McGeehan, Conduit Philanthropic Intelligence Partner Meghan Walsh, Virtua Health</p> <p>Beginner and Intermediate Room: George</p>	<p>(B4)</p> <p>Measuring Success: Navigating a New Metrics Implementation</p> <p>Dan Zarlenga, American Cancer Society Michelle Bisbee, American Cancer Society</p> <p>Intermediate Room: York</p>	
3:15 pm - 3:30 pm	Break				
3:30 pm - 4:30 pm	<p>(C1)</p> <p>Partnering Across Advancement and Beyond: The Potential of Prospect Development</p> <p>Ashley Bannon, College of the Holy Cross Amy Tesoro, Perkins School for the Blind</p> <p>Intermediate Room: Temple</p>	<p>(C2)</p> <p>How to Automate Rating All Your Finance Prospects by Job Title</p> <p>Rachel Davies, Yale University</p> <p>Intermediate Room: College</p>	<p>(C3)</p> <p>Push it to the Limit! Using Looker Studio as a BI Tool for Resource Challenged Organizations</p> <p>John Carasone, Williams College Nicholas Hersey, Williams College</p> <p>Beginner Room: George</p>	<p>(C4)</p> <p>Creating a DEI Data Guide for Prospect Development</p> <p>April Genung, Memorial Sloan Kettering Cancer Center Brendan O’Hagen, Memorial Sloan Kettering Cancer Center</p> <p>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				
6:00 pm - 8:00 pm	Dinner Break - various locations throughout New Haven				
8:00 pm - 11:00 pm	NEDRA After Dark at Elm City Social Club with Trivia - Sponsored by Altrata				





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***Make sure to visit our exhibitor booths Thursday through Friday: AlmaConnect(t), Comprehensive Prospect Research(t), DonorSearch(t), Insightful(t), Kaleidoscope(t), Kindsight(t), Lindauer, NEDRA, Slate(t), Altrata(t), Windfall(t), Xapien(t)

(t) Indicates NEDRAcon2024 sponsor

Friday, May 3, 2024

6:45 am - 7:30 am	The Walk to Remember - Meet in the hotel lobby			
7:30 am - 3:00 pm	Registration Desk Open			
7:30 am - 8:30 am	Breakfast Buffet - Grand Ballroom			
7:45 am - 8:15 am	Volunteer Orientation - TBD			
8:30 am - 9:30 am	Keynote Speaker - Josh Birkholz, CEO, BWF			
9:30 am - 9:40 am	Break			
9:40 am - 10:40 am	<p>(D1) Prospect Management is STILL More Than Data Nicole Fonsh, Harvard Law School</p> <p>All levels Room: Temple</p>	<p>(D2) Mining for Gold: The Art and Science of Prospect Identification Sarah Price, BWF</p> <p>All levels Room: College</p>	<p>(D3) 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>Beginner Room: George</p>	<p>(D4) Pipelines, Proposals, and Portfolios: The Art of Running Highly Effective Meetings Ruthie Giles, University of New Hampshire</p> <p>All levels Room: York</p>
10:40 am - 10:50 am	Break			
Sponsor Presentations 10:50 am - 11:20 am	 Room: College	 Room: Temple	 Room: George	 Room: York
11:20 am - 11:30 am	Break			
11:30 am - 12:30 pm	<p>(E1) Asia 2024: What's going on? Shauna Meegan, Harvard University Stephanie Snow, Harvard University</p> <p>Intermediate Room: Temple</p>	<p>(E2) Protecting Our Institutions: Due Diligence and Risk Management Trends and Insights Josh Birkholz, BWF Chris Green, Xapien</p> <p>Beginner and Intermediate Room: College</p>	<p>(E3) 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>Beginner Room: George</p>	<p>(E4) Equitable Hiring: What it takes, why it matters, and who cares? Faith Montgomery, Lindauer Chandra Montgomery, Lindauer</p> <p>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>(F1) A Case Study: Generative AI in Due Diligence at Dartmouth College Chris Green, Xapien Michael Foote, Dartmouth College</p> <p>Intermediate and Advanced Room: Temple</p>	<p>(F2) The ABCs and 123s of DAFs Melissa Bank Stepno, Helen Brown Group</p> <p>Beginner Room: College</p>	<p>(F3) Working With Data Science Interns Hope Boulanger, Brandeis University Pamela Poland, Brandeis University</p> <p>All levels Room: George</p>	<p>(F4) 2017: A Portfolio Review Odyssey Jolene Crosby-Jones, Massachusetts General Hospital</p> <p>All levels Room: York</p>
2:40 pm	Conference Concludes			

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