

# NEDRA Chronology

## 1986

- Joe Donnelly, Susan Ehrman and Mike Shultz meet to begin organizing a researcher's organization
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## 1987

- February 1987 – Planning Committee begins meeting
  - March 1987 – First ‘Official’ Meeting at Radcliffe College on March 5<sup>th</sup>
  - March 1987: Membership Update: 15 members
  - April 1987 – Planning committee distributes questionnaire at CASE District I conference on prospect research; 100 researchers responded
  - July 23, 1987 – NEDRA was incorporated in the Commonwealth of Massachusetts
  - July 1987: Joe Donnelly elected president for 1987-1988
  - Slate of 1987-1988 Board Members
    - Joe Donnelly; Susan Ehrman; Nancy Eidelman; Sarah Fernandez; Kate Fultz Hollis; Mary Lee; Helyn MacLean; Betty McDonald; Beth Melvin; Megan Page; Judith Rottenberg; Mick Schultz; Kim Watson
  - Fall 1987: First issue of NEDRA News published
  - November 1987 – Panel Discussion on Ethics in Research held at Bentley College
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## 1988

- April 1988: Roundtable on “Research or Information Management?” at the University of Southern Maine
  - April 1988: Roundtable on “Gift Processing – Whose Responsibility? in Holyoke, MA
  - April 1988: Roundtable on “How Much for Whom?” at the Mystic Seaport Museum
  - May 1988: 1<sup>st</sup> Annual Conference *Database Searching* at Brandeis University (Waltham, MA)
  - May 1988: Membership Update: 133 members
  - May 1988: Joe Donnelly elected president for 1988-1989
  - Slate of 1988-1989 Board Members
    - Joe Donnelly; Susan Ehrman; Sarah Fernandez; Kate Fultz Hollis; Helyn MacLean; Beth Melvin; Megan Page; Judith Rottenberg; Mick Schultz; Kim Watson
  - October 1988: Roundtable on “Research’s Role in Planning Solicitation Strategies” at the Massachusetts Institute of Technology
  - November 1988: Roundtable on “Small Shop Research” at The Williston-Northampton School in Easthampton, MA
  - November 1988: Roundtable on “Information Management” at Bryant College in Smithfield, RI
  - November 1988: Roundtable for Managers on “Staffing Issues” at Brandeis University in Waltham, MA
  - November 1988: Roundtable on “Information Management” at Dartmouth College in Hanover, NH
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## 1989

- February 1989: Half-Day Conference at Brandeis University
  - April 1989: Roundtable on “Screening and Rating” at Phillips Exeter Academy
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- April 1989: Roundtable on the “Evolving Role of Development Researchers” at Brown University In Providence, RI
  - April 1989: Roundtable on “Researcher Women” at Mount Holyoke College
  - May 1989: Roundtable on “Identifying and Researching Planned Giving Prospects” at Harvard University Medical School
  - June 1989: 2<sup>nd</sup> Annual Conference *Ethics in Research* at Bryant University (Smithfield, RI)
  - June 1989: Joe Donnelly elected president for 1989-1990
  - Slate of 1989-1990 Board Members
    - Joe Donnelly; Janet Couch; David Eberly; Sarah Fernandez; Kate Fultz Hollis; Lisa Peterson; Judith Rottenberg; Carol McConaghy Thorp; Kim Watson
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### 1990

- March 1990: Mid-Winter Forum on “The Future of Major Donor Research: Roles and Responsibilities” at the University of New Hampshire
  - May 1990: 3<sup>rd</sup> Annual Conference *Rating and Screening: Research Gets Scientific* at Worcester Polytechnic Institute (Worcester, MA)
  - May 1990: David Eberly elected president for 1990-1991
  - Slate of 1990-1991 Board Members
    - Janet Couch; David Eberly; Kate Fultz Hollis; Kathleen Kelleher; Laurie Lamothe; Elaine Lotto; Lisa Peterson; Susan Cronin Ruderman; Carol McConaghy Thorp
  - November 1990: Fall Conference *Using Specialized Sources* at Brandeis University (Waltham, MA)
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### 1991

- May 1991: 4<sup>th</sup> Annual Conference at Mount Marie (Holyoke, MA)
  - May 1991: David Eberly elected president for 1991-1992
  - Slate of 1991-1992 Board Members
    - David Eberly; Robin Good; Kate Fultz Hollis; Margaret Link; Laurie Lamothe; Susan Cronin Ruderman; Mimi Landau Steele; Carol McConaghy Thorp
  - October 1991: Vermont Roundtable
  - November 1991: Fall Conference *Surviving the Turbulent 90s: Strategies for Prospect Research* at the Howard Johnson Hotel (Cambridge, MA)
  - December 1991: DIALOG Roundtable
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### 1992

- March 1992: Directors Roundtable
  - April 1992: Roundtable on “Research in Hospitals and Healthcare Organizations” at Deaconess Hospital Boston
  - May 1992: Roundtable “Making the Most of Scarce Resources in Cultural and Social Service Organizations” at the Museum of Science (Boston)
  - May 1992: 5<sup>th</sup> Annual Conference *Corporate and Foundation Research* at the Ramada Hotel (Worcester, MA)
  - May 1992: David Eberly elected president for 1992-1993
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- Slate of 1992-1993 Board Members
    - Peg Dreger; David Eberly; Robin Good; Margaret Link; Laurie Lamothe; Anne Marie Michel; Janet Poerber-Jones; Susan Cronin Ruderman; Mimi Landau Steele; Carol McConaghy Thorp
  - September 1992: Laurie Lamothe elected president for remainder of 1992 & 1993
  - October 1992: Fall Conference: *A Conference on Net Worth* at the Newton Marriott Hotel (Newton, MA)
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### 1993

- May 1993: Roundtable on Research Basics
  - June 1993: 6<sup>th</sup> Annual Conference at the Johnson & Wales Airport Hotel (Warwick, RI)
  - June 1993: Laurie Lamothe elected president for 1993-1994
  - Slate of 1993-1994 Board Members
    - Peg Dreger; David Eberly; Robin Good; Sandra Larkin; Margaret Link; Laurie Lamothe; Rob Millar; Susan Cronin Ruderman; Carol McConaghy Thorp
  - October 1993: Fall Conference *Strategic Assessment of Business Information* at the Newton Marriott Hotel (Newton, MA)
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### 1994

- February 1994: Roundtable “Cruising Down the Information Superhighway – A Map for Prospect Researchers” at Harvard University
  - May 1994: 7<sup>th</sup> Annual Conference *Hidden Millionaires: Researching Low Profile Prospects* at the Guest Quarters Suite Hotel (Boston, MA)
  - May 1994: Laurie Lamothe elected President for 1994-1995
  - Slate of 1994-1995 Board Members
    - Peg Dreger; David Eberly; Georgia Glick; Robin Good; Julie Joyce; Sandra Larkin; Margaret Link; Laurie Lamothe; Merritt Maxim; Ann Hodge White; Barbara Ziff
  - August 1994: NEDRA co-hosted APRA International Conference in Boston, MA
  - November 1994: Fall Conference *Innovations in Prospect Research – The Technological Challenges* at the Sheraton Tara Hotel (Braintree, MA)
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### 1995

- March 1995: Roundtable on “Researching Genealogy at the National Archives” at the Silvio Conte Federal Records Center (Pittsfield, MA)
  - May 1995: 8<sup>th</sup> Annual Conference *Coping with Change* at the Boston Newton Marriot Hotel (Newton, MA)
  - May 1995: Laurie LaMothe elected President for 1995-1996
  - Slate of 1995-1996 Board Members
    - Peg Dreger; Georgia Glick; Robin Good; Randy Lakeman; Sandra Larkin; Margaret Link; Laurie Lamothe; Merritt Maxim; Susan Moore; Almeda Nicholson; Barbara Ziff
  - October 1995: Roundtable on “Research Internet Issues for Independent Schools” Westminster School (Simsbury, CT)
  - November 1995: Roundtable on “An Introduction to Using the Internet for Prospect Research” at the Massachusetts Institute of Technology
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- November 1995: Round on “Foundation Research” at the University of New England (Biddeford, Maine)
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### 1996

- May 1996: Workshop on “Researching Private Companies” presented by David Eberly at the Kennedy School of Harvard University
  - May 1996: 9<sup>th</sup> Annual Conference *The Major Gifts Research Interface* at the Boston Newton Marriot Hotel (Newton, MA)
  - May 1996: Barbara Ziff elected president for 1996-1997
  - Slate of 1996-1997 Board Members
    - Valerie Anastasio; Peg Dreger; Georgia Glick; Robin Good; Sandra Larkin; Margaret Link; Merritt Maxim; Susan Moore; Almeda Nicholson; Hope Prockop; Barbara Ziff
  - May 1996: Round table on “Researching Private Companies” at Harvard University
  - June 1996: Workshop “Breakfast Basics – the Individual Profile” presented by Sandra Larkin
  - June 1996: Workshop “Using What You’ve Got: Segmenting and targeting Your Constituency” presented by Georgia Glick and Margret Dreger in Sturbridge, Massachusetts
  - November 1996: Roundtable on “Changing Roles and Demands in Development Research” at Colby College (Waterville, Maine)
  - November 1996: Roundtable on “The Basics of the Individual Profile” at Worcester Polytechnic Institute
  - November 1996: Roundtables on “Ethical Dilemmas Facing the Prospect Researcher” and “Using the Internet Effectively for Prospect Research” at the Westminster School (Simsbury, CT)
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### 1997

- January 1997: Roundtable on “Introduction to the Internet”
  - February 1997: Roundtable on “Researching Private Companies”
  - February 1997: Roundtable on “Basics of Public Company Research & Prospect Strategy”
  - May 1997: 10<sup>th</sup> Annual Conference *Hidden Millionaires: Researching Low Profile Prospects* at the Boston Newton Marriot Hotel (Newton, MA)
  - May 1997: Barbara Ziff elected president for 1997-1998
  - Slate of 1997-1998 Board Members
    - Valerie Anastasio; Maggie Barber; Lisa Cohen; Peg Dreger; Georgia Glick; Sandra Larkin; Susan Moore; Almeda Nicholson; Hope Prockop; Valerie Roberts; Scott Tomlinson; Barbara Ziff
  - December 1997: Roundtable on “Wall Street Compensation Trends”
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### 1998

- April 1998: Roundtable on “Corporation and Foundations Research” at the Maine Medical Center (Portland, ME)
  - May 1998: 11<sup>th</sup> Annual Conference at the Boston Newton Marriot Hotel (Newton, MA)
  - May 1998: Georgia Glick elected president for 1998-1999
  - Slate of 1998-1999 Board Members
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- Helen Brown; Georgia Glick; Patty Lam; Sandra Larkin; Barbara McGuigan; Almeda Nicholson; Marianne Pelletier; David Perkins; Valerie Roberts; Scott Tomlinson; Barbara Ziff
  - September 1998: NEDRA hires an outside management company, The Guild Associates, Inc., to handle the organization's administrative tasks
  - December 1998: Forum for Directors of Research at Brandeis University
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## 1999

- February 1999: Roundtable on "web Tools for Effective Prospect Research Strategy" at the Massachusetts Institute of Technology Attendance 80
  - March 1999: Roundtable on "When Research is Only One Hat on Your Rack" at New Hampshire College.
  - May 1999: 12<sup>th</sup> Annual Conference *Show Me the Money* at the Boston Newton Marriot Hotel (Newton, MA)
  - May 1999: Georgia Glick elected president for 1999-2000
  - Slate of 1999-2000 Board Members
    - Helen Brown; Carol Byrne; Roseanne Fitzgerald; Georgia Glick; Patty Kelleher; Elise Ober LaFosse; Patty Lam; Barbara McGuigan; Marianne Pelletier; Valerie Roberts; Scott Tomlinson; Barbara Ziff
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## 2000

- February 2000: Workshop on "Reading Public Company Documents" presented by David Lawson and David Eberly
  - April 2000: Connecticut RING at Salisbury School
  - May 2000: 13<sup>th</sup> Annual Conference *Measuring Impact & Adding Value: Research in the New Millennium* at the Newton Marriott Hotel (Newton, MA)
  - May 2000: Helen Brown elected president for 2000-2001
  - Slate of 2000-2001 Board Members
    - Helen Brown; Carol Byrne; Paul Dakin; Roseanne Fitzgerald; Patty Kelleher; Elise Ober LaFosse; Patty Lam; Jill Meister; Marianne Pelletier; Valerie Roberts; Scott Tomlinson
  - August 200: Connecticut RING at Kent School
  - November 2000: RINGs at Boston Symphony Orchestra and Mount Holyoke College
  - November 2000: Research 101 seminar (Waltham, MA)
  - November 2000: Directors Forum at Boston University
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## 2001

- May 2001: 14<sup>th</sup> Annual Conference *The Point of Technology* Doubletree Guest Suites (Waltham, MA)
    - The 14<sup>th</sup> Annual Conference marked the conference format moving to a day-and-a-half format as opposed to earlier conferences that lasted for a single day
  - May 2001: Helen Brown elected president for 2001-2002
  - Slate of 2001-2002 Board Members
    - Helen Brown; Carol Byrne; Paul Dakin; Roseanne Fitzgerald; Patty Kelleher; Elise Ober LaFosse; Julie Macksoud; Jill Meister; Marianne Pelletier; Valerie Roberts; Pamela Smith
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- November 2001: Connecticut RING at Westminster School (Simsbury, CT)
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## 2002

- January 2002: Workshop “One Size Doesn’t Fit All: Data Mining in the 21<sup>st</sup> Century” presented by Lawrence Henze at Bryant College (Smithfield, RI)
  - March 2002: Workshop “Web Searching Strategies” presented by Ran Houck at the College of the Holy Cross (Worcester, MA)
  - March 2002: Greater Boston RING including candlepin bowling mixer.
  - May 2002: 15<sup>th</sup> Annual Conference *We’ve Come a Long Way* Burlington Marriott (Burlington, MA)
  - May 2002: The inaugural *Ann Castle Award* was presented to Judy Rottenburg
  - May 2002: Patty Kelleher elected president for 2002-2003
  - Slate of 2002-2003 Board Members
    - Helen Brown; Carol Byrne; Paul Dakin; Roseanne Fitzgerald; Patty Kelleher; Elise Ober LaFosse; Julie Macksound; Jill Meister; Marianne Pelletier; Valerie Roberts; Pamela Smith
  - November 2002: Boston RING at the Children’s Hospital Trust
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## 2003

- February 2003: Research Director’s Forum
  - May 2003: 16<sup>th</sup> Annual Conference *Research in Transition* Burlington Marriott (Burlington, MA)
  - May 2003: The 2<sup>nd</sup> *Ann Castle Award* was presented to Shelly Brown
  - May 2003: Patty Kelleher elected president for 2003-2004
  - Slate of 2003-2004 Board Members
    - Carol Byrne; Paul Dakin; Roseanne Fitzgerald; Patty Kelleher; Elise Ober LaFosse; Kathy Nadire; Marianne Pelletier; Fran Roller; Pamela Smith
  - September 2003: Directors’ Forum
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## 2004

- May 2004: 17<sup>th</sup> Annual Conference *Get Smart! From Clues to Gifts* Sheraton Ferncroft Resort (Danvers, MA)
  - May 2002: The 3<sup>rd</sup> *Ann Castle Award* was presented to David Eberly
  - May 2004: Paul Dakin elected president for 2004-2005
  - Slate of 2004-2005 Board Members
    - Carol Byrne; Cheryl Cerny; Dave Chase; Paul Dakin; Roseanne Fitzgerald; Patty Kelleher; Mary Lawrence; Rick Snyder; Deborah Reinhardt Youmans; Ming Zhong
  - September 2004: Boston RING at the Dana-Farber Cancer Institute.
  - September 2004: Workshop “Prospect Research 101” at Bentley College.
  - December 2004: RING-Fest 2004 featured 4 RINGs over two days:
    - New Hampshire RING at Philips Exeter Academy
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- Connecticut RING at The Loomis Chafee School
- Maine RING at Bates College
- Boston RING

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### 2005

- February 2005: Research Director's Forum in Boston
- April 2005: 18<sup>th</sup> Annual Conference Sheraton Ferncroft Resort (Danvers, MA)
- April 2005: The 4<sup>th</sup> *Ann Castle Award* was presented to Sandra Larkin.
- April 2005: Paul Dakin elected president for 2005-2006
- Slate of 2005-2006 Board Members
  - Dave Chase; Paul Dakin; Lisa Howley; Mary Lawrence; Jill Meister; Amy Minton; Beth Parsons; Amy Reed; Rick Snyder; Deborah Reinhardt Youmans; Dina Zelleke; Ming Zhong
- April 2005: NEDRA votes to affiliate with APRA as the New England chapter.
- September 2005: Forum on Prospect Tracking and Management at the Harvard Graduate School of Education.
- October 2005: Boston RING combined with APRA Virtual Seminar "Prospect Research 101"
- November 2005: Workshop on Understanding SEC Documents presented by Michelle Leder at the Federal Reserve Building in Boston
- December 2005: Boston RING combined with APRA Virtual Seminar on "Relationship Mapping – Connections, Associations and Circles of Influence" at the Dana-Farber Cancer Institute

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### 2006

- January 2006: RING at Dartmouth College in Hanover, NH
- February 2006: Research Director's Forum
- March 2006: Workshop "Show Me the Money – The Role of Research in Building a Major Gifts Operation" presented by Poonam Prasad at Northeastern University
- May 2006: 19<sup>th</sup> Annual Conference *Turning Over a New Leaf* The Westin Hotel (Providence, RI)
- May 2006: The 5<sup>th</sup> *Ann Castle Award* was presented to Helen Brown
- Slate of 2006-2007 Board Members & Officers Presented at Annual Business Meeting
  - Jill Meister (President); Rick Snyder (Vice President); Lisa Howley (Secretary); Dave Chase (Treasurer); Nancy Faughnan; Allison King Crosscup; Elise Ober LaFosse; Amy Minton; Amy Reed; Heather Reisz; David Sterling; Dina Zelleke
- June 2006: Workshop on "Welcome to Wall Street – Understanding Trends and Practices in the Financial Services Sector" presented by Professor Patrick C. Gregory of Bentley College
- September 2006 Research Directors' Forum at the Museum of Science
- October 2006: Research Boot Camp at the Radisson Hotel in Boston
- November 2006: Research Boot Camp at the University of Massachusetts Amherst

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## 2007

- May 2007: 20<sup>th</sup> Annual Conference *Charting the Course to Success: NEDRA's 20 Year Voyage* The Cliff House (Ogunquit, Maine)
  - May 2007: The 6<sup>th</sup> *Ann Castle Award* was presented to Elizabeth Crabtree
  - Slate of 2007-2008 Board Members & Officers Presented at Annual Business Meeting
    - Jill Meister (President); Rick Snyder (Vice President); Lisa Howley (Secretary); David Sterling (Treasurer); Dave Chase; Allison King Crosscup; Nancy Faughnan; Elise Ober LaFosse; Joe Medina; Amy Minton; Amy Reed; Heather Reisz; Dina Zelleke
  - August 2007: NEDRA President-Elect Rick Snyder dons a lobster suit and man's NEDRA's *The Expert is in Booth* at the APRA International Conference in Chicago
  - October 2007: Workshop "Approaches for Estimating Gift Capacity and Developing Rating Systems" presented by Elizabeth Crabtree and Joyce Newton at the Massachusetts Institute of Technology
  - October 2007: Workshop "Research Primer & Small Shop Research" at the Hotel Marlowe, Cambridge, MA
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## 2008

- May 2008: 21<sup>st</sup> Annual Conference *Research – Coming of Age* Renaissance Providence Hotel (Providence, RI)
  - May 2008: The 7<sup>th</sup> *Ann Castle Award* was presented to Valerie Anastasio
  - May 2008: The *Outstanding Service Award* presented to Dave Chase
  - Slate of 2008-2009 Board Members & Officers Presented at Annual Business Meeting
    - Rick Snyder (President); Amy Minton (Vice President); Heather Reisz (Secretary); David Sterling (Treasurer); Bruce Berg; Allison King Crosscup; Nancy Faughnan; Janet Liberman; Joe Medina; Jill Meister; Barbara Moore; Dina Zelleke
  - June 2008: RING on "Best Practices for Corporate and Foundation Research" at Yale University
  - September 2008: Research Director's Forum at Harvard University
  - September 2008: Research Basics Boot Camp at Northeastern University
  - October 2008: Research Basics Boot Camp at Fairfield University
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## 2009

- January 2009: Seminar on "Donor Privacy and Institutional Risk: Red Flags and Yellow Alerts" presented by David Eberly in partnership with Women in Development of Greater Boston
  - March 2009: Research Director's Forum at Wesleyan University
  - May 2009: RING on "The Ratings Game: New Strategies for Rating and Wealth Evaluation in Today's Economy" at Brown University
  - May 2009: 22<sup>nd</sup> Annual Conference *Intersections: Many Fields, One Common Goal* at the Holiday Inn by the Bay (Portland, Maine)
  - May 2009: The 8<sup>th</sup> *Ann Castle Award* was presented to Paul Dakin
  - Slate of 2009-2010 Board Members & Officers Presented at Annual Business Meeting
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- Rick Snyder (President); Barbara Moore (Vice President); Amber Countis (Secretary); Bruce Berg (Treasurer); Britt Beedenbender; Nancy Faughnan; Janet Liberman; Joe Medina; Amy Minton; Jeffrey Ouellette; David Sterling; Dina Zelleke
  - September 2009: Research Boot Camp at the Radisson Hotel Boston
  - September 2009: RING on “Building Your Brand: How to Market Your Prospect Research Department” at Tufts University
  - October 2009: Research Director’s Forum
  - October 2009: Research Seminars: *New York Research: Navigating Your Way Through a Changing Financial Landscape* and *Leveraging Resources and Empowering Others* at the Radisson Hotel Boston
  - October 2009: Research Boot Camp at the University of Hartford
  - November 2009: Research Seminars on “Intellectual Property” and “The Family Office” presented by Jeffrey Ouellette at the Radisson Hotel Boston
  - December 2009: Boston RING at Tufts University
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### 2010

- February 2010: Connecticut Research Director’s Forum at Saint Joseph College in West Hartford
  - April 2010: 23<sup>rd</sup> Annual Conference *Research: The Hub of Philanthropy* Radisson Hotel (Boston, MA)
  - April 2010: The 9<sup>th</sup> *Ann Castle Award* was presented to Charlie Carr
  - Slate of 2010-2011 Board Members
    - Bruce Berg; Cheryl Cerny; Amber Countis; Nancy Faughnan; Tara McMullen; Amy Minto; Barbara Moore; Sarah Ruberti; Marlisa Simonson; Melissa Bank Stepno; David Sterling; Leigh Walker; Dina Zelleke
  - May 2010: Workshop *The Ratings Game, Part II: Successful Strategies for Rating and Wealth Evaluation in Today’s Economy* presented by Elizabeth Crabtree at Brown University
  - October 2010: Research Basics Boot Camp at the Radisson Hotel Boston
  - October 2010: Research Boot Camp at Yale University
  - November 2010: Seminar “Is the Financial Crisis Over? A Survey of Our Economy and Our Prospects” presented by Richard Horne and Steven Towns at Yale University. A joint program of NEDRA and CASE District I
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### 2011

- The NEDRA Conference Scholarship was established and has been sponsored by the Helen Brown Group since its inception
    - The inaugural Helen Brown Group-NEDRA Conference Scholarship recipients were recognized at the 24<sup>th</sup> Annual Conference
  - March 2011: Connecticut Research Director’s Forum at Wesleyan University
  - April 2011: Workshop with AFP Northern New England, *An Introduction to Prospect Research* at Dartmouth College
  - May 2011: 24<sup>th</sup> Annual Conference *Transforming Information into Intelligence* Radisson Hotel (Boston, MA)
  - May 2011: The 10<sup>th</sup> *Ann Castle Award* was presented to Marianne Pelletier
  - May 2011: The Inaugural *Helen Brown Group-NEDRA Conference Scholarships* were awarded to Catherine Boothby & Mary Kelly
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- Slate of 2011-2012 Board Members & Officers Presented at Annual Business Meeting
    - Amy Minton (President); Amber Countis (Vice President); Tara McMullen (Secretary); Bruce Berg (Treasurer); Amy Begg; Cheryl Cerny; Nancy Faughnan; Barbara Moore; Sarah Ruberti; Marlisa Simonson; Melissa Bank Stepno; David Sterling
  - September 2011: Research Director's Forum at Harvard University
  - September 2011: RING on "Proactive Research" at Tufts University
  - October 2011: Research Basics Boot Camp at City Year Boston
  - October 2011: Research Basics Boot Camp at Central Connecticut State University
  - October 2011: Seminar "Mineral, Air and Water Rights" presented by Jeffrey Ouellette at Northeastern University
  - November 2011: Seminar "Joys of Compounding" presented by Chris Begg at Harvard University
  - November 2011: RING on Small Shops at the Boston Ballet
  - December 2011: RING on Corporations and Foundations at Yale University
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### 2012

- March 2012: Share Training REPLAY: Golden BRICs: Researching Prospects in Brazil, Russia, India & China
  - March 2012: RING: Parent Programs & Research at Milton Academy
  - March 2012: RING: Parent Programs & Research at Miss Porter's School
  - March 2012: An Introduction to Prospect Research Program presented in Partnership with AFP Northern New England at University of New England
  - March 2012: Research Directors Forum at The UCONN Foundation
  - April 2012: 25<sup>th</sup> Annual Conference at Hotel Marlow (Cambridge, MA)
  - April 2012: The 11<sup>th</sup> *Ann Castle Award* was presented to Joe Donnelly
  - April 2012: The *Helen Brown Group-NEDRA Conference Scholarship* was awarded to Elizabeth Moyer
  - Slate of 2012-2013 Board Members & Officers Presented at Annual Business Meeting
    - Amber Countis (President); Tara McMullen (Vice President); Suzy Campos (Secretary); Bruce Berg (Treasurer); Amy Begg; Anne Brownlee; James Cheng; Cheryl Cerny; Lisa Foster; Melissa Bank Stepno; Ian T. Wells
  - June 2012: Living in the Gray Area: Understanding Wealth that Isn't Black and White at Harvard Business School
  - October 2012: The Frugal Researcher at Amherst College
  - October 2012: Research Basics Bootcamp at Northeastern University
  - October 2012: Development Analytics 101 at Massachusetts General Hospital
  - October 2012: Donor Screening: How To Do It On A Budget at The Delaney House
  - November 2012: RING: Small Shop Research at Boston Ballet
  - November 2012: Director Forum at Dana-Farber Cancer Institute
  - November 2012: Research Basics Bootcamp at University of New England
  - December 2012: Is the Financial Crisis Over? A Survey of Our Economy and Our Prospects at Yale University
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- December 2012: RING: Large Research Shops at Harvard University
  - December 2012: RING: The Financial Services Industry at Combined Jewish Philanthropies
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### 2013

- January 2013: RING: Organizational Potluck – Making the Most of International Resources at Wesleyan University
  - February 2013: RING: Parents as Prospects – Researching Strategies for Parents at Pingree School
  - March 2013: RING: Planned Giving & Research at Clark University
  - March 2013: The Road Ahead: Campaign Planning and Prospect Research at Combined Jewish Philanthropies
  - March 2013: RING: Parents as Prospects at University of New Haven
  - April 2013: 26<sup>th</sup> Annual Conference *Broadening Perspectives* at Hotel Marlowe (Cambridge, MA)
  - April 2013: The 12<sup>th</sup> *Ann Castle Award* was presented to Sarah Fernandez
  - Slate of 2013-2014 Board Members
    - Amy Begg; Bruce Berg; Anne Brownlee; Suzy Campos; James Cheng; Sarah Cook; Amber Countis; Lisa Foster; Tara McMullen; Laura Parshall; Mary Taddia; Tina Tong; Ian T. Wells
  - June 2013: Development Analytics 101 at Tufts University
  - July 2013: RING: Setting the Table – Research’s Role at Prospect Review Meetings at The Hotchkiss School
  - July 2013: Development Analytics 102 at Boston College
  - September 2013: Research Basics Bootcamp at Wesleyan University
  - October 2013: Research Basics Bootcamp at Northeastern University
  - November 2013: RING: Discover The Golden Egg - How to Find Elusive International Prospects at Northeastern University
  - December 2013: RING: The Silmarillion: An (Un)expected Journey of a Development Analytics Program at Dana-Farber Cancer Institute
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### 2014

- The Heather Reisz Memorial Scholarship (HRMS) was established
    - The inaugural HRMS recipients were recognized at the 27<sup>th</sup> Annual NEDRA Conference
  - February 2014: RING: Prospect ID Tips & Tricks at Massachusetts Institute of Technology
  - March 2014: Research Basics Bootcamp at Revere Hotel
  - March 2014: 27<sup>th</sup> Annual Conference *Strategies for Success* at Revere Hotel (Boston, MA)
  - March 2014: The 13<sup>th</sup> *Ann Castle Award* was presented to Heather Reisz
  - March 2014: The *Helen Brown Group-NEDRA Conference Scholarship* was awarded to Denise Dabney
  - March 2014: The inaugural *Heather Reisz Memorial Scholarships* were awarded to Laura Koo & Monique Miller
  - Slate of 2014-2015 Board Members & Officers Presented at Annual Business Meeting
    - Suzy Campos (President); Tara McMullen (Vice President); Lisa Foster (Secretary); Bruce Berg (Treasurer); Amy Begg; Sarah Benson; Anne Brownlee; James Cheng; Amber Countis; Laura Parshall; Mary Taddia; Tina Tong; Ian T. Wells
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- April 2014: RING: Hiding in Plain Sight – Markers of Philanthropy at Massachusetts General Hospital
  - May 2014: Panel – Inside Chinese Philanthropy at Tufts University
  - September 2014: RING: APRA Conference Recap Roundtables at Amherst Brewing Company
  - September 2014: Residential Real Estate Review at Combined Jewish Philanthropies
  - October 2014: Research Basics Bootcamp at Tufts University
  - November 2014: VINO at The Red Hat (Boston, MA)
  - November 2014: Research Basics Bootcamp at Smith College
  - December 2014: Webinar: Pipeline Management During a Campaign (Online)
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### 2015

- February 2015: RING: Corporate and Foundation Research at Tufts University
  - March 2015: RING: Strategies for Re-energizing Prospect Portfolios at Wethersfield Public Library
  - April 2015: Research Basics Bootcamp at Sheraton Portsmouth Harborside Hotel
  - April 2015: 28<sup>th</sup> Annual Conference *Fundraising Intelligence* at Sheraton Portsmouth Harborside Hotel (Portsmouth, NH)
  - April 2015: The 14<sup>th</sup> *Ann Castle Award* was presented to Nancy Faughnan
  - April 2015: The *Helen Brown Group-NEDRA Conference Scholarship* was awarded to Pam Abraham
  - April 2015: The *Heather Reisz Memorial Scholarships* were awarded to Stephanie Cavagnuolo & Becca Elwin
  - Slate of 2015-2016 Board Members & Officers Presented at Annual Business Meeting
    - Suzy Campos (President); Tara McMullen (Vice President); Ian T. Wells (Secretary); Lisa Foster (Treasurer); Erin Ambrose Dupuis; Amy Begg; Sarah Benson; James Cheng; Tim Enman; Susan Grivno; Laura Parshall; Mary Taddia; Stacey Vial MacDonnell
  - May 2015: RING: May Day! What's Next for Prep School Research & Fundraising? At Choate Rosemary Hall
  - May 2015: RING: Commercial Real Estate at Harvard University
  - June 2015: Webinar: Tips & Practices on Corporate Research (Online)
  - September 2015: RING: A Roundtable Discussion – Board Nomination & Governance Pipelines at Museum of Science
  - September 2015: RING: Social Media at Boston Children's Hospital Trust
  - September 2015: Creating a Powerful Public Presence: A Workshop for Researchers Who Need Training in Speaking at MIT Sloan School of Management
  - October 2015: Webinar: Researching Prospects in India with Beth Bandy (Online)
  - October 2015: Portfolio Management: From Adequate to Amazing at Harvard Business School
  - November 2015: Research Basics Bootcamp at Harvard Business School
  - December 2015: VINO at Meadhall (Cambridge, MA)
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# NEDRA Chronology

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## 2016

- January 2016: RING: Keeping Up with a Growing Office: New Tools, New Leads, New Staff at Plan International (Warwick, RI)
- March 2016: Cooperation Makes it Happen: NEDRA Panel Discussion at Assumption College
- April 2016 Research Basics Bootcamp at Portsmouth Harborside Hotel
- April 2016: 29<sup>th</sup> Annual Conference at Portsmouth Harborside Hotel (Portsmouth, NH)
- April 2016: The 15<sup>th</sup> *Ann Castle Award* was presented to Dina Zelleke
- April 2016: The *Helen Brown Group-NEDRA Conference Scholarship* was awarded to Emily Burke
- April 2016: The *Heather Reisz Memorial Scholarships* were awarded to Annalise Baird & Laura Gebhart
- Slate of 2016-2017 Board Members & Officers Presented at Annual Business Meeting
  - Amy Begg (President); Ian T. Wells (Vice President); Susan Grivno (Secretary); Lisa Foster (Treasurer); Erin Ambrose Dupuis; Suzy Campos; James Cheng; Tim Enman; William Gotfredson; Laura Parshall; Stacey Vial MacDonnell; Tim Wilson
- April 2016: Networking Lunch in Western Mass at Mi Tierra Mexican Restaurant (Hadley, MA)
- May 2016: Directors Round Table at Dana-Farber Cancer Institute
- June 2016: VINO at Tiger Mama (Boston, MA)
- At the Annual Board Retreat the decision was made to re-brand RINGs as Think Tanks
- October 2016: Estimating Private Company Value at Massachusetts Institute of Technology
- November 2016: Unconscious Bias with Harvard University's Christopher Dial at Massachusetts Institute of Technology
- November 2016: VINO at Grafton Street Pub & Grill (Cambridge, MA)
- November 2016: Think Tank: Prospect Management at Harvard University
- December 2016: Research Basics Bootcamp at Northeastern University

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## 2017

- NEDRA Celebrates its 30<sup>th</sup> Anniversary with Celebrations throughout New England
  - January 2017: Celebrating 30 Years of NEDRA in Rhode Island at Ogie's Trailer Park (Providence, RI)
  - January 2017: Celebrating 30 Years of NEDRA in Connecticut at Engine Room (Mystic, CT)
  - February 2017: Celebrating 30 Years of NEDRA in Western Mass at Bertucci's Restaurant (Amherst, MA)
  - March 2017: Celebrating 30 Years of NEDRA in Greater Boston at Cambridge Brewing Company (Cambridge, MA)
  - March 2017: Celebrating 30 Years of NEDRA in Maine at Salvage BBQ (Portland, ME)
  - April 2017: Celebrating 30 Years of NEDRA in New Hampshire at Moxy (Portsmouth, NH)
- January 2017: Think Tank: Resource Refresh at Dana-Farber Cancer Institute
- February 2017: Think Tank: International Research at Boston Children's Hospital Trust
- March 2017: Think Tank: Data Analytics Show & Tell at Dana-Farber Cancer Institute
- March 2017: Directors Round Table at Northeastern University

## NEDRA Chronology

- April 2017: Research Basics Bootcamp at Portsmouth Harborside Hotel
- April 2017: 30<sup>th</sup> Annual Conference at Portsmouth Harborside Hotel (Portsmouth, NH)
  - As the most long-standing NEDRA Member in attendance, Marianne Pelletier is invited to join NEDRA President, Amy Begg, to make the ceremonial first cut of NEDRA's 30<sup>th</sup> Birthday Cake
- April 2017: The 16<sup>th</sup> *Ann Castle Award* was presented to Jill Meister
- April 2017: The *Helen Brown Group-NEDRA Conference Scholarship* was awarded to Varounny Chanthasiri
- April 2017: The *Heather Reisz Memorial Scholarships* were awarded to Sam Kjellberg & Nina Emmi
- Slate of 2017-2018 Board Members & Officers Presented at Annual Business Meeting
  - Amy Begg (President); Ian T. Wells (Vice President); Erin Ambrose Dupuis (Secretary); Lisa Foster (Treasurer); Suzy Campos; James Cheng; Bill Gotfredson; Jenn Grasso; Susan Grivno; Renana Kehoe; Pamela McCarthy; Laura Parshall; Ginny Santamaria; Tim Wilson
- June 2017: Think Tank: Prospect Management at Mount Holyoke College
- July 2017: Lunch VINO: NEDRA Networking in Maine at Bowdoin College
- August 2017: Research Basics Bootcamp at Bowdoin College
- September 2017: International Research: United Kingdom at Dana-Farber Cancer Institute
- September 2017: VINO: NEDRA Networking in Connecticut at Bar (New Haven, CT)
- October 2017: Prospect Management Panel at UMass Medical School
- October 2017: Think Tank: Healthcare at Dana-Farber Cancer Institute
- November 2017: Residential Real Estate Review at Northeastern University
- November 2017: Research Basics Bootcamp at Sheraton Portsmouth Harborside Hotel

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### 2018

- January 2018: The Road Ahead: Campaign Planning and Prospect Development at Salem State University
- January 2018: Corporate and Foundation Research at Dana-Farber Cancer Institute
- January 2018: Understanding and Utilizing SEC Filings at Boston Children's Hospital Trust
- Winter 2018: NEDRA Website ([www.nedra.org](http://www.nedra.org)) re-design launched
- February 2018: Think Tank: Small Shop Prospect Research & Management at Buckingham Browne & Nichols School
- February 2018: Think Tank: Large Shop Prospect Research & Management at MIT Sloan School of Management
- February 2018: Charitable Powerhouses: A Fundraising Approach to Donors from Private Equity, Venture Capital, Hedge Funds and Family Offices at Beth Israel Deaconess Medical Center
- March 2018: International Research: Asia at Peabody Essex Museum
- March 2018: Charitable Powerhouses: A Fundraising Approach to Donors from Private Equity, Venture Capital, Hedge Funds and Family Offices at Yale University
- March 2018: Two Sides of the Coin: Hiring & Getting Hired at Dana-Farber Cancer Institute
- March 2018: Think Tank: Small Shop Prospect Research & Management at The Governor's Academy
- March 2018: Building a Major Gift Model using Microsoft Excel at Dana-Farber Cancer Institute

## NEDRA Chronology

- April 2018: Think Tank: Prospect Management and Capacity Ratings at Keene State College
- April 2018: Directors Round Table at Northeastern University
- April 2018: NEDRA Night Out at Grafton Street Pub & Grill in Cambridge, MA
- April 2018: Optimizing your Data Science Workflow in R at Dana-Farber Cancer Institute
- April 2018: Research Basics Bootcamp at Hotel Viking
- April 2018: Fundraising Data Science Summit at Hotel Viking
- April 2018: 31<sup>st</sup> Annual Conference at Hotel Viking (Newport, RI)
- April 2018: The 17<sup>th</sup> *Ann Castle Award* was presented to David Sterling
- April 2018: The *Helen Brown Group-NEDRA Conference Scholarship* was awarded to Keith Aron
- April 2018: The *Heather Reisz Memorial Scholarships* were awarded to Darthula Matthews & Charlotte Redgate Myers
- Slate of 2018-2019 Board Members & Officers Presented at Annual Business Meeting
  - Susan Grivno (President); Bill Gotfredson (Vice President); Jenn Grasso (Secretary); Pamela McCarthy (Treasurer); Erin Ambrose Dupuis; Kristen Cocce; Richard Horne; Renana Kehoe; Claire Moitra; Diane Parsons; Elana Pierkowski; Ginny Santamaria
- May 2018: Affinity Scores & Donor Engagement at Tufts University
- June 2018: Think Tank: Resource Refresh at UMass Medical School
- June 2018: NEDRA Networking Lunch in Western MA at Mi Tierra Restaurant (Hadley, MA)
- June 2018: Understanding and Utilizing SEC Filings at Maine Medical Center
- August 2018: Ice Cream Social Networking Event at Flavors Ice Cream at Cook Farm (Hadley, MA)
- August 2018: Networking Lunch – New Hampshire at Smuttynose Brewing (Hampton, NH)
- September 2018: Research Basics Bootcamp at Sheraton Portsmouth (Portsmouth, NH)
- September 2018: Prospect Management Think Tank at Amherst College
- September 2018: Excel for Prospect Researchers and Portfolio Managers at Dana-Farber Cancer Institute
- September 2018: International Research: India at Tufts University
- October 2018: Prospect Management Think Tank at Mount Desert Island Hospital
- October 2018: Building a Major Gift Model Using Microsoft Excel at Dana-Farber Cancer Institute
- October 2018: GDPR Think Tank at Northeastern University
- November 2018: An Introduction to OKRS: How Operations Changed Office-wide Goal Setting at Beth Israel Deaconess Medical Center
- November 2018: Prospect Management Think Tank at Brown University

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### 2019

- January 2019: Charitable Powerhouses: A fundraising approach to donors from private equity, venture capital, hedge funds, and family offices at Northeastern University
- February 2019: Prospect Compensation Think Tank at Brigham and Women's Hospital

## NEDRA Chronology

- February 2019: Large Shop Think Tank at Tufts University
- February 2019: VINO: NEDRA Networking in New Haven at Elm City Social (New Haven, CT)
- February 2019: Quiet Perseverance: A Prospect Management Tale at Dana-Farber Cancer Institute
- March 2019: The Shadow of Wealth: How Ultra-High-Net-Worth Individuals and Wealth Managers Protect Their Wealth Through Hidden Assets at University of New England
- March 2019: Data Science Think Tank at Suffolk University
- March 2019: Research Basics Bootcamp at Combined Jewish Philanthropies (Boston, MA)
- April 2019: Research Basics Bootcamp (full day) at Westin Portland Harborview Hotel (Portland, ME)
- April 2019: Beginner/Intermediate Fundraising Data Science Workshop (full day) at Westin Portland Harborview Hotel (Portland, ME)
- April 2019: Advanced Fundraising Data Science Workshop (half day) at Westin Portland Harborview Hotel (Portland, ME)
- April 2019: Guiding the Way: Concepts in Wealth Analysis and Gift Capacity Ratings (half day) at Westin Portland Harborview Hotel (Portland, ME)
- April 2019: 32<sup>nd</sup> Annual Conference at the Westin Portland Harborview Hotel (Portland, ME)
- April 2019: The 18<sup>th</sup> *Ann Castle Award* was presented to Amy Begg
- April 2019: The *Helen Brown Group-NEDRA Conference Scholarship* was awarded to Mackenzie Betrone-Harpst
- April 2019: The *Heather Reisz Memorial Scholarships* were awarded to Laura Webb & Sarah Cook
- Slate of 2019-2020 Board Members & Officers Presented at Annual Business Meeting
  - Susan Grivno (President); Bill Gotfredson (Vice President); Renana Kehoe (Secretary); Pamela McCarthy (Treasurer); Erin Ambrose Dupuis; Emily Burke; Kristen Cocce; Jenn Grasso; Richard Horne; Claire Moitra; Diane Parsons; Elana Pierkowski; Scott Rosensweig
- April 2019: NEDRAcon2019 Highlights! (online webinar)
- April 2019: The Ins and Outs of Corporate and Foundation Research at Dana-Farber Cancer Institute
- May 2019: VINO: NEDRA Networking in Western Mass at Platform Sports Bar (Northampton, MA)
- May 2019: VINO: NEDRA Networking in Boston at Hojoko (Boston, MA)
- May 2019: The Nuts and Bolts of Volunteering with NEDRA (online webinar)
- June 2019: VINO: NEDRA Networking in Connecticut at Moonlight Sushi Bar & Grill (Middletown, CT)
- June 2019: VINO: NEDRA Networking in New Hampshire at Martingale Wharf (Portsmouth, NH)
- June 2019: Healthcare Think Tank at Dana-Farber Cancer Institute
- June 2019: VINO: NEDRA Networking in Maine at The Trust for Public Land (Portland, ME)
- June 2019: International Research: Middle East at Year Up (Boston, MA)
- July 2019: Lyft that Rocket Lab to the Improbable (all things “unicorn”) (online webinar)
- August 2019: What's Going On? Creating and Sharing Prospect Research Intelligence in Your Organization at Dana-Farber Cancer Institute
- September 2019: Diversity and Inclusion for Prospect Researchers Think Tank at Massachusetts General Hospital

## NEDRA Chronology

- September 2019: Prospect Management Think Tank at Combined Jewish Philanthropies (Boston, MA)
- September 2019: Prospecting on a Budget: Identifying your Pipeline through Public Data (online webinar)
- September 2019: Engaging Millennials to Raise Big Money at Dana-Farber Cancer Institute
- October 2019: Inclination & Capacity Estimation at The Jackson Laboratory (Farmington, CT)
- October 2019: Research Basics Bootcamp at Sheraton Portsmouth Harborside Hotel (Portsmouth, NH)
- October 2019: Finding Connections (Relationship Mapping) at Dana-Farber Cancer Institute
- October 2019: Genealogy and Prospect Research at Suffolk University
- November 2019: Directors Round Table at Boston Children's Hospital Trust
- November 2019: VINO: NEDRA Networking in Boston at Hojoko (Boston, MA)
- December 2019: Lunch VINO: NEDRA Networking in Western Mass at Mi Tierra Restaurant (Hadley, MA)
- December 2019: High Finance Workshop at Beth Israel Deaconess Medical Center

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### 2020

- January 2020: Think Tank: Research Strategies for Briefings at UMass Boston
- January 2020: Research Basics Bootcamp at Suffolk University
- February 2020: Think Tank: Inclination & Capacity Estimation at The Jackson Laboratory (Farmington, CT)
- February 2020: VINO: NEDRA Networking in Maine at Westin Portland Harborview Hotel (Portland, ME)
- February 2020: International Research: Asia at Tufts University
- March 2020: Pave the On Ramp: How Data Visualizations Can Help You Onboard New Fundraisers (online webinar)
- March 2020: Think Tank: Parents as Prospects at The Governor's Academy (Byfield, MA)
- In March 2020 it was announced that the May 2020 NEDRA Conference would be cancelled due to Covid-19.
- March - April 2020: NEDRA held a series of six online VINO: NEDRA Networking sessions
- April 2020: Research as a Second Language (online webinar)
- May 2020: Virtual Conversation: Managing Remotely (online webinar)
- May 2020: Virtual Conversation: Analyzing Stock Holdings During a Crisis (online webinar)
- May 2020: Virtual Conversation: Who's Doing Well Now? (online webinar)
- May 2020: Virtual Conversation: Resources and Tools (online webinar)
- May 2020: Virtual Conversation: Western MA (online webinar)
- May 2020: Virtual Conversation: Special Events (online webinar)
- May 2020: Virtual Conversation: Prospect Management (online webinar)
- May 2020: Annual Business Meeting (online webinar)
  - Slate of 2020-2021 Board Members & Officers Presented at Annual Business Meeting
    - Renana Kehoe (President); Elana Pierkowski (Vice President); Rich Horne (Secretary); Pamela McCarthy (Treasurer); Susan Grivno (Past-President); Jolene Crosby-Jones Elizabeth Dill; Emily Donohue; Liz Downey; Phil Harden; Scott Rosensweig; Amitha Vasanth

## NEDRA Chronology

- May 2020: Virtual Conversation: Analytics from Home (online webinar)
- May 2020: Virtual Conversation: Proactive Projects (online webinar)
- June 2020: Virtual Conversation: Healthcare (online webinar)
- June 2020: Virtual Conversation: Corporations and Foundations (online webinar)
- June 2020: Research Basics Bootcamp (online webinar)
- June 2020: RStudio and Reproducible Research: Cleaning and Preparing Your Data (online webinar)
- June 2020: Virtual Conversation: Membership Organizations (online webinar)
- June 2020: Virtual Conversation: Analyzing Stock Holdings During a Crisis (online webinar)
- June 2020: Virtual Conversation: Segmenting your Database in Good Times or Bad (online webinar)
- June 2020: Virtual Conversation: Higher Education (online webinar)
- June 2020: Virtual Conversation: Prospect Management (online webinar)
- September 2020: VINO: NEDRA Team Trivia (online)
- September 2020: NEDRA Excel Series Part 1: Tips and Tricks (online webinar)
- September 2020: Finding Your Way Through the C&F Wonderland (online webinar)
- September 2020: NEDRA Excel Series Part 2: Formulas and Functions (online webinar)
- October 2020: Think Tank: Diversity, Equity & Inclusion (DEI) and Corporate & Foundation Research (online webinar)
- October 2020: Research Basics Bootcamp (online webinar)
- October 2020: NEDRA Excel Series Part 3: Pivot Tables and Charts (online webinar)
- October 2020: Risky Business: Creating a due diligence policy for your organization and how it differs from prospect research (online webinar)
- October 2020: Creative Collaboration: Taking the Path from Reaction to Relationship (online webinar)
- November 2020: Think Tank: “Is That a Major Gift Sequence in Your Constituent’s Genes or...”: Brainstorming a Novel Approach for Donor/Prospect History Presentation (online webinar)
- November 2020: Prospect Management Workshop (online webinar)
- November 2020: High Finance Course for Prospect Researchers (online webinar)
- November 2020: Think Tank: Reputational Risk and Philanthropic Due Diligence (online webinar)
- November 2020: Score Trek Discovery: Employing Test Construction Methods to Measure Donor/Prospect Inclination (online webinar)
- December 2020: Diversifying Donor Bases: An Action Plan (online webinar)
- December 2020: Think Tank: Raiser’s Edge (online webinar)

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### 2021

- January 2021: High Finance Course for Prospect Researchers (January/February 2021 session; online webinars)
- February 2021: Data Analytics for Prospect Researchers (online webinar)
- February 2021: Think Tank: Ellucian Advance (online webinar)

## NEDRA Chronology

- March 2021: International Research: An Exploration of China (online webinar)
- March 2021: Research Basics Bootcamp (online webinar)
- March 2021: Think Tank: Listen, Learn, and Discuss – Planet Money’s “We Set Up An Offshore Company in a Tax Haven” Podcast (online webinar)
- March 2021: Author Book Reading: Tuesday Mooney Talks With Ghosts (a joint program with APRA Florida, online)
- March 2021: Think Tank: Metrics in the Time of Corona (online webinar)
- March 2021: High Finance Course for Prospect Researchers (March/April 2021 session, online webinars)
- March 2021: Cryptocurrency - What It Is, How to Accept Gifts, and How to Measure Its Value (online webinar)
- April 2021: Think Tank: Days of Future Past Pandemic - Conversations on the State of Philanthropy Data Science (online webinar)
- April 2021: Think Tank: Tips, Tools and Tricks on Resources (online webinar)
- April 2021: Demystifying SEC Filings (online webinar)
- May 2021: NEDRAcon2021 Annual Conference (online)
- May 2021: The 19<sup>th</sup> *Ann Castle Award* was presented to Melissa Bank Stepno
- May 2021: The *Helen Brown Group-NEDRA Conference Scholarship*, The *Heather Reisz Memorial Scholarships*, and the new *Diversity, Equity, Inclusion (DEI) Scholarship* were announced during the 2021 annual conference. The 12 recipients were: Regina Alhassan, Sara Borden, Mary Ellen Cafiso, Robin Hess, Ana Hidalgo, Erik Privert, Cynthia Reeves, Jason Rosenberg, Khalia Shaw, Jodi Walsh, Stephanie Walters-Serrette, Kristina Yurko.
- June 2021: NEDRA 2021 Annual Business Meeting (online webinar)
  - Slate of 2021-2022 Board Members & Officers Presented at Annual Business Meeting
    - Renana Kehoe (President); Elana Pierkowski (Vice President); Jolene Crosby-Jones (Secretary); Pamela McCarthy (Treasurer); Elizabeth Dill; Emily Donohue; April Genung; Erin Gianni; Ruthie Giles; Phil Harden; Beth Inman; Liz Marzilli; Scott Rosensweig; Kiran Tahir; Amitha Vasanth
- July 2021: VINO: NEDRA Team Trivia (online)
- August 2021: Parent Research Think Tank (online)
- September 2021: Research Basics Bootcamp (online)
- October 2021: Get in the Driver’s Seat: Defining and Promoting Your Role as a Leader in Prospect Development (online)
- November 2021: Small Shop Panel (online)
- December 2021: Directors Roundtable (online)
- December 2021: Compensation and Salary Survey Think Tank (online)

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### 2022

- January 2022: Research Basics Bootcamp (online)
  - January 2022: Recruiting and Onboarding Think Tank (online)
  - January 2022: Diversity, Equity, and Inclusion for Prospect Research in Healthcare (online)
  - January 2022: Free Resources Think Tank (online)
  - February 2022: Partnering with Planned Giving (online)
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## NEDRA Chronology

- February 2022: Prospect Management Workshop (online)
  - March 2022: High Finance for Prospect Researchers: Private Equity and Hedge Funds (online)
  - March 2022: Onboarding Think Tank (online)
  - April 2022: Research Basic Bootcamp (online)
  - April 2022: Venture Into the World of NFTs (online)
  - May 2022: NEDRAcon2022 Annual Conference (online)
  - May 2022: The 20<sup>th</sup> Ann Castle Award was presented to Tara McMullen-King
  - May 2022: The Helen Brown Group-NEDRA Conference Scholarship, The Heather Reisz Memorial Scholarships, and the NEDRA DEI Scholarship were announced during the 2022 annual conference. The five recipients Paige Berry, Heather Hanami, Rachel Lancia, Belle Lee and Betsy Maury.
  - June 2022: NEDRA 2022 Annual Business Meeting (online)
    - Slate of 2022-2023 Board Members & Officers presented at Annual Business Meeting
      - Elizabeth Dill (President); Emily Donohue (Vice President); Pamela McCarthy (Treasurer); Jolene Crosby-Jones (Secretary); April Genung; Erin Gianni; Ruthie Giles; Steve Grimes; Beth Inman; Becky Kremenitzer; Scott Rosensweig; Amy Sacco; and Kiran Tahir
-