






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>Pre-Conference Workshop Morning Session</p> <p>Research Basics Bootcamp Lisa Foster, Phillips Academy Dave Owens, Boston Children's Hospital Trust</p>	<p>Pre-Conference Workshop Morning Session</p> <p>High Finance for Prospect Researchers: Private Equity and Hedge Funds Valerie Anastasio, Boston Children's Hospital Trust</p> <p><i>Minimum 2 years experience in prospect research required.</i></p>
12:00 pm - 1:15 pm	Luncheon - Grand Ballroom	
1:15 pm - 1:30 pm	Break	
1:30 pm - 4:30 pm	<p>Pre-Conference Workshop Afternoon Session</p> <p>Research Basics Bootcamp Lisa Foster, Phillips Academy Dave Owens, Boston Children's Hospital Trust</p>	<p>Pre-Conference Workshop Afternoon Session</p> <p>High Finance for Prospect Researchers: Private Equity and Hedge Funds Valerie Anastasio, Boston Children's Hospital Trust</p> <p><i>Minimum 2 years experience in prospect research required.</i></p>
4:30 pm - 5:00 pm	Break	
5:00 pm - 8:30 pm	NEDRAcon2024 Opening Reception	





*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	(A1) Pipeline Growth With A DXO Program Rich Horne, Vassar College Deborah Vanecek, Vassar College Intermediate	(A2) Insights to Planned Giving Jill Meister, Yale University Beginner and Intermediate	(A3) How to Make Your News Digest More Streamlined and Actionable (and have fun while doing it) Lauren Casas, Dana-Farber Cancer Institute Ryan Frank, Wellesley College Christina Priplata, Dana-Farber Cancer Institute Beginner	(A4) Panel: Advancing in Advancement Moderator: Melissa Bank Stepno, Helen Brown Group Panelists: Suzy Campos, Amherst College Tim Enman, Memorial Sloan Kettering Cancer Center Sara Massari, Harvard University All levels
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	    			
12:20 pm - 12:30 pm	Break			
12:30 pm - 2:00 pm	Luncheon, Business Meeting, and Awards			
2:00 pm - 2:15 pm	Break			
2:15 pm - 3:15 pm	(B1) Data Compliance: The Who, What, Where, When, Why, and How Jessica Woodbridge, Helen Brown Group Michele Borucki, Helen Brown Group Intermediate	(B2) Due Diligence: The What, Why, and How of Prospect Research and Risk Assessment Krista Pierce, Tufts University All levels	(B3) Building an Intentional Prospect Research Program for Operational Efficiency Kelley McGeehan, Conduit Philanthropic Intelligence Partner Meghan Walsh, Virtua Health Beginner and Intermediate	(B4) Measuring Success: Navigating a New Metrics Implementation Dan Zarlenga, American Cancer Society Michelle Bisbee, American Cancer Society Intermediate
3:15 pm - 3:30 pm	Break			
3:30 pm - 4:30 pm	(C1) Partnering Across Advancement and Beyond: The Potential of Prospect Development Ashley Bannon, College of the Holy Cross Amy Tesoro, College of the Holy Cross Intermediate	(C2) How to Automate Rating All Your Finance Prospects By Job Title Rachel Davies, Yale University Intermediate	(C3) Push It To the Limit! Using Looker Studio as a BI Tool for Resource Challenged Organizations John Carasone, Williams College Nicholas Hersey, Williams College Beginner	(C4) Creating a DEI Data Guide for Prospect Development April Genung, Memorial Sloan Kettering Cancer Center Brendan O'Hagen, Memorial Sloan Kettering Cancer Center Intermediate
4:30 pm - 5:00 pm	Break			
5:00 pm - 6:00 pm	Networking Reception at the Omni New Haven			
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			

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Friday, May 3, 2024				
6:45 am - 7:30 am	The Walk to Remember - Meet in the hotel lobby			
7:30 am - 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	(D1) Prospect Management is STILL More Than Data Nicole Fonsh, Harvard Law School All levels	(D2) 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 Beginner	(D3) Due Diligence: As Layered as a Croissant Sarah Price, BWF All levels	(D4) Pipelines, Proposals, and Portfolios: The Art of Running Highly Effective Meetings Ruthie Giles, University of New Hampshire All levels
10:40 am - 10:50 am	Break			
Sponsor Presentations 10:50 am - 11:20 am	   			
11:20 am - 11:30 am	Break			
11:30 am - 12:30 pm	(E1) Asia 2024: What’s going on? Shauna Meegan, Harvard University Stephanie Snow, Harvard University Intermediate	(E2) Protecting Our Institutions: Due Diligence and Risk Management Trends and Insights Josh Birkholz, BWF Chris Green, Xapien Beginner and Intermediate	(E3) We Just Ran a Screening...Now What? Ian Wells, Ian T. Wells & Associates, LLC Dr. Emily O'Brien, Ian T. Wells & Associates, LLC Beginner	(E4) Equitable Hiring: What it takes, why it matters, who cares? Faith Montgomery, Lindauer Chandra Montgomery, Lindauer All levels
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	(F1) A Case Study: Generative AI in Due Diligence at Dartmouth College Chris Green, Xapien Michael Foote, Dartmouth College Intermediate and Advanced	(F2) Working With Data Science Interns Hope Boulanger, Brandeis University Pamela Poland, Brandeis University All levels	(F3) The ABCs and 123s of DAFs Melissa Bank Stepno, Helen Brown Group Beginner	(F4) 2017: A Portfolio Review Odyssey Jolene Crosby-Jones, Massachusetts General Hospital All levels
2:40 pm	Conference Concludes			

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