# NEDRA

New England Development Research Association

A chapter of APRA International

*Presents its 23rd Annual Conference*

# Research: The Hub of Philanthropy

**April 12-13, 2010**

**Radisson Hotel**

**Boston MA**

# Conference-At-A-Glance

**Monday – April 12, 2010**

| | | | |
|---|---|---|---|
| 8:00am – 4:00pm | Registration, Vendor Displays Open | | |
| 8:00am – 9:00am | Breakfast Buffet | | |
| 8:30am – 9:00am | Volunteer Orientation | | |
| **Sessions** | **RESEARCH BASICS** | **ADVANCED RESEARCH** | **RESEARCH & BEYOND** |
| 9:15am – 10:30am | (A1)<br>The Frugal Researcher: How to do Successful Research on Little to No Budget<br><br>Heather Reisz | (A2)<br>Redefining Metrics for Major Gifts, Prospect Management, and Research<br><br>Rob Scott | (A3)<br>An Introduction to Forecasting Gift and Campaign Activity<br><br>Dave Robertson |
| 10:30am – 10:45am | Morning Break, Visit with Vendors | | |
| 10:45am – Noon | (B1)<br>The Basics of Researching Compensation<br><br>Nancy Gramolini & Amanda Yost Parker | (B2)<br>Auditing Your Research Shop<br><br>Helen Brown & Heather Reisz | (B3)<br>Creating Your Own Unique Predictive Models<br><br>Dave Robertson |
| 12:15pm – 1:15pm | Conference Welcome Luncheon, Presentation of Ann Castle Award | | |
| 1:15pm-2:15pm | Keynote Address: Charlie Collier "The Practices of Flourishing Families" | | |
| 2:20pm-3:00pm | Sponsor Presentations | | |
| 3:00pm-3:15pm | Afternoon Break, Visit with Vendors | | |
| 3:15pm – 4:30pm | (C1)<br>Picks and Shovels: Tools for Finding New Prospects<br><br>Hugh Bennett and Joel Rodgers | (C2)<br>Alternative Investment Firms<br><br>Rich Horne<br>& Michael Regan | (C3)<br>Project Management Concepts and Tools for Small Projects and Everyday Use<br><br>Cheryl Ann Cerny |

# Conference-At-A-Glance

**Tuesday – April 13, 2010**

| | | | |
|---|---|---|---|
| 8:00am – 3:00pm | Registration, Vendor Displays Open | | |
| 8:00am – 9:00am | Breakfast Buffet | | |
| 8:30am – 9:00am | Volunteer Orientation | | |
| **Sessions** | **Research Basics** | **Advanced Research** | **Research & Beyond** |
| 9:15am – 10:30am | (D1)<br>Panel Discussion: Art, Animals & Anatomy – Research Outside of Higher Education<br><br>Britt Beedenbender, Molly Carocci, Paul Dakin, David Eberly | (D2)<br>Pay No Attention to That Man Behind the Curtain: How Screening and Modeling Actually Work<br><br>Bill Tedesco | (D3)<br>The Missing Link: The Search for Transitional Giving Prospects<br><br>Lawrence Henze |
| 10:30am – 11:00am | Morning Break, Visit with Vendors | | |
| 11:00am – 12:15pm | (E1)<br>The New Math of Wealth Estimation<br><br>David Lawson | (E2)<br>'Til Death (or Divorce) Do Us Part: Survivorship, Settlement & Status<br><br>Jeffrey Ouellette | (E3)<br>Mythbusters<br><br>Mitchell Linker & David Sterling |
| 12:30pm – 2:15pm | Luncheon, Roundtable Discussions, Annual Business Meeting | | |
| 2:15pm – 2:30pm | Afternoon Break, Visit with Vendors | | |
| 2:30pm – 3:45pm | (F1)<br>Planned Giving Primer<br><br>Jill Meister & Sara Lawrence | (F2)<br>Maximizing Your Prospect Research Results<br><br>Lawrence Henze | (F3)<br>Emerging Trends in Major Gifts<br><br>Terry Burton |
| 3:45pm | Conference Ends | | |

# Keynote Session

### The Practices of Flourishing Families

Monday • 1:15 pm – 2:15 pm

The wealthy, like all of us, have challenges. In particular, they are anxious about the use of their money, with their wealth amplifying the anxiety that often comes with making financial and philanthropic decisions.

In his keynote address, Mr. Collier will discuss the challenges and opportunities that wealthy families face and describe how he helps them have breakthrough conversations that can strengthen those families and enhance the way they think about philanthropy.

Mr. Collier will discuss the decision making processes often used by these families and share his own first hand observations in working with them. He will describe the differences between multi-generational wealth and first generation wealth and how they approach philanthropy, providing a lens that can enhance our research efforts.

**Charles W. Collier** is the senior philanthropic adviser at Harvard University. He has worked with hundreds of individuals to shape their philanthropy, help them make tax-wise gift decisions, and advise them on family relationship issues surrounding wealth. He serves on the committee on the Emotional and Psychological Issues in Estate Planning of the American Bar Association. Mr. Collier holds a BA from Dartmouth College and an MTS from Harvard Divinity School. A second edition of his book, *Wealth in Families*, was published by Harvard University in 2006.

## Research Basics Track

### The Frugal Researcher: How to Do Successful Research on Little to No Budget (A1)

Monday • 9:00am – 10:15am

Shocking yet true, you *can* conduct prospect research without a subscription to LexisNexis. Many research shops do not have large budgets and can not afford expensive tools. Some development departments don't even have a research shop and are struggling to do research as part of many other projects so they have no research budget at all.

If you fit either of these categories, or even if you have a reasonable research budget but want to train your fundraisers to do some quick free research on their own, this is the program for you. The speaker will focus mainly on free Internet resources and ways to access fee-based resources for free at public sources such as libraries. Learn how to access insider stock holdings, real estate assessments, salaries, biographical information, company information, philanthropic giving and foundation information.

The speaker is a seasoned researcher who started her research career at an organization with $0 in their research budget. She has trained many nonprofit professionals to conduct prospect research with little to no money spent on resources.

**Heather Reisz** is the Director of Development Research at the Museum of Fine Arts, Boston. In addition to her work at the Museum of Fine Arts, Heather is the former Secretary of the NEDRA and has served as the Conference Volunteer Co-Chair for two APRA Conferences. Heather is a frequent speaker and has presented sessions at APRA, NEDRA, and AFP events on such subjects as research basics, free research tools, and prospecting without an alumni base. Previously, she ran the research shop at the Museum of Science in Boston and was a researcher at Northeastern University and the San Francisco Jazz Festival. She began her career in fundraising as a grant writer for the AIDS Memorial Quilt in San Francisco.

## The Basics of Researching Compensation (B1)

Monday · 10:30am – 11:45am

A prospect's compensation is a key factor in understanding their capacity to give. However, this information can be difficult to find. This session will provide an overview of compensation, including key principles and clues to help you estimate compensation. We will also highlight general and industry specific resources.

**Amanda Parker** is a Senior Prospect Research Associate at Tufts University in Medford, MA, where she has worked since 2006. Prior to Tufts, Amanda served as the Director of the Annual Fund and Membership at Mount Auburn Cemetery in Cambridge, MA. She is a graduate of Gordon College and Tufts University, where she earned a Master’s degree in American history.

**Nancy Gramolini** is a Senior Prospect Research Associate at Tufts University in Medford, MA. Nancy also coordinates Tufts Student Ambassador Program. Prior to her current position, she worked in the Office of Alumni Relations in the Field Services department at Tufts. She received her BS in Political Science from Salem State College.

## Picks and Shovels: Tools for Finding New Prospects (C1)

Monday · 3:15pm – 4:30pm

Finding wealthy prospects often requires finding data that doesn't already exist in your database. Sometimes there are embedded clues; often there are not.

In this session, we will discuss tools and processes for finding wealth information on individuals who should be upgraded to major prospect status. We will also discuss how one can discover previously unrecognized connections and/or overlapping interest areas for wealthy individuals who should be added to your prospect database for solicitation.

We will also discuss how these methods have successfully been employed in full time pro-active research to find over 2,000 new prospects for MIT (an increase in the prospect pool of over 25% in two years).

**Hugh Bennett** is assistant director for prospect identification in the office of development services at the Massachusetts Institute of Technology, where he has worked since 2005. He works actively with screening methodologies to identify new major gift prospects and to quantify wealth factors. Hugh's prior experience includes working as a volunteer fund raiser for three different secondary school's annual funds and capital campaigns and working for over twenty years in the investment banking industry. He worked on financings, mergers/ acquisitions, and business valuations and specialized in the technology, telecom, biotech, and plastic manufacturing industries. He worked for The First Boston Corporation (now part of Credit Suisse), Advest (now part of Merrill Lynch/BofA), McKinley Allsopp, and Gagan, Bennett & Co. Bennett has previously served on the boards of trustees/ directors of non-profits and corporations, both privately owned and publicly traded. He is a graduate of the University of North Carolina.

**Joel Rodgers** is a research analyst focused on prospect identification in the office of development services at the Massachusetts Institute of Technology, where he has worked since 2007. His work is dedicated to identifying new major gift prospects worldwide. Prior to joining the office of development services, Joel spent seven years with the MIT Annual Fund in the Alumni Association. He previously worked as a freelance graphic & digital designer and photographer for the music industry in New York State. Joel began his career as an Instructor at the Millersville University of Pennsylvania and currently serves as an active volunteer and fund raiser with his alma maters. A native of Lancaster County, PA, he holds degrees from both the Paul Smith's College of Arts & Sciences and the Millersville University of Pennsylvania.

## Arts, Animals & Anatomy – Research Outside Higher Ed (D1)

Tuesday • 9:15am - 10:30am

Join a panel of veteran development staff for a lively discussion about the particular challenges and unique rewards of working in prospect research outside of higher education. Among the topics panelists will discuss: strategies for prospect identification and data acquisition when you do not have built-in alumni; establishment of priorities when you have limited staff and budget; and, the perks of working for a cause or member-based organization.

**Britt Beedenbender** is Manager, Donor Relations and Research for the Office of Philanthropy at the International Fund for Animal Welfare, one of the leading animal welfare organizations in the world. She is responsible for the administration and management of prospect research, analysis and strategy, donor communications as it relates to proposals, reports and stewardship, and serves as the departmental liaison both at headquarters and with country directors.

Britt joined IFAW in 2008 and has served in her current position since 2009. She has over 11 years experience in fundraising, membership development and marketing. Prior to joining IFAW, she worked as a consultant for non-profits leading prospect research, marketing, and board development projects. Prior to that, she was Director of an historical museum for seven years. Britt is also a freelance arts and culture writer.

Britt is a member of NEDRA's Board of Directors. She holds a B.A. from Muhlenberg College and an M.A. from Rutgers University.

**Molly Carocci** is Manager of Prospect Research Operations at Beth Israel Deaconess Medical Center. She has worked in development research since 1985, with some time away for graduate school and owning a bookstore. Her experience includes research positions at Tufts University and the Whitehead Institute for Biomedical Research. Molly holds an MA in History and Historical Archaeology from UMass Boston, and a BA from Smith College.

**Paul Dakin** is Director of Development Systems and Research at the Isabella Stewart Gardner Museum. He is a past director and president of the New England Development Research Association (NEDRA) and has been in development research since 1995. Paul has worked for Harvard, MIT, Northeastern, Phillips Exeter Academy - and the Gardner Museum starting in August 2006. He has presented or facilitated sessions, workshops and forums at NEDRA, APRA, CASE and AFP over the years. In addition, from 2001 to 2009 Paul led the annual pledge drive for Arlington Street Church, Boston. Paul holds a BA in English and Psychology from the University of Rochester.

**David Eberly** has been in the fundraising profession for thirty years, dividing his time between higher education and health care. He served as Director of Research at Tufts University, Director of Development Services at the Harvard Medical School, and Director of Resource Development at Harvard's Kennedy School of Government. David returned to the research field in 2003 when he joined the Children's Hospital Trust Boston in 2003 where he is Senior Director, Prospect Development. In that capacity he oversees prospect research and analysis, prospect management, and HIPAA compliance. He has also served as a consultant to numerous educational institutions, hospitals, and membership organizations. David is a past president of NEDRA and the 2004 recipient of its Ann Castle Award. He is also a past director of APRA and chair of its Ethics Committee.

## The New Math of Wealth Estimation (E1)

Tuesday • 10:45am – 12:00pm

The economic upheaval has called into question many of the long-held rules which guided wealth estimation. Fresh approaches are needed to create a more accurate picture of a prospect's giving capacity, approaches that take into account more than the value of assets. This session will examine how to recalibrate your wealth estimates based on new realities and new normals.

**David Lawson** brings more than 25 years of experience as an entrepreneur focused on the information needs of the philanthropic community. He is currently the President of Screening & Analytics for DonorTrends, a company offering actionable intelligence for fundraisers. In 1997, David founded Prospect Information Network (P!N) to provide prospect identification services and software to fundraisers. P!N was acquired by Kintera in 2004 where he served as a Senior Vice President until 2008. In the 1980s he founded The Information Prospector, a company that provided in-depth profiles of philanthropists. In 1988 he introduced Securities Prospector, the first asset screening service for fundraisers. From 1993-97 David was a senior consultant with CDA/Investnet's WealthID division, where he created their Real Estate MATCH product and designed the first dedicated wealth screening software application, FACT$Viewer. Most recently David co-founded WorkingPhilanthropy.com, a company providing eLearning experiences for fundraising professionals. David is a frequent speaker at industry conferences and has authored numerous articles for publications such as The Chronicle of Philanthropy, The Nonprofit Times, CASE Currents, and APRA Connections. David is a contributing author to Major Donors: Finding Big Gifts in Your Database and Online and People to People Fundraising: Social Networking and Web 2.0 for Charities. David is a Member of APRA, AASP, a CASE Steuben Apple Award and an APRA Distinguished Service Award recipient, and is the Co-founder of The WOW Institute, a training organization for fundraisers and philanthropists. You can follow David on Twitter at @Lawson_David.

## A Planned Giving Primer (F1)

Tuesday • 2:45pm – 4:00pm

Do the acronyms PLIF, CGA, and CRUT all sound like a foreign language? Do you shy away from any talk about planned giving? Then this is the session for you. The session presenters will go over in plain language what the planned giving tools are and what they really mean, and how researchers can use this knowledge to identify and research prospects for planned giving.

**Sara Lawrence** is the Director of Major and Planned Gifts at The Williston Northampton School. Sara came to Williston after ten years at Mount Holyoke College, where she served as Senior Development Officer. Prior to Mount Holyoke, Sara was the Director of Planned Giving at Colby-Sawyer College. She has a B.A. from the University of Massachusetts at Dartmouth.

**Jill Meister** is the Director of Research at The Williston Northampton School. Jill began her development career in 1991 when she joined the development office at the School for International Training (SIT) in Southern Vermont. She moved onto Landmark College in 1994, also in Vermont, and prospected lead donors for the first campaign ever at Landmark. In 1996, she joined the research office at the University of Massachusetts Amherst, and was promoted to Manager of Research Services in 1997. In 2001, Jill moved to Rhode Island and became the Director of Development Research at Bryant College. Jill was the Assistant Director of Prospect Development at Brown University from 2003-2007.

Jill received a B.S. in Business Management from Franklin Pierce College, and a MBA from the University of Massachusetts Amherst. She is a former director of NEDRA, and is also a past president of the NEDRA Board of Directors.

# Advanced Research Track

## Redefining Metrics for Major Gifts, Prospect Management & Research (A2)

Monday · 9:15am – 10:30am

MIT is working through a project to redefine and restructure major giving metrics and prospect management procedures, with a goal of deployment for the fiscal year starting July 1, 2010. Research, analytics, and relationship management were critical to this project, which aims to increase transparency and accountability and enhance the freedom of frontline staff to manage themselves. Come hear a case study for how to assemble a team to define metrics, set goals, and mesh the need for measurement with the realities of major gifts fundraising.

**Robert D. Scott** is Executive Director of Development at the Massachusetts Institute of Technology, where he has responsibility for prospect management and research, leadership gifts, the Campaign for Students, planned giving, foundation relations, database and computing services, stewardship and donor relations, special events, and financial and campaign reporting. Before joining MIT in 2002, Rob held progressively responsible development positions in communications and information services in five years of service at New York University. He entered the advancement field as a development officer, serving Cornell University in a leadership and major giving capacity for seven years. Rob is president-elect of the Association of Professional Researchers for Advancement.

## A is for Audit (B2)

Monday · 10:45am – Noon

Since the goal is to meet institutional goals and provide the best service we can with the resources we have, it helps every once in awhile to take a look at our shop from a different angle to gain some perspective and grab some new ideas. If you have ever thought of a research shop audit, this session is for you. When should you do an audit?

What are the metrics you should benchmark against? How do you balance between what is “best” practice and what is reasonable? What are the benefits and disadvantages to doing it yourself vs. hiring a consultant? Join Heather Reisz and Helen Brown for insights and answers to these questions and more on auditing your research shop.

**Heather Reisz** is the Director of Development Research at the Museum of Fine Arts, Boston. In addition to her work at the Museum of Fine Arts, Heather is the former Secretary of the NEDRA and has served as the Conference Volunteer Co-Chair for two APRA Conferences. Heather is a frequent speaker and has presented sessions at APRA, NEDRA, and AFP events on such subjects as research basics, free research tools, and prospecting without an alumni base. Previously, she ran the research shop at the Museum of Science in Boston and was a researcher at Northeastern University and the San Francisco Jazz Festival. She began her career in fundraising as a grant writer for the AIDS Memorial Quilt in San Francisco.

**Helen Brown** is president of The Helen Brown Group LLC (HBG), a full-service prospect research consulting firm. She is also president of ShareTraining, a web-based training company specializing in fundraising research, and is managing partner of BFTConnect ContactReporter, providing telephone and web-based contact reporting solutions for nonprofit organizations. Prior to founding HBG in 2002, Helen directed advancement research departments at Northeastern University and the Harvard School of Public Health. Helen has been a development professional since 1987.

Helen is a board member of the Association of Professional Researchers for Advancement (APRA) and is past president of the New England Development Research Association (NEDRA). She is the 2006 recipient of the NEDRA Ann Castle Award for service to the prospect research community. Helen is Special Advisor on Fundraising to the board of the North American Foundation for the University of Manchester, and is a Fellow of the Royal Society for the Arts. She is also a non-executive director of Factary Ltd (UK). The Helen Brown Group is based in Watertown, Massachusetts.

## Alternative Investment Firms (C2)

Monday • 3:15pm – 4:30pm

This presentation will describe how alternative investment firms (i.e. hedge funds, LBO shops, VC, etc.) make their money in the market and how their principals and employees are compensated, based on surveys and our own ongoing market research. Using the economic downturn as a basis, we will briefly discuss how these firms have been faring of late in the markets, including discussions of secondary markets, illiquidity issues, instruments such as collateralized debt obligations and credit default swaps, TARP, university endowments, and how it all comes together.

**Rich Horne** has been working in university development since he returned to his studies at Yale in September 2004. He frequently gives development presentations at Yale in areas such as alternative investment management, securities analysis, non-stock assets and wealth indicators. Rich previously worked for the International Monetary Fund via a

Washington, DC law firm, and he served in the Marine Corps. He is a co-founder of the Yale Economic Review and has an abiding interest finance and economics.

**Michael Regan** joined Yale as a prospect research analyst in 2008. The topics he has presented on include capital markets and private equity. Prior to pursuing a career in development, he worked in education, both as an administrator and instructor. He has taught a variety of subjects at the secondary and college level in the US and Italy. Michael has a deep love for twentieth-century American poetry and once spent a year driving a yellow cab in New York City. He holds a BA in English from Tufts University.

## Pay No Attention to That Man Behind the Curtain: How Screening and Modeling Actually Work (D2)

Tuesday · 9:15am – 10:30am

This will be a technical discussion to demystify these tools and hopefully debunk some misinformation along the way. We will discuss how this work is actually done, whether it is completed in-house or external vendors. The review will include the itemization of databases currently available and used, an investigation of the search techniques and modeling methodologies. The session will summarize the pro and cons of each based on your objectives. This will be an interactive discussion, drawing on the experience of the attendees.

**Bill Tedesco,** CEO and Managing Partner, DonorSeries, has over 15 years of experience in the field of philanthropy and after working with over 800 nonprofit clients, Bill engineered a superior prospect research tool that surpassed the expectations of the majority, and established DonorSearch. Built on the strength and experiences of its affiliates, employees, and business partners, DonorSearch provides the best service possible to its clientele. Bill Tedesco's experience as a major gift officer and director of development has enabled him to bring a unique understanding to the progress of prospect research. While representing Target America, and later as executive vice president and CEO of WealthEngine, Bill earned a reputation for customer focus and consultative expertise that contributed to his clients' success.The commitment to furthering the advancement of non-profit development, is seen not only through DonorSearch, but also research, personally conducted by Bill. He proved that there is a correlation between data that is normally supplemented during screening processes and a prospect's philanthropic inclination. The results offered a fresh outlook on prospect research and development. The publication of his results and a how-to-guide for data mining implementation has earned him, a reputation as being an expert in the business of development. Bill is a frequent speaker at AFP, APRA, AHP and other professional organization events.

## ‘Til Death (or Divorce) Do Us Part: Survivorship, Settlement & Status (E2)

Tuesday · 10:45am – 12:00pm

Researchers are accustomed to scrutinizing the low hanging fruit of a Family Tree. But how does one weigh such entanglements as death, divorce or family discord? This session will help us better understand the finances and apportionment for inheritance or marriage dissolution as they benefit spouses and progeny.

**Jeffrey Ouellette** joined the Office of Prospect Research at Brown University in July 2003. He served previously as Volunteer Engagement Coordinator in the Office of International Advancement. Prior to joining Brown University, Jeffrey served as General Manager of Pacific Opera Victoria in British Columbia, and in the areas of development and artistic administration at New York City Opera, the New York Philharmonic and Florida Grand Opera. Jeffrey serves on the board of directors of NEDRA. He has served as a presenter for APRA, NEDRA and Share*Training* for The Helen Brown Group.

### Maximizing Your Prospect Research Results (F2)

Tuesday • 2:30pm – 3:45pm

Now that you have the results of your prospect screening project, how do you develop implementation plans that ensure that you utilize the data in the most cost effective and comprehensive manner possible. From annual giving to planned giving, through prospect management to major giving solicitations, prospect screening must be used to be effective. Join a seasoned expert with experience in working with hundreds of clients in the successful implementation of screening results.

Learning Outcomes:

1. How to prepare for a prospect screening project
2. How to ensure initial success with a step-by-step implementation project
3. How to maximize results and evaluate your success

**Lawrence Henze**, managing director of Target Analytics, a Blackbaud Company, has extensive experience in fundraising, market research and the application of predictive modeling services to the nonprofit marketplace. The founder of Core Data Services, which Blackbaud acquired in 2001, Lawrence has also served as vice president of predictive modeling services at USA Group Noel Levitz and president of The Philanthropic Division of Econometrics, Inc. Lawrence has 15 years of experience in development, raising more than $125 million, primarily for higher education institutions. He holds a BA in political science from Carroll College in Wisconsin, and an MA in public policy and administration and a law degree from the University of Wisconsin at Madison.

## Research & Beyond Track

### An Introduction to Forecasting Gift and Campaign Activity (A3)

Monday • 9:15am – 10:30am

For those interested in predictive modeling but confused with all the statistical jargon, this presentation will demonstrate how the beginner can start with a tool they already have on their desktop. By starting with MS Excel the user will understand the underlying concepts of forecasting gift activity. Participants will walk away with a solid understanding simple forecasting/predictive modeling. A working knowledge of MS Excel would be beneficial but not necessary.

**David Robertson** is current Director of Operations Research at Syracuse University. He has been at SU for 7+ years. His area of expertise is Data Analytics, utilizing methods such as Data Mining, Forecasting and Predictive Modeling. He has presented at APRA, CASE and NEDRA conferences throughout the US and Canada. David has a BS and MBA from Le Moyne College in Syracuse, NY where he teaches business and social science statistics as an adjunct professor. A doctoral student in the Social Science Ph.D. Program within the Maxwell School at Syracuse University; his research investigates both formal and informal charitable behavior; specially looking the philanthropic activities of disenfranchised or marginalized populations.

## Creating Your Own Unique Predictive Models (B3)

Monday • 10:45am – Noon

How can we use our current alumni and prospect data to predict giving behavior? In this session we will discuss the steps in creating your own predictive prospect model. We will build upon our understanding and formulate a multiple characteristic profiling tool leading to a true predictive model. Participants will come away with a better understanding of the predictive modeling process. A working knowledge of MS Excel would be beneficial but not necessary.

**See David Robertson's bio above**

## Project Management Concepts & Tools for Small Projects and Everyday Use (C3)

Monday • 3:15pm – 4:30pm

This session will provide a very basic introduction to project management and will provide the tools necessary to manage small-scale projects and everyday tasks. The idea is that you can take the same concepts and tools used for larger projects and scale them down to meet your needs.

**Cheryl Ann Cerny** has eleven years of experience in fundraising operations. She began her career at Bentley College in Waltham, MA, where she served first as Director of Prospect Research and then as Director of Advancement Services. She shifted into development technology when she joined MIT's Office of Resource Development as Director of Programming and Systems Support. She was recently recruited to Children's Hospital Trust as Associate Director of Information Management and Technology, overseeing business analytics, intranet services, and the administration of the fundraising and financial databases. Cheryl is a graduate of the University of Richmond and a candidate for an MBA in Information Technology from Bentley College. She is also pursuing a certificate in Project Management from WPI and plans to sit for the Project Management Institute's certification exam. When she is not rock climbing or hiking, she lives with her husband, two children, and three dogs in Bolton, Massachusetts.

## The Missing Link: The Search for Transitional Giving Prospects (D3)

Tuesday • 9:15am – 10:30am

Data analysis suggests that many organizations have difficulty in identifying transitional giving prospects: individuals emerging from the annual fund process who demonstrate potential to become mid-to-high level donor pyramid prospects in the years to come. History further suggests that we are often content to allow these prospects to self-identify through their first transitional gift, rather than using research to seek emerging prospects so that targeted development strategies – donor relations, personal cultivation, and cultivation events – can be implemented to encourage more prospects to reach this goal more quickly.

This session will:

1. Discuss the concept of transitional giving and its critical contribution to fundraising and campaign success
2. Describe available tools for identifying transitional giving prospects
3. Identify fundraising strategies that will encourage successful cultivation of transitional giving prospects

**Lawrence Henze**, managing director of Target Analytics, a Blackbaud Company, has extensive experience in fundraising, market research and the application of predictive modeling services to the nonprofit marketplace. The founder of Core Data Services, which Blackbaud acquired in 2001, Lawrence has also served as vice president of predictive modeling services at USA Group Noel Levitz and president of The Philanthropic Division of Econometrics, Inc. Lawrence has 15 years of experience in development, raising more than $125 million, primarily for higher education institutions. He holds a BA in political science from Carroll College in Wisconsin, and an MA in public policy and administration and a law degree from the University of Wisconsin at Madison.

## Mythbusters: A researcher and *researcher-turned gift officer* debate, discuss, dispel and at times "destroy" each other's perspectives on the role of research (E3)

Tuesday • 10:45am – Noon

Reprising their co-presenting role from several years ago, David M. Sterling, NEDRA Board Member and Director of Advancement Operations at Western New England

College and Mitchell Linker, Associate Director of Institutional Advancement at Kingswood-Oxford School will have a lively, spirited, and humorous discussion about stereotypes, misconceptions and truths regarding their respective positions. Attendees will learn tips on how to further ingratiate themselves in their respective offices and obtain a better understanding of how to relate to everyone from gift officers, to VP's/CEO's to donors.

**Mitchell Linker** began his development career in 2002 at the Ethel Walker School in Simsbury, CT where he served as Associate Director of Advancement Services and was mostly responsible for database management. From there, he pursued prospect research and honed his skills at Connecticut Children's Medical Center and Eastern Connecticut Health Center. Since 2007, Mitchell has worked at Kingswood-Oxford School in W. Hartford, CT where he made the transition from systems manager to major gifts officer (and - being a small office - everything in between). Additionally, he chairs Our Companions Domestic Animal Sanctuary's development committee, an organization he founded along with his wife in 2002. He is also a recovering rock musician.

**David M. Sterling** is the Director of Advancement Operations at Western New England College. He served as Director of Research at the University of South Florida from 1996 to 2003. Previously, he held management positions in the development offices of The George Washington University and Dartmouth College. David has presented at NEDRA, APRA and APRA-Florida conferences and workshops. He has edited and written for APRA Connections. He is a member of the Board of Director's of NEDRA. He was a founder member of APRA-Florida and served as the chapter's second President. He graduated from the University of Maine and the University of Rochester.

## Emerging Trends in Major Gifts (F3)

Tuesday • 2:30pm – 3:45pm

As competition for major gifts picks up, an understanding of trends in donor behavior becomes increasingly important. This session will examine significant emerging trends in major giving and their impact on annual, endowment, and capital campaigns. Specific topics will include: repeat gifts by namesake donors, the increase in transformational gifts to lower profile non-profits, shifts in frequency and dollar amount of major gifts, the impact of planned giving decisions on major gifts, and stewardship of major gifts. Content will include examples culled from the speaker's independent research on the topic.

**Terry Burton** is the founder of Dig In Research and has been involved in providing strategic information to nonprofit organizations since 1989. Starting in 2005 Terry has been conducting an international Survey of Major Gifts, Naming Opportunities and Named Gifts. The content is available online at http://diginresearch.biz. Recently he published his first collection of Top 25 Major Gifts by sector for American and Canadian nonprofits. A new publication is in the works, the Survey of Major Gifts & Philanthropy – 2009. In 2007 Terry was commissioned by John Wiley & Sons to write a book on his research called *Naming Rights: Legacy Gifts & Corporate Money*. Terry is the author of more than a dozen benchmark reports the peg the market value for naming opportunities at universities, hospitals, libraries and other nonprofits. In 1989 he was the co-founder of Rainforest Publications, where he helped develop the Directory of Corporate Giving in Canada and later PRO – Prospect Research Online for Canadian and American development staff. He has been a presenter at AFP, AHP and APRA conferences. An author of three books on stewardship and donor relations, Terry has been actively involved in pushing the envelope of thought leadership on prospect research for major gifts. A graduate of St. Clair College, he resides in Windsor, Ontario.

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NEDRA
New England Development Research Association

# REGISTRATION

You can also register on-line at www.NEDRA.org

Name: ____________________________________________

Organization: ____________________________________________

Address: ____________________________________________

City, State, Zip: ____________________________________________

Phone: (           ) ____________________ Email: ____________________________

____________________________________________

Credit Card Number & CVV Code    Expiration Date    Name on the Card

**Registration Fees** (please choose one):

Full Conference: Monday & Tuesday (breakfast and lunch included)

☐ $299 member    ☐ $399 nonmember

Monday (breakfast & lunch included)

☐ $199 member    ☐ $279 nonmember

Tuesday (breakfast & lunch included)

☐ $199 member    ☐ $279 nonmember

Please indicate any special dietary needs: ______________________________

☐ To Join NEDRA Now - $85.00 Membership through June 2011

**Session Selection** (choose one for each session time)

| **Monday, April 12** | **Research Basics** | **Advanced Research** | **Research & Beyond** |
|---|---|---|---|
| 9:15am – 10:30am | ☐ A1 | ☐ A2 | ☐ A3 |
| 10:45am – 12:00pm | ☐ B1 | ☐ B2 | ☐ B3 |
| 3:15pm – 4:30pm | ☐ C1 | ☐ C2 | ☐ C3 |
| **Tuesday, April 13** | | | |
| 9:15am – 10:30am | ☐ D1 | ☐ D2 | ☐ D3 |
| 11:00am – 12:15pm | ☐ E1 | ☐ E2 | ☐ E3 |
| 2:30pm – 3:45pm | ☐ F1 | ☐ F2 | ☐ F3 |

## Cancellation Policy

All cancellations must be received by the NEDRA office prior to April 1, 2010 by emailing: **office@nedra.org**. Cancellations made after that date will be charged the full conference fee. Contact the NEDRA office at 781-894-1457.

NEDRA mailing address:
411 Waverley Oaks Road, Suite 331B
Waltham MA 02542
Fax: 781-647-7222

## Hotel Information

Radisson Hotel Boston
200 Stuart Street, Boston Massachusetts
Reservations: 617-482-1800

Room Rate: $189 per night, plus tax
Room rate and room block held until March 21, 2010. Reservations after that date will be on a space available basis at the hotel's prevailing rate.