

Conference Program

Thursday, May 2, 2024

Beginner

How to Make Your News Digest More Streamlined and Actionable (and have fun while doing it)

Lauren Casas	Ryan Frank	Christina Priplata
Senior Research Analyst II	Assoc. Director of Prospect Research	Senior Corporate Analyst
Dana-Farber Cancer Institute	Dana-Farber Cancer Institute	Dana-Farber Cancer Institute

Push it to the Limit! Using Looker Studio as a BI Tool for resource challenged organizations

John Carasone	Nicholas Hersey
Director, Prospect Management & Analytics	Data Analyst
Williams College	Williams College

Intermediate

Measuring Success: Navigating a New Metrics Implementation

Dan Zarlenga	Michelle Bisbee
Director, Prospect Development	Director, Philanthropy Operations
American Cancer Society	American Cancer Society

Data Compliance: The Who, What, Where, When, Why, and How

Jessica Woodbridge	Michele Borucki
Senior Consultant	Director, Research and Consulting
Helen Brown Group	Helen Brown Group

Pipeline Growth with a DXO Program

Rich Horne	Deborah Vanecek
Director, Prospect Development and Research	Director of Annual Giving
Vassar College	Vassar College

Creating a DEI Data Guide for Prospect Development

April Genung	Brendan O'Hagen
Memorial Sloan Kettering Cancer Center	Memorial Sloan Kettering Cancer Center

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Partnering Across Advancement and Beyond: The Potential of Prospect Development

Amy Tesoro

Director of Prospect Development

College of the Holy Cross

Ashley Bannon

Associate Director of Prospect Development

College of the Holy Cross

How to Automate Rating All Your Finance Prospects by Job Title

Rachel Davies

Assistant Director, Prospect Development

Yale University

Beginner/Intermediate

Building an Intentional Prospect Research Program for Operational Efficiency

Kelley McGeehan

Principal Consultant

Conduit Philanthropic Intelligence Partner

Meghan Walsh

Director of Philanthropy Operations

Virtua Health

Insights to Planned Giving

Jill Meister

Director, Prospect Development

Yale University

Beginner/Intermediate/Advanced

Pipelines, Proposals, and Portfolios: The Art of Running Highly Effective Meetings

Ruthie Giles

Director of Prospect Research and Management

University of New Hampshire

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

Due Diligence: The What, Why, and How of Prospect Research and Risk Assessment

Krista Pierce

Tufts University

Friday, May 3, 2024

Beginner

Bootcamp Refresher/General Q&A for newbies

Lisa Foster	Tara-McMullen-King	Dave Owens
Director of Prospect Development	Director, Research and Consulting	Principal Analyst
Phillips Academy	Helen Brown Group	Boston Children's Hospital Trust

We Just Ran a Screening...Now What?

Ian Wells	Dr. Emily O'Brien
President	Vice President
Ian T. Wells and Associates	Ian T. Wells & Associates

The ABCs and 123s of DAFs

Melissa Bank Stepno
Managing Director
DAFinitive (The Helen Brown Group)

Intermediate

Prospect Management is STILL More Than Data

Nicole Fonsh
Director of Prospect Development
Harvard Law School

Asia 2024: What's Going On?

Shauna Meegan	Stephanie Snow
Managing Director	Assistant Director
Harvard University	Harvard University

Generative AI in Due Diligence: Case Study with Dartmouth College

Chris Green	Afam Omambala	Michael Foote
CEO	Account Executive	AVP Development Operations & Performance
Xapien	Xapien	Dartmouth College

Friday, May 3, 2024

Beginner/Intermediate

Due Diligence: As Layered as a Croissant

Sarah Price

Managing Director, Research Services

BWF

Working with Interns

Hope Boulanger

Associate Director Prospect Research & Pipeline Development

Brandeis University

Protecting Our Institutions: Due Diligence and Risk Management Trends and Insights

Josh Birkholz

CEO

BWF

Chris Green

CEO

Xapien

Beginner/Intermediate/Advanced

Equitable Hiring: What it Takes, Why it Matters, Who Cares?

Faith Montgomery

Vice President and Managing Director

Lindauer

Chandra Montgomery

Senior Consultant

Lindauer

2017: A Portfolio Review Odyssey

Jolene Crosby-Jones

Senior Director

Massachusetts General Hospital

Working with Data Science Interns

Hope Boulanger

Brandeis University

Pamela Poland

Brandeis University



NEDRA Annual Conference
May 2-3, 2024
Omni New Haven Hotel at Yale

Pre-Conference Workshops

Wednesday, May 1, 2024

Research Basics Bootcamp

Lisa Foster
Phillips Academy

Dave Owens
Boston Children's Hospital Trust

High Finance for Prospect Researchers: Private Equity and Hedge Funds

Valerie Anastasio
Boston Children's Hospital Trust

Minimum 2 years' experience in prospect research required.