





2014 Conference: Strategies for Success Schedule-At-A-Glance

Thursday – March 20, 2014 Revere Hotel, Boston MA			
8:00am – 4:00pm	Registration/Information Desk Open in Gallery (6 th Floor)		
8:00am – 4:00pm	Exhibitor Hall Open in Gallery		
8:00am – 9:00am	Breakfast Buffet in Gallery		
8:30am – 9:00am	Volunteer Orientation in Loft 2		
8:30am – 9:00am	Welcome & Networking for First-Time Attendees & New or Prospective Members in Studio 3		
9:15am-10:15am	Keynote Session: Dan Pallotta in Loft 1		
10:15am-10:30am	Book signing with Dan Pallotta in Loft 1 and Break (Refreshments in the Gallery) Note: Hotel check-out by 11:00 am		
Sessions	PROSPECT RESEARCH	PROSPECT MANAGEMENT AND ANALYTICS	TRENDS AND HOT TOPICS
	(A1)	(A2)	(A3)
10:45am – 12:00pm	I Got the Job! Now What? Establishing Yourself as a Key Member of the Team <i>Debbi Olley Murphy</i> The Morgan Library & Museum Room: Studio 3	The Secrets to a Success Driven Major Giving Team: KPIs, Metrics and Shared Goals <i>Tricia Ambler</i> WealthEngine Room: Loft 2	Career Panel: Defining Your Strategy for Success <i>Moderator: Dina Zelleke</i> Harvard University Room: Loft 1
12:00pm-1:00pm	Luncheon and Ann Castle Award in Loft 1		
Gold Sponsor Presentations 1:00pm-1:30pm	  Room: Studio 3 Room: Loft 2		
1:30pm-1:45pm	Break		
1:45pm-3:00pm	(B1) More Than 2&20: Gaining a Better Assessment of Investment Managers' Wealth <i>Christopher Haight</i> Cornell University Room: Loft 1	(B2) Portfolio Analysis: A Practical Guide to Evaluating Portfolio Value and Gift Officer Activity <i>Daniel Sacks</i> GG+A Room: Studio 3	(B3) Leveraging Impactful Synergies: The ROI of Prospect Research <i>Ian Wells</i> Boston College Room: Loft 2
3:00pm – 3:15pm	Break (Refreshments in the Gallery)		
3:15pm– 4:30pm	(C1) Securing Principal Gifts <i>Melissa Bank Stepno</i> Target Analytics, a Division of Blackbaud, Inc. & <i>Amy Begg</i> Harvard University Room: Studio 3	(C2) The Evolution of Prospect Management <i>Jill Meister</i> University of New Hampshire & <i>Brett Berger</i> University of New Hampshire Room: Loft 2	(C3) Panel: Prospect Screening- Managing for Success <i>Moderator: David Eberly</i> Independent Consultant Room: Loft 1
4:30pm – 6:00pm	Networking Reception Hosted by the NEDRA Membership Committee, open to all NEDRA members as well as conference attendees in the Upper Emerald Lounge at the Revere Hotel		
6:00pm – 9:00pm	Group Dinners with NEDRA Board Members, depart from Lobby (Sign-up sheets in Studio 1)		

2014 Conference: Strategies for Success Schedule-At-A-Glance

Friday – March 21, 2014 Revere Hotel, Boston MA			
8:00am – 2:15pm	Registration/Information Desk Open in Gallery (6 th Floor)		
8:00am – 2:15pm	Exhibitor Hall Open in Gallery		
8:00am – 9:00am	Breakfast Buffet in Gallery		
8:30am – 9:00am	Volunteer Orientation in Loft 2		
8:30am – 9:00am	Welcome & Networking for First-Time Attendees & New or Prospective Members in Studio 3		
Sessions	PROSPECT RESEARCH	PROSPECT MANAGEMENT AND ANALYTICS	TRENDS AND HOT TOPICS
	(D1)	(D2)	(D3)
9:15am – 10:30am	Panel: The Joys and Challenges of Working in a Small Research Shop <i>Moderator: Lisa Foster</i> Phillips Academy Room: Studio 3	Partnering on Prospects: The Role of Prospect Research in Strategy Development <i>Amy Gingle</i> Massachusetts General Hospital & <i>Sarah Guarino</i> Massachusetts General Hospital Room: Loft 1	The Year of the Mega Donor <i>Bond Lammey</i> Bentz Whaley Flessner Room: Loft 2
10:30am – 10:45am	Break (Refreshments in the Gallery) Note: Hotel check-out by 11:00 am		
	(E1)	(E2)	(E3)
10:45am – 12:00pm	The Science and Art of Rating <i>Sharon Das</i> Rutgers University Foundation Room: Loft 1	Where To Put Them? Affiliation Scoring to Build A Better Prospect Management Process <i>Dan Lowman</i> GG+A Room: Loft 2	Big Data, Big Gifts: Social Donor Management <i>Jesse Bardo</i> Evertrue Room: Studio 3
12:00pm – 1:30pm	Roundtable Discussions in Loft 1 Luncheon, Annual Business Meeting, and Sponsor Raffles in Loft 1 (Note: Roundtable Sign-up sheets can be found in Studio 1)		
Gold Sponsor Presentations 1:30pm – 2:00pm			
	Room: Loft 2		Room: Studio 3
2:00pm – 2:15pm	Break (Refreshments in the Gallery)		
	(F1)	(F2)	(F3)
2:15pm – 3:30pm	Intellectual Property: Rights, Reason, Research! <i>Jeffrey Ouellette</i> Consultant Room: Loft 1	Shifting Research Priorities in Campaign <i>Rob Scott</i> Massachusetts Institute of Technology Room: Loft 2	Wealth in America – A Fundraising Perspective <i>David Sterling</i> Western New England University Room: Studio 3
3:30pm	Conference Close		