### NEDRA 2017 Annual Conference
**April 27-28, 2017**

#### Schedule-at-a-Glance*

**Thursday – April 27, 2017**

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
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<tbody>
<tr>
<td>7:45 a.m. – 4:00 p.m.</td>
<td>Registration/Information Desk and Exhibitor Hall Open</td>
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<tr>
<td>7:45 a.m. – 8:45 a.m.</td>
<td>Breakfast Buffet</td>
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<tr>
<td>8:15 – 8:45 a.m.</td>
<td>Volunteer Orientation in Harbor’s Edge</td>
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<td>8:15 – 8:45 a.m.</td>
<td>Welcome &amp; Networking for First-Time Attendees &amp; Members at 250 Market (Lobby Bar)</td>
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<td>9:00 – 10:00 a.m.</td>
<td><strong>Keynote Session: Julissa Arce</strong> (including Q&amp;A)</td>
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<td>10:00 – 10:30 a.m.</td>
<td>Book Signing with Julissa Arce</td>
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| 10:35 – 11:50 a.m. | *(A1)* City Mouse, Country Mouse: Ownership, Value and Trends from Park Avenue to Waggoner Ranch  
Kelly Labrecque & Heather Willis  
Helen Brown Group  
Room: TBD |                |
| *(A2)* | Crowd-Based Prospecting: Parents Fund Meets Grateful Patients  
Bill Gottfredson & Sean Harris  
Boston Children’s Hospital Trust  
Room: TBD |                |
| *(A3)* | How Do Donors Love Us? Let Us Count the Ways: DIY Affinity Scores  
Molly Carocci, Meg Cushing & Donna Bursey  
Beth Israel Deaconess Medical Center  
Room: TBD |                |
| *(A4)* | International Fundraising: Cultural Intelligence  
Jon Garrow  
Albert Einstein College of Medicine  
Room: TBD |                |
| 12:00 – 1:00 p.m. | Luncheon and Welcome Remarks                                                               |                |
| 1:15 – 2:30 p.m. | *(B1)* Exhilarating Email  
Sarah Richards  
Otterbein University  
Room: TBD |                |
| *(B2)* | New Data = New Prospects  
Hugh Bennett  
MIT  
Room: TBD |                |
| *(B3)* | Don’t Just Excel, Pivot!: Data Driven Wealth Analysis from Annual Fund to Major Gift  
Amy Begg & Meghan Hakanson  
Harvard University  
Room: TBD |                |
| *(B4)* | Risk, Reputation & Research  
Lori Hood Lawson & David Lawson  
WorkingPhilanthropy.com, LLC/ NewSci, LLC  
Room: TBD |                |
| 2:40 – 3:10 p.m. | **Platinum & Gold Sponsor Presentations**  
TBD (Snacks located in vendor sessions) |                |
| 3:10 – 3:20 p.m. | Break                                                                                      |                |
| 3:30 – 4:45 p.m. | *(C1)* Help-My Electronic Screening is Dying!  
Armando Zumaya  
USS Hornet Museum  
Room: TBD |                |
| *(C2)* | The Next 30: Meeting the Needs of Nonprofits in Decades to Come (Panel)  
Moderator: Valerie Anastasio  
Boston Children’s Hospital Trust  
Featuring: Elizabeth Crabtree, James Cheng, Helen Brown & Dina Zelleke  
Room: TBD |                |
| *(C3)* | Where Do I Start? Incorporating Data Analysis into your Prospect Development Shop  
Tory Pedonti  
Tufts University  
Room: TBD |                |
| *(C4)* | My Year as a Man in a Women’s Prison: Understanding Socioeconomic Influences on Giving & Wealth  
Mark Vogel  
Excelsior College  
Room: TBD |                |
| 4:45 – 7:00 p.m. | **Networking Reception** at the Portsmouth Gaslight (64 Market St) sponsored by iWave; open to all NEDRA members as well as conference attendees |                |
| 7:00 – 9:00 p.m. | Group Dinners                                                                              |                |
| 8:30 p.m. | Karaoke - TBD                                                                              |                |

*Schedule is subject to change*  
**Arrangements for the appearance of Julissa Arce made through Greater Talent Network, Inc., New York, NY**
## Friday – April 28, 2017

<table>
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<td>8:00 a.m. – 3:15 p.m.</td>
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| 9:00–10:15 a.m. | (D1) Best Practices for Identifying Top Incoming Parent Prospects  
Rachel Pike-Norton  
University of Chicago  
Room: TBD       |
|                | (D2) Emotion or Engagement: a Study of Key Drivers for Donor Motivation  
Dan Lowman  
GG+A  
Room: TBD     |
|                | (D3) Developing an Interactive Reporting and Prospect Research Tool using R/Shiny  
Rich Majerus  
Colby College  
Room: TBD    |
|                | (D4) The Wealth of New England: an Overview  
Marianne Pelletier  
Staupell Analytics Group  
Room: TBD  |
| 10:15 a.m.–10:25 p.m. | Break                                                                    |
| 10:30–11:00 a.m. | Platinum & Gold Sponsor Presentations  
TBD (Snacks located in vendor sessions)          |
| 11:10 a.m.–12:25 p.m. | (E1) The Wealth Management Industry  
Valerie Anastasio  
Boston Children’s Hospital Trust  
Room: TBD   |
|                | (E2) Navigating the Changing Landscape of Philanthropy  
Elizabeth Roma & Rachel Dakarian  
Helen Brown Group  
Room: TBD      |
|                | (E3) The Digital Advancement Office: How Williams College Is Integrating Best-in-Class Solutions Across the Giving Pyramid  
Brent Grinna/TBD  
Evertrue/Williams College  
Room: TBD   |
|                | (E4) Research Renovations  
Victoria Sundgren, Carol Chidley & Cecily Channer-Schmid  
Brandeis University  
Room: TBD  |
| 12:30 p.m.-2:00 p.m. | Luncheon, Heather Reisz Memorial Scholarship, The Helen Brown Group-NEDRA Conference Scholarship, Sponsor Raffles and Annual Business Meeting, Ann Castle Award |
| 2:10–3:25 p.m.  | (F1) Research, Riches, and Ratings: Using Wealth Indicators to Determine Gift Capacity (Panel)  
Moderator: Melissa Bank Stepno  
Target Analytics   |
|                | (F2) Moving Beyond Us vs Them: Embracing Our Fundraiser Role  
Kristen Watson  
Tufts University  
Room: TBD      |
|                | (F3) Predictive Modeling: Using Existing Data to Segment Prospects and Improve Fundraising Results  
Doug Cogswell  
Advizor  
Room: TBD    |
|                | (F4) Why the Wealthy Are Wealthy: Understanding the Composition of Wealth  
David Sterling  
Western New England University  
Room: TBD  |
| 3:30-4:30 p.m. | Think Tanks  
Join these informal discussions about a variety of topics including:  
Prospect Management for Small Shops  
Prospect Management for Large Shops  
How to Leverage My Conference Experience for Small Shops  
How to Leverage My Conference Experience for Large Shops  
Fundraising Data Science  
Locations: TBD   |
| 4:30 p.m.      | Conference Close                                                        |

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