2019 NEDRA Annual Conference

#NEDRAcon2019

April 10-12, 2019

Schedule-at-a-Glance

Wednesday – April 10, 2019					
8:15 a.m. – 4:30 p.m.	Registration/Information Desk Open – Hotel Lobby				
8:15 a.m. – 9:00 a.m.	Breakfast – Eastland Grand Ballroom				
9:00am -12:00pm	**Research Basics Bootcamp Morning Session** *Amy Begg* (Harvard University); *Amber Countis* (Texas A&M University - Commerce); *Lisa Foster* (Phillips Academy) Room: Longfellow	**Beginner/Intermediate FDS Workshop Morning Session** *Lindsay Brown* (Dana-Farber Cancer Institute); *Jolene Crosby-Jones* (Massachusetts General Hospital) Room: Rines A			
12:00 p.m. – 1:00 p.m.	**Luncheon** Room: Eastland Grand Ballroom				
1:00 p.m. – 1:30 p.m.	**Networking Session** Room: Eastland Grand Ballroom				
1:30 p.m. – 4:30 p.m.	**Research Basics Bootcamp Afternoon Session** *Amy Begg* (Harvard University); *Amber Countis* (Texas A&M University - Commerce); *Lisa Foster* (Phillips Academy) Room: Longfellow	**Beginner/Intermediate FDS Workshop Afternoon Session** *Lindsay Brown* (Dana-Farber Cancer Institute); *Jolene Crosby-Jones* (Massachusetts General Hospital) Room: Rines A	**Guiding the Way: Concepts in Wealth Analysis and Gift Capacity Ratings** *Elizabeth Crabtree* (Brandeis University) Room: Winslow Homer	**Advanced FDS Workshop** *Rich Majerus* (Colby College) Room: Sara Orne	
4:30 p.m. – 5:00 p.m.	Break				
5:00 p.m. – 12:00 a.m.	**NEDRAcon2019 Opening Reception sponsored by DonorScape|GG+A** at Westin Portland Harborview Top of the East - Open to all NEDRA Members as well as conference attendees				

**Schedule is subject to change*

***For complete descriptions please refer to the NEDRA website: www.nedra.org/conference*

NEDRA An Apra Chapter

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Schedule-at-a-Glance

Thursday – April 11, 2019

7:45 a.m. – 4:15 p.m.	Registration/Information Desk Open – Hotel Lobby			
7:45 a.m. – 4:30 p.m.	Exhibitor Hall Open – Eastland Grand Ballroom			
7:45 a.m. – 8:45 a.m.	Breakfast Buffet – Eastland Grand Ballroom			
8:15 a.m. – 8:45 a.m.	Volunteer Orientation – Rines A			
8:15 a.m. – 8:45 a.m.	Welcome & Networking for New Members & First Time Conference Attendees – Hotel Lobby Area			
9:00 a.m. – 10:00 a.m.	**Keynote: A Look Ahead Panel Discussion and Q&A with Ann Castle Award Recipients Valerie Anastasio, Helen Brown & Elizabeth Crabtree** Room: Eastland Grand Ballroom			
10:00 a.m. – 10:15 a.m.	Break			
10:15 a.m. – 11:15 a.m.	(A1) **Best Practices for Understanding your Data** [B I] *William Tedesco* DonorSearch Room: Longfellow	(A2) **Diversity & Inclusion: The Way Forward through Self-Knowledge** [I A] *Gina Lepore* MACH4 Ventures Room: Sara Orne	(A3) **Tips & Tricks to Search SEC.gov Website for the Prospect Researcher** [B] *Roger Magnus* Roger Magnus Research Room: Winslow Homer	(A4) **Research and the Mystery of the Disappearing Donor** [B I A] *Jay Frost* Frost on Fundraising Room: Rines A
11:15 a.m. – 11:30 a.m.	Break			
11:30 a.m. – 12:15 p.m.	(Sponsor Presentation) iWave Room: Longfellow	(Sponsor Presentation) DS DonorScape | GG+A Grenzebach Glier and Associates Room: Winslow Homer	(Sponsor Presentation) DonorSearch Room: Rines A	(Sponsor Presentation) LexisNexis Nexis for Development Professionals Room: Sara Orne
12:15 p.m. – 1:55 p.m.	**Luncheon, Business Meeting, Awards, Dessert & Networking** Room: Eastland Grand Ballroom			
1:55 p.m. – 2:00 p.m.	Break			
2:00 p.m. – 3:00 p.m.	(B1) **The Zany Powers of Fundraising Data Science** [B I] *James Cheng* Memorial Sloan Kettering Room: Longfellow	(B2) **Do Your Homework!** [I] *Sandra Larkin* Stanford Medical Center Development Room: Sara Orne	(B3) **Introverts in an Extroverted World** [B] *Sarah Richards* The Dynamic Catholic Institute Room: Rines A	(B4) **GDPR – An Opportunity not an Obstacle** [I A] *Deborah Cunningham & Gareth Griffin* MIT Room: Winslow Homer
3:00 p.m. – 3:15 p.m.	Break			
3:15 p.m. – 4:15 p.m.	(C1) **Harried Researcher & The Goblet of Analytics** [B] *Ian T. Wells* Ian T. Wells & Associates Room: Winslow Homer	(C2) **Data Science: Demystifying Prospect Scoring to Fundraising Officers** [B I A] *Yulia Hill* Harvard Business School Room: Sara Orne	(C3) **Better Prospect Management with your BFF (Best Friend Fundraiser)** [I] *Emily Donohue & Cate McLaughlin* Simmons University Room: Longfellow	(C4) **Lyft that Rocket Lab to the Improbable (all things "unicorn")** [B] *Richard Horne & LaShawn Underdue* Beth Israel Deaconess Medical Center Room: Rines A
4:15 p.m. – 4:30 p.m.	Break			
4:30 p.m. – 6:00 p.m.	**Networking Reception sponsored by iWave** at Westin Portland Harborview in the Eastland Grand Ballroom - Open to all NEDRA Members as well as conference attendees			
6:00 p.m. – 8:00 p.m.	Group Dinners – various locations throughout Portland			
8:00 p.m. – 12:00 a.m.	**NEDRA After Dark sponsored by DonorSearch** at One Longfellow Square (181 State Street, Portland, ME) - Open to all NEDRA Members as well as conference attendees			

[B] Denotes Beginner Level Session *[I] Denotes Intermediate Level Session* *[A] Denotes Advanced Level Session*

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NEDRA
An Apra Chapter

2019 NEDRA Annual Conference

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Friday – April 12, 2019

6:30 a.m. – 7:15 a.m.	Walk to Remember (Suggested $10 donation to HRMS and group networking walk around downtown Portland)			
7:45 a.m. – 2:00 p.m.	Registration/Information Desk Open – Hotel Lobby			
7:45 a.m. – 2:35 a.m.	Exhibitor Hall Open – Eastland Grand Ballroom			
7:45 a.m. – 8:45 a.m.	Breakfast Buffet – Eastland Grand Ballroom			
8:15 a.m. – 8:45 a.m.	Volunteer Orientation – Rines A			
9:00 a.m. – 10:00 a.m.	(D1) **Bootcamp Refresher/General Research Overview Panel Discussion** [B] *Moderator: Mary Taddia* *Panelists: Amy Begg, Amber Countis & Lisa Foster* Room: Rines A	(D2) **Insights on Global Wealth & Philanthropy** [B] *Elizabeth Crabtree* Brandeis University Room: Longfellow	(D3) **Depth and Taxes: The Revenge!** [I] *Sarah "Sam" Johnson* University of Chicago Room: Sara Orne	(D4) **Solving the Puzzle: ADV Filings** [B I A] *Dave Owens* Boston Children's Hospital Trust Room: Winslow Homer
10:00 a.m. – 10:15 a.m.	Break			
10:15 a.m. – 11:00 a.m.	(Sponsor Presentation) WINDFALL Room: Rines A	(Sponsor Presentation) BENTZ WHALEY FLESSNER Room: Sara Orne	(Sponsor Presentation) WEALTHENGINE Room: Winslow Homer	(Sponsor Presentation) Blackbaud Target Analytics® Room: Longfellow
11:00 a.m. – 11:15 a.m.	Break			
11:15 a.m. – 12:15 p.m.	(E1) **Money Businesses: A Capitalist Primer** [B I] *Valerie Anastasio* Boston Children's Hospital Trust Room: Longfellow	(E2) **From Researcher to Investor: A Tutorial for Personal Growth and Capacity Ratings** [A] *Marianne Pelletier* Staupell Analytics Group Room: Winslow Homer	(E3) **The Relationship Game: Celebrating & Overcoming Communication Breakdowns** [I] *Lindsey Athanasiou,* Gravyty & *Trent Beattie,* iWave Room: Rines A	(E4) **Ch-ch-ch-Changes: Turn and Face the Strange** [I A] *Amy Gingle* Year Up Room: Sara Orne
12:15 p.m. – 1:30 p.m.	**Luncheon, Sponsor Raffle (1:00pm), Dessert & Networking** Room: Eastland Grand Ballroom			
1:30 p.m. – 1:35 p.m.	Break			
1:35 p.m. – 2:35 p.m.	(F1) **Segmenting for Success: Identifying Wealth & Philanthropy in the U.S.** [B I A] *Melissa Stepno* Blackbaud Target Analytics Room: Winslow Homer	(F2) **Using Data & Modern Analytics to Personalize your Fundraising Campaign** [I] *John Seaman* WealthEngine Room: Sara Orne	(F3) **Prospect Identification: Tips & Tricks** [I] *Joel Rodgers* MIT Room: Longfellow	(F4) **Engaging Millennials to Raise Big Money** [B I A] *Alyssa Wright* Alyssa F. Wright Consulting Room: Rines A
2:35 p.m.	Conference Concludes			

[B] Denotes Beginner Level Session *[I] Denotes Intermediate Level Session* *[A] Denotes Advanced Level Session*

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2019 Pre-Conference Workshops

Research Basics Bootcamp (Full Day)

Research Basics Bootcamp is a full day of instruction in the essentials of prospect research. This training is a must for those new to research or those who have had research added to their roles. No experience in the field is necessary to begin learning how to apply professional research methodologies. This full day of learning will cover a variety of topics including:

- The Strategic Role of Advancement Research
- Prospect Research Fundamentals
- The Ethical Researcher
- Advancement Research Sources and Methodology
- Assessing Gift Capacity
- Presenting Research

Date & Time: Wednesday, April 10, 2019 9:00am-4:30pm

Facilitators:

Amy Begg

Amy Begg is managing director of prospect management at Harvard University's Office of Alumni Affairs and Development. Prior to joining Harvard in 2003, Amy was the director of research at the YMCA of Greater New York in Manhattan. Amy is a trustee and secretary for the University System of New Hampshire, where she serves on the Executive Committee, the Finance Committee on Investments and the Governance Committee. She is a former board member for the New England Development Research Association and served as president from 2016-2018. Previously, Amy served as a board member for the Plymouth State Alumni Association, including a term as chair of the association.

Amber Countis

Amber W. Countis is the senior director of advancement services at Norwich University. In her role, she has responsibility for the Prospect Management and Research, Advancement Services, and Donor Relations and Stewardship teams. She joined the Norwich development office in October 2012. She was previously director of prospect development and research at Tufts University (2005 to 2012) during its successful $1.2 billion *Beyond Boundaries* campaign. Amber began her career in nonprofit development and prospect research at Loyola University (2003 to 2005) and Ochsner Clinic Foundation (2001 to 2003) in New Orleans, Louisiana. She is a graduate of Tulane University with a BA in political science and environmental studies and earned a certificate in management of nonprofit organizations and a master of public policy from Tufts University. She served two terms as president (2012 to 2014) of the New England Development Research Association (NEDRA) and was on the board from 2009 to 2015. She currently serves as a member of NEDRA's Heather Reisz Memorial Scholarship Committee, Social Media Committee, and the Nominating Committee. She was a member of Apra's curriculum planning committee for the 2018 Prospect Development conference in Pittsburgh and previously served as president and board member for the Central Vermont Humane Society (2014 to 2018).

Lisa Foster

Lisa Foster is the Director of Prospect Development at Phillips Academy in Andover, Massachusetts, where she is also an alumna, past parent and current parent. Lisa recently completed her six-year term as member of the Board of Directors of NEDRA. Over the course of her term, she served as the Treasurer of the Board of Directors, Conference Co-Chair for two NEDRA Conferences, Secretary of the Board, and Co-Chair of various committees. Lisa continues to serve on the NEDRA Programming Committee. Lisa recently stepped down as a Director of the Haverhill Foundation for Excellence in Education after serving as a director for over twenty years and has also served as a director of the Discovery Club Program.

Beginner/Intermediate Fundraising Data Science Workshop (Full Day)

Organizations of any size can benefit from applying the fundamentals of data science to understand their donors and improve their fundraising. In this hands-on workshop, participants will learn to use Microsoft Excel to manipulate and analyze data, build and evaluate predictive models, and communicate insights to gift officers and senior leadership. In this session, participants will learn to:

- Translate fundraising needs into data questions
- Manipulate and analyze a sample donor dataset
- Create and format a portfolio dashboard
- Build a major gift model using the Data Analysis Toolpak
- Use charts and pivot tables to visualize results

Date & Time: Wednesday, April 10, 2019 9:00am-4:30pm

Facilitators:

Lindsay Brown

Lindsay Brown is the Associate Director of Analytics at Dana-Farber Cancer Institute. She previously held roles in prospect development at Babson College, London School of Economics, and the Make-A-Wish Foundation of America. She earned a master's degree in business intelligence and analytics from the University of Westminster.

Jolene Crosby-Jones

Jolene Crosby-Jones is the Associate Director of Prospect Management and Research at Massachusetts General Hospital. Prior to joining MGH in 2017, she was a Senior Research Analyst at Dana-Farber Cancer Institute. Jolene also previously held roles at Teach For America and Facing History and Ourselves. She graduated from Wellesley College with a bachelor's degree in economics and psychology.

Advanced Fundraising Data Science Workshop (Half Day)

Learn to scale your impact using reproducible and automated workflows in R to create:

- Interactive dashboards and visualizations
- Dynamic predictive models
- Prescriptive email notifications

This workshop will introduce attendees to the process of constructing reproducible, scalable, and automated analyses in RStudio using projects, rmarkdown, and shiny. The workshop will then work on a progressive hands-on case study in which students will build an interactive exploratory data analysis, a predictive model, and a notification system that alerts individuals when a prospect surpasses a threshold specified by the model.

Date & Time: Wednesday, April 10, 2019 1:30pm-4:30pm

Facilitator:

Rich Majerus

Rich Majerus is the Assistant Vice President of Donor Relations and Advancement Strategy at Colby College. At Colby, he oversees the Advancement Operations, Prospect Research, and Donor Relations teams and develops new approaches to modeling and visualizing fundraising data. He regularly presents at national conferences, teaches R programming workshops, and blogs about data science at www.richmajerus.com. Additionally, Rich is an instructor on DataCamp and a data science mentor with San Francisco based start-up SpringBoard. Prior to his work at Colby, Rich was a founder of Third Coast Analytics (TCA), a data science consulting firm (TCA's IP was acquired by Capture Higher Ed in 2016). Rich earned his B.A. summa cum laude in sociology and anthropology at Carleton College and an M.A. in sociology from the University of Notre Dame, where he studied in the Center for Research on Educational Opportunity.

Guiding the Way: Concepts in Wealth Analysis and Gift Capacity Ratings (Half Day)

Have you heard of the Crabtree Method? Have you wondered what it is or how it's changed over the years? Now is your chance!

This popular program on capacity ratings first debuted at NEDRA in 2004 and has become one of the profession's leading and definitive systems on gift capacity ratings. Join this half-day program by the creator of the method to learn fundamental and advanced techniques for understanding and evaluating wealth indicators to estimate the potential for philanthropic giving.

Topics covered will include:

- How to research wealth indicators and apply financial analysis strategies
- How to use the Crabtree Method and customize your gift capacity rating system
- How to provide evidence-based research analysis and strategic commentary
- How to present financial and rating information using strong report designs and technical writing principles.

This program will conclude with interactive case studies and group exercises focusing on how financial analysis and ratings impact donor cultivation and solicitation strategies.

Date & Time: Wednesday, April 10, 2019 1:30pm-4:30pm

Facilitator:
Elizabeth Crabtree

Elizabeth Crabtree is the Vice President for Administration and Operations for Institutional Advancement at Brandeis University where she serves on the senior leadership team as a key advisor to and partner with the Senior Vice President and is effectively the CFO/COO for the Division. Her primary responsibilities include overseeing the Division's administrative, financial and technology systems, talent management, prospect development, business intelligence, reporting and operational support services, as well playing a leadership role in the planning and management of major fundraising campaigns.

Elizabeth is also the Founder and President of Crabtree Lane LLC, a nonprofit management and consultancy practice. She has over 20 years of senior management experience in fundraising and has been a successful nonprofit consultant since 2007. Recognized as a visionary leader and change agent with demonstrated team-building and problem-solving skills, Elizabeth's leadership and guidance has helped organizations raise billions of dollars, increase donor participation and volunteer engagement levels, identify new prospects, and develop best-in-class systems and practices for nonprofit administration and fundraising operations.

Before starting her own consulting firm, Elizabeth was Assistant Vice President for Strategy and Resource Development at Brown University where she served for 13 years as a member of the senior leadership team and managed a 50-member professional staff. Prior to her work in the nonprofit sector, Elizabeth was a marketing director and senior analyst in the consumer products industry and was a talent manager/music agent in her early professional career.

Thursday, April 11, 2019

(A1) Best Practices for Understanding your Data (B/I)

10:15 a.m. – 11:15 a.m.

The nature of prospect research is changing. With technological advances such as artificial intelligence and digital centralization, the prospect research industry is facing new challenges and opportunities.

After conducting a groundbreaking study of $5 billion in given from two million donors to 400 organizations, DonorSearch was able to identify the six factors that best predict future giving. Surprisingly, wealth by itself was not one of the top indicators of future philanthropy. In 2017, DonorSearch expanded on this research, analyzing an additional $685 million giving—excluding outliers—from 1 million individuals to 400 more organizations.

This presentation will highlight how to identify leadership giving prospects using easily obtainable data, and it will highlight the latest findings in major giving activity. Attendees will learn the six factors that best predict future philanthropy, and they will also understand how new technology plays into their research and how to identify the best major giving prospects using analytics and big data.

Presenter:

William Tedesco, DonorSearch

Bill Tedesco is a well-known entrepreneur in the field of philanthropy with over 15 years of experience at the helm of companies serving the fundraising profession. He has personally conducted original research to identify markers of philanthropy and has developed modelling and analytical products that use those markers to accurately predict future giving. Since 2007, he's been the founder, CEO and Managing Partner of DonorSearch. DonorSearch is one of a small group of companies providing wealth screening, philanthropic reviews, and online prospect research tools exclusively to the nonprofit market. Prior to DonorSearch, he was CEO of WealthEngine and Executive Vice President of Target America, which was later purchased by Blackbaud and folded into Blackbaud's Target Analytics division. Mr. Tedesco was also a principal of BFTConnect/ContactReporter. He also has four years of fundraising experience as Director of Development for the Fund for Educational Excellence, Baltimore's public education fund, and as a major gift officer at the University Of Maryland School Of Medicine. He earned B.S. and M.P.A. degrees from Pennsylvania State University and is a frequent speaker at conferences around the United States.

(A2) Diversity & Inclusion: The Way Forward through Self-Knowledge (I/A)

10:15 a.m. – 11:15 a.m.

This session is an hour long bidirectional conversation which allows the participant to explore cultural, gender and personal difference to allow for greater understanding of how diversity in the workplace leads to better outcomes.

Presenter:

Gina Lepore, MACH4 Ventures

Dr. Gina Lepore is an experienced, insightful career and business coach and consultant. As a former senior executive guiding organizations from small enterprises to multi-billion dollar organizations, she offers the powerful combination of successful business leadership experience coupled with intuition, empathy, and well-honed communication abilities. Gina works primarily with executives, professionals and management teams to help drive and deliver business outcomes. For more than 30 years, Gina has provided operational and financial leadership for companies across a number of industries including financial services, education and technology firms.

(A3) Tips & Tricks to Search SEC.gov Website for the Prospect Researcher (B)

10:15 a.m. – 11:15 a.m.

The SEC.gov website is not set up well to do prospect research. For example, there are no fields in any of the search interfaces to search on director or executive names. Moreover, the site can be confusing to search because it relies on “conceptual searching”, has multiple search interfaces, and contains other special types of information that can be searched. In fact, some organizations rely on or supplement this site with online databases that contain the SEC information because they make it easier to find. In this workshop, we will explore innovative tips and tricks to make this free information-rich but search-complex -site to work for you. We will explore the different interfaces and the different types of individual information available (compensation, biographical, SEC Actions, Investment Advisors, etc.) and how best to navigate them. Please note that this workshop does not delve into the intricacies of determining executive and director compensation.

Presenter:

Roger Magnus, Roger Magnus Research

Roger Magnus is the Owner of Roger Magnus Research located in Amherst, MA. His firm specializes in helping nonprofits find information about potential donors and foundations. He has over 20 years of experience as a librarian and researcher.

(A4) Research and the Mystery of the Disappearing Donor (B/I/A)

10:15 a.m. – 11:15 a.m.

Over the last decade, individual giving has been on a steady rise alongside a booming stock market. At the same time, the percentage of Americans giving has been dropping dramatically. Fewer donors are giving and those few are giving more money than ever before. Research has been at the center of the effort to find and know those few and successfully propel fundraising to historic highs. But have we also inadvertently contributed to the collapse of donor engagement? And what will happen when the market goes into bear territory? What will we do to ensure that we are moving our institutions into new philanthropic terrain? Join fundraising and research veteran Jay Frost in exploring the most important questions in 21st Century philanthropy and our role in addressing them on the road ahead.

Presenter:

Jay Frost, Frost on Fundraising

Over his thirty years as a grantmaker, fundraiser, consultant, and serial entrepreneur, Jay Frost has worked with thousands of organizations to identify and pursue billions in fundraising opportunities around the world. Jay has been recognized as one of America's Top 10 Fundraising Experts by Philanthropy Media, one of the Top Eight Fundraising Influencers by Elevation Media, and one of the Top Thirteen Excellent Fundraising Consultants by Double the Donation. Jay is a consultant to nonprofits and an advisor to companies serving the philanthropic marketplace. He currently serves as Senior Advisor and Flash Class Series Host to DonorSearch, the leading provider of research services to the nonprofit sector. He is also a Senior Consultant at Brian Lacy and Associates, Senior Consultant at Visionary, and Senior Consultant at Jerold Panas, Linzy & Partners. A popular speaker and trainer, Jay has addressed hundreds of meetings in the US, UK, Canada, Asia, and the Middle East and is proud to return to the NEDRA stage.

(B1) The Zany Powers of Fundraising Data Science: How Automated Estimation, Predictive Modeling, and Unsupervised Learning are Integrated into the Prospect Development Process (B/I)

2:00 p.m. – 3:00 p.m.

As information become more voluminous, velocious, veracious, varied, and valuable, the worlds of research and data science within fundraising have evolved as "wonder twins" to support the prospect development pipeline. While we as development professionals have come to rely on and collaborate with researchers, however, we have less of an understanding of the various forms data science have taken within fundraising. Thus, using Memorial Sloan Kettering Cancer Center's Development Analytics group as a case study, this session will explore how data science is employed in the automated estimation of capacity for roughly 9 million constituents in the database for identification purposes. The session will also go over the calculation of giving likelihood via predictive modeling to aid in prospect identification and verification by researchers. Finally, the concept of unsupervised learning for portfolio optimization will be introduced.

Presenter:

James Cheng, Memorial Sloan Kettering

James Cheng currently holds the position of Development Data Analytics Specialist at Memorial Sloan Kettering Cancer Center (MSKCC). Previously, he served as Associate Director of Analytics within Development Research at Dana-Farber Cancer Institute (DFCI). Like many folks in the Third Sector, James' background was not directly related to philanthropy. Besides fundraising data science, he's made intellectual and professional forays into cell and development biology, secondary science education, as well as educational research, measurement, and evaluation. While finishing up a doctorate degree in applied statistics in education at Boston College, James' interest in development was piqued when he took on the role of Prospect Data Mining & Modeling Specialist at MIT from 2006 to 2008. After spending time in the corporate world as a healthcare market researcher, James returned to the Light, working at DFCI from 2011 to 2015 before join MSKCC Development Analytics and Process in September 2015.

(B2) Do Your Homework! (I)

2:00 p.m. – 3:00 p.m.

Working from a home office is a growing trend. Is it right for you? Learn about the advantages and disadvantages, as well as the technology and methods that make working at home a viable option, whether you're a remote employee or a freelance consultant, spending the occasional day at your home office or being a full-time remote employee.

Presenter:

Sandra Larkin, Stanford Medical Center Development

Sandra Larkin began her prospect research career at MIT and Harvard, then became a self-employed research consultant under the name Larkin Research Associates, providing services to nonprofits and consultants across the U.S. and in Europe. She has also worked in marketing and communications, and is currently employed by Stanford University's Medical Center Development Office as a remote employee. A past NEDRA board member and 2005 Ann Castle Award winner, Sandra has spent more of her career working from home than commuting to an office.

(B3) Introverts in an Extroverted World (B)

2:00 p.m. – 3:00 p.m.

What is an introvert? Are you or someone you know introverted? Discover ways to become a better public speaker and presenter. Find ways to better network. Learn tips to build better relationships with co-workers.

Presenter:

Sarah Richards, The Dynamic Catholic Institute

Sarah Richards is the coordinator of prospect research for The Dynamic Catholic Institute. She has previously worked in prospect research for higher education at Ave Maria University in Naples, Fla., and Otterbein University in

Westerville, Ohio. She is a board member of OPRN, a member of AFP, and has spoken at NEDRA, APRA international and presented webinars with Donor Search.

(B4) GDPR – An Opportunity not an Obstacle (I/A)

2:00 p.m. – 3:00 p.m.

There have been many discussions regarding the implications of GDPR for research, many of them not positive. MIT has spent the last year working closely with our General Counsel's office to un-package this 209 page regulation. In reality, it presents the Advancement profession with a unique opportunity to reflect on how we collect, manage, and disseminate information. This session will provide an overview of what MIT has done to date to address these guidelines, next steps, and a discussion on best data practices.

Presenters:

Deborah Cunningham, MIT

Deb Cunningham is currently the Executive Director, Strategic Information Management at MIT Resource Development where she provides strategic oversight to IT Systems and Prospect Development, building on the unique synergies between these two departments. Prior to this position, Deb served as Vice President of Administration, CAO at the University of Connecticut Foundation, where she consolidated and expanded Advancement Services while also overseeing Annual Giving, Human Resources and Facilities Management. Prior to UConn, Deb consulted for SunGard Higher Education (Ellucian), delivering Advancement project leadership and management services to many outstanding institutions, among them Harvard, Dartmouth, Columbia, University of Colorado, the California State System and Notre Dame.

Gareth Griffin, MIT

Gareth Griffin is the Senior Director of Prospect Development at MIT, where he leads the institute's prospect research, prospect management, and prospect data integrity teams. Prior to heading back east, he was the Senior Director of Prospect Management & Analytics at Santa Clara University and Assistant Director of Prospect

Management at UC Berkeley. Before heading west to California, he served as a Prospect Research Analyst at Clemson University.

(C1) Harried Researcher & The Goblet of Analytics (B)

3:15 p.m. – 4:15 p.m.

Are you a researcher who gets overwhelmed by predictive models? Does speaking with data analysts make you feel like a muggle talking with wizards? This introductory session will help to demystify the seemingly arcane world of fundraising data science. We will explore why organizations should use data analytics, address what can be done to prepare organizations to implement predictive models, and discuss how to leverage basic data science to benefit prospect development processes. Join us to learn how you can invoke and make manifest the untapped magic of your constituent base.

Presenter:

Ian T. Wells, Ian T. Wells & Associates

Ian T. Wells is the President of Ian T. Wells & Associates, a privately-held company providing research and advisory services to nonprofit organizations in the United States. He is a former Vice President of NEDRA, where he served on the Board of Directors from 2012 to 2018. Prior to founding his company, he was Director of Prospect Development at Boston College, where he oversaw efforts to prioritize high-potential prospects for the closing years of the school's $1.5 billion Light the World campaign. Mr. Wells previously served as Associate Director of Development, Prospect Research at Massachusetts General Hospital, where he spearheaded a prospect identification initiative and facilitated the creation of campaign development plans to benefit the hospital's $1.5 billion Campaign for the Third Century of MGH Medicine. He began his career at Boston Children's Hospital, where he accepted positions of increasing authority as he learned the fundamentals of prospect development to support the hospital's Cause for Wonder campaign. Today, Mr. Wells provides articles and lectures on best practices for organizations such as the Association of Fundraising Professionals, the Association of Professional Researchers for Advancement, the Planned Giving Group of New England, and NEDRA. He resides with his family in Beverly, Massachusetts.

(C2) Data Science: Demystifying Prospect Scoring to Fundraising Officers (B/I/A)

3:15 p.m. – 4:15 p.m.

Prospect scoring oftentimes is presented as a black box algorithm that development teams have hard time relating to or decoding. In this session I will present a few stakeholder engagement tactics that help bring the development team alongside on the Data Science discovery journey, enabling collaboration, trust and mutual benefit.

Presenter:

Yulia Hill, Harvard Business School

Yulia Hill is the Associate Director of Analytics at Harvard Business School, where she is spearheading data-driven decision making in prospect management. Prior to HBS, Yulia was in advanced analytical consulting in the US and UK.

(C3) Better Prospect Management with your BFF (Best Friend Fundraiser) (I)

3:15 p.m. – 4:15 p.m.

Prospect and portfolio management works best when you partner with a member of the fundraising team. Frontline fundraisers can offer insight and expertise that allow you to develop more meaningful metrics, actionable analysis and reporting, and comprehensive cultivation strategies that take advantage of each partner's strengths. In this session we'll share how the Assistant Vice President of Capital Gifts and the Director of Prospect Development have partnered to create prospect management procedures that improved productivity and morale. You too can have a BFF!

Presenters:

Emily Donohue, Simmons University

Emily Donohue is the Director of Prospect Development at Simmons University. She previously served as Director of Development Research and Prospect Management at Emmanuel University and started her career as a Development Officer for Research at Combined Jewish Philanthropies. Emily has her B.A. in History from Kenyon College and her M.S. in Library Science from Simmons University.

Cate McLaughlin, Simmons University

Cate McLaughlin is Assistant Vice President of Capital Gifts at Simmons University. Prior to joining Simmons, she was with Tufts University School of Dental Medicine where she held several positions including Director of Development and Director of the Dental Fund. Cate began her career in philanthropy at the United Way of Massachusetts Bay and Merrimack Valley where she served as Program Director, Leadership and Planned Giving. She received her B.A. from Regis College, her MBA from Suffolk University, and an Exec MA in Philanthropic Studies from Indiana University-Purdue University Indianapolis.

(C4) Lyft that Rocket Lab to the Improbable (all things "unicorn") (B)

3:15 p.m. – 4:15 p.m.

Lyft, Rocket Lab, and Improbable are three of more than 260 private companies valued at $1 billion plus, an ensemble known as unicorns. We will explore how unicorns are similar and different, investigate industry signals of activity and momentum, and examine wealth generation patterns.

Presenters:

Richard Horne, Beth Israel Deaconess Medical Center

Richard Horne leads a team at Beth Israel Deaconess Medical Center, a Harvard Medical School teaching hospital which is merging to become the second-largest health system in Massachusetts, to promote fundraising research insights and prospect management support for a rapidly-growing development office. He previously worked in development/advancement at Yale, where he studied Ethics, Politics, and Economics. Richard is a co-founder of the Yale Economic Review and a member of NEDRA's Board of Directors for which he chairs the Diversity & Inclusion Committee and co-chairs the Sponsorship Committee.

LaShawn Underdue, Beth Israel Deaconess Medical Center

LaShawn Underdue joined Beth Israel Deaconess Medical Center in August 2017 as its Associate Director for Prospect Management after seven years culminating in a senior research role on the distinguished Boston Children's Hospital's Prospect Research team. While at BCH, LaShawn earned a LEAN Six Sigma yellow belt and helped her team build many good things as part of their contributions toward a $1.3 billion capital campaign result (to be). A graduate of Washington, DC's Howard University and lover of good books, LaShawn has helped media companies and Boston's (and New England's) beloved WGBH meet sales and fundraising goals since joining our field in 2001.

Friday, April 12, 2019

(D1) Bootcamp Refresher/General Research Overview Panel Discussion (B)

9:00 a.m. – 10:00 a.m.

This panel discussion is for individuals who recently attended Bootcamp and would like a refresher on a specific research topic, or for conference attendees who would like to discuss a specific research topics in more depth. The session will be comprised of four seasoned Bootcamp presenters and will be in a Q&A format.

Moderator: Mary Taddia, Helen Brown Group

Mary Taddia has been a prospect researcher for over 10 years. She is a Research Associate at The Helen Brown Group and previously worked at several nonprofit organizations in Minnesota, Maine and Massachusetts. She is a proud member of NEDRA and serves on the Conference Committee and the Scholarship Committee. Mary and her family live in Portland, ME.

Panelists:

Amy Begg, Harvard University

Amy Begg is managing director of prospect management at Harvard University's Office of Alumni Affairs and Development. Prior to joining Harvard in 2003, Amy was the director of research at the YMCA of Greater New York in Manhattan. Amy is a trustee and secretary for the University System of New Hampshire, where she serves on the Executive Committee, the Finance Committee on Investments and the Governance Committee. She is a former board member for the New England Development Research Association and served as president from 2016-2018.

Previously, Amy served as a board member for the Plymouth State Alumni Association, including a term as chair of the association.

Amber Countis, Texas A&M University - Commerce

Since December 2018, Amber W. Countis has served as the director of donor relations for Texas A&M University-Commerce where she oversees Advancement Services including prospect management and research, gift processing, reporting and analytics, and donor relations and stewardship. She previously served as senior director of advancement services at Norwich University in central Vermont. She joined the Norwich development office in October 2012. She was previously director of prospect development and research at Tufts University (2005 to 2012) during its successful $1.2 billion *Beyond Boundaries* campaign. Amber began her career in nonprofit development and prospect research at Loyola University (2003 to 2005) and Ochsner Clinic Foundation (2001 to 2003) in New Orleans, Louisiana. She is a graduate of Tulane University with a BA in political science and environmental studies and earned a certificate in management of nonprofit organizations and a master of public policy from Tufts University. She served two terms as president (2012 to 2014) of the New England Development Research Association (NEDRA) and was on the board from 2009 to 2015. She currently serves as a member of NEDRA's Heather Reisz Memorial Scholarship Committee and has previously been involved with NEDRA's Social Media and Nominating Committees. She has served as a member of Apra's curriculum planning committee for the 2019 Prospect Development conference in Phoenix and the 2018 Prospect Development conference in Pittsburgh and previously served as president and board member for the Central Vermont Humane Society (2014 to 2018).

Lisa Foster, Phillips Academy

Lisa Foster is the Director of Prospect Development at Phillips Academy in Andover, Massachusetts, where she is also an alumna, past parent and current parent. Lisa recently completed her six-year term as member of the Board of Directors of NEDRA. Over the course of her term, she served as the Treasurer of the Board of Directors, Conference Co-Chair for two NEDRA Conferences, Secretary of the Board, and Co-Chair of various committees. Lisa continues to serve on the NEDRA Programming Committee.   Lisa recently stepped down as a Director of the Haverhill Foundation for Excellence in Education after serving as a director for over twenty years and has also served as a director of the Discovery Club Program.

(D2) Insights on Global Wealth & Philanthropy (B)

9:00 a.m. – 10:00 a.m.

Gain enlightening perspectives and insights on how the growth in global wealth and affluence drive philanthropy. Learn how to access, understand and apply information from published wealth reports and academic research to your work in fundraising and prospect development.

Presenter:

Elizabeth Crabtree, Brandeis University

Elizabeth Crabtree is the Vice President for Administration and Operations for Institutional Advancement at Brandeis University where she serves on the senior leadership team as a key advisor to and partner with the Senior Vice President and is effectively the CFO/COO for the Division. Her primary responsibilities include overseeing the Division's administrative, financial and technology systems, talent management, prospect development, business intelligence, reporting and operational support services, as well playing a leadership role in the planning and management of major fundraising campaigns. Elizabeth is also the Founder and President of Crabtree Lane LLC, a nonprofit management and consultancy practice. She has over 20 years of senior management experience in fundraising and has been a successful nonprofit consultant since 2007. Recognized as a visionary leader and change agent with demonstrated team-building and problem-solving skills, Elizabeth's leadership and guidance has helped organizations raise billions of dollars, increase donor participation and volunteer engagement levels, identify new prospects, and develop best-in-class systems and practices for nonprofit administration and fundraising operations. Before starting her own consulting firm, Elizabeth was Assistant Vice President for Strategy and Resource Development at Brown University where she served for 13 years as a member of the senior leadership team and managed a 50-member professional staff. Prior to her work in the nonprofit sector, Elizabeth was a marketing director and senior analyst in the consumer products industry and was a talent manager/music agent in her early professional career.

(D3) Depth and Taxes II: The Revenge! (I)

9:00 a.m. – 10:00 a.m.

Last year's discussion of the 2017 "Tax Cuts and Jobs Act" ended on a cliffhanger. Would the new tax law materially affect giving in 2018? Had it already impacted Donor-Advised Funds, and would the trend continue? What were we about to learn about philanthropic behavior from a drastic shift in individual deductibles? We'll try to answer these questions and maybe address some new ones in this death-defying sequel to 2018's presentation "Depth and Taxes."

Presenter:

Sarah "Sam" Johnson, University of Chicago

Sarah "Sam" Johnson is a Senior Research Analyst at the University of Chicago, where she previously served as Research Analyst and Project Manager. She holds two degrees in theater, which have obviously been a huge help in her study of tax law.

(D4) Solving the Puzzle: ADV Filings (B/I/A)

9:00 a.m. – 10:00 a.m.

When researching a prospect or donor that is managing director/partner or senior executive at an investment firm, you confront the following questions: How large of an investment firm is their employer? Do they have an ownership stake in the firm, and, if so, how significant is their direct stake in the company? What is their client base? What type of investment advisory firm are they? Are they a hedge fund? What is their fee structure for compensating the firm's owners/partners?

The session will review how to find essential information mentioned above on an investment firm that files an ADV form, that are available to search and review for free through an SEC-related website.

Presenter:

Dave Owens, Boston Children's Hospital Trust

Dave Owens is a Senior Prospect Researcher at the Boston Children's Hospital Trust, where he also began his development career as a Prospect Researcher in 2001. Prior to his tenure at Boston Children's Hospital, he worked in clinical administration at Beth Israel Deaconess Medical Center in the departments of Pulmonary Care and Oncology. He received his M.A. degree in Political Science from Northeastern University, a B.A. degree in Philosophy and Public Policy from UMass/Boston, as well as an A.A. degree in Mathematics/Science from Cape Cod Community College. Dave is currently a member of the NEDRA 2019 Communications Committee, and previously served on NEDRA's Programming Committee from 2014 to 2017, and Conference Committee in 2014 and 2018. When not scouring for investment firm ownership stakes and Assets under Management figures, he is often found outdoors enjoying fishing, birding, kayaking and paddle-boarding. Dave is also commissioner of two interoffice fantasy football leagues at the Trust.

(E1) Money Businesses: A Capitalist Primer (B/I)

11:15 a.m. – 12:15 p.m.

The numbers boggle the mind: US financial services and insurance firms represented $1.45 trillion (or more than 7%) of US GDP in 2017. The US exports more than $155B in financial and insurance products and employs more than 6 million people. And it's no surprise that financiers represent almost 25% of the Forbes list of 400 Wealthiest Americans every year.

Despite the sector's dominance...understanding the distinctions between banking (retail, merchant, investment), money managers, hedge fund managers, private equity, real estate, insurance and re-insurance can be daunting. So let's start at the basics, and work our way up.

Presenter:

Valerie Anastasio, Boston Children's Hospital Trust

Valerie Anastasio is Senior Director of Prospect Development and Knowledge Management at Boston Children's Hospital Trust, the philanthropic arm of Boston Children's Hospital, that raises approximately $150M annually. The 9 member Prospect Development team provides direction and support for prospect identification, wealth analysis and tactical engagement strategies, as well as moves management, knowledge management and data governance functions at the Trust. Previously, Valerie held roles in operations, consulting, and front line capacities at nonprofit sector leaders including the Broad Institute, Museum of Fine Arts Boston, Harvard University, Brandeis University and the Helen Brown Group, among others. She is a past director of NEDRA and a recipient of its Ann Castle Award for Distinguished Service. She is a graduate of Williams College.

(E2) From Researcher to Investor: A Tutorial for Personal Growth and Capacity Ratings

(A)

11:15 a.m. – 12:15 p.m.

As researchers, we're trained to understand stock ownership and the corporate proxy. But what about the company? Will it do well? And can we turn our skills into something profitable for ourselves?

Join Marianne Pelletier to review the basic concepts of understanding the value of a company and how to assess whether to invest in it. Topics include: 1. Choosing the right industry, 2. Understanding the accounting reports, 3. Using key business ratios, 4. Forecasting a company's future stock price an earnings.

Presenter:

Marianne Pelletier, Staupell Analytics Group

Marianne Pelletier has 30 years of experience in fundraising, with the majority in prospect research and prospecting. She is one of the first adopters of donor modeling and data mining techniques, and is now a world-renown leader on this segment of the research profession. Her prospect research experience began when she was a research analyst for Harvard and Lesley Universities. She later served as a department director for Carnegie Mellon University and Cornell University. Pelletier's career also includes running an annual giving program with average increased revenues of 27% per year and providing software consulting through the Datatel Corporation, teaching clients both how to use their new software and assisting them with better analysis and more efficient processing. She occasionally serves as a best practices consultant through CampusWorks. Pelletier is a graduate of Rockford University, and earned her MBA at Southern New Hampshire University. Her recent workbook, Building Your Analytics Shop: A Workbook for Nonprofits, was a finalist for the Terry McAdam Award in 2016.

(E3) The Relationship Game: Celebrating and Overcoming Communication Breakdowns (I)

11:15 a.m. – 12:15 p.m.

When the tension is so great that you could cut it with a knife, it's often the result of a communication breakdown that's holding both sides back. As researchers, have you ever felt like your hard work went unnoticed or maybe worse, wasn't understood and acted upon? The relationship between Advancement Services and frontline fundraisers is one with room to grow, as both parties march toward the same ultimate goal – securing gifts that propel your mission forward. In this session, we'll simulate the popular "Dating Game" of the 70s and 80s by role-playing scenarios where there's a difference between *what*'s *said* and *what's heard* between researchers and fundraisers. *Who's who? Why are they being so stubborn? Why did* ***that*** *happen? How do I fix this?* With real practitioners, representatives from Gravyty and iWave will discuss how AI technology can help us avoid these breakdowns and show how the two companies have been collaborating so that a researcher's work is recognized, acted upon, and drives more and greater fundraiser success. The audience will walk away (hopefully) entertained, a bit relieved, and with an understanding of how AI technology is addressing a need that's existed since the early days of philanthropy.

Presenters:

Lindsey Athanasiou, Gravyty

Lindsey Athanasiou is VP of Sales at Gravyty and a former fundraiser with deep knowledge of higher education advancement, annual and reunion giving, volunteer management, and participation fundraising. She spent years building innovative annual giving strategies in her prior roles at Babson College and Emerson College, and was a key member of the team that doubled alumni participation at Babson in just three years. Her experience in higher education fundraising spans back to her undergraduate years at UMass Amherst where she was a proud phonathon caller and supervisor. It’s there that she grew a love and appreciation for fundraising that eventually led her to Gravyty, where she helps nonprofits expand their workforce and achieve donor-centric outreach, at scale with AI.

Trent Beattie, iWave
For the past 20 years, Trent has been helping organizations leverage world-class technology solutions from companies such as Dun & Bradstreet, NetSuite and iWave. As part of the iWave leadership team, Trent recognizes a great privilege in supporting iWave clients and the impact they each make. Leading iWave’s partnership and strategic alliance program, Trent is focused on creating a collaborative network of industry-focused solution providers that work together enabling more nonprofits to Fundraise with Confidence and further the impact of their missions.

(E4) Ch-ch-ch-Changes: Turn and Face the Strange (I/A)

11:15 a.m. – 12:15 p.m.
Change doesn’t have to be hard (or strange) if it is done in the right way. Turn and face the strange as we explore the 4Es of change management (Explore, Envision, Empower, Embed) in the context of the evolution of prospect management practices at Year Up. In this interactive presentation, we will use the prospect management structure that Year Up recently developed and implemented as a case study in change management. Learn from our mistakes and successes as you prepare to make change in your organization!

Presenter:
Amy Gingle, Year Up
Amy Gingle is Director of Prospect Development at Research at Year Up, a national non-profit dedicated to closing the opportunity divide for young adults in this country. Prior to joining Year Up in August 2016, Amy was Associate Director of Prospect Research and Analytics at Massachusetts General Hospital. Prior to that, she was a Senior Research Analyst at MIT and a Research Associate at Isaacson, Miller. Amy lives on the North Shore of Boston with her family, golden retriever and several chickens and ducks.

(F1) Segmenting for Success: Identifying Wealth & Philanthropy in the U.S. (B/I/A)

1:35 p.m. – 2:35 p.m.

Target Analytics completed a meta-analysis of household wealth, assets and philanthropy across the United States. The findings indicate that the US population can be segmented into just 5 primary donor groups, focused primarily on past philanthropic behavior and further differentiated by current financial circumstances and household demographics. Join Melissa to hear more about the findings and her recommended best practices on how these findings can be incorporated into your work.

Presenter:

Melissa Stepno, Blackbaud Target Analytics

Melissa Bank Stepno is Director of Client Services for Blackbaud Target Analytics. Prior to her current role, she spent a decade consulting with non-profits, focusing on the impact high net worth philanthropy on major giving, using analytics to effectively segment and prioritize within fundraising programs, and working to assure successful research and prospect management operations. Melissa sits on the Board of Directors for Apra and is an instructor for the Rice University Center for Philanthropy and Nonprofit Leadership. Previously, she has served on the boards of NEDRA, AFP's Northern New England Chapter and Brandeis University's Alumni Association. She received her BA from Brandeis University and masters' degrees in Arts Administration and Higher Education Administration from Boston University.

(F2) Using Data & Modern Analytics to Personalize your Fundraising Campaign (I)

1:35 p.m. – 2:35 p.m.

Using actionable wealth & lifestyle insights, learn how you can run highly-targeted campaigns that continuously deliver improved outcomes. In today's world, it's vital to truly understand your audience & personalize your engagement to improve conversion. When you harness wealth and lifestyle data, you are able to engage donors in ways that are more focused and individualized. This allows you to see and understand how likely new and existing donors are going to live, give, save, and spend. This helps you understand what each consumer and prospect will need. With these tools at your disposal, you're actively finding ways to understand and be of service to each consumer's needs.

The same can be said when you're in the process of putting together your highly-targeted, fundraising campaigns. Although generalized consumer data can give you a comprehensive understanding of existing and potential donors, it's important to dig into the details. By understanding your donors on an individual level, leveraging a hyper-personalized approach to engagement, you can create tailored messages to them based on their unique interests. This acknowledgment of your donors' values, and the display of how your values align with theirs, shows them that you're attuned and ready to meet their needs.

Presenter:

John Seaman, WealthEngine

John Seaman, originally from Philadelphia, PA, brings over 25 years of sales experience in various industries to the WealthEngine team. In 2001, he left a successful career as a Senior Account Executive at Blackbaud, Inc. to pursue real estate investing full time. In just 5 years, John accumulated over 130 rental properties in the Charleston, SC region, many of which provided affordable housing for low income families. John also started and operated a successful construction company and a top rated Italian restaurant. Mr. Seaman later co-founded Premier One, a full service multi-office real estate company serving South and North Carolina, and was involved in the start-up of SentinelWorks, a “Green-Tech” software company that provides energy management and conservation solutions to utility companies and commercial and industrial buildings throughout the world. John is a single dad to Conrad. They both enjoy boating in the beautiful waters in and around their hometown of Charleston, SC and spending time outdoors “Glamping” in their lovingly restored 1972 Jayco camper. John is a graduate of Drexel University, holds multiple awards for sales achievements throughout his career, and is involved in numerous religious and secular organizations and causes.

(F3) Prospect Identification: Tips & Tricks (I)

1:35 p.m. – 2:35 p.m.

This session will cover Prospect Identification sources, strategies, and tools. A focus on identifying previously unknown or unrecognized major gift prospects and wealth events. This will include tracking and interpretation of venture financings, IPOs, Mergers & Acquisitions. Techniques for reviewing and expanding existing constituent data. Specialized internal projects to track and identify prospects in an industry. Exploring family wealth and histories. External screenings and sources.

Presenter:

Joel Rogers, MIT

Joel Rodgers is a senior research analyst focused on prospect identification at the Massachusetts Institute of Technology, where he has worked since 2007. His work is dedicated to identifying and evaluating new major gift prospects worldwide. Prior to joining the MIT office of prospect development, 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. Joel has also been a volunteer researcher for the Vermont-based non-profit Purple Hearts Reunited. A native of Lancaster County, PA, he holds degrees from both the Paul Smith's College of Arts & Sciences and the Millersville University.

(F4) Engaging Millennials to Raise Big Money (B/I/A)

1:35 p.m. – 2:35 p.m.

Currently, over $31 trillion in wealth transfer has already begun in high-net worth families across the country. With the next generation poised to inherit this wealth, building strong relationships with millennial donors is key to a robust fundraising strategy. Join Alyssa Wright, a thought leader in intergenerational philanthropy, in learning how to engage millennial donors in giving strategies. In this interactive and informative workshop, attendees will learn how to go beyond traditional fundraising strategies to engage, retain, and inspire millennial donors.

Presenter:

Alyssa Wright, Alyssa F. Wright Consulting

Alyssa Wright is an award-winning artist, strategic philanthropic advisor, and creative social impact strategist. Throughout her career, Alyssa has collaborated with dozens of nonprofit organizations, companies, and philanthropists who desire innovative and collaborative ways to create impact in their respective fields. With over a decade of experience in international philanthropy and human rights activism in Eastern Europe, Africa, and the United States, Alyssa started Wright Consulting Group to deepen her work in facilitating social change. A regular contributor to Forbes, Global Giving, Feminist Wednesday and Levo League, Alyssa is a powerful Millennial voice in the social change movement.

(B) *= Beginner Level Session*

(I)*=Intermediate Level Session*

(A)*=Advanced Level Session*