

NEDRA Chronology

1986

- Joe Donnelly, Susan Ehrman and Mike Shultz meet to begin organizing a researcher's organization
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1987

- February 1987 – Planning Committee begins meeting
 - March 1987 – First ‘Official’ Meeting at Radcliffe College on March 5th
 - March 1987: Membership Update: 15 members
 - April 1987 – Planning committee distributes questionnaire at CASE District I conference on prospect research; 100 researchers responded
 - July 23, 1987 – NEDRA was incorporated in the Commonwealth of Massachusetts
 - July 1987: Joe Donnelly elected president for 1987-1988
 - Slate of 1987-1988 Board Members
 - Joe Donnelly; Susan Ehrman; Nancy Eidelman; Sarah Fernandez; Kate Fultz Hollis; Mary Lee; Helyn MacLean; Betty McDonald; Beth Melvin; Megan Page; Judith Rottenberg; Mick Schultz; Kim Watson
 - Fall 1987: First issue of NEDRA News published
 - November 1987 – Panel Discussion on Ethics in Research held at Bentley College
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1988

- April 1988: Roundtable on “Research or Information Management?” at the University of Southern Maine
 - April 1988: Roundtable on “Gift Processing – Whose Responsibility? in Holyoke, MA
 - April 1988: Roundtable on “How Much for Whom?” at the Mystic Seaport Museum
 - May 1988: 1st Annual Conference *Database Searching* at Brandeis University (Waltham, MA)
 - May 1988: Membership Update: 133 members
 - May 1988: Joe Donnelly elected president for 1988-1989
 - Slate of 1988-1989 Board Members
 - Joe Donnelly; Susan Ehrman; Sarah Fernandez; Kate Fultz Hollis; Helyn MacLean; Beth Melvin; Megan Page; Judith Rottenberg; Mick Schultz; Kim Watson
 - October 1988: Roundtable on “Research’s Role in Planning Solicitation Strategies” at the Massachusetts Institute of Technology
 - November 1988: Roundtable on “Small Shop Research” at The Williston-Northampton School in Easthampton, MA
 - November 1988: Roundtable on “Information Management” at Bryant College in Smithfield, RI
 - November 1988: Roundtable for Managers on “Staffing Issues” at Brandeis University in Waltham, MA
 - November 1988: Roundtable on “Information Management” at Dartmouth College in Hanover, NH
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1989

- February 1989: Half-Day Conference at Brandeis University
 - April 1989: Roundtable on “Screening and Rating” at Phillips Exeter Academy
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- April 1989: Roundtable on the “Evolving Role of Development Researchers” at Brown University In Providence, RI
 - April 1989: Roundtable on “Researcher Women” at Mount Holyoke College
 - May 1989: Roundtable on “Identifying and Researching Planned Giving Prospects” at Harvard University Medical School
 - June 1989: 2nd Annual Conference *Ethics in Research* at Bryant University (Smithfield, RI)
 - June 1989: Joe Donnelly elected president for 1989-1990
 - Slate of 1989-1990 Board Members
 - Joe Donnelly; Janet Couch; David Eberly; Sarah Fernandez; Kate Fultz Hollis; Lisa Peterson; Judith Rottenberg; Carol McConaghy Thorp; Kim Watson
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1990

- March 1990: Mid-Winter Forum on “The Future of Major Donor Research: Roles and Responsibilities” at the University of New Hampshire
 - May 1990: 3rd Annual Conference *Rating and Screening: Research Gets Scientific* at Worcester Polytechnic Institute (Worcester, MA)
 - May 1990: David Eberly elected president for 1990-1991
 - Slate of 1990-1991 Board Members
 - Janet Couch; David Eberly; Kate Fultz Hollis; Kathleen Kelleher; Laurie Lamothe; Elaine Lotto; Lisa Peterson; Susan Cronin Ruderman; Carol McConaghy Thorp
 - November 1990: Fall Conference *Using Specialized Sources* at Brandeis University (Waltham, MA)
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1991

- May 1991: 4th Annual Conference at Mount Marie (Holyoke, MA)
 - May 1991: David Eberly elected president for 1991-1992
 - Slate of 1991-1992 Board Members
 - David Eberly; Robin Good; Kate Fultz Hollis; Margaret Link; Laurie Lamothe; Susan Cronin Ruderman; Mimi Landau Steele; Carol McConaghy Thorp
 - October 1991: Vermont Roundtable
 - November 1991: Fall Conference *Surviving the Turbulent 90s: Strategies for Prospect Research* at the Howard Johnson Hotel (Cambridge, MA)
 - December 1991: DIALOG Roundtable
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1992

- March 1992: Directors Roundtable
 - April 1992: Roundtable on “Research in Hospitals and Healthcare Organizations” at Deaconess Hospital Boston
 - May 1992: Roundtable “Making the Most of Scarce Resources in Cultural and Social Service Organizations” at the Museum of Science (Boston)
 - May 1992: 5th Annual Conference *Corporate and Foundation Research* at the Ramada Hotel (Worcester, MA)
 - May 1992: David Eberly elected president for 1992-1993
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- Slate of 1992-1993 Board Members
 - Peg Dreger; David Eberly; Robin Good; Margaret Link; Laurie Lamothe; Anne Marie Michel; Janet Poerber-Jones; Susan Cronin Ruderman; Mimi Landau Steele; Carol McConaghy Thorp
 - September 1992: Laurie Lamothe elected president for remainder of 1992 & 1993
 - October 1992: Fall Conference: *A Conference on Net Worth* at the Newton Marriott Hotel (Newton, MA)
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1993

- May 1993: Roundtable on Research Basics
 - June 1993: 6th Annual Conference at the Johnson & Wales Airport Hotel (Warwick, RI)
 - June 1993: Laurie Lamothe elected president for 1993-1994
 - Slate of 1993-1994 Board Members
 - Peg Dreger; David Eberly; Robin Good; Sandra Larkin; Margaret Link; Laurie Lamothe; Rob Millar; Susan Cronin Ruderman; Carol McConaghy Thorp
 - October 1993: Fall Conference *Strategic Assessment of Business Information* at the Newton Marriott Hotel (Newton, MA)
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1994

- February 1994: Roundtable “Cruising Down the Information Superhighway – A Map for Prospect Researchers” at Harvard University
 - May 1994: 7th Annual Conference *Hidden Millionaires: Researching Low Profile Prospects* at the Guest Quarters Suite Hotel (Boston, MA)
 - May 1994: Laurie Lamothe elected President for 1994-1995
 - Slate of 1994-1995 Board Members
 - Peg Dreger; David Eberly; Georgia Glick; Robin Good; Julie Joyce; Sandra Larkin; Margaret Link; Laurie Lamothe; Merritt Maxim; Ann Hodge White; Barbara Ziff
 - August 1994: NEDRA co-hosted APRA International Conference in Boston, MA
 - November 1994: Fall Conference *Innovations in Prospect Research – The Technological Challenges* at the Sheraton Tara Hotel (Braintree, MA)
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1995

- March 1995: Roundtable on “Researching Genealogy at the National Archives” at the Silvio Conte Federal Records Center (Pittsfield, MA)
 - May 1995: 8th Annual Conference *Coping with Change* at the Boston Newton Marriot Hotel (Newton, MA)
 - May 1995: Laurie LaMothe elected President for 1995-1996
 - Slate of 1995-1996 Board Members
 - Peg Dreger; Georgia Glick; Robin Good; Randy Lakeman; Sandra Larkin; Margaret Link; Laurie Lamothe; Merritt Maxim; Susan Moore; Almeda Nicholson; Barbara Ziff
 - October 1995: Roundtable on “Research Internet Issues for Independent Schools” Westminster School (Simsbury, CT)
 - November 1995: Roundtable on “An Introduction to Using the Internet for Prospect Research” at the Massachusetts Institute of Technology
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- November 1995: Round on “Foundation Research” at the University of New England (Biddeford, Maine)
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1996

- May 1996: Workshop on “Researching Private Companies” presented by David Eberly at the Kennedy School of Harvard University
 - May 1996: 9th Annual Conference *The Major Gifts Research Interface* at the Boston Newton Marriot Hotel (Newton, MA)
 - May 1996: Barbara Ziff elected president for 1996-1997
 - Slate of 1996-1997 Board Members
 - Valerie Anastasio; Peg Dreger; Georgia Glick; Robin Good; Sandra Larkin; Margaret Link; Merritt Maxim; Susan Moore; Almeda Nicholson; Hope Prockop; Barbara Ziff
 - May 1996: Round table on “Researching Private Companies” at Harvard University
 - June 1996: Workshop “Breakfast Basics – the Individual Profile” presented by Sandra Larkin
 - June 1996: Workshop “Using What You’ve Got: Segmenting and targeting Your Constituency” presented by Georgia Glick and Margret Dreger in Sturbridge, Massachusetts
 - November 1996: Roundtable on “Changing Roles and Demands in Development Research” at Colby College (Waterville, Maine)
 - November 1996: Roundtable on “The Basics of the Individual Profile” at Worcester Polytechnic Institute
 - November 1996: Roundtables on “Ethical Dilemmas Facing the Prospect Researcher” and “Using the Internet Effectively for Prospect Research” at the Westminster School (Simsbury, CT)
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1997

- January 1997: Roundtable on “Introduction to the Internet”
 - February 1997: Roundtable on “Researching Private Companies”
 - February 1997: Roundtable on “Basics of Public Company Research & Prospect Strategy”
 - May 1997: 10th Annual Conference *Hidden Millionaires: Researching Low Profile Prospects* at the Boston Newton Marriot Hotel (Newton, MA)
 - May 1997: Barbara Ziff elected president for 1997-1998
 - Slate of 1997-1998 Board Members
 - Valerie Anastasio; Maggie Barber; Lisa Cohen; Peg Dreger; Georgia Glick; Sandra Larkin; Susan Moore; Almeda Nicholson; Hope Prockop; Valerie Roberts; Scott Tomlinson; Barbara Ziff
 - December 1997: Roundtable on “Wall Street Compensation Trends”
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1998

- April 1998: Roundtable on “Corporation and Foundations Research” at the Maine Medical Center (Portland, ME)
 - May 1998: 11th Annual Conference at the Boston Newton Marriot Hotel (Newton, MA)
 - May 1998: Georgia Glick elected president for 1998-1999
 - Slate of 1998-1999 Board Members
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- Helen Brown; Georgia Glick; Patty Lam; Sandra Larkin; Barbara McGuigan; Almeda Nicholson; Marianne Pelletier; David Perkins; Valerie Roberts; Scott Tomlinson; Barbara Ziff
 - September 1998: NEDRA hires an outside management company, The Guild Associates, Inc., to handle the organization's administrative tasks
 - December 1998: Forum for Directors of Research at Brandeis University
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1999

- February 1999: Roundtable on "web Tools for Effective Prospect Research Strategy" at the Massachusetts Institute of Technology Attendance 80
 - March 1999: Roundtable on "When Research is Only One Hat on Your Rack" at New Hampshire College.
 - May 1999: 12th Annual Conference *Show Me the Money* at the Boston Newton Marriot Hotel (Newton, MA)
 - May 1999: Georgia Glick elected president for 1999-2000
 - Slate of 1999-2000 Board Members
 - Helen Brown; Carol Byrne; Roseanne Fitzgerald; Georgia Glick; Patty Kelleher; Elise Ober LaFosse; Patty Lam; Barbara McGuigan; Marianne Pelletier; Valerie Roberts; Scott Tomlinson; Barbara Ziff
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2000

- February 2000: Workshop on "Reading Public Company Documents" presented by David Lawson and David Eberly
 - April 2000: Connecticut RING at Salisbury School
 - May 2000: 13th Annual Conference *Measuring Impact & Adding Value: Research in the New Millennium* at the Newton Marriott Hotel (Newton, MA)
 - May 2000: Helen Brown elected president for 2000-2001
 - Slate of 2000-2001 Board Members
 - Helen Brown; Carol Byrne; Paul Dakin; Roseanne Fitzgerald; Patty Kelleher; Elise Ober LaFosse; Patty Lam; Jill Meister; Marianne Pelletier; Valerie Roberts; Scott Tomlinson
 - August 200: Connecticut RING at Kent School
 - November 2000: RINGs at Boston Symphony Orchestra and Mount Holyoke College
 - November 2000: Research 101 seminar (Waltham, MA)
 - November 2000: Directors Forum at Boston University
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2001

- May 2001: 14th Annual Conference *The Point of Technology* Doubletree Guest Suites (Waltham, MA)
 - The 14th Annual Conference marked the conference format moving to a day-and-a-half format as opposed to earlier conferences that lasted for a single day
 - May 2001: Helen Brown elected president for 2001-2002
 - Slate of 2001-2002 Board Members
 - Helen Brown; Carol Byrne; Paul Dakin; Roseanne Fitzgerald; Patty Kelleher; Elise Ober LaFosse; Julie Macksoud; Jill Meister; Marianne Pelletier; Valerie Roberts; Pamela Smith
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- November 2001: Connecticut RING at Westminster School (Simsbury, CT)
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2002

- January 2002: Workshop “One Size Doesn’t Fit All: Data Mining in the 21st Century” presented by Lawrence Henze at Bryant College (Smithfield, RI)
 - March 2002: Workshop “Web Searching Strategies” presented by Ran Houck at the College of the Holy Cross (Worcester, MA)
 - March 2002: Greater Boston RING including candlepin bowling mixer.
 - May 2002: 15th Annual Conference *We’ve Come a Long Way* Burlington Marriott (Burlington, MA)
 - May 2002: The inaugural *Ann Castle Award* was presented to Judy Rottenburg
 - May 2002: Patty Kelleher elected president for 2002-2003
 - Slate of 2002-2003 Board Members
 - Helen Brown; Carol Byrne; Paul Dakin; Roseanne Fitzgerald; Patty Kelleher; Elise Ober LaFosse; Julie Macksound; Jill Meister; Marianne Pelletier; Valerie Roberts; Pamela Smith
 - November 2002: Boston RING at the Children’s Hospital Trust
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2003

- February 2003: Research Director’s Forum
 - May 2003: 16th Annual Conference *Research in Transition* Burlington Marriott (Burlington, MA)
 - May 2003: The 2nd *Ann Castle Award* was presented to Shelly Brown
 - May 2003: Patty Kelleher elected president for 2003-2004
 - Slate of 2003-2004 Board Members
 - Carol Byrne; Paul Dakin; Roseanne Fitzgerald; Patty Kelleher; Elise Ober LaFosse; Kathy Nadire; Marianne Pelletier; Fran Roller; Pamela Smith
 - September 2003: Directors’ Forum
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2004

- May 2004: 17th Annual Conference *Get Smart! From Clues to Gifts* Sheraton Ferncroft Resort (Danvers, MA)
 - May 2002: The 3rd *Ann Castle Award* was presented to David Eberly
 - May 2004: Paul Dakin elected president for 2004-2005
 - Slate of 2004-2005 Board Members
 - Carol Byrne; Cheryl Cerny; Dave Chase; Paul Dakin; Roseanne Fitzgerald; Patty Kelleher; Mary Lawrence; Rick Snyder; Deborah Reinhardt Youmans; Ming Zhong
 - September 2004: Boston RING at the Dana-Farber Cancer Institute.
 - September 2004: Workshop “Prospect Research 101” at Bentley College.
 - December 2004: RING-Fest 2004 featured 4 RINGs over two days:
 - New Hampshire RING at Philips Exeter Academy
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- Connecticut RING at The Loomis Chafee School
- Maine RING at Bates College
- Boston RING

2005

- February 2005: Research Director's Forum in Boston
- April 2005: 18th Annual Conference Sheraton Ferncroft Resort (Danvers, MA)
- April 2005: The 4th *Ann Castle Award* was presented to Sandra Larkin.
- April 2005: Paul Dakin elected president for 2005-2006
- Slate of 2005-2006 Board Members
 - Dave Chase; Paul Dakin; Lisa Howley; Mary Lawrence; Jill Meister; Amy Minton; Beth Parsons; Amy Reed; Rick Snyder; Deborah Reinhardt Youmans; Dina Zelleke; Ming Zhong
- April 2005: NEDRA votes to affiliate with APRA as the New England chapter.
- September 2005: Forum on Prospect Tracking and Management at the Harvard Graduate School of Education.
- October 2005: Boston RING combined with APRA Virtual Seminar "Prospect Research 101"
- November 2005: Workshop on Understanding SEC Documents presented by Michelle Leder at the Federal Reserve Building in Boston
- December 2005: Boston RING combined with APRA Virtual Seminar on "Relationship Mapping – Connections, Associations and Circles of Influence" at the Dana-Farber Cancer Institute

2006

- January 2006: RING at Dartmouth College in Hanover, NH
- February 2006: Research Director's Forum
- March 2006: Workshop "Show Me the Money – The Role of Research in Building a Major Gifts Operation" presented by Poonam Prasad at Northeastern University
- May 2006: 19th Annual Conference *Turning Over a New Leaf* The Westin Hotel (Providence, RI)
- May 2006: The 5th *Ann Castle Award* was presented to Helen Brown
- Slate of 2006-2007 Board Members & Officers Presented at Annual Business Meeting
 - Jill Meister (President); Rick Snyder (Vice President); Lisa Howley (Secretary); Dave Chase (Treasurer); Nancy Faughnan; Allison King Crosscup; Elise Ober LaFosse; Amy Minton; Amy Reed; Heather Reisz; David Sterling; Dina Zelleke
- June 2006: Workshop on "Welcome to Wall Street – Understanding Trends and Practices in the Financial Services Sector" presented by Professor Patrick C. Gregory of Bentley College
- September 2006 Research Directors' Forum at the Museum of Science
- October 2006: Research Boot Camp at the Radisson Hotel in Boston
- November 2006: Research Boot Camp at the University of Massachusetts Amherst

2007

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- May 2007: 20th Annual Conference *Charting the Course to Success: NEDRA's 20 Year Voyage* The Cliff House (Ogunquit, Maine)
 - May 2007: The 6th *Ann Castle Award* was presented to Elizabeth Crabtree
 - Slate of 2007-2008 Board Members & Officers Presented at Annual Business Meeting
 - Jill Meister (President); Rick Snyder (Vice President); Lisa Howley (Secretary); David Sterling (Treasurer); Dave Chase; Allison King Crosscup; Nancy Faughnan; Elise Ober LaFosse; Joe Medina; Amy Minton; Amy Reed; Heather Reisz; Dina Zelleke
 - August 2007: NEDRA President-Elect Rick Snyder dons a lobster suit and man's NEDRA's *The Expert is in Booth* at the APRA International Conference in Chicago
 - October 2007: Workshop "Approaches for Estimating Gift Capacity and Developing Rating Systems" presented by Elizabeth Crabtree and Joyce Newton at the Massachusetts Institute of Technology
 - October 2007: Workshop "Research Primer & Small Shop Research" at the Hotel Marlowe, Cambridge, MA
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2008

- May 2008: 21st Annual Conference *Research – Coming of Age* Renaissance Providence Hotel (Providence, RI)
 - May 2008: The 7th *Ann Castle Award* was presented to Valerie Anastasio
 - May 2008: The *Outstanding Service Award* presented to Dave Chase
 - Slate of 2008-2009 Board Members & Officers Presented at Annual Business Meeting
 - Rick Snyder (President); Amy Minton (Vice President); Heather Reisz (Secretary); David Sterling (Treasurer); Bruce Berg; Allison King Crosscup; Nancy Faughnan; Janet Liberman; Joe Medina; Jill Meister; Barbara Moore; Dina Zelleke
 - June 2008: RING on "Best Practices for Corporate and Foundation Research" at Yale University
 - September 2008: Research Director's Forum at Harvard University
 - September 2008: Research Basics Boot Camp at Northeastern University
 - October 2008: Research Basics Boot Camp at Fairfield University
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2009

- January 2009: Seminar on "Donor Privacy and Institutional Risk: Red Flags and Yellow Alerts" presented by David Eberly in partnership with Women in Development of Greater Boston
 - March 2009: Research Director's Forum at Wesleyan University
 - May 2009: RING on "The Ratings Game: New Strategies for Rating and Wealth Evaluation in Today's Economy" at Brown University
 - May 2009: 22nd Annual Conference *Intersections: Many Fields, One Common Goal* at the Holiday Inn by the Bay (Portland, Maine)
 - May 2009: The 8th *Ann Castle Award* was presented to Paul Dakin
 - Slate of 2009-2010 Board Members & Officers Presented at Annual Business Meeting
 - Rick Snyder (President); Barbara Moore (Vice President); Amber Countis (Secretary); Bruce Berg (Treasurer); Britt Beedenbender; Nancy Faughnan; Janet Liberman; Joe Medina; Amy Minton; Jeffrey Ouellette; David Sterling; Dina Zelleke
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- September 2009: Research Boot Camp at the Radisson Hotel Boston
 - September 2009: RING on “Building Your Brand: How to Market Your Prospect Research Department” at Tufts University
 - October 2009: Research Director’s Forum
 - October 2009: Research Seminars: *New York Research: Navigating Your Way Through a Changing Financial Landscape and Leveraging Resources and Empowering Others* at the Radisson Hotel Boston
 - October 2009: Research Boot Camp at the University of Hartford
 - November 2009: Research Seminars on” Intellectual Property” and “The Family Office” presented by Jeffrey Ouellette at the Radisson Hotel Boston
 - December 2009: Boston RING at Tufts University
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2010

- February 2010: Connecticut Research Director’s Forum at Saint Joseph College in West Hartford
 - April 2010: 23rd Annual Conference *Research: The Hub of Philanthropy* Radisson Hotel (Boston, MA)
 - April 2010: The 9th *Ann Castle Award* was presented to Charlie Carr
 - Slate of 2010-2011 Board Members
 - Bruce Berg; Cheryl Cerny; Amber Countis; Nancy Faughnan; Tara McMullen; Amy Minto; Barbara Moore; Sarah Ruberti; Marlisa Simonson; Melissa Bank Stepno; David Sterling; Leigh Walker; Dina Zelleke
 - May 2010: Workshop *The Ratings Game, Part II: Successful Strategies for Rating and Wealth Evaluation in Today’s Economy* presented by Elizabeth Crabtree at Brown University
 - October 2010: Research Basics Boot Camp at the Radisson Hotel Boston
 - October 2010: Research Boot Camp at Yale University
 - November 2010: Seminar “Is the Financial Crisis Over? A Survey of Our Economy and Our Prospects” presented by Richard Horne and Steven Towns at Yale University. A joint program of NEDRA and CASE District I
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2011

- The NEDRA Conference Scholarship was established and has been sponsored by the Helen Brown Group since its inception
 - The inaugural Helen Brown Group-NEDRA Conference Scholarship recipients were recognized at the 24th Annual Conference
 - March 2011: Connecticut Research Director’s Forum at Wesleyan University
 - April 2011: Workshop with AFP Northern New England, *An Introduction to Prospect Research* at Dartmouth College
 - May 2011: 24th Annual Conference *Transforming Information into Intelligence* Radisson Hotel (Boston, MA)
 - May 2011: The 10th *Ann Castle Award* was presented to Marianne Pelletier
 - May 2011: The Inaugural *Helen Brown Group-NEDRA Conference Scholarships* were awarded to Catherine Boothby & Mary Kelly
 - Slate of 2011-2012 Board Members & Officers Presented at Annual Business Meeting
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- Amy Minton (President); Amber Countis (Vice President); Tara McMullen (Secretary); Bruce Berg (Treasurer); Amy Begg; Cheryl Cerny; Nancy Faughnan; Barbara Moore; Sarah Ruberti; Marlisa Simonson; Melissa Bank Stepno; David Sterling

- September 2011: Research Director's Forum at Harvard University
- September 2011: RING on "Proactive Research" at Tufts University
- October 2011: Research Basics Boot Camp at City Year Boston
- October 2011: Research Basics Boot Camp at Central Connecticut State University
- October 2011: Seminar "Mineral, Air and Water Rights" presented by Jeffrey Ouellette at Northeastern University
- November 2011: Seminar "Joys of Compounding" presented by Chris Begg at Harvard University
- November 2011: RING on Small Shops at the Boston Ballet
- December 2011: RING on Corporations and Foundations at Yale University

2012

- March 2012: Share Training REPLAY: Golden BRICs: Researching Prospects in Brazil, Russia, India & China
- March 2012: RING: Parent Programs & Research at Milton Academy
- March 2012: RING: Parent Programs & Research at Miss Porter's School
- March 2012: An Introduction to Prospect Research Program presented in Partnership with AFP Northern New England at University of New England
- March 2012: Research Directors Forum at The UCONN Foundation
- April 2012: 25th Annual Conference at Hotel Marlow (Cambridge, MA)
- April 2012: The 11th *Ann Castle Award* was presented to Joe Donnelly
- April 2012: The *Helen Brown Group-NEDRA Conference Scholarship* was awarded to Elizabeth Moyer
- Slate of 2012-2013 Board Members & Officers Presented at Annual Business Meeting
 - Amber Countis (President); Tara McMullen (Vice President); Suzy Campos (Secretary); Bruce Berg (Treasurer); Amy Begg; Anne Brownlee; James Cheng; Cheryl Cerny; Lisa Foster; Melissa Bank Stepno; Ian T. Wells
- June 2012: Living in the Gray Area: Understanding Wealth that Isn't Black and White at Harvard Business School
- October 2012: The Frugal Researcher at Amherst College
- October 2012: Research Basics Bootcamp at Northeastern University
- October 2012: Development Analytics 101 at Massachusetts General Hospital
- October 2012: Donor Screening: How To Do It On A Budget at The Delaney House
- November 2012: RING: Small Shop Research at Boston Ballet
- November 2012: Director Forum at Dana-Farber Cancer Institute
- November 2012: Research Basics Bootcamp at University of New England
- December 2012: Is the Financial Crisis Over? A Survey of Our Economy and Our Prospects at Yale University
- December 2012: RING: Large Research Shops at Harvard University

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- December 2012: RING: The Financial Services Industry at Combined Jewish Philanthropies
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2013

- January 2013: RING: Organizational Potluck – Making the Most of International Resources at Wesleyan University
 - February 2013: RING: Parents as Prospects – Researching Strategies for Parents at Pingree School
 - March 2013: RING: Planned Giving & Research at Clark University
 - March 2013: The Road Ahead: Campaign Planning and Prospect Research at Combined Jewish Philanthropies
 - March 2013: RING: Parents as Prospects at University of New Haven
 - April 2013: 26th Annual Conference *Broadening Perspectives* at Hotel Marlowe (Cambridge, MA)
 - April 2013: The 12th *Ann Castle Award* was presented to Sarah Fernandez
 - Slate of 2013-2014 Board Members
 - Amy Begg; Bruce Berg; Anne Brownlee; Suzy Campos; James Cheng; Sarah Cook; Amber Countis; Lisa Foster; Tara McMullen; Laura Parshall; Mary Taddia; Tina Tong; Ian T. Wells
 - June 2013: Development Analytics 101 at Tufts University
 - July 2013: RING: Setting the Table – Research’s Role at Prospect Review Meetings at The Hotchkiss School
 - July 2013: Development Analytics 102 at Boston College
 - September 2013: Research Basics Bootcamp at Wesleyan University
 - October 2013: Research Basics Bootcamp at Northeastern University
 - November 2013: RING: Discover The Golden Egg - How to Find Elusive International Prospects at Northeastern University
 - December 2013: RING: The Silmarillion: An (Un)expected Journey of a Development Analytics Program at Dana-Farber Cancer Institute
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2014

- The Heather Reisz Memorial Scholarship (HRMS) was established
 - The inaugural HRMS recipients were recognized at the 27th Annual NEDRA Conference
 - February 2014: RING: Prospect ID Tips & Tricks at Massachusetts Institute of Technology
 - March 2014: Research Basics Bootcamp at Revere Hotel
 - March 2014: 27th Annual Conference *Strategies for Success* at Revere Hotel (Boston, MA)
 - March 2014: The 13th *Ann Castle Award* was presented to Heather Reisz
 - March 2014: The *Helen Brown Group-NEDRA Conference Scholarship* was awarded to Denise Dabney
 - March 2014: The inaugural *Heather Reisz Memorial Scholarships* were awarded to Laura Koo & Monique Miller
 - Slate of 2014-2015 Board Members & Officers Presented at Annual Business Meeting
 - Suzy Campos (President); Tara McMullen (Vice President); Lisa Foster (Secretary); Bruce Berg (Treasurer); Amy Begg; Sarah Benson; Anne Brownlee; James Cheng; Amber Countis; Laura Parshall; Mary Taddia; Tina Tong; Ian T. Wells
 - April 2014: RING: Hiding in Plain Sight – Markers of Philanthropy at Massachusetts General Hospital
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- May 2014: Panel – Inside Chinese Philanthropy at Tufts University
 - September 2014: RING: APRA Conference Recap Roundtables at Amherst Brewing Company
 - September 2014: Residential Real Estate Review at Combined Jewish Philanthropies
 - October 2014: Research Basics Bootcamp at Tufts University
 - November 2014: VINO at The Red Hat (Boston, MA)
 - November 2014: Research Basics Bootcamp at Smith College
 - December 2014: Webinar: Pipeline Management During a Campaign (Online)
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2015

- February 2015: RING: Corporate and Foundation Research at Tufts University
 - March 2015: RING: Strategies for Re-energizing Prospect Portfolios at Wethersfield Public Library
 - April 2015: Research Basics Bootcamp at Sheraton Portsmouth Harborside Hotel
 - April 2015: 28th Annual Conference *Fundraising Intelligence* at Sheraton Portsmouth Harborside Hotel (Portsmouth, NH)
 - April 2015: The 14th *Ann Castle Award* was presented to Nancy Faughnan
 - April 2015: The *Helen Brown Group-NEDRA Conference Scholarship* was awarded to Pam Abraham
 - April 2015: The *Heather Reisz Memorial Scholarships* were awarded to Stephanie Cavagnuolo & Becca Elwin
 - Slate of 2015-2016 Board Members & Officers Presented at Annual Business Meeting
 - Suzy Campos (President); Tara McMullen (Vice President); Ian T. Wells (Secretary); Lisa Foster (Treasurer); Erin Ambrose Dupuis; Amy Begg; Sarah Benson; James Cheng; Tim Enman; Susan Grivno; Laura Parshall; Mary Taddia; Stacey Vial MacDonnell
 - May 2015: RING: May Day! What's Next for Prep School Research & Fundraising? At Choate Rosemary Hall
 - May 2015: RING: Commercial Real Estate at Harvard University
 - June 2015: Webinar: Tips & Practices on Corporate Research (Online)
 - September 2015: RING: A Roundtable Discussion – Board Nomination & Governance Pipelines at Museum of Science
 - September 2015: RING: Social Media at Boston Children's Hospital Trust
 - September 2015: Creating a Powerful Public Presence: A Workshop for Researchers Who Need Training in Speaking at MIT Sloan School of Management
 - October 2015: Webinar: Researching Prospects in India with Beth Bandy (Online)
 - October 2015: Portfolio Management: From Adequate to Amazing at Harvard Business School
 - November 2015: Research Basics Bootcamp at Harvard Business School
 - December 2015: VINO at Meadhall (Cambridge, MA)
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2016

- January 2016: RING: Keeping Up with a Growing Office: New Tools, New Leads, New Staff at Plan International (Warwick, RI)
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- March 2016: Cooperation Makes it Happen: NEDRA Panel Discussion at Assumption College
- April 2016 Research Basics Bootcamp at Portsmouth Harborside Hotel
- April 2016: 29th Annual Conference at Portsmouth Harborside Hotel (Portsmouth, NH)
- April 2016: The 15th *Ann Castle Award* was presented to Dina Zelleke
- April 2016: The *Helen Brown Group-NEDRA Conference Scholarship* was awarded to Emily Burke
- April 2016: The *Heather Reisz Memorial Scholarships* were awarded to Annalise Baird & Laura Gebhart
- Slate of 2016-2017 Board Members & Officers Presented at Annual Business Meeting
 - Amy Begg (President); Ian T. Wells (Vice President); Susan Grivno (Secretary); Lisa Foster (Treasurer); Erin Ambrose Dupuis; Suzy Campos; James Cheng; Tim Enman; William Gotfredson; Laura Parshall; Stacey Vial MacDonnell; Tim Wilson
- April 2016: Networking Lunch in Western Mass at Mi Tierra Mexican Restaurant (Hadley, MA)
- May 2016: Directors Round Table at Dana-Farber Cancer Institute
- June 2016: VINO at Tiger Mama (Boston, MA)
- At the Annual Board Retreat the decision was made to re-brand RINGs as Think Tanks
- October 2016: Estimating Private Company Value at Massachusetts Institute of Technology
- November 2016: Unconscious Bias with Harvard University's Christopher Dial at Massachusetts Institute of Technology
- November 2016: VINO at Grafton Street Pub & Grill (Cambridge, MA)
- November 2016: Think Tank: Prospect Management at Harvard University
- December 2016: Research Basics Bootcamp at Northeastern University

2017

- NEDRA Celebrates its 30th Anniversary with Celebrations throughout New England
 - January 2017: Celebrating 30 Years of NEDRA in Rhode Island at Ogie's Trailer Park (Providence, RI)
 - January 2017: Celebrating 30 Years of NEDRA in Connecticut at Engine Room (Mystic, CT)
 - February 2017: Celebrating 30 Years of NEDRA in Western Mass at Bertucci's Restaurant (Amherst, MA)
 - March 2017: Celebrating 30 Years of NEDRA in Greater Boston at Cambridge Brewing Company (Cambridge, MA)
 - March 2017: Celebrating 30 Years of NEDRA in Maine at Salvage BBQ (Portland, ME)
 - April 2017: Celebrating 30 Years of NEDRA in New Hampshire at Moxy (Portsmouth, NH)
- January 2017: Think Tank: Resource Refresh at Dana-Farber Cancer Institute
- February 2017: Think Tank: International Research at Boston Children's Hospital Trust
- March 2017: Think Tank: Data Analytics Show & Tell at Dana-Farber Cancer Institute
- March 2017: Directors Round Table at Northeastern University
- April 2017: Research Basics Bootcamp at Portsmouth Harborside Hotel
- April 2017: 30th Annual Conference at Portsmouth Harborside Hotel (Portsmouth, NH)

NEDRA Chronology

- As the most long-standing NEDRA Member in attendance, Marianne Pelletier is invited to join NEDRA President, Amy Begg, to make the ceremonial first cut of NEDRA's 30th Birthday Cake
- April 2017: The 16th *Ann Castle Award* was presented to Jill Meister
- April 2017: The *Helen Brown Group-NEDRA Conference Scholarship* was awarded to Varounny Chanthasiri
- April 2017: The *Heather Reisz Memorial Scholarships* were awarded to Sam Kjellberg & Nina Emmi
- Slate of 2017-2018 Board Members & Officers Presented at Annual Business Meeting
 - Amy Begg (President); Ian T. Wells (Vice President); Erin Ambrose Dupuis (Secretary); Lisa Foster (Treasurer); Suzy Campos; James Cheng; Bill Gotfredson; Jenn Grasso; Susan Grivno; Renana Kehoe; Pamela McCarthy; Laura Parshall; Ginny Santamaria; Tim Wilson
- June 2017: Think Tank: Prospect Management at Mount Holyoke College
- July 2017: Lunch VINO: NEDRA Networking in Maine at Bowdoin College
- August 2017: Research Basics Bootcamp at Bowdoin College
- September 2017: International Research: United Kingdom at Dana-Farber Cancer Institute
- September 2017: VINO: NEDRA Networking in Connecticut at Bar (New Haven, CT)
- October 2017: Prospect Management Panel at UMass Medical School
- October 2017: Think Tank: Healthcare at Dana-Farber Cancer Institute
- November 2017: Residential Real Estate Review at Northeastern University
- November 2017: Research Basics Bootcamp at Sheraton Portsmouth Harborside Hotel

2018

- January 2018: The Road Ahead: Campaign Planning and Prospect Development at Salem State University
- January 2018: Corporate and Foundation Research at Dana-Farber Cancer Institute
- January 2018: Understanding and Utilizing SEC Filings at Boston Children's Hospital Trust
- Winter 2018: NEDRA Website (www.nedra.org) re-design launched
- February 2018: Think Tank: Small Shop Prospect Research & Management at Buckingham Browne & Nichols School
- February 2018: Think Tank: Large Shop Prospect Research & Management at MIT Sloan School of Management
- February 2018: Charitable Powerhouses: A Fundraising Approach to Donors from Private Equity, Venture Capital, Hedge Funds and Family Offices at Beth Israel Deaconess Medical Center
- March 2018: International Research: Asia at Peabody Essex Museum
- March 2018: Charitable Powerhouses: A Fundraising Approach to Donors from Private Equity, Venture Capital, Hedge Funds and Family Offices at Yale University
- March 2018: Two Sides of the Coin: Hiring & Getting Hired at Dana-Farber Cancer Institute
- March 2018: Think Tank: Small Shop Prospect Research & Management at The Governor's Academy
- March 2018: Building a Major Gift Model using Microsoft Excel at Dana-Farber Cancer Institute
- April 2018: Think Tank: Prospect Management and Capacity Ratings at Keene State College
- April 2018: Directors Round Table at Northeastern University

NEDRA Chronology

- April 2018: NEDRA Night Out at Grafton Street Pub & Grill in Cambridge, MA
- April 2018: Optimizing your Data Science Workflow in R at Dana-Farber Cancer Institute
- April 2018: Research Basics Bootcamp at Hotel Viking
- April 2018: Fundraising Data Science Summit at Hotel Viking
- April 2018: 31st Annual Conference at Hotel Viking (Newport, RI)
- April 2018: The 17th *Ann Castle Award* was presented to David Sterling
- April 2018: The *Helen Brown Group-NEDRA Conference Scholarship* was awarded to Keith Aron
- April 2018: The *Heather Reisz Memorial Scholarships* were awarded to Darthula Matthews & Charlotte Redgate Myers
- Slate of 2018-2019 Board Members & Officers Presented at Annual Business Meeting
 - Susan Grivno (President); Bill Gotfredson (Vice President); Jenn Grasso (Secretary); Pamela McCarthy (Treasurer); Erin Ambrose Dupuis; Kristen Cocce; Richard Horne; Renana Kehoe; Claire Moitra; Diane Parsons; Elana Pierkowski; Ginny Santamaria
- May 2018: Affinity Scores & Donor Engagement at Tufts University
- June 2018: Think Tank: Resource Refresh at UMass Medical School
- June 2018: NEDRA Networking Lunch in Western MA at Mi Tierra Restaurant (Hadley, MA)
- June 2018: Understanding and Utilizing SEC Filings at Maine Medical Center

2019

- August 2018: Ice Cream Social Networking Event at Flavors Ice Cream at Cook Farm (Hadley, MA)
- August 2018: Networking Lunch – New Hampshire at Smuttynose Brewing (Hampton, NH)
- September 2018: Research Basics Bootcamp at Sheraton Portsmouth (Portsmouth, NH)
- September 2018: Prospect Management Think Tank at Amherst College
- September 2018: Excel for Prospect Researchers and Portfolio Managers at Dana-Farber Cancer Institute
- September 2018: International Research: India at Tufts University
- October 2018: Prospect Management Think Tank at Mount Desert Island Hospital
- October 2018: Building a Major Gift Model Using Microsoft Excel at Dana-Farber Cancer Institute
- October 2018: GDPR Think Tank at Northeastern University
- November 2018: An Introduction to OKRS: How Operations Changed Office-wide Goal Setting at Beth Israel Deaconess Medical Center
- November 2018: Prospect Management Think Tank at Brown University
- January 2019: Charitable Powerhouses: A fundraising approach to donors from private equity, venture capital, hedge funds, and family offices at Northeastern University
- February 2019: Prospect Compensation Think Tank at Brigham and Women's Hospital
- February 2019: Large Shop Think Tank at Tufts University
- February 2019: VINO: NEDRA Networking in New Haven at Elm City Social (New Haven, CT)

NEDRA Chronology

- February 2019: Quiet Perseverance: A Prospect Management Tale at Dana-Farber Cancer Institute
 - March 2019: The Shadow of Wealth: How Ultra-High-Net-Worth Individuals and Wealth Managers Protect Their Wealth Through Hidden Assets at University of New England
 - March 2019: Data Science Think Tank at Suffolk University
 - March 2019: Research Basics Bootcamp at Combined Jewish Philanthropies (Boston, MA)
 - April 2019: Research Basics Bootcamp (full day) at Westin Portland Harborview Hotel (Portland, ME)
 - April 2019: Beginner/Intermediate Fundraising Data Science Workshop (full day) at Westin Portland Harborview Hotel (Portland, ME)
 - April 2019: Advanced Fundraising Data Science Workshop (half day) at Westin Portland Harborview Hotel (Portland, ME)
 - April 2019: Guiding the Way: Concepts in Wealth Analysis and Gift Capacity Ratings (half day) at Westin Portland Harborview Hotel (Portland, ME)
 - April 2019: 32nd Annual Conference at the Westin Portland Harborview Hotel (Portland, ME)
 - April 2019: The 18th *Anne Castle Award* was presented to Amy Begg
 - April 2019: The *Helen Brown Group-NEDRA Conference Scholarship* was awarded to Mackenzie Betrone-Harpst
 - April 2019: The *Heather Reisz Memorial Scholarships* were awarded to Laura Webb & Sarah Cook
 - Slate of 2019-2020 Board Members & Officers Presented at Annual Business Meeting
 - Susan Grivno (President); Bill Gotfredson (Vice President); Renana Kehoe (Secretary); Pamela McCarthy (Treasurer); Erin Ambrose Dupuis; Emily Burke; Kristen Cocce; Jenn Grasso; Richard Horne; Claire Moitra; Diane Parsons; Elana Pierkowski; Scott Rosensweig
 - April 2019: NEDRAcon2019 Highlights! (online webinar)
 - April 2019: The Ins and Outs of Corporate and Foundation Research at Dana-Farber Cancer Institute
 - May 2019: VINO: NEDRA Networking in Western Mass at Platform Sports Bar (Northampton, MA)
 - May 2019: VINO: NEDRA Networking in Boston at Hojoko (Boston, MA)
 - May 2019: The Nuts and Bolts of Volunteering with NEDRA (online webinar)
 - June 2019: VINO: NEDRA Networking in Connecticut at Moonlight Sushi Bar & Grill (Middletown, CT)
 - June 2019: VINO: NEDRA Networking in New Hampshire at Martingale Wharf (Portsmouth, NH)
 - June 2019: Healthcare Think Tank at Dana-Farber Cancer Institute
 - June 2019: VINO: NEDRA Networking in Maine at The Trust for Public Land (Portland, ME)
 - June 2019: International Research: Middle East at Year Up (Boston, MA)
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