

## **NEDRA 2023 Annual Conference** May 4-5, 2023 Schedule-at-a-Glance

|                        |  | Wednesday – May 3, 2023  |   |  |  |  |
|------------------------|--|--|---|--|--|--|
| 8:15 a.m. – 4:30 p.m.  | Registration/Information Desk Open   |  |   |  |  |  |
| 8:15 a.m. – 9:00 a.m.  | Breakfast Buffet – Grand Ballroom  |  |   |  |  |  |
| 9:00 a.m. – 12:00 p.m. | Research Basics Bootcamp<br>Morning Session<br>Amy Begg, Emory University<br>Lisa Foster, Phillips Academy<br>Room: Worthy | High Finance for Prospect Researchers Morning Session Valerie Anastasio Boston Children's Hospital Trust Room: Charles   | Applied Prospect Research Analytics Workshop Steve Grimes Helen Brown Group  Room: Executive Boardroom                                |  |  |  |
| 12:00 p.m. – 1:30 p.m. | Luncheon – Grand Ballroom  |  |   |  |  |  |
| 1:30 p.m. – 4:30 p.m.  | Research Basics Bootcamp Afternoon Session Amy Begg, Emory University Lisa Foster, Phillips Academy  Room: Worthy          | High Finance for Prospect Researchers Afternoon Session Valerie Anastasio Boston Children's Hospital Trust Room: Charles | Beginner/Intermediate Microsoft Excel & Word Workshop Jamie Lewis Harvard T.H. Chan School of Public Health Room: Executive Boardroom |  |  |  |
| 4:30 p.m. – 5:00 p.m.  | Break  |  |   |  |  |  |
| 5:00 p.m. – 8:30 p.m.  | NEDRAcon2023 Opening Reception sponsored by DonorSearch at the Basketball Hall of Fame                                     |  |   |  |  |  |
| 9:00 p.m. – 11:00 p.m. | NEDRA After Dark Karaoke sponsored by iWave at the Sheraton's Stonehaven Room  |  |   |  |  |  |

<sup>\*</sup>Schedule is subject to change.

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<sup>\*\*</sup>For complete session descriptions please refer to the NEDRA website: www.nedra.org/conference



## **NEDRA 2023 Annual Conference** May 4-5, 2023 Schedule-at-a-Glance

|                         |   |        | Thursday - May 4, 20   | 23                       |   |   |  |  |
|-------------------------|---|--------|--|--------------------------|---|---|--|--|
| 7:45 a.m. – 4:00 p.m.   | Registration/Information Desk and Exhibitor Hall  | l Onen | marsday May 4/20   |                          |   |   |  |  |
| 7:45 a.m. – 8:45 a.m.   | Breakfast Buffet – Grand Ballroom   | ГОРСП  |  |                          |   |   |  |  |
| 8:15 a.m. – 8:45 a.m.   | Volunteer Orientation – Executive Boardroom   |        |  |                          |   |   |  |  |
| 8:15 a.m. – 8:45 a.m.   | Welcome & Networking for New Members & First Time Conference Attendees – Room: Worthy   |        |  |                          |   |   |  |  |
| 9:00 a.m. – 10:00 a.m.  | Keynote: Patricia Banks, Professor, Mount Holyoke College & Author  Moderator: Milagro "Misa" Lobato, Director, Prospect Management & Analytics, Rhode Island School of Design Room: Grand Ballroom |        |  |                          |   |   |  |  |
| 10:00 a.m. – 10:15 a.m. | Break   |        |  |                          |   |   |  |  |
| 10:15 a.m. – 11:15 a.m. | (A1) The Dark Arts of Revenue and Fundraising Forecasting John Carasone   |        | (A2) <b>Changing Asia Landscape</b> <i>Shauna Meegan &amp; Stephanie Snow</i> Harvard <u>University</u> Room: Worthy   |                          | (A3)  Prospecting & Artle: Connecting the Dots Between an Online Game and Prospecting  Beth Inman, Shriners Children's  Jennifer Vincent, Blackbaud |   |  |  |
|                         | Williams College  Room: Charles   |        |  |                          | Room: Highland  |   |  |  |
| 11:15 a.m. – 11:30 a.m. |   |        |  |                          |   |   |  |  |
| 11:30 a.m. – 12:00 p.m. | Sponsor Presentations  ALTRATA  WW. WEALTHER  Room: Highland  |        | DONORSEARCH Room: Worthy   | QUANTIFIND Room: Charles |   | WINDFALL Room: Grand Ballroom   |  |  |
| 12:00 p.m. – 12:15 p.m. | Break   |        |  | Room: Charles            |   |   |  |  |
| 12:15 p.m. – 1:45 p.m.  | Luncheon, Business Meeting and Awards   | S      |  |                          |   |   |  |  |
| 1:45 p.m. – 2:25 p.m.   | Networking – Roundtable Discussions   |        |  |                          |   |   |  |  |
| <u> </u>                | (B1)  |        | (B2)   |                          |   | (B3)  |  |  |
| 2:30 p.m. – 3:30 p.m.   | From Data Science to Skipping the Line: Ways to Use Your Analytics Skills in Daily Life  Marianne Pelletier  Staupell Analytics Group  Room: Charles  |        | Panel: Researchers In The Arts Kristina Gropper, Helen Brown Group Megan Horton, Rhode Island School of Design Jana Peretti, Boston Symphony Orchestra Colleen O'Donnell, Museum of Fine Arts Room: Worthy |                          |   | The Principal Gift Track Suzy Campos Amherst College Room: Highland                                   |  |  |
| 3:30 p.m. – 3:45 p.m.   | Break   |        |  | ·                        |   |   |  |  |
| 3:45 p.m. – 4:45 p.m.   | (C1) <b>The Joys and Challenges of Small Research Shops</b> <i>Lisa Foster</i> Phillips Academy  Room: Charles  |        | (C2) The Psychology of the PhilanthropistUnderstanding How a Donor Thinks is Essential to Your Research Scot Scala Scala & Associates Room: Worthy   |                          | Planned Gi  | (C3)  iving Models: Explore the Data Enabling the Analytics  Lawrence Henze Blackbaud  Room: Highland |  |  |
| 5:00 p.m. – 6:00 p.m.   | Networking Reception sponsored by Windfall at Sheraton Monarch 2 <sup>nd</sup> floor Atrium   |        |  |                          |   |   |  |  |
| 6:00 p.m. – 8:00 p.m.   | Dinner Break – various locations throughout Spri  |        | SHELATOH MOHALCH Z. HOOF ALFIUM  | <u> </u>                 |   |   |  |  |
|                         |   |        | CM Carinafield   |                          |   |   |  |  |
| 8:00 p.m. – 12:00 a.m.  | NEDRA After Dark sponsored by Quantifind at MGM Springfield   |        |  |                          |   |   |  |  |

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## **NEDRA 2023 Annual Conference** May 4-5, 2023 Schedule-at-a-Glance

| ### 2-45 p.m. ## |                         |  | Friday – May 5, 2023   |   |  |  |  |  |  |
|--|-------------------------|--|--|---|--|--|--|--|--|
| Volunteer Orientation — Executive Boardroom  (D3)  Demystifring Donor Advised Funds Maureen Barry Smith College Room: Worthy Smith College Room: Highland  Roo | 7:45 a.m. – 2:45 p.m.   | • • •  |  |   |  |  |  |  |  |
| (D1) Demystifying Donor Advised Funds Manuere Barry Smith College Room: Worthy Smith College Room: Worthy Smith College Room: Worthy Sponsor Presentations  (D2) Demystifying Donor Advised Funds Manuere Barry Smith College Room: Highland  Room: Highland  (D2) Demystifying Donor Advised Funds Manuere Barry Smith College Room: Worthy  Break Sponsor Presentations  (D2) Demystifying Donor Advised Funds Manuere Barry Smith College Room: Highland  (D2) Demystifying Donor Advised Funds Manuere Room: Manuere Barry Manuere Barry Manuere Barry Worthy  Room: Highland  (E2) Demystifying Donor Advised Funds Manuere Room: Manuere Barry Room: Charles  (E3) Demystifying Donor Advised Funds Room: Charles  (E3) Demystifying Donor Advised Funds Room: Charles  (E3) Demystifying Donor Advised Funds Room: Worthy Manuere Barry Manuere Barry Manuere Barry Manuere Barry Manuere Barry Manuere Barry Manuere Harry | 7:45 a.m. – 8:45 a.m.   |  |  |   |  |  |  |  |  |
| Demystifying Donor Advised Funds Maureen Barry Smith College Room: Worthy Special College Room: Highland Room: Charles  Break Sponsor Presentations  Williams Sociace Room: Highland Room: Highland Room: Highland Room: Charles  KALEIDOSCOPE Room: Charles  Room: C | 8:15 a.m. – 8:45 a.m.   | Volunteer Orientation – Executive Boardroom  |  |   |  |  |  |  |  |
| Aduren Barry Smith College Room: Worthy Room: Highland Room: KALEIDOSCOPE Room: Worthy Room: Highland Room: Carake Room: Highland Room: Carake Room: Highland Room: Highland Room: Carake Room: Carake Room: Carake Room: Highland Room: Carake Room: Ca |                         | (D1)   | (D3)   |   |  |  |  |  |  |
| Sponsor Presentations   Spon   | 9:00 a.m. – 10:00 a.m.  | Maureen Barry Smith College  | Gillian Sciacca Williams College   | Marie Kelly, Stonehill College<br>Callie Curran Morrell, UCLA   |  |  |  |  |  |
| 10:15 a.m. – 10:45 a.m.  10:15 a.m. – 10:45 a.m.  10:15 a.m. – 11:00 a.m.  10:45 a.m. – 11:15 p.m.  10:45 a.m. – 11:15 p. | 10:00 a.m. – 10:15 a.m. | Break  |  |   |  |  |  |  |  |
| Room: Worthy Room: Highland Room: Charles  | 10:15 a.m. – 10:45 a.m. | Sponsor Presentations  |  |   |  |  |  |  |  |
| Room: Highland   Room: Charles     |                         | 10 - Control C | imana  |   |  |  |  |  |  |
| (E1)  Panel: Diversity, Equity & Inclusion Kristal Enter, Massachusetts General Hospital Lauren Casas, Dana-Farber Cancer Institute Samir Chapra, Princeton University Steve Grimes, Helen Brown Group Room: Worthy  Break  12:15 p.m. = 1:15 p.m. 12:10 p.m 1:15 p.m.  12:00 p.m 3:00 p.m 3:00 p.m.  (E1)  (E2)  (E2)  (E3)  How to Get Started Using Power BI for Visualization Visualization Emily Marcason-Tolnie & Katy Rusate Skidmore College Room: Charles  Room: Charles  Room: Charles  (F2)  (E3)  How to Get Started Using Power BI for Visualization Emily Marcason-Tolnie & Katy Rusate Skidmore College Room: Charles  Room: Charles  (F2)  (F3)  (F3)  Oh What a Tangled Web We Weave! Sarah Price BWF Room: Highland  Canadian Million \$ Prospects: An untapped pool Terry Burton Dig In Research Room: Charles  Room: Charles   |                         | Room: Worthy   | Room: Highland   | Room: Charles   |  |  |  |  |  |
| Panel: Diversity, Equity & Inclusion Kristal Enter, Massachusetts General Hospital Lauren Casas, Dana-Farber Cancer Institute Samir Chapra, Princeton University Steve Grimes, Helen Brown Group Room: Worthy  Billionaires are Unlisted: Supporting and Working with Principal Gifts Cara Kennedy & Lucy Miller Massachusetts General Hospital Room: Highland Room: Highland Room: Charles  Billionaires are Unlisted: Supporting and Working with Principal Gifts Cara Kennedy & Lucy Miller Massachusetts General Hospital Room: Highland Room: Charles  Break  Licute part of the principal Gifts Cara Kennedy & Lucy Miller Massachusetts General Hospital Room: Highland Room: Charles  Break  Licute part of the principal Gifts Cara Kennedy & Lucy Miller Massachusetts General Hospital Room: Charles  Break  Licute part of the principal Gifts Cara Kennedy & Lucy Miller Massachusetts General Hospital Room: Highland Room: Charles  Canadian Million \$ Prospects: An untapped pool Terry Burton Dig In Research Room: Charles  Room: Charles   | 10:45 a.m. – 11:00 a.m. | Break  |  |   |  |  |  |  |  |
| L2:15 p.m. – 1:15 p.m.  Luncheon and Sponsor Raffle – Grand Ballroom  (F1)  No Due Dates Required: Upcycling Old Scores & Ratings Via Unsupervised Machine Learning and Internal Consistency  James Cheng Boston University Room: Highland  Room: Worthy  Luncheon and Sponsor Raffle – Grand Ballroom  (F2)  (F3)  Canadian Million \$ Prospects: An untapped pool Terry Burton Dig In Research Room: Charles   | 11:00 a.m. – 12:00 p.m. | Panel: Diversity, Equity & Inclusion  Kristal Enter, Massachusetts General Hospital  Lauren Casas, Dana-Farber Cancer Institute  Samir Chapra, Princeton University  Steve Grimes, Helen Brown Group   | Billionaires are Unlisted: Supporting and Working with Principal Gifts Cara Kennedy & Lucy Miller Massachusetts General Hospital | How to Get Started Using Power BI for Visualization  Emily Marcason-Tolmie & Katy Rusate Skidmore College |  |  |  |  |  |
| Roundtable Discussions – Grand Ballroom  (F1)  (F2)  (F3)  No Due Dates Required: Upcycling Old Scores & Ratings Via Unsupervised Machine Learning and Internal Consistency  James Cheng Boston University  Room: Highland  Room: Worthy  (F2)  (F3)  Canadian Million \$ Prospects: An untapped pool Terry Burton Dig In Research Room: Charles   | 12:00 p.m. – 12:15 p.m. | Break  |  |   |  |  |  |  |  |
| No Due Dates Required: Upcycling Old Scores & Ratings Via Unsupervised Machine Learning and Internal Consistency  James Cheng Boston University  Room: Highland  (F2)  (Canadian Million \$ Prospects: An untapped pool  Terry Burton Dig In Research  Room: Charles   | 12:15 p.m. – 1:15 p.m.  | Luncheon and Sponsor Raffle – Grand Ballroom   |  |   |  |  |  |  |  |
| No Due Dates Required: Upcycling Old Scores & Ratings Via Unsupervised Machine Learning and Internal Consistency  James Cheng Boston University  Room: Highland  No Due Dates Required: Upcycling Old Scores & Canadian Million \$ Prospects: An untapped pool Terry Burton Dig In Research  Room: Charles   | 1:15 p.m. – 1:55 p.m.   | Roundtable Discussions – Grand Ballroom  |  |   |  |  |  |  |  |
|  | 2:00 p.m. – 3:00 p.m.   | No Due Dates Required: Upcycling Old Scores & Ratings Via Unsupervised Machine Learning and Internal Consistency  James Cheng  Boston University   | Oh What a Tangled Web We Weave!  Sarah Price  BWF  | Canadian Million \$ Prospects: An untapped pool  Terry Burton  Dig In Research                            |  |  |  |  |  |
|  | 3:00 p.m.               | Conference Concludes   |  |   |  |  |  |  |  |

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