



The California Advancement Researchers Association

Northern California Fall 2005 Seminar Day

Thursday, November 10, 2005
9:30 a.m. – 4:00 p.m.

Stanford University,
Fisher Conference Center
The Frances C. Arrillaga Alumni Center
26 Galvez Street
Stanford, CA 94305

Program Schedule

9:30 – 10:00 am Continental Breakfast and Networking

10:00 am Welcome and CARA announcements
Jenifer Botch, CARA Regional Chair, Northern California
James Rygg, CARA President

10:15 -11:15 am *Estimating Net Worth Using IRS Statistical Models*

Joseph R. Boeke, Director of Development Operations & Interim Director of Annual and Special Gifts, California Institute of Technology

Joe will discuss utilizing IRS Statistics Reports to determine a prospect's base net worth and to develop formulas to project giving capacity.

11:15 am BREAK

11:30 – 12:30 pm *Small is Beautiful: A Grassroots Approach to Fund Development*

Giuliana Matioli, Project Manager, Alta Plaza Park Renovation Campaign

Giuliana spent many years in the corporate sector before diving into the nonprofit world. Learn how she made the transition from a "9 to 5+" professional to an independent consultant. As the sole project manager and fundraiser for a San Francisco neighborhood park renovation campaign, Giuliana uses her passion and drive to accomplish various development tasks from identifying funding sources to cultivating prospective donors and soliciting donations in an effort to successfully rebuild a neighborhood park.

12:30 -1:30 pm Catered Lunch on site

1:30 – 2:30 pm *The Right Gift at the Right Time: Tracking Your Prospects*

Robert Weiner, President, Robert L. Weiner Consulting

Robert will provide an overview on how frontline fundraising and development services teams can work together to develop a useful prospect management and tracking system. He will describe detailed information about how to identify your organization's needs from rating prospects at a particular giving level to dividing your prospect pool using readiness and capacity codes.

2:30 – 2:45 pm BREAK

2:45 -3:45 pm *Finding Clues and How the Clues Find You—Identifying and Analyzing Wealth Indicators through Basic Research and Advanced PUSH Technology*

**Aaron Begg, Research and Corporate Development Manager,
California Shakespeare Theater**
Dori Cavala, Development Research Coordinator, Mills College

Dori and Aaron will present on the application of basic research techniques to identify wealth indicators utilizing both hard copy and electronic resources. They will share their favorite research sources; discuss how to leverage accessibility by setting up “push technology” reminders; and how to use *Really Simple Syndication* (RSS) technology through a news reader or aggregator to sort data more efficiently.

Mentor Program: Sign up to be mentored by a seasoned researcher throughout the seminar day. This is an excellent opportunity for newly-hired or beginning researchers to meet and interact with more seasoned research professionals who can answer your specific questions or help you to understand the various topics being presented throughout the day. For those of you who have been in the research profession for a number of years, this is your opportunity to get involved with CARA by serving as a mentor.

Questions about registration? Please contact Rebecca Benard at cara@iswest.com, or 805-649-4647.

Questions about programming? Please contact Jenifer Botch at jenifer@sfpt.org or 415-750-5109.

Directions to Stanford University

Fisher Conference Center
The Frances C. Arrillaga Alumni Center
26 Galvez Street
Stanford, CA 94305

The Frances C. Arrillaga Alumni Center is located at 326 Galvez Street, at the intersection of Campus Drive and Galvez Street.

For driving directions, please check the Stanford Website at:
http://www.stanfordalumni.org/aboutsaa/alumni_center/directions.html

Registration Form

California Advancement Researchers Association
Northern California Fall 2005 Seminar Day

November 10, 2005 at Stanford University

**Mail check (payable to CARA) and registration form to:
CARA, Box 1705, Oak View, CA 93022**

Please postmark your registration form no later than November 1st so that we may provide an accurate food count. Phone reservations and credit cards are not accepted. Cancellations received before November 4, 2005 will be 100% refunded; no refunds will be made after that date. Fee includes the seminar program, continental breakfast, lunch, and breaks. Dietary restrictions will be considered in menu planning.

Questions about registration? Contact Rebecca Benard, CARA Administrator, at 805-649-4746 or cara@iswest.com.

CARA Member Registration Fee:

\$60 Members

Non-CARA Member Registration Fee:

\$90 Non-members

Join CARA and Register for this Event (\$50 membership fee + member registration fee) Please note: If you join CARA today, your membership is good through December 31, 2006

\$110

Name: _____

Title: _____

Organization: _____

Address/City/State/Zip: _____

Phone: _____

Email (mandatory field): _____

Number of Years in Advancement Research: _____

Please check here if you require a vegetarian meal option _____

Mentor Program

Yes, I would like to be assigned a mentor for the day

Yes, I would like to serve as a mentor