Thanks!
Research would like to thank Monty Shepardson and Stephen Clark for leading great discussions about their work as fundraisers. We met with them earlier this month to better understand how our research is used and what specific information is most useful—and why. Monty and Steve gave us helpful insights into how they view and use research and how other administrators focus on different informational aspects of prospect cultivation and gift solicitation.

Spotlight Private Company Research

Researcher Bill Jarmuz recently spoke about privately-held companies evaluation to the research staff. A privately-held company does not sell stock to the public and is usually not bound to disclose financial performance and compensation information to the SEC. In order to preserve their decision-making freedom, these companies usually do not report their value and the profit that might come to the owner if the company was sold.

Bill laid out two basic methods for assigning value to these companies involving a close look at company size, industry-peculiarities, and "multiples" (formulas for calculating value).

We are currently evaluating these methods and look forward to creating a set of metrics for the Ratings Primer in the coming month.

Spring is almost here!

To celebrate, we’ll be introducing a couple of new sections for our next issue, including Prospecting Highlights (numbers and dollars) and Discoveries, which will bring to you humorous and interesting material from our sleuthing and spelunking files.

Here’s to finding your own pot of gold!

Investopedia

Articles, Tutorials, Financial Tools, Terms of the Day and financial Buzz Words are all available at Investopedia.com.

Business Glossary Resource

The glossary contains more than 1,250 business terms, organized and cross-referenced for your convenience. You can search the glossary for a particular word or search the full text of the glossary to find every reference to a word or phrase.

Investor Words

Have investment words e-mailed to you daily. This financial glossary has over 6,000 definitions and 20,000 links.

Recent News

The Research Team regretfully said adieu to Rick Gropper on March 1st as he embarked on his new role as Assistant Director for Annual & Special Giving at SOM. It won’t be the same around here without Rick, but he promised to come back for any 265 Church Street parties!

Congratulations to Monica Keith, whose baby, Bryce, was born on March 12th! He was a healthy 9lbs 9.5oz and 20.75" long at birth!
Tip of the Month

SEARCHING On The WWW: BOOLEAN

Boolean is derived from the mathematical system of notation created by nineteenth Century mathematician, George Boole. It symbolically represents a relationship between sets (entities). In the case of information retrieval, Boolean uses AND, OR, and NOT to identify those records that meet the criteria as specified.

AND means both terms must be present: Yale AND University

OR means either word can be present: Yale OR University

NOT means to exclude a word: Yale NOT University.

Nesting uses multiple parameters & the use of parenthesis: Yale AND (University OR College)

AND one non-Boolean search limiter:

w/2 means terms must be within 2 words of one another: Yale w/2 University