**Director’s Corner**
In the intervening months since our last issue, we have been hard at work honing our skills and improving our work product. We have instituted a new internal monthly evaluation process which generates constructive, anonymous colleague feedback, which we have found immensely helpful. This process has also led us to make subtle but significant modifications to our templates; some of which you may have already noticed.

In our efforts toward a better product, we have also been collaborating with several departments, C&F and Principal Gifts in particular, to work directly on briefings, rather than creating separate, stand alone documents. We hope that you are happy with the results.

~Michele

**Announcements**
The following Yale Family Trees have recently been completed:

- Annenber
- Beinecke
- Blaustein
- Klingenstein
- Rose
- Taft
- Weyerhaeuser

Look in Prospects on Herry for these and all 35 of the trees we currently have done. As always, email any questions to: prospectresearch@yale.edu.

**Tracking Wealth with WealthTracker**

We are pleased to announce the newest addition to our investigative arsenal, the very powerful WealthTracker. This product is customized to track and search the business and financial activity of Yale alumni identified in available SEC filings, online profiles and additional available online materials. Any information WealthTracker finds is then compiled and sent in a daily alert e-mail to dedicated team members who analyze and organize the information to support proactive prospecting efforts. WealthTracker sends alerts when it finds things like: SEC insider transactions, private and public company sales, mergers and acquisitions, promotions, appointments, and resignations. Many of these may require immediate action.

When the alerts are received, Research Analysts verify the identity of the named individuals, extract the important details and then notify appropriate staff if one or more of the following occurs:

- We learn of major business deals or financial transactions performed by rated and assigned prospects.
- We receive information that needs to be updated in a prospect or company’s BERT Profile or major prospect news screen.
- A sudden change in a previously untracked/unrated prospect’s financial status or employment status justifies a new or updated RCR that may affect development strategy.

So far this tool has proved invaluable with the immediate identification of important prospecting opportunities that would have otherwise remained unknown or recognized outside of key time frames. We would like to thank the development staff for their feedback as we have been refining this process and becoming proficient in this new capability.

**C&F Spotlight: Teambuilding**

After several years of being separated by a 20-minute walk or a short car ride, Research and C&F have taken full advantage of co-location on the 10th floor in our new building. In the Fall, we moved forward with team meetings for the three new principal divisions: Humanities, Arts, and International; Science, Technology, and Business; and Medicine, with the dedicated Research Analysts and Development Officers discussing upcoming visits, goals, and projects. We also instituted shop-wide sessions to brainstorm about top C&F prospects. We held our second session in December and used the momentum to rethink and restructure Research's support for C&F by introducing new, higher-impact report templates. Looking forward, one of our primary goals over the next few months is to build a solid platform for proactive prospecting research related to C&F’s campaign goals. More to come!
**Yale Trivia!**

This Yale alumna was the first African-American woman to be admitted to the state bar of Mississippi.

Can you name her?

Please email answers to: prospectresearch@yale.edu.

One correct respondent will win a prize!

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**CASE Conference San Diego**

On February 5-7, Jenni Whitfield attended the CASE Annual Conference for Development Researchers: Researchers as Knowledge Managers. There were excellent sessions on topics including: research for planned giving, working with departments outside of development, such as the Office of Institutional Research, and using metrics to monitor the quality and quantity of our department’s work. Presenters came from M.I.T., the University of Washington, and Temple University, among other schools; as well as from several vendors of analytics products for the development market.

Much of the focus of the conference was on how research departments can and are moving beyond analysis toward optimization of data management and processes. Many of our group’s recent efforts reflect this goal: trying to integrate stewardship information into BERT, coordinating access to contact memos and working with AYA to make data from reunion books available electronically; are just some of the projects we are involved in now. Colleagues shared experiences from the field reflecting the limitations of the various databases and other systems in place in their organizations, but, more importantly, the great potential for improvement.

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**Hot Sites!**

Check out these web links to watch recent news clips and interviews. Search for news coverage on any topic or for recent mentions of Yale. If you’re lucky, you might even be able to see a prospect in action!

- **[www.tveys.com](http://www.tveys.com)**
  Use a keyword search to find transcripts and videos from leading TV and radio stations.

- **[www.reuters.com](http://www.reuters.com)**
  Search for news, videos, photos, or all three.

- **[www.hoovers.com](http://www.hoovers.com)**
  Search for a prospect or company to find out if any CNBC video interviews are available. Look for the CEOs on Camera feature under “Browse Company Record.”

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**Kiva—"Loans That Change Lives"**

In the world of university fundraising, we rely on gifts of six and seven figures to make an impact on the success of the organization we support. Yet, in many economies around the globe, a business’ success may hinge on the ability to acquire even $500 or less. Enter Kiva, a new microlending organization founded by chief executives from Tivo, Paypal, Google and Barclays Global Investors. Their mission is to match multiple ‘micro-philanthropists’ with business owners in impoverished areas who are in search of small loans that are pivotal to both their businesses’ as well as their families’ survival. It could be $1,000 for a new taxi or $475 for a seamstress’ new sewing machine. With loan amounts of as little as $25, you can contribute to the entrepreneur you choose and read progress reports to watch as the full loan amount is raised and repaid (over an preset repayment period ranging from six months to two years). For more information visit [www.Kiva.org](http://www.Kiva.org).