

John Taylor
John H. Taylor Consulting, LLC
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Partial List of Services

- Advancement Operations Audit (AOA)
 - A 4-6 day examination and report on an organization's advancement operation, with a focus on improving efficiency and verification of regulatory compliance
 - Recommended for any organization that has not had a similar review in over 5 years
 - Typically requires 2-3 days on-site and 2-3 days for pre-visit review and development of a detailed report of findings and recommendations. Areas to be audited include, but are not limited to:
 - gift processing, biographical records, advancement IT/reporting, prospect research, prospect management, donor relations/stewardship/development communications, and key departmental relationships including the business office, separate foundations, admissions & student affairs, and "central" IT
 - Compliance areas to be reviewed include IRS/Canada Revenue Agency, FASB/GASB, HIPAA, FERPA, PCI, CASE Guidelines, etc.

- Pre-conversion Audit (PCA)
 - A 2.5-3.5 day audit/training experience designed to fully prepare an organization for a major development system conversion. Key components include:
 - What to expect in a conversion
 - What to plan for
 - How to plan
 - What not to expect
 - The audit will include a "state of the database" analysis and recommendations for areas to address prior to conversion to ensure that you avoid the "garbage in; garbage out" conundrum
 - Also designed to fully prepare end-users and help establish proper expectations – involves/requires meetings with senior management to ascertain their expectations, and conduct a reality check to confirm what leadership and staff expect as a result of the conversion

- Software Integration Assessment (SIA)
 - A 1.5-2.5 day customized evaluation, preferably conducted within 90-180 days of a software conversion or module installation, to ensure that the system, and staff, are functioning optimally and that appropriate business processes have been reengineered to optimize the new system/upgrade
- Annual Compliance and Efficiency Review (ACER)
 - A substantially scaled-down version of the AOA (1-2 days on-site), conducted for institutions that have already obtained an AOA to ensure best practices continue to be followed, and that the organization continues to conform to all regulatory requirements including new regulations imposed within the previous 12 months
 - Reviews progress on recommendations made during the previous AOA and identifies roadblocks/hurdles that remain with recommendations for resolving those issues
- Campaign Preparedness Audit (CPA)
 - A vastly expanded (6-8 days) version of the AOA and recommended for institutions preparing to launch a multi-year comprehensive campaign
 - Recommended to be conducted within 3 years of the launch of the pre-public phase of a 5+ year campaign
 - Includes all aspects of an AOA as well as a Readiness Assessment to include:
 - Staff size and work distribution assessment
 - Position description review and analysis
 - Campaign, Gift Acceptance Policy, Naming Policy, etc. development (possibly to include formal development of a Gift Acceptance Committee structure and assignment)
 - Review of entire Advancement/Development organizational structure and assignment
 - Recommendations, as appropriate, for phased-in staff increases/changes to support the campaign, as well as recommendations for phased-in staff reductions/reallocations post-campaign
- Optimization of Advancement Systems Assist (OASA)
 - Designed for senior-level advancement professionals – CAO, VP, DoD and other key staff actively engaged in primary fundraising activities

- Focuses on training programs to familiarize these individuals with the various tools available to fundraise most effectively
- Focused on the needs of the fundraiser from the system perspective
- Advancement Mediation Assistance (AMA)
 - A highly customized service to help foster/facilitate better relationships between different divisions within the organization, or even between departments within the same division
 - Common areas of focus include the relationship between the Advancement/Development Office and the Business Office
Advancement/Development Office and the Alumni Association
Advancement/Development Office and the Athletic Office
Advancement/Development Office and institutionally-related foundations
- Policy & Procedure Documentation Development (PPDD)
 - Embracing best practices within the industry we will help an institution develop, redevelop, or enhance policies and procedures relevant to the Advancement Office, including:
 - Gift acceptance policies
 - Gift entry policies and procedures
 - Data entry policies and procedures
 - Endowment policies and MOUs
 - Naming Policies
 - Donor confidentiality policies
 - Prospect management policies & procedures
- Advancement Office Strategic Planning (AOSP)
 - A highly customized service to assist a new Advancement operation – or a new Chief Advancement Officer – to look beyond what has been and what is and develop a plan for the future (3-5 years)
 - Requires an initial two-day site visit interviewing senior management officials within the organization including, if available, the Board Chair and/or the Development Committee Chair and organization CEO
 - Full magnitude and scope of assistance and documentation is discerned immediately following the initial interviews
- Customized Consulting, Staff/Board professional development, and mentoring/coaching services