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## EXPERIENCE

- JOHN H. TAYLOR CONSULTING, LLC** Durham, NC  
1994-Present **Principal** Resumed in 2013, as a sole practitioner, a full-time consulting practice that began part-time in 1994 while working at Duke University, and greatly expanded under Advancement Solutions Consulting Group (see below). The practice offers consulting services to all nonprofit organizations nationally and internationally to enhance the operational aspects of development and advancement and assist them in strategic and campaign planning. Projects with clients involve auditing advancement operations, determining preparedness for comprehensive campaigns, and assessments of current policies and procedures. Additional expertise in helping organizations develop and maintain effective database management policies, and pre-conversion systems assessments and post-implementation analysis. Additional services include board development, conducting professional development in a wide variety of Advancement topics, and conducting overall personnel assessments.
- Partner, Alexander Haas (Atlanta, GA) since 2016 providing counsel as needed requiring specific skills and expertise in the areas of advancement services, campaign readiness, campaign planning/preparation, feasibility studies, and ongoing campaign counsel.
  - Creator, owner, and host of the Advancement Services listserv, FundSvc, with roughly 4,000 subscribers globally.
- NORTH CAROLINA STATE UNIVERSITY** Raleigh, NC  
2008-2013 **Associate Vice Chancellor for Advancement Services & Interim Campaign Manager** Responsible for all University Advancement infrastructure functions supporting central administration, ten colleges, twelve independent affiliated foundations, and three additional fundraising programs. Departments under this position include Alumni & Donor Records, Development Communications & Donor Relations, Information Services, Prospect Management, and Prospect Research. Managed a staff of 35 professional employees and numerous student assistants. Achievements include:
- Served as Interim Campaign Manager for a \$1.6 billion campaign for 18 months.
  - Development of the first Constituent Relations Best Practices manual for NC State.
  - Served as project manager for the institution-wide initiative to convert the SunGard Advance system from a Sybase platform to Oracle.
  - Served as project manager for the institution-wide initiative to deploy a state-of-the-art ePhilanthropy program including the ability to automate recurring and sustaining giving.
  - Led a review of all fundraising practices for compliance with national and industry standards.
  - Managed the implementation of a Web Intelligence end-user reporting tool.
  - Served as a member of the University Administrative Systems Steering Team.
- ADVANCEMENT SOLUTIONS CONSULTING GROUP** Durham, NC  
2004-2008 **Principal** Launched a new division of RuffaloCODY (now RuffaloNL) providing innovative consulting and training solutions for universities and state-wide systems, public and private colleges & independent schools, and other US-based and international nonprofit organizations. Services concentrated in the areas of Advancement Services, Prospect Research and Management, Donor Relations, system conversions, feasibility studies, and staff assessments. Achievements include:
- Expanded numerous consulting programs including adding regulatory and compliance reviews; pre-campaign assessments; interdepartmental mediation services; policy & procedure documentation development; and strategic planning.
  - Expanded services to include board & staff development and training programs, as well as strategic planning retreats, in response to client requests.

2002-2004 **COUNCIL FOR ADVANCEMENT & SUPPORT OF EDUCATION (CASE)** Washington, DC  
*Vice President, Research & Data Services* A newly created position responsible for increasing revenue related to research activities, the CASE Matching Gifts Clearinghouse, and the CASE Information Center. Managed a staff of eight professional employees. Achievements include:

- Authored the 3<sup>rd</sup> edition of the nationally accepted fundraising reporting standards – CASE Management & Reporting Standards.
- Initiated and developed several comprehensive advancement surveys, including CASE’s first “real-time” compensation survey; an analysis of email solicitation practices; and an examination of donor recognition best practices.
- Developed and marketed CASE Matching Gifts products and services resulting in a 30% increase in revenue in one year.
- Developed and organized the first conferences for Gift Processing and Bio Maintenance specialists, resulting in unbudgeted net revenue for CASE.
- Developed and personally delivered Carnegie Corporation-sponsored Advancement workshops in Ghana, Nigeria, and Tanzania in 2003 and 2004.

1988-2002 **DUKE UNIVERSITY** Durham, NC  
*Director, Alumni & Development Records* Responsible for the processing and reconciliation of \$260MM+ in annual charitable contributions and grants, as well as the management and maintenance of accurate records of 400K+ donors, friends, and alumni. Managed a staff of 16 professional and clerical employees. Achievements include:

- Managed the successful conversion from a homegrown legacy system to BSR’s (now Ellucian) Advance, and served as Chair of the BSR Users Group for all DB2 sites.
- Improved gift processing productivity by over 500% through implementation of technology enhancements and workflow improvements.
- Developed policies and procedures to reduce the University’s lost alumni rate to under 4%.
- Increased matching gifts revenue by 300% in 3 years through automation and innovation.

1987-1988 *Manager, University Payrolls* Directed the operation of three payroll systems supporting over 18,000 employees. Managed a staff of eight professional and clerical employees.

1981-1987 **FIRST WACHOVIA** Atlanta, GA & Raleigh, NC  
*Assistant Vice President* Managed the operational aspects of products developed and marketed to their corporate customers, with emphasis on new technologies and electronic banking capabilities. Managed a staff of 18 professional and clerical employees.

1978-1981 **UNITED STATES NAVY** Norfolk, VA  
*Lieutenant Commander* Assigned to the USS Emory S. Land (AS-39) and served in various capacities including Communications/Intelligence Officer, Asst. Chief Engineer, and Legal Officer leading to the ultimate designation as a Surface Warfare Officer.

## EDUCATION

**VANDERBILT UNIVERSITY** Nashville, TN  
BA, Mass Communications and Socio-Political Change

**DUKE UNIVERSITY** Durham, NC  
Certificate in Nonprofit Management  
Graduate Student – Master of Arts in Liberal Studies

OTHER

- **Consulting Editor:** CASE Management & Reporting Standards, 3<sup>rd</sup>, 4<sup>th</sup> & 5<sup>th</sup> Editions, CASE® Books, 2004, 2009 & 2021
- **Editor:** Advancement Services: Enhancing Fundraising Success  
CASE® Books, 2015 (also edited 1<sup>st</sup> edition in 1999; 2<sup>nd</sup> in 2007)
- **Instructor:** 2001-2005 Duke University Office of Continuing Education  
Certificate Program in Nonprofit Management
- **Chair:** 2016 – 2021 Co-Chair Annual Meeting of the Minds Conference  
California and Chicago (Beginning in 2018)  
Seattle Engage Conference (Beginning in 2020)  
1996, 1997 & 2011 CASE Summer Institute in Advancement Services  
2005-2008 Annual Advancement Academy
- **Faculty:** 1994 & 1995 CASE Summer Institute in Educational Fund Raising  
1998-2000, 2002-2004, 2006, 2012, 2013 CASE Conference for Senior  
Advancement Services Professionals  
2001-2005, 2008, 2011 CASE Summer Institute in Advancement Services  
1998, 2002-2007 CASE Matching Gifts Symposium  
2003 & 2005 CASE Advanced Planned Giving Conference
- **Speaker:** 2018 New England Annual Giving Conference  
2016 Keynote Address, AcademicWorks Annual Conference  
2015 & 2018 CASE Community College Advancement Conference  
2016 Independent College Advancement Associates Conference  
2004, 2006, 2008, 2010, 2011, 2014-2020 CASE District Conference  
2008, 2011, 2014-2020 aasp Summit  
1994-1999, 2003, 2009, 2010 SunGard Users Conference  
2006, 2007 AFP International Conference  
2003, 2005, 2006 APRA International Conference  
Over 300 other conferences and user group presentations and keynotes
- **Awards:** CASE Laureate – 2019  
International Mailys Award for listserv Excellence – 2014  
aasp Jonathan Lindsey Lifetime Achievement – 2012  
CASE Crystal Apple for Outstanding Teaching – 2001

COMMUNITY ACTIVITIES

- **President; Secretary**, Board of Governors, Duke University Faculty Club (2000-2002 & 2017-2020)
- **Founder, Board Member, Treasurer, & President**, Association of Advancement Services Professionals (2007-2020)
- **Member**, CASE Commission on Philanthropy (2011-2014)
- **Chair**, Durham Crisis Response Center Board of Directors (2001-2002)
- **Member**, North Carolina Symphony Development Committee (2000-2002)
- **Member**, Elon University Parent's Council (1998-2001)
- **Chair**, Hillsborough, NC Planning Board (1995-2000)
- **Treasurer, & President**, Theatre In The Park, Raleigh, NC, Board of Directors (1987-1994)