

John H. Taylor Consulting, LLC
Pre-Assessment Checklist

Program Review: The program review will acquaint us with the current program and will include an advance review of materials related to existing programs as follows:

- ✓ Current organizational chart for the entire Advancement/Development division
- ✓ Detailed organizational chart (ideally with names/tenure in position) for the Advancement/Development/Operations Services unit
- ✓ Position descriptions for all positions within Advancement/Development/Operations Services, regardless of whether the position is filled
- ✓ Resumes, if available, for those same individuals¹
- ✓ Development system/CRM user/procedure/training manuals as developed by the institution (vendor-supplied material is not needed)
- ✓ Development system/CRM statistics (name of system and current version number, number of records by donor type; % of valid mail/email/phone numbers; number of gift/pledge transactions/year by type; etc.), including all regular metrics reports
- ✓ Names of all ancillary technology in use to support the Advancement/Development program (reporting tools, portals, phonathon systems, online giving systems, etc.)
- ✓ Vendors used for regular data cleansing/appending and frequency of service
- ✓ Pertinent policy, procedure, and protocol (PPP) documents
- ✓ Confidential assessments of issues and concerns from senior management. This will be explained further, but is a critical factor in this review
- ✓ Copies of pertinent sections of any internal or external audits or feasibility studies conducted within the last 7 years

The material outlined in this list will be delivered to me sufficiently in advance of any onsite meetings (at least 15 days prior) to ensure time to thoroughly review all contents. This review will allow me to have some familiarity of organization and structure in advance of our onsite conversations, as well as enable us to begin the analysis of existing policy and procedure documents.

¹ Required only if conducting a personnel evaluation as part of the assessment.