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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 assessing current policies and procedures. Additional expertise in helping organizations develop and maintain effective database management policies, CRM conversion systems assessments and project management, and post-implementation analysis. Additional services include board development, SOAR and BHAG development, training in various Advancement topics, and conducting overall organizational and personnel assessments.
- Creator and host of the Advancement Services listserv, FundSvc, since 1994.
 - Co-Host/Creator/Facilitator of the Meeting of the Minds (Pomona, CA), Midwest Meeting of the Minds (Chicago, IL), and PNW Engage (Seattle, WA, and Portland, OR) Conferences.
 - Speaker/Keynote/Leader at over 300 conferences, symposia, and workshops worldwide. Including a 2022 Leadership Forum in London, UK, for four diverse charities/clients.
- 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 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 and 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 3rd 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, email solicitation practices analysis, and 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 maintaining 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% by implementing 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, emphasizing 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 Reporting Standards, 3rd, 4th & 1st Global Editions
CASE® Books, 2004, 2009 & 2021
- **Editor:** Advancement Services Strategies
CASE® Books, 2023 (also edited 1st edition in 1999; 2nd in 2007;
3rd edition in 2015)
- **Instructor:** 2001-2005 Duke University Office of Continuing Education
Certificate Program in Nonprofit Management
- **Chair:** 2007 – 2023 Co-Chair Annual Meeting of the Minds Conference
California and Chicago (Beginning in 2018)
Seattle & Portland 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, 2014-2022 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 (aasp) (2007-)
- **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)
- **Chair**, Hillsborough, NC Planning Board (1995-2000)
- **Treasurer, & President**, Theatre In The Park, Raleigh, NC, Board of Directors (1987-1994)