

# TATE & TRYON

CERTIFIED PUBLIC ACCOUNTANTS AND CONSULTANTS



## Nonprofit Advisory Services Enhancing Performance for Nonprofits

# Nonprofit Advisory Services

## ENHANCING PERFORMANCE FOR NONPROFIT ORGANIZATIONS

Management and boards are demanding tighter controls, higher levels of efficiency, and real time reporting of key performance indicators. Our consultants help organizations develop and implement strategies for improving the efficiency and relevancy of their business, financial accounting, and technology processes. Whether your goal is to lower costs, improve efficiency, or keep up with today's rapidly changing technology, Tate & Tryon's Advisory Services can help improve your organization's performance.

Our Consultants have extensive experience and a keen understanding of the key issues facing nonprofit organizations and offer trustworthy, objective, and cost-effective expertise and support across all areas of operations.



### FINANCE AND ACCOUNTING SOLUTIONS

Change within the finance function is driven by a dynamic business model, regulatory and compliance directives, as well as the demand for improved efficiencies. The need for timely and accurate financial information, technical accounting expertise and internal controls commands the attention of nonprofit leaders today.

In this environment, establishing precise, efficient finance and accounting processes is paramount. Our Advisory Services team is strategically focused on helping clients strengthen the finance function. Working with CFOs, Controllers, other finance and accounting executives, the Tate & Tryon team enables superior finance function performance by delivering unique insight, best practices, and guidance on the latest accounting, compliance and governance regulations affecting nonprofit organizations.



- **Finance strategy**
- **Process enhancement/design**
- **Policy and procedure development**
- **Cost reduction**
- **Financial reporting improvement**
- **Key performance indicators**
- **Pre/post-merger support**
- **Modeling**

# Trusted advice based on leading industry practices

## INFORMATION TECHNOLOGY SOLUTIONS

Prioritizing and managing technology initiatives can be challenging, yet failure to do so can spell disaster for any organization. Success requires leadership with both technology know-how and a strategic perspective that accelerates results.

Decisions about technology and innovation cannot be undertaken lightly. They require a strategic approach that ensures technology is an enabler, rather than a constraint.

Tate & Tryon understands the challenges associated with technology initiatives: the risks and costs of new technology, the implications of a stalled IT project, the intricacies of IT strategy and governance. Our executives are adept at assessing technological issues, determining appropriate options and developing an action plan for implementation. They merge technological know-how with strategic business acumen to help you prioritize and manage technology initiatives and quickly reap their rewards.

- **IT strategy**
- **Technology adequacy**
- **System selection**
- **Implementation Management/Oversight**

## RISK & CONTROL SOLUTIONS

New regulatory and compliance requirements are driving change at a relentless pace. Financial reporting, accounting practices and controls are the subject of unprecedented public and regulatory scrutiny in the nonprofit sector. The pressure on financial officers, executives, and their respective legal counsel to demonstrate compliance has never been greater.

In this environment, maintaining strong internal controls and effective risk management is critical. Tate & Tryon works with organizations to develop and implement the right set of controls to mitigate their specific risks. The professionals at Tate & Tryon bring unique internal control expertise and relevant industry knowledge to every consulting engagement — with the objective of mitigating any related fraud, business, and financial reporting risks.



- **Risk assessment**
- **Fraud risk assessment**
- **Internal controls review and design**
- **Internal audit co-source/outsource**

## REPRESENTATIVE CLIENTS

ASAE & THE CENTER FOR ASSOCIATION LEADERSHIP

AMERIDREAM

INTERNATIONAL CODE COUNCIL

NATIONAL ASSOCIATION OF INSURANCE COMMISSIONERS

NATIONAL ASSOCIATION OF BROADCASTERS

NATIONAL CONFECTIONERS ASSOCIATION

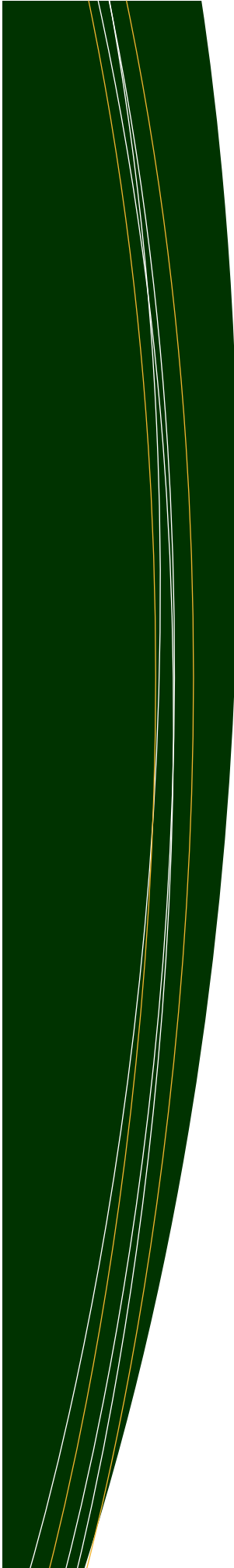
PHARMACEUTICAL RESEARCH AND MANUFACTURERS OF AMERICA

PUBLIC COMPANY ACCOUNTING OVERSIGHT BOARD

RECORDING INDUSTRY ASSOCIATION OF AMERICA

SOUND EXCHANGE, INC.

UNITED WAY OF THE NATIONAL CAPITAL AREA



# Reliable, cost-effective solutions that address your organization's key challenges

## OPERATIONS SOLUTIONS

Increased regulations, changing market conditions, and demand for greater efficiency are challenges facing all nonprofit organizations. In today's environment, improving and sustaining operational efficiency while minimizing conflict and risk requires exceptional experience and resources.

Our professionals help nonprofit organizations align and exceed operational objectives. With extensive expertise in the nonprofit sector, our team provides insight and guidance to streamline performance gaps, enhance operational controls, and strengthen competitive advantage.

Through a keen understanding of nonprofit organizations and the unique economic environment in which they function, we help our clients eliminate inefficiencies, reduce costs, and improve quality, flexibility and efficiency.

- **Organization assessment**
- **Process enhancement/design**
- **Operations review**
- **Complex/troubled project management**
- **Restructuring**
- **Interim executive support**

## DATA MANAGEMENT SOLUTIONS

Today, the most successful organizations are those that can respond quickly and flexibly to market changes and opportunities. The key to this response is the effective and efficient management of data and information. Placing strategic information in the hands of decision-makers aids productivity, empowers users to make better decisions, and improves customer service, leading to greater competitive advantage.

Our comprehensive data management solutions enable you to identify, access, validate, cleanse, transform, organize, administer and deliver data to support your organization's business goals. Our solutions will help you maximize the use of your enterprise data, reduce costs through streamlined data management processes, and increase the efficiency of your business.

- **Data collection and analysis**
- **Data quality and transformation**
- **Business intelligence/data mining**
- **Data cleaning and migration**



# Why Chose Tate & Tryon?

## Solid Reputation

Providing consistent quality services to the nonprofit community for over 25 years is the hallmark of our firm. We are widely recognized and respected in the nonprofit community and by our peers as experts in the area of nonprofit accounting and exempt organization taxation.

## Objective, Value-Added Approach

With a depth and breadth of experience in auditing, governance, performance improvement, and tax services, our consultants are well-equipped to help you improve your business processes, enhance your internal controls, create operating efficiencies, and extend financial oversight throughout your organization. Furthermore, we regularly offer articles and publications to help our clients assess the impact of changing laws, regulations, standards, and practices affecting nonprofit organizations.

## Commitment to Nonprofits

Tate & Tryon has a proud tradition of leadership and commitment to the nonprofit community. Many of Tate & Tryon's staff members volunteer their personal time in support of a wide variety of charitable organizations and causes. In addition, many of the Firm's senior staff members serve on nonprofit boards and committees. Whether through firm-wide initiatives or the efforts of individual staff members, we are firmly committed to sharing our knowledge and resources with the communities in which we do business.

## Right Size, Right Fit

With a staff of nearly 100 professionals dedicated exclusively to serving nonprofits, Tate & Tryon offers a unique combination of services, technical expertise, and resources that is unmatched by most other accounting firms, including the Big 4. This allows us to offer an exceptional level of client service that translates into prompt, personalized attention for you and your organization.

## Contact Us

**Charles F. Tate, CPA, MS**  
Managing Partner  
(202) 419-5101  
ctate@tatetryon.com

**Michael M. Tryon, CPA**  
Senior Partner  
(202) 419-5102  
mtryon@tatetryon.com

## About Tate & Tryon

Tate & Tryon is a public accounting and consulting firm that specializes in accounting and financial management for nonprofit entities. We offer unparalleled experience and financial solutions through a wide range of accounting, audit & attest, tax preparation, and advisory services. We also provide financial systems consulting through T3 Information Systems, which is a wholly-owned subsidiary of Tate & Tryon. T3 specializes in the Microsoft Dynamics GP (Great Plains) accounting system, as well as business intelligence and planning software that meet the unique needs of the nonprofit community.