



**Technology Affinity Group**  
Promoting technology in philanthropy

## **Guidelines for Vendors and Consulting Organizations**

**Adopted May 6, 2010**

### **Statement of Purpose**

As stated in TAG's Strategic Plan, "TAG is an active community of professionals responsible for information and communications technology in the philanthropic sector. The community provides the highest quality resources and learning opportunities in an open and trusted environment."

When developing this vision, the TAG Board identified several goals that would help develop the TAG community and foster a strong sense of trust, collaboration, and participation. The development and publication of membership guidelines, in particular, was identified as a priority.

This document provides guidelines for Vendors and Consultants on confidentiality and participation protocols as agreed upon by the TAG community.

### **A. Associated Organization Status**

Vendors and consultants may participate in TAG as Associated Organizations and as such, receive TAG member benefits, as described below. The difference between Associated Organization status versus full membership is that Associated Organizations may not vote on TAG member issues or serve in TAG leadership positions.

Throughout these guidelines, the term "Associated Organization" refers to all vendors and consulting organizations that have paid a fee to join TAG and receive Associated Organization status.

### **B. Conferences and Meetings**

Annual Conference: Each year TAG hosts an annual conference targeted to foundation technology staff, making it a unique educational opportunity to learn how peer foundations utilize technology systems. Associated Organizations contribute valuable knowledge from the field and are welcome to attend conferences and meetings.

- **Participation:** No more than two representatives from each Associated Organization may attend the conference. Vendors and Consultants who have not joined the TAG community may also participate in the TAG Annual Conference.
- **Vendor roundtables/exhibitions:** There are a select number of Vendor roundtables/exhibits at each conference. Vendors interested in hosting a roundtable/exhibition should contact the TAG Executive Director. Although exhibitor spots are primarily allocated on a first come, first served basis, they are not guaranteed and are subject to alignment with member interest and conference theme. Preference will also be given to Associated Organizations.
- **Conference sponsorship:** Vendors may sponsor the welcome reception during the evening before the official conference start day. Although sponsorship opportunities are primarily allocated on a first come, first served basis, they are not guaranteed and are subject to alignment with member interest, conference theme, and Board approval. Preference will also be given to Associated Organizations.

Regional Meetings: Associated Organizations may participate in TAG regional meetings. There is a limit of two participants from each Associated Organization per meeting.

### **C. TAG Website and Newsletter**

The TAG website has hundreds of documents about best practices in foundation technology management and information about nonprofit sector technology. The site also contains a discussion forum, members' blog, and a database of foundation members, their organizations and technology hardware and software systems.

Guidelines for using the web site include:

- Associated Organizations are welcome to participate in discussion forums as long as recommendations include a range of products and services, and are not limited solely to recommendations of their own product and/or service.
- Associated Organizations may post educational content to the web site in the Resources Archive and the Members' Blog.
- Associated Organizations may not 'sell' their products or services directly online or solicit TAG members directly, via email or telephone, unless invited.
- Under no circumstances shall Associated Organizations sell, distribute, or share member contact information.
- Associated Organizations shall not forward, share or copy discussion group conversations and other community discussions for business development purposes.
- TAG publishes a monthly online newsletter that highlights new members, news and events, and upcoming webinars. The TAG Newsletter is not accepting requests for ad placement at this time.

### **D. Surveys**

Foundation-wide Technology Survey: Every other year, TAG conducts a foundation-wide Grantmakers Information Technology Survey. A copy of previous years' full survey reports can be found on TAG's web site. TAG members who participate in the survey can also run their own reports comparing their responses to the survey to those of their peers using an online benchmarking tool.

- Associated Organizations do not have access to the survey database. The survey database is only for foundation members who participated in the survey.

TAG Mini-Surveys and Moderated Discussions: TAG conducts mini-surveys on topics of particular interest to TAG members. The survey results are shared in a moderated discussion format, where TAG members share their experiences and lessons learned.

- Unless previously publicized and approved by the participants, recording and/or distribution of survey results and moderated discussions is prohibited.
- To respect participant confidentiality, Associated Organizations should obtain permission from other members before publicly sharing and attributing any statements made during a moderated discussion.

Associated Organization Surveys: Associated Organizations may not conduct surveys of the TAG membership, unless special permission is given by the TAG Executive Director. Special permission may be granted if the survey topic is of particular interest to TAG members. Under no circumstances can Associated Organizations conduct a survey strictly for the purpose of furthering their business interests. If permission is granted, all survey results shall be shared with the TAG community.

### **E. Idealware Webinars**

TAG provides its members with bi-monthly webinars via Idealware on topics relevant to nonprofit technology. The content is focused on the application of the technology rather than pure technical education.

- Unless previously publicized and approved by the participants, recording and/or distribution of survey results and moderated discussions is prohibited.
- To respect participant confidentiality, members should obtain permission from other members before publicly sharing and attributing any statements made during a moderated discussion.

#### **F. Free Access to Philanthropy In/Sight™**

Philanthropy In/Sight is a mapping tool designed by the Foundation Center to help grantmakers understand the impact of philanthropy globally, nationally or at regional and local levels. Users can create Google maps combining the Foundation Center's database of 97,000+ grantmakers and 1.8 million grants with demographic and socio-economic indicators.

#### **G. Gartner Research, Webinars and Conference Discounts**

Gartner Research: Associated Organizations have access to all of Gartner's Core Research. Members search the Gartner site for the research note number and then submit a request for the research via a form on the TAG web site. Research will be provided to Associated Organizations, with a limit of two documents per month.

Please note: Associated Organizations must comply with the Terms of Use specified by Gartner.

Gartner Webinars: TAG hosts bi-monthly webinars with Gartner about relevant technology systems and trends. These sessions are very informative, educational and technical in nature.

- Unless previously publicized and approved by the participants, recording and/or distribution of survey results and moderated discussions is prohibited.
- To respect participant confidentiality, members should obtain permission from other members before publicly sharing and attributing any statements made during a moderated discussion.

Gartner Conference Discounts: Associated Organizations can attend Gartner conferences at reduced prices. For Gartner's major Symposium, TAG members can attend for \$2800. The normal rate for this conference is \$3895. For Gartner's themed conferences, TAG members can attend for \$1200. The normal rate for these conferences ranges from \$1795 - \$1995.

#### **H. Associated Organization-Sponsored Webinars**

Associated Organizations may host webinars that are of particular interest to TAG members. Each Associated Organization may host two webinars each year targeted for TAG members. These events may be posted in the TAG Community Calendar and marketed to the TAG membership. Associated Organizations should submit event details to the Executive Director for posting on the web site. The event description must note that the event is not sponsored by TAG.

#### **I. Violation of Guidelines**

Any Associated Organization who violates the guidelines listed above risks losing participation privileges. Although a verbal and written warning may be issued, the TAG Board reserves the right to revoke participation immediately should circumstances warrant such action. Upon notification of possible membership cancellation, members may submit a one-page petition for Board review. Any member dues paid will not be refunded. Membership may be renewed after one year and upon majority Board agreement.