



5 THINGS TO KNOW THIS MONTH

Highlights from NYC and Bay Area Regionals

In March, TAG members gathered across the United States to share best practices and networking at regional events in both NYC and San Francisco. Thanks to the full houses in both locations and to our hosts Haas Jr Fund and the Wallace Foundation. Takeaway topics include:

What cultural characteristics enable agile, innovative teams in technology and beyond?

- Support from the highest level for experimentation, democratization of new ideas, and “learning as we go.” Less emphasis on a command and control approach
- Willingness to share failures / lessons learned
- Willingness to balance risk (legal and otherwise) with opportunity for breakthrough ideas and approaches

What are the characteristics of successful technology launches?

- Balancing the desire for functionality checklists with a prioritization on ease-of-use
- Integrating the use of technology within the role’s responsibilities; Hiring for technology literacy throughout the organization
- Joint sponsorship and ongoing engagement by tech lead AND functional lead
- Ensuring that technologies really do ease pain points and/or delight our users (i.e., truly addressing “How this helps your workload or frustration.”)

Thanks to all who joined our East and West Coast regional events.

Member Spotlight:

Jonathan Mergy, IT Director, Tides Foundation



ENGAGE WITH TAG

Upcoming Webinar

[Setting Up Success with Service-Oriented Architecture](#)

Thursday, April 19
1:00–2:00 pm ET

[Announcing Salesforce.org Philanthropy Cloud: a New Corporate Philanthropy Network](#)

Thursday, May 17
1:00–2:00 pm ET

Have a webinar idea? Volunteer by emailing info@tagtech.org.

Latest Discussions

Colleagues are seeking your advice. Peruse thought-provoking questions or raise your own on our discussion board. Here's the latest:

[Idealware Information Security Toolkit](#)

[Sputnik Moment - Salesforce Consultants](#)

[Computer Donation/Recycling](#)

[Diversity, Equity & Inclusion Contractor/Vendor Hiring Policy](#)

[Tableau Online and Desktop](#)

[Free Security Awareness Training from TechSoup](#)

[Donor Portal Analysis?](#)

New Members

Take a moment to reach out and welcome our new TAG members.

"Technology is absolutely playing a more strategic role for Tides internally and with our clients on everything we do."

"The needs today and moving forward are much different than what I looked for previously in this sort of environment. The people I've brought into the organization have to understand and connect to our mission of driving social change."

"Major projects we're leading and tracking are: Office 365 migration, move to the new Lightning interface in Salesforce, doing more to our electronic payments integration with our bank, and continuing to invest time and effort into the community portal and knowledgebase."

[Read more about Jonathan's approach to staffing, his priorities for 2018 and what's on his audiobook list.](#)

Midwest Members, Where & When?

Before spring slips away from us, let's block a date and location for our first 2018 meeting for TAG members in the central region. All members are welcome to join, whether you're in Oklahoma, Ohio, Minnesota, Michigan or beyond.

- What is your preferred month & location?
- Is it "just lunch" or do you prefer an all-day agenda with optional networking events and more?

[Share your preferences in a short 3 question survey.](#)

TAG 2018: Tucson, AZ

Planning for the capstone event in #PhilanthropyTech is underway. TAG 2018 is November 5-8 in Tucson, AZ at the breathtaking [Westin La Paloma Resort & Spa](#) and we're planning sunrise hikes, yoga, golf, stargazing events, and more. For those who proposed a session, presenters will be notified in May. Registration opens July 15.

"Tucson is a city that encourages you to explore. The food is delicious. The access to natural beauty is even better."

[Frugal Traveler on Tucson, NY Times, March 28, 2018](#)

Risk & Security Resources

Prepared for legal aid organizations but applicable beyond, the [Idealware Information Security Toolkit](#) offers a wide array of useful resources including security audit checklists, security policy examples and more.

[REPORT: Information Security Toolkit \(No registration required\)](#)

Additional Resources: TAG members may also be interested in replaying our April webinar with Jim Rutt of the Dana Foundation and Ann Puckett from the Grand Rapids Community Foundation.

[WEBINAR: Cyber Insurance to Manage Risk](#)

[Idaho Community Foundation](#)

– Zach Mars

[Medtronic Foundation](#)

– Heidi Halvarson

Job Opportunities

- [Director of Technology](#)
– Heising-Simons Foundation
- [Grants Management Associate, Temporary Position](#)
– American Society for Prevention of Cruelty to Animals (ASPCA)

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