CONFERENCE PROGRAM

NEW ORLEANS
NOVEMBER 6–9

TECHNOLOGY AFFINITY GROUP
15th ANNUAL CONFERENCE
The Ritz-Carlton Hotel
New Orleans
Welcome to TAG 2017

Social Media
TAG will use Twitter as a communication tool during the Conference. Following TAG on Twitter, at @tagtechorg.
If you tweet about the TAG 2017 Conference, please use the hashtag #tagconf. You can also tweet from the conference app.

Resources
During the conference, session presentations are available using the Guidebook Conference App.
After the conclusion of the conference, TAG members may download session presentations from the TAG website: tagtech.org/TAG2017Resources

WiFi Access
Network
Ritz-Carlton_Conference
Password
TAG2017

Open Meeting Space
ST. CHARLES, FLOOR TWO
Looking for a space to hold a small meeting, join a conference call or have a quiet place for a break?
We have reserved a small conference room for the use of attendees to hold small private meetings. Sign-up at the registration desk.

Dine-Arounds and Local Restaurant Recommendations
Experience the culinary offerings of New Orleans with your colleagues. We will offer a variety of dine-around options Wednesday evening, please sign-up at the registration desk.
Additional restaurant dine-around information is available in the conference app.

Conference App
Make sure you have the latest information about the conference and download our Guidebook conference app. Please stop by the registration desk on Level Two for instructions and passphrase.
# Agenda-at-a-Glance

## Updated: 10-28-2017

### Monday, November 6

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>1:00 pm – 7:30 pm</td>
<td>Registration Open</td>
<td>Level 2; @ 5:00 Level 3</td>
</tr>
<tr>
<td>2:00 pm – 5:00 pm</td>
<td>Community Foundations Meeting (by Invitation Only)</td>
<td>Lafayette East</td>
</tr>
<tr>
<td>2:00 pm – 5:00 pm</td>
<td>Grants Managers Meeting (Foundation Staff Only)</td>
<td>Salon 1</td>
</tr>
<tr>
<td>6:30 pm</td>
<td>Community Foundations Dinner (by Invitation Only)</td>
<td>Red Fish Grill</td>
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<tr>
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<td>Grants Managers Dinner (Foundation Staff Only)</td>
<td>Red Fish Grill</td>
</tr>
<tr>
<td>6:30 pm</td>
<td>Mix and Mingle—Snacks Provided until 8:15 pm; Cash Bar until 9:30 pm</td>
<td>French Quarter Bar</td>
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### Tuesday, November 7

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
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</thead>
<tbody>
<tr>
<td>8:00 am – 5:00 pm</td>
<td>Registration Open</td>
<td>Lafayette Foyer, Level 2</td>
</tr>
<tr>
<td>8:00 am – 8:45 am</td>
<td>Speed Networking—Ideal for first-timers; open to everyone</td>
<td>Salon 1</td>
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<tr>
<td>9:00 am – 11:00 am</td>
<td>Opening Breakfast and Keynote: Britt Andreatta—Creating a Culture of Learning</td>
<td>Salon 2 and 3</td>
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<tr>
<td>11:00 am – 5:00 pm</td>
<td>Vendor Exhibits Open</td>
<td>Lafayette Foyer, Level 2</td>
</tr>
<tr>
<td>11:15 am – 12:45 pm</td>
<td>Debunking the Myth: Learning for All</td>
<td>Lafayette West</td>
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<tr>
<td>11:15 am – 12:45 pm</td>
<td>How to Design Technology Training to Maximize User Adoption &amp; Return on Investment</td>
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<td>Data &amp; Workflow in the Microsoft Cloud: Making Sense of the Chaos</td>
<td>Salon 1</td>
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<tr>
<td>12:45 pm – 2:15 pm</td>
<td>Lunch: Roundtables by Topic</td>
<td>Salon 2 and 3</td>
</tr>
<tr>
<td>12:45 pm – 2:15 pm</td>
<td>Lunch—Networking Time/Phone/Email</td>
<td>Courtyard/French Qtr Bar</td>
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<tr>
<td>12:45 pm – 2:15 pm</td>
<td>Learning by Numbers (but Not Only): The Story of Two Foundations</td>
<td>Lafayette East</td>
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<tr>
<td>3:30 pm – 5:00 pm</td>
<td>Integrating IT Systems to Increase Efficiency &amp; Effectiveness of a Foundation</td>
<td>Lafayette East</td>
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<tr>
<td>3:30 pm – 5:00 pm</td>
<td>User Acceptance Aikido: The Art of Partnering to Drive Technological Change</td>
<td>Salon 1</td>
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<tr>
<td>3:30 pm – 5:00 pm</td>
<td>CIS Security Controls—The First Five!</td>
<td>Lafayette West</td>
</tr>
<tr>
<td>6:30 pm</td>
<td>Networking Dine-around Dinners</td>
<td>Mardi Gras World</td>
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### Wednesday, November 8

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00 am – 9:00 am</td>
<td>Breakfast</td>
<td>Salon 2 and 3</td>
</tr>
<tr>
<td>9:00 am – 5:00 pm</td>
<td>Vendor Exhibits Open</td>
<td>Lafayette Foyer, Level 2</td>
</tr>
<tr>
<td>9:00 am – 10:30 am</td>
<td>Business Continuity Planning: Where to Begin?</td>
<td>Lafayette East</td>
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<tr>
<td>9:00 am – 10:30 am</td>
<td>Learning in Motion: Collaborating Across Organizations to Manage, Preserve &amp; Use Digital Records</td>
<td>Salon 1</td>
</tr>
<tr>
<td>9:00 am – 10:30 am</td>
<td>Successful Strategies for Implementing New Integrated Philanthropic Systems</td>
<td>Lafayette West</td>
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<tr>
<td>10:45 am – 11:45 am</td>
<td>Barr Case Study: Leveraging Technology to Accelerate Culture Change</td>
<td>Lafayette East</td>
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<tr>
<td>10:45 am – 11:45 am</td>
<td>Learn Why Great IT Requires Great Policies!</td>
<td>Salon 1</td>
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<tr>
<td>10:45 am – 11:45 am</td>
<td>William Davidson Case Study: Lessons Learned from a Cyber Security Assessment</td>
<td>Lafayette West</td>
</tr>
<tr>
<td>11:45 am – 2:00 pm</td>
<td>Lunch—Networking Time/Phone/Email</td>
<td>Courtyard/French Qtr Bar</td>
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<tr>
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<tr>
<td>2:00 pm – 2:30 pm</td>
<td>Plenary: TAG Update</td>
<td>Salon 2 and 3</td>
</tr>
<tr>
<td>2:30 pm – 3:30 pm</td>
<td>Plenary: Inherent Conflict and Trade-offs with Security vs. Privacy</td>
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<tbody>
<tr>
<td>8:00 am – 9:00 am</td>
<td>Breakfast: Roundtables by Topic</td>
<td>Salon 2 and 3</td>
</tr>
<tr>
<td>9:00 am – 10:15 am</td>
<td>Enabling a Smart Platform for Community Collaboration</td>
<td>Salon 1</td>
</tr>
<tr>
<td>9:00 am – 10:15 am</td>
<td>Learning by Numbers (but Not Only): The Story of Two Foundations</td>
<td>Lafayette East</td>
</tr>
<tr>
<td>10:30 am – 12:00 pm</td>
<td>Closing Plenary: Emerging Technologies in Philanthropy</td>
<td>Salon 2 and 3</td>
</tr>
<tr>
<td>12:00 pm</td>
<td>Conference Ends. Thank you for attending TAG 2017!</td>
<td>Salon 1</td>
</tr>
<tr>
<td>12:00 pm – 5:00 pm</td>
<td>Post-Conference: Grants Management Software Vendor User Group Meetings</td>
<td>Salon 1</td>
</tr>
</tbody>
</table>
Vendor/Consultant Exhibits
Exhibit Hall Open: November 7: 11:00 AM–5:00 PM & November 8: 9:00 AM–5:00 PM — Level Two

AWH is a digital product consulting, user experience, and software development firm. We collaborate with clients to drive desired business outcomes through great digital products. Building great digital products is hard. Being a great digital products company is harder. We help you be great at both.

Blackbaud is the world’s leading cloud software company powering social good. We provide software, services, expertise and data intelligence for the entire social good community—nonprofits, foundations, corporations, education institutions, and individual change agents. Our solutions connect and empower organizations to increase their impact through grant management, corporate social responsibility, volunteerism, fundraising and relationship management, digital marketing, advocacy, accounting, payments and analytics.

Bromelkamp Company is a leading provider of foundation management software, serving more than 200 grant making organizations. We stay connected to our customers to offer creative solutions that are designed from their point of view. Our newest product, Akoya.net, is a customizable CRM system tailored to the unique needs of each client, including contacts tracking, grant/scholarship management, volunteering, fundraising, fund accounting, PRI/loan servicing, and more. Optional web portals for applicants and reviewers (eGrant.net) and donors (Fundweb.net) allow for a completely paperless office. Privately owned and operated since 1978, we remain committed to outstanding customer service, and we earn lifelong partnerships through customer satisfaction, not contracts.

Fionta (www.fionta.com)—previously known as Confluence is a leading national technology partner to the foundation and nonprofit community, providing strategic technology consulting, Salesforce implementation services and website design and implementation. Working out of our Washington, DC and Los Angeles, CA bi-coastal offices, our services include:

- Salesforce (including FoundationConnect, Pardot, and Communities) implementations
- Comprehensive, holistic strategic technology assessments
- A range of expert technology consulting
- Web site design, development, maintenance and support (Drupal, Wordpress, Joomla)

Since 2001, we have supported close to 1,000 organizations and a hundred-some foundations. We evaluate information systems architectures, focusing on when/whether it makes sense to migrate to new system(s) or invest in existing systems. Other services include organization capacity building in the technology arena, and assistance with vendor selection for commercial software packages including grants management.

FORT is a creative agency based in the Short North district of Columbus, Ohio. For more than 20 years, we’ve focused on developing branded experiences across multiple marketing touchpoints including identity, print and digital. Creative impact is our ambition to hit the mark while helping build brands that want to leave their mark. We are fortunate to work with organizations that share our commitment to shaping the communities we serve.
Foundant Technologies provides the powerful online Grant Lifecycle Manager (GLM) system for grantmakers, the intuitive online GrantHub system for grantseekers, and (most recently) CommunitySuite—a comprehensive financial solution for community foundations. Through easy to use software, Foundant has made grants management easier for more than 1,200 philanthropic organizations. Intuitive platforms—suitable for even the most basic computer user and a company-wide dedication to honest, lasting relationships allow Foundant to guarantee client success with the software. Foundant, its community, and its partners continually work together to improve both the software and the user experience. To learn more about our solutions and how we can help you, give us a call at (877) 297-0043.

foundationConnect is a CRM and grants management solution for foundations. Built on Salesforce and delivered by roundCorner, it provides all the tools needed to manage philanthropic giving, scholarship and fellowship programs, and similar application-based processes in a single user interface. foundationConnect enables you to focus more on your mission and less on administration, so you can transform philanthropic giving and achieve a greater impact in the world.

GivingData helps foundations manage and transform grantmaking with its feature-rich, customizable grants management platform and expert consulting practice. Our team is comprised of former foundation leaders and seasoned software developers. We are more than just a grants management system—we are a trusted partner dedicated to building the best solution for your foundation’s needs.

GrantBook is an advisory firm that provides:

- Big picture digital strategy
- Audit & gap analysis of digital systems & processes
- Prepare solution-set comparisons
- Implement, integrate, & support new/existing systems
- Eliminate ‘shadow systems’ & workarounds
- Administer technology change management
- Transition legacy software and processes
- Drive technology adoption & remove impediments

Ideal State helps organizations working for social good accelerate knowledge exchange and learning to achieve maximum impact. We design and build thriving “knowledge ecosystems” for our clients that combine people, processes and state-of-the-art technology to redefine how people work and learn together. Our whole-systems approach incorporates elements of human-centered design, knowledge management and organizational learning to address persistent challenges in the areas of collaboration, content, and information management. Please visit us in the exhibition hall or online at www.idealstate.co.
iMission Institute works exclusively with nonprofit organizations and foundations for the purpose of exploiting digital technologies and communications for fundraising, advocacy and community-building.

We are passionate about helping our clients discover how technology and analytics can empower social network development for change. We work with our clients to integrate and activate constituent relations management systems, email marketing and social media.

Our strategic services include Digital Advocacy, Organizing and Mobilization; Data Structuring and Segmentation; In-Bound Marketing, Community Outreach Analytics; and, Work Process Design and Implementation.

With our support, our clients leverage their investments in digital technologies, identify ways to fill gaps that inhibit effective utilization, and implement new workflows that improve organizational effectiveness and advance stakeholder engagement.

Our clients include community foundations, nonprofit associations and advocacy-oriented nonprofits.

The Innovation Network (IN) is a technology strategy and management consulting firm. We specialize in Grant Management and Assessment; Software Implementation; IT Strategy; Project Management; Operational Planning and Process Improvement. We deliver best-in-class grants management services, including custom development solutions and complex integrations, to nonprofit organizations, family and research foundations, as well as Federal, State and Local government. Our goal is to help clients operate more effectively and efficiently in order to better serve their community.

With our customized, methodology-driven approach to grants management implementations, we provide targeted collaboration, access to crucial information, and the ability to make real-time insightful decisions throughout the implementation process.

Oracle NetSuite Global Business Unit, a wholly-owned subsidiary of Oracle, pioneered the Cloud Computing revolution in 1998, establishing the world’s first company dedicated to delivering business applications over the Internet. With NetSuite’s unified business management solution, nonprofit organizations can manage their entire end-to-end global operations with a single business application-integrating accounting, fundraising, constituent relationship management (CRM), Ecommerce, inventory management, HR, payroll, and more.

PEAK Grantmaking is the national leader in grants management for funding organizations. Our vibrant community of grantmaking practice advances shared leadership and learning across the sector. This is where Practice Meets Purpose. By cultivating resources, learning opportunities, and collaborations across the philanthropic spectrum, we support grantmaking practices designed to maximize mission-driven efficiency and effectiveness of funders of every size.

Our mission is to advance grantmaking so that grantmakers and grantseekers can best achieve their missions.

Thus, PEAK Grantmaking connects, convenes, and trains grantmakers to create momentum for change, making best practices into standard practices, improving the ways grantmakers deliver resources directly to mission-driven activities, leading to better outcomes for grantmakers and grantseekers alike.
SmartSimple’s GMS360° is a robust, end-to-end grants management system that gives you the ability to oversee the entire granting process from the initial call for proposals to tracking acceptance letters and awards. A cloud-based platform, GMS360° offers seamless collaboration between your organization and all associated stakeholders. From data collection and analysis, to fully trackable and reportable options for all your information, the GMS360° system can streamline your grants management process, reduce administrative effort and eliminate paper.

SmartSimple interacts with over 70,000 unique users a month and nearly 300 organizations. We are an Amazon Web Services (AWS) Public Sector Partner with a government competency, providing secure cloud hosting for all of our clients’ data.

Visit www.smartsimple.com to request a demo.

Stellar Technology Solutions is a leading provider of integrated enterprise level philanthropic management solutions for charitable organizations. Stellar’s suite of software and services, iPhi™, provides a fully integrated suite of applications to address the core needs of modern philanthropies. Stellar’s iPhi software solutions power some of the largest and most well-respected Community Foundations, Religious Philanthropies and Commercially Sponsored Donor Advised Fund, Planned Giving and Endowment Programs in the nation. Stellar has enabled philanthropies the ability to increase revenue and expand donor and program services. At Stellar Technology Solutions, we are committed to serving as a single source provider for your charitable organization’s technology, financial, operations and services needs. Stellar offers a fully integrated, real-time, web-based solution that provides comprehensive functionality for all philanthropic constituencies. This integrated operations platform is licensed to nonprofit organizations within the philanthropic and financial services markets. Current clients have approximately $24 billion in assets under administration. Our software solutions are deployed by more than 120 of the largest philanthropic, donor advised fund, charitable endowment and participant accounting programs in North America.

SurveyMonkey Apply empowers organizations to effortlessly collect and review applications for grants, scholarships, fellowships and other programs. Comprehensive and collaborative, our solution enables organizations to select their best candidates and drive their mission forward, faster.

WizeHive helps you streamline and simplify your application process with Zengine™, a cloud-based platform designed to simplify the collection, review, and management of applications for grants, scholarships, and countless other programs. Currently favored by more than 700 foundations and other non-profits, our robust yet amazing simple-to-use platform:

- Addresses all of your application needs—scholarships, grants, intern/fellowships, and more
- Allows you to effortlessly customize forms, workflows, and reports to fit your process
- Is designed to deploy quickly and adapt and extend to your needs over time
- Integrates with your other software—and 750+ cloud-based programs—to further simplify your process

And Zengine scales as you do. Thanks to it’s “low code” nature even customers without technical expertise can easily build out new applications and workflows, while on-staff developers can continuously add new integrations and more complex functionality.
The Digital Civil Society Lab at Stanford created digitalIMPACT.io to support civil society organizations in using digital data ethically, safely, and effectively. The resources it offers are designed to help organizations learn from and share with others, and to inform decision-making, organizational practice, and policy creation.

The Foundation Center gathers, analyzes, and shares grantmaker data to promote better efficiency, understanding, transparency in philanthropy. The Center’s tools and services offer data visualization, support research, promote the sharing of knowledge and ideas, foster performance benchmarking, and help with finding funders.

GuideStar collects and data about nonprofits, including information about each organization’s mission, legitimacy, impact, reputation, finances, programs, transparency, governance, and more. Tools from GuideStar support grantmakers, donors, and nonprofits to help simplify fundraising, expand collaboration, increase trust, and improve efficiency and effectiveness.

TechSoup provides capacity-building programs to nonprofits worldwide via technology products, knowledge, and services. In partnership with more than 60 of the world’s leading civil society organizations, TechSoup has reached more than 760,000 organizations and delivered more than US$6 billion in technology tools and philanthropic services.

For more information, visit simplifynow.org
**Benefits:** Learn how the tools can help your foundation save time and improve data accuracy.

**Demonstrations:** See hands-on demos of the tools to better understand how they work.

**Adoption:** Learn what it takes to adopt and implement the tools within your organization.

**STOP BY DURING LUNCH**

**TUESDAY**
12:45 pm – 2:15 pm

**WEDNESDAY**
11:45 am – 2:00 pm

Baronne Room (Level 2, adjacent to SALON 2 AND 3) | Tuesday & Wednesday
Monday, November 6

1:00 pm–7:30 pm  **Registration Open**
LEVEL 2, @ 5:00 PM LEVEL 3
Pick up your registration badge before 5:00 pm on Level 2, or after 5:00 pm on level 3.

2:00 pm–5:00 pm  **Community Foundations Meeting**
LAFAYETTE EAST
(by Invitation Only)

2:00 pm–5:00 pm  **Grants Managers Meeting: A New Operating System for Philanthropy (Foundation Staff Only)**
SALON 1
Philanthropy has created a dizzying range of practice when it comes to how grants get made. This enormous variability, which appears throughout the grantmaking life cycle, remains a significant drain on both grantmaker andgrantseeker resources. Staff from PEAK Grantmaking (formerly GMN) will lead this discussion about their proposal for a new “operating system” for grantmaking practices—one that replaces the legacy, custom-built, clunky systems of the past with a streamlined version based on ideal practices that bring consistency, and therefore efficiency, to the field, while recognizing the places and spaces where funders need their own customizations.

Join the meeting to help develop this new operating system. PEAK Grantmaking will share its case for why grantmakers should work to be more consistent in their practices and explore evidence-based research of where an ideal practice appears both possible and impactful for grantmakers and grantseekers. Participants will be asked to:

- Provide feedback on the ideal practices identified to date.
- Help identify any barriers to adoption and solutions to overcoming them.
- Strengthen the case to the field for why this work is important, necessary, and urgent.

6:30 pm  **Community Foundations Dinner** (by Invitation Only)
RED FISH GRILL

6:30 pm  **Grants Managers Dinner** (Foundation Staff Only)
RED FISH GRILL

6:30 pm–10:00 pm  **Mix and Mingle—Cash Bar; Snacks Provided**
FRENCH QUARTER BAR
THE RITZ-CARLTON
Join us when you arrive to meet your colleagues for drinks and hors d’oeuvres. Snacks provided until 8:15 pm; Cash Bar until 9:30 pm
Registration Open
8:00 am–5:00 pm
LEVEL 2

Speed Networking—Ideal for First-timers; Open to Everyone
8:00 am–8:45 am
SALON 1
This session will be a speed networking session for attendees to meet each other and find common areas of interest.

Opening Breakfast & Keynote Speaker: Britt Andreatta—
Creating a Culture of Learning
9:00 am–11:00 am
SALON 2 AND 3
SESSION LIAISON: LISA POOL, Technology Affinity Group

Vendor Exhibits Open
11:00 am–5:00 pm
LEVEL 2

Debunking the Myth: Learning for All
11:15 am–12:45 pm
LAFAYETTE WEST
Conceptually, learning technology is the broad range of communication, information and related technologies that can be used to support learning, teaching and assessment. This session will challenge the notion that organizations of all sizes cannot implement learning technologies. Beginning with a discussion about the trends on learning technologies, the session will explore various barriers to execution and how organizations can overcome them through tactical, hands-on approaches. For each barrier/myth, audience members will get real examples from the public sector along with an opportunity to discuss as a group. Attendees of this session will leave with tangible actions that can be applied immediately.

PRESENTERS: VIKAS MITTAL, Managing Director, Accenture
SESSION LIAISON: ERICKA NOVOTNY, Arcus Foundation

How to Design Technology Training to Maximize User Adoption and Return on Investment
11:15 am–12:45 pm
LAFAYETTE EAST
If you’re frustrated with ineffective technology training, this session is for you. This session will talk about how training fits into a user adoption plan, adapting your training approach to the learning styles and skill levels of your trainees, and figuring out the logistics for a great training experience. Knowing how to design and deliver effective technology training is a skill that will boost your leadership and increase your organization’s technology ROI. This session will combine presentation and audience participation in a lively format that adapts the content to those present.

MODERATOR: KAREN GRAHAM, Executive Director, Idealware
PANELISTS: KELLY KLEPPPE, Program Operations Director, Bush Foundation ANIL PATEL, Co-Founder, Digital Strategy, GrantBook ANN PUCKETT, IT Manager, Grand Rapids Community Foundation
SESSION LIAISON: DAVID KRUMLAUF, Pierce Family Foundation
Conference Schedule

**TUESDAY, NOVEMBER 7**

11:15 am–12:45 pm  
**SALON 1**

Data & Workflow in the Microsoft Cloud: Making Sense of the Chaos

With the rise of shared cloud solutions, Microsoft has finally admitted that what it was doing before wasn’t working. The Microsoft cloud now allows organizations to integrate data and process from multiple systems rather than forcing organizations to only use Microsoft products. InfoPath and SharePoint Workflows are no more. Flow and PowerApps are in. Power BI and Microsoft Analytics have replaced SSRS, and what is this Common Data Model thing, anyway?

It’s all a little confusing. Come learn what Microsoft tools are available now to nonprofits looking to manage, automate, analyze, and tell stories with their data. Learn about which tools really work and which ones just aren’t there yet. Learn what you can do yourself and what requires an expert. And learn where exactly all of this is going in the future.

**PRESENTER:**  
SAMUEL CHENKIN, Director of Consulting Services, Tech Impact

**SESSION LIAISON:**  
LEON WILSON, The Cleveland Foundation

12:45 pm–2:15 pm  
**BARONNE**

Simplify Learning Lab

Learn how to implement the Simplify tools to help your foundation save time and improve data accuracy. See hands-on demos of the tools to better understand how they work.

Visit the staff and tools from DIGITALIMPACT, GUIDESTAR, FOUNDATION CENTER and TECHSOUP.

1:00 pm–2:00 pm  
**SALON 2 AND 3**

Lunch: Roundtables by Topic

Meet colleagues at tables with specific topics of interest. Or, join a table of colleagues at an open table.

**TODAY’S DISCUSSION TOPICS:**

1. Best Things We’ve Learned from Our Users This Year. HOST: NADA O’NEAL
2. Community Foundations and Salesforce. HOST: JOHN REICHLING
4. Vendors, Complete a SOC 2 Audit, but Some Clients Are Unwilling to Accept It in Response to Their Security Questions. HOST: TODD LAPIN
5. Establishing a Staff Task Force. HOST: NORI MITNICK
7. Cyber Security Issues. HOST: TIM O’LEARY
8. Implementing an Incident Response Plan. HOST: ANN PUCKETT

2:15 pm–3:15 pm  
**SALON 1**

Blockchain for Philanthropy

Every year in North America alone, more than $382 billion is donated to over 1.6 million charitable organizations, often with delayed payments, tracking and reporting. Blockchain technology will make a significant impact by providing instant and complete visibility while improving efficiency through the entire charitable process. Attendees will receive an overview of the current Blockchain environment; how payments, tracking and reporting will change; and why innovations such as smart contracts will revolutionize the philanthropic sector.

**PRESENTERS:**  
SAMUEL CAPLAN, Director of Technology & Data, Walmart Foundation  
JOSHUA SUGAR, CEO, Business Solutions, Re-Solved

**SESSION LIAISON:**  
CRISTINA YOON, Skoll Foundation
Conference Schedule

TUESDAY, NOVEMBER 7

2:15 pm–3:15 pm  LAFAYETTE EAST

**McKnight Case Study: From Chaos to Order—Putting the FUN in Functional Information Management**

Staff will share the story of the foundation’s adventures in Information Management: how they went from chaos and disorder—with a hint of mystery as to where the information actually lived—to a standardized rule set and platform that incorporated the tenet of Simple, Useful and Sustainable. This happened while having fun and laughing through the rough spots. Attendees will learn about Knowledge Management, Data Management/Data Governance and Technology Leadership.

**PRESENTERS:**
BernaDETTE CHRISTIANSEN, Vice President of Operations, McKnight Foundation
STEPHANIE DUFFY, Director of Grants and Information Management, McKnight Foundation
JODY SPEER, Director of Information Technology, McKnight Foundation

**SESSION LIAISON:**
NICOLETTE LODICO, Ford Foundation

2:15 pm–3:15 pm  LAFAYETTE WEST

**Wallace Case Study: Elements of a Successful Security Awareness Program**

The Wallace Foundation implemented a Security Awareness Training Program for its 50 staff members in 2015. Come learn what the program included and what lessons the staff learned. You will hear why the Security Awareness Program was necessary and why the foundation is repeating it again this year.

Since there is no “one size fits all” program, you will learn what your organization should be doing at a minimum as well as many other security awareness elements to consider, depending on your organization’s needs and exposure. Finally, you’ll learn about some of the tools you can use to assist with developing your own Security Awareness program.

**PRESENTER:**
ERIK WILLIAMS, Information Technology Manager, The Wallace Foundation

**SESSION LIAISON:**
ANN PUCKETT, Grand Rapids Community Foundation

3:30 pm–4:30 pm  LAFAYETTE WEST

**Columbus Case Study: Why a World-Class Digital User Experience Matters and How to Achieve It**

Providing a unified, digital user experience is critical to meeting stakeholder needs and fostering engagement. Philanthropic organizations are often stuck between leveraging existing products that fall short of expectations and not having the resources or expertise to build new products. Learn how one community foundation partnered with a design studio and a development firm to create an experience that drives operational efficiencies, provides marketing agility, and boosts community impact.

**PRESENTERS:**
JOYCE RAY, Associate Director, PowerPhilanthropy and Knowledge Management, The Columbus Foundation
TERRY ROHRBACH, Creative Director and Owner, FORT
CHRIS SLEE, Founder and Principal, AWH

**SESSION LIAISON:**
LEON WILSON, The Cleveland Foundation
**Conference Schedule**

**TUESDAY, NOVEMBER 7**

### 3:30 pm–4:30 pm  
**LAFAYETTE EAST**

**Enhancing Philanthropic Impact & Storytelling: Lessons from the Knight Foundation’s Grantseeker Pilot Study**

There is growing pressure on philanthropic organizations to engage in the use of data and measurement to demonstrate the impact of their work. While some foundations and nonprofits possess the knowledge, expertise, and experience to achieve these goals, many others lack the capacity to do so. In some cases, this includes the technology needed to capture, analyze, and share data and metrics, to engage and collaborate both internally and externally, and to visualize and present their impact “stories” in a meaningful way.

Seeking to enhance their impact and storytelling, the Knight Foundation participated in a pilot study with their grantees using Fluxx’s new Grantseeker system. Grantseeker uses a “ground up” approach to the collection, submission, and visualization of impact-related data while giving both funders and grantees the ability to engage and collaborate within the same system. Come hear the benefits and challenges of implementing a “ground up” approach, and lessons learned for philanthropic organizations looking to enhance their impact and storytelling.

**PRESENTERS:**  
**DAVID GOODMAN,** Director of Impact, Fluxx  
**DANIEL SCHOENFELD,** Director of Grants & Impact Administration, Knight Foundation  

**SESSION LIAISON:**  
**SAM CAPLAN,** The Walmart Foundation

### 3:30 pm–4:30 pm  
**SALON 1**

**Secure Your Network with Free & Low-Cost Tools**

Reduce your risk of attack using tools like Secure Score, Advance Threat Protection, and Multi-Factor Authentication. You won’t have to spend a lot of time or money once you learn about these powerful security tools. In this open discussion, our panelists will also highlight their top security threats list, top mitigations strategies, and top resources for continued professional development.

**MODERATOR:**  
**DANIEL CALLAHAN,** VP, Global Services, CGNET  

**PANELISTS:**  
**GARY POOLE,** Senior Manager for Information Technology—Global Infrastructure Services, Ford Foundation  
**ROBERT ROSENTHAL,** Director of IT, Carnegie Corporation of New York  
**MICHAEL WRIGHT,** Information Services Manager, Charles Stewart Mott Foundation  

**SESSION LIAISON:**  
**LINDA ROSANO,** William T. Grant Foundation

### 6:30 pm–10:00 pm  
**MARDI GRAS WORLD**

**Networking Reception and Dinner**

Join us for TAG’s own Mardi Gras party! We’ll have cocktails amongst the floats and props, followed by dinner in a typical New Orleans-style courtyard.

**Bus transportation is provided starting at 6:00 pm at the hotel’s Canal Street Entrance. You must have your name badge to get on the bus to the networking event and to get into Mardi Gras World.**

Thank you to the **Knight Foundation** and the **Jessie Ball DuPont Fund** for their generous sponsorship of the Networking Reception and Dinner.
Conference Schedule

Wednesday, November 8

8:00 am–9:00 am
Breakfast
SALON 2 AND 3

9:00 am–5:00 pm
Vendor Exhibits Open
LEVEL 2

9:00 am–10:30 am
Business Continuity Planning: Where to Begin?
LAFAYETTE EAST

Business Continuity Planning is often overlooked, considered to be unnecessary, or too complex for many organizations. The most significant challenge is knowing where to start. Participants of this session will learn how to conduct a basic evaluation of their organization to identify their scope, analyze risk against the results, and establish a plan that aligns with their mission and capabilities.

PRESENTER: ROBERT HEWITT, Chief Information Officer, Stellar Technology Solutions
SESSION LIAISON: ART FRANK, Oregon Community Foundation

9:00 am–10:30 am
Learning in Motion: Collaborating Across Organizations to Manage, Preserve & Use Digital Records
SALON 1

The digital age presents massive challenges to managing and preserving a foundation’s historical records. First and foremost, it requires a sustained commitment to create a culture of learning. Policies and procedures must be built to support the management of records; expertise must be shared across functional areas to effectively steward these records for the long term; and infrastructure must be built to support the movement of records to repositories where they can be managed for the long term.

The Ford Foundation, with its model knowledge management program, relies on its records to provide perspective and a historical framework for present-day decision-making. Together, the Rockefeller Archive Center and Marist College have developed and implemented a system to transfer, manage, and preserve digital records created by the Ford Foundation and other foundations whose records are housed at the Archive Center. This session will describe how Ford is using its digital archival records in an internal learning environment and how Rockefeller, Marist, and Ford are learning from each other, constantly evolving in their learning practices, policies, procedures, and systems in this digital age.

MODERATOR: BOB CLARK, Director of Archives, Rockefeller Archive Center
PRESENTERS: HILLEL ARNOLD, Assistant Director—Head of Digital Programs, Rockefeller Archive Center
ANDREA DONOHUE, Records and Archives Manager, Ford Foundation
ANTONI SOUSA, Director, Web and Interface Innovation, Marist College
SESSION LIAISON: MICHAEL WRIGHT, Charles Stewart Mott Foundation
9:00 am–10:30 am

LAFAYETTE WEST

**Successful Strategies for Implementing New Integrated Philanthropic Systems**

More grantmaking organizations are now selecting and migrating to integrated information systems than ever before. This is a complex process that needs careful planning and decision-making. Learn how to work effectively by establishing prioritized requirements and providing philanthropic service providers with the key information they need for proposals, contracts, project management, migrating data, configurations, and testing of your system. A mutual partnership will be needed for your success.

This session will include a series of sequential real-world presentations about relevant topics, followed by participants discussing their real-world experience about what happened to them, what they learned, and what they recommend to other grantmakers.

**PRESENTER:** MARTIN SCHNEIDERMAN, CEO, Information Age Associates

**PANELISTS:**
- LINDA DIAMOND, Program Associate, Grants Management, Doris Duke Charitable Foundation
- JOSH DOUBLEDAY, Project Manager, Crown Family Philanthropies
- DAN GAFF, Grants Manager, AdminiTrust LLC—May and Stanley Smith Charitable Trust
- PHENISHER HARRIS, Program Associate, Grants Management, Doris Duke Charitable Foundation

**SESSION LIAISON:** ANDREW HALPRYN, Hartford Foundation for Public Giving

10:45 am–11:45 am

LAFAYETTE EAST

**Barr Case Study: Leveraging Technology to Accelerate Culture Change**

If workplace culture is critical to increasing impact, how can technology accelerate the change desired? Barr Foundation expanded and redesigned their office space, implemented a new grants platform, and transitioned to Mac laptops, all to shift workplace culture and further productivity. In this interactive session, staff will explore what it takes to strategically implement technological solutions that foster culture change. Through their experience and group discussions, participants will leave with ideas/lessons learned that could be applied within their own organizations.

**PRESENTERS:**
- IFY MORA, Director of Operations, Barr Foundation
- NATE MULLEN, Senior Business Applications Analyst, Barr Foundation

**SESSION LIAISON:** JENNIFER BURRAN, The Lemelson Foundation

10:45 am–11:45 am

SALON 1

**Learn Why Great IT Requires Great Policies!**

What IT policies do foundations need? Do today’s new security issues require new policies? What is the best way to get IT policies created and updated? How can you get support from top management? How do you get people to observe the policies? Which policies have worked; which have not? Experienced TAG members will discuss these questions and supply examples of policies which you can take home.

**MODERATOR:** MATT SHARP, Director, Information Technology, The Duke Endowment

**PANELISTS:**
- DAN CALLAHAN, VP, Global Services, CGNET
- GAVIN CLABAUGH, Vice President, Information Systems, Charles Stewart Mott Foundation
- ROBERT ROSENTHAL, Director of IT, Carnegie Corporation of New York

**SESSION LIAISON:** ROBERT ROSENTHAL, Carnegie Corporation of New York
Conference Schedule

WEDNESDAY, NOVEMBER 8

10:45 am–11:45 am
LAFAYETTE WEST

William Davidson Case Study: Lessons Learned from a Cyber Security Assessment

As a nontechnical manager, how do you know that your technology team and/or outsourced consultants are keeping your organization’s environment and information safe? Come hear about the William Davidson Foundation’s experience in undergoing a Cyber Security Assessment. Learn why the organization decided to engage a third party to conduct an assessment, what to do to prepare for an assessment, and what to do with the results.

PRESENTER: DANIELLE OLEKSZYK, Chief Financial Officer, William Davidson Foundation
SESSION LIAISON: CAROLYN WENDROWSKI, Rockefeller Foundation

11:45 am–2:00 pm
BARONNE

Simplify Learning Lab

Learn how to implement the Simplify tools to help your foundation save time and improve data accuracy. See hands-on demos of the tools to better understand how they work.

Visit the staff and tools from DIGITALIMPACT, GUIDESTAR, FOUNDATION CENTER and TECHSOUP.

12:00 pm–1:45 pm
COURTYARD & FRENCH QUARTER BAR

Lunch—Networking Time/Phone/E-mail

2:00 pm–2:30 pm
SALON 2 AND 3

Plenary: TAG Update

PRESENTER: LISA POOL, Executive Director, Technology Affinity Group

2:30 pm–3:30 pm
SALON 2 AND 3

Plenary: Inherent Conflict and Trade-offs with Security vs. Privacy

This presentation will focus on the business implications of the tradeoffs that foundations face when trying to balance convenience, control, freedom, and protection. We will discuss what to think about as you plan for new security systems, steps foundations are taking today and the existing challenges on this issue that sits at the intersection of policy, strategy, and technology.

Questions to be addressed include:
• Where do we draw the line between ease of access and tight controls intended to protect foundation resources?
• Is email filtering and other forms of monitoring a protection or an intrusion/infringement of privacy?
• When are personal rights subordinated to organizational responsibility?
• What are the implications of domestic and international regulations?
• How does a millennial workforce change the way we look at technology?
• What is the impact of social media and a mobile workforce on privacy and controls?
• How do we keep the organization safe from malware while not impinging on individual freedoms?
• How do we protect institutional data, but still provide access to grantees and share data effectively?

PRESENTER: MARK OSTER, National Managing Partner, Not-for-Profit & Higher Education Practices, Grant Thornton LLP
SESSION LIAISON: JIM RUTT, The Dana Foundation
Conference Schedule

WEDNESDAY, NOVEMBER 8

3:45 pm–5:00 pm
LAFAYETTE EAST

**Integrating IT Systems to Increase Efficiency & Effectiveness of a Foundation**

Integrating IT systems is challenging: The IT roadmap should be based on the organization’s strategy and lead to increased efficiency and effectiveness of processes.

In the past four years, the European Climate Foundation has introduced and integrated Grants Management, Planning and Monitoring, Accounting, Information & Knowledge, Expense Management, CRM, Budgeting, and other systems and has learned a lot about the implementation challenges along the way. This session will show the different steps in the selection, implementation and integration processes for several of these IT systems and the resulting changes in the organization.

**PRESENTER:** MAYTA VILLAFANE, COO, European Climate Foundation

**SESSION LIAISON:** EDIMA ELINEWINGA, United Nations Foundation

3:45 pm–5:00 pm
SALON 1

**User Acceptance Aikido: The Art of Partnering to Drive Technological Change**

Implementing new technologies can be thankless, frustrating, and laborious. In this session you’ll learn how, with a little initial investment on your part, your users will gladly step forward to help you inform requirements, improve processes, and cultivate greater enthusiasm to increase adoption and drive peer-to-peer training. The presenter will share details based on her experiences implementing Google Calendar, Box, and O365.

**PRESENTER:** NADA O’NEAL, VP, Information Technology, ASPCA

**SESSION LIAISON:** MICHAEL WRIGHT, Charles Stewart Mott Foundation

3:45 pm–5:00 pm
LAFAYETTE WEST

**CIS Security Controls—The First Five!**

Security Controls (CIS Controls) are a concise, prioritized set of cyber practices created to stop today’s most pervasive and dangerous cyber-attacks. This session will introduce you to the CIS Controls with an emphasis on the first five. These initial controls will aid in protecting your data while helping achieve many compliance requirements.

**PRESENTER:** ROBERT HEWITT, Chief Information Officer, Stellar Technology Solutions

**SESSION LIAISON:** ART FRANK, Oregon Community Foundation

6:30 pm
HOTEL LOBBY

**Networking Dine-around Dinners**

Dinner on your own. Participants can sign-up at the registration desk to join colleagues at one of the following restaurants or you can make your own plans. More information is available in the conference app or at the registration desk.

<table>
<thead>
<tr>
<th>RESTAURANT</th>
<th>TYPE</th>
<th>TIME</th>
<th>HOST(S)</th>
</tr>
</thead>
<tbody>
<tr>
<td>K-Paul</td>
<td>Down-home Cajun ($$)</td>
<td>6:00 pm</td>
<td>Valerie Black &amp; Joanna Cabral</td>
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<tr>
<td>Red Fish Grill (Group A)</td>
<td>Seafood &amp; Cajun ($$)</td>
<td>6:30 pm</td>
<td>Gail Goldfinger</td>
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<tr>
<td>Red Fish Grill (Group B)</td>
<td>Seafood &amp; Cajun ($$)</td>
<td>6:45 pm</td>
<td>José Aron-Diaz &amp; Charles Boname</td>
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<tr>
<td>Tujague’s Restaurant</td>
<td>Creole ($$$)</td>
<td>7:00 pm</td>
<td>Selena Jepkema</td>
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</tbody>
</table>
Conference Schedule

Thursday, November 9

8:00 am–9:00 am
SALON 2 AND 3

**Breakfast Roundtables by Topic**
Meet colleagues at tables with specific topics of interest. Or, join a table of colleagues at an open table.

**TODAY’S DISCUSSION TOPICS:**
1. Best Things We’ve Learned from Our Users This Year. HOST: NADA O’NEAL
2. Community Foundations and Salesforce. HOST: JOHN REICHLING
4. Vendors, Complete a SOC 2 Audit, but Some Clients Are Unwilling to Accept It in Response to Their Security Questions. HOST: TODD LAPIN

9:00 am–10:15 am
SALON 1

**Enabling a Smart Platform for Community Collaboration**
The four presenter organizations are working on platforms to support changemakers. In this session you will hear from each about why they are doing this work, the audiences they hope to reach, what you can do in the platforms, and shared learnings and questions. In this effort to enable smart platforms for community collaboration, the group is exploring efforts towards a combined shared digital ecosystem for changemakers.

**PRESENTERS:**
- CHARLES BRIGHAM, Account Executive, Nonprofit & Global Organizations, Esri
- ROSS COMSTOCK, Vice President for Information Systems and Technology, W.K. Kellogg Foundation
- NONA JONES, Strategic Partner Manager, Communities, Facebook
- KIMBERLY PHILLIPS, Senior Program Officer, Bill & Melinda Gates Foundation

**SESSION LIAISON:** DANIEL SCHOENFELD, Knight Foundation

9:00 am–10:15 am
LAFAYETTE EAST

**Learning by Numbers (but Not Only): The Story of Two Foundations**
How much hard data is needed to support monitoring, evaluation, and learning in foundations? Some argue that only quantitative methods provide the rigor required to measure and demonstrate impact. Others take a qualitative approach, using hypotheses and reflective practices to uncover results as they emerge from day-to-day work.

In this session, presenters will explore how two foundations employ technology to bridge these contrasting visions, using data to support but not replace qualitative insight.

**MODERATOR:** ROBERTO CREMONINI, Senior Partner, GivingData LLC

**PRESENTERS:**
- RICHARD CARDER, Learning & Evaluation Associate, Wellspring Advisors
- KERRY MEDEK, Director, Grants Management & Learning, GHR Foundation

**SESSION LIAISON:** CARLOS VELEZ, Wellspring Advisors
10:30 am–12:00 pm

**Closing Plenary: Emerging Technologies in Philanthropy**

Closing is a constant in our society and technology is no exception to this rule. More than ever, it is essential for technology professionals to understand what is coming and anticipate both the opportunity and the impact of new technologies for our organizations. How will some key emerging technologies impact and expand our work and personal lives in the future? What important technologies should we be tracking when planning technology for our organizations?

In this plenary, presenters will give you their insights into where the foundation sector is heading. They will explore some key technologies and look at how the many manifestations of Artificial Intelligence promise to change how we learn and who is doing the learning. Or perhaps more appropriately, “what?”

**PRESENTERS:** MARK BOLGIANO, Director of Technology, PBS Education

GAVIN CLABAUGH, Vice President, Information Systems, Charles Stewart Mott Foundation

TIMOTHY DECHANT, Chief Partnership Officer, Information Technology Partners

**SESSION LIAISON:** DANIEL SCHOENFELD, Knight Foundation

12:00 pm

**Conference Ends. Thank you for attending TAG 2017!**

12:00 pm–5:00 pm

**Post-Conference: Grants Management Software Vendor User Group Meetings**—Check with the following 3 vendors to confirm your participation.

<table>
<thead>
<tr>
<th>Vendor User Group Meeting</th>
<th>Time</th>
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<tbody>
<tr>
<td>MicroEdge + Blackbaud</td>
<td>12:00–5:00 pm</td>
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<tr>
<td>Bromelkamp</td>
<td>1:00 pm–2:30 pm</td>
</tr>
<tr>
<td>foundationConnect</td>
<td>12:30–5:00 pm</td>
</tr>
</tbody>
</table>

**MicroEdge + Blackbaud User Group Meeting**

The MicroEdge + Blackbaud User Group Meeting can only be attended by current MicroEdge + Blackbaud customers.

**Bromelkamp User Group Meeting**

**Thirsty for More Data Management Success? Attend the Bromelkamp Users Group of the Future**

Bromelkamp Company clients regularly seek to maximize the functionality of their Pearl or Akoya.net database. Sometimes this is by enhancing the skill set of finance, program, executive, administrative and fundraising staff. Sometimes it’s about customizing fields, forms, reports, dashboards, and workflow processes, or even extending functionality through integration with other software and data sources. We say “Never type the same thing twice.” Join this Users Group for Pearl and Akoya.net users, facilitated by President Henry A. Bromelkamp and staff, and including other Pearl and Akoya.net users via web meeting. We’ll not only share your ideas about what has been but also where you’d like to go. You’re welcome to join us if you’re a prospective user of Bromelkamp software, or simply curious. Questions get the same prize as answers.

**foundationConnect User Group Meeting**

The foundationConnect User Group Meeting can only be attended by current foundationConnect customers. The foundationConnect team would like to invite you to this year’s user group meeting at TAG. Your participation in this event will help shape the future of foundationConnect. Plus, it will help you network with other foundationConnect users and learn from each other.