

8:00 am to 5:00 pm		Registration Open
8:00 am to 11:00 am		Consultant/Vendor Breakfast Roundtables These vendor-sponsored roundtable discussions will provide you with an opportunity to learn more about vendor products, services and new strategies. Participants can visit more than one roundtable.
9:00 am to 12:00 pm		Community Foundations Meeting (by invitation)
12:00 pm to 2:00 pm		<i>Opening Lunch & Keynote</i> Keynote: T.B.D. Session Liaison: Michael O'Brien
	M/T	<i>Building Dashboards and Scorecards to Make Sense of your Foundation's Data</i> Transform your grants database from an underutilized repository to a living, breathing business intelligence platform. Too often, staff and trustees are limited in their ability to make strategic decisions because data is difficult to access, not available in useful formats, or out-of-date. In this session, we will show how the Barr Foundation is using real-time, interactive dashboards to inform its work. After a live demo, we will describe our design approach, provide technical details of the platform we built, and share lessons learned from our project. Presenters: Roberto Cremonini Chief Knowledge and Learning Officer Barr Foundation Alf Gracombe President Gracombe IT Solutions Session Liaison: Mike Murphy
2:15 pm to 3:30 pm	M	<i>The Role of IT Staff in the Age of the Cloud</i> As technology advances continue to increase the complexity of foundation IT environments and cloud platforms and services continue to mature, there is an increased expectation among foundation leadership that more IT infrastructure support will be outsourced. How do foundations transition their current IT staffing models to respond to these continued technological advances? This session will focus on how foundation IT staff will continue to be relevant and add value to the foundation in the age of the cloud. Moderator: Michael Keats Principal Michael D. Keats Consulting, LLC Panelists: Indira Anand Chief Information Officer Lumina Foundation for Education Linda Rosano Director of Information Technology W.T. Grant Foundation Guli Basu Information Services Operations Manager Doris Duke Charitable Foundation Session Liaison: Mike Murphy

		M/T	<p><i>Understanding and Leveraging CRM Systems</i> Foundations are communicating more than ever before. As foundations take a more active role in promoting their work, they are learning the communication limitations of existing grants management software systems. Does your foundation need a customer relationship management (CRM) system? Or, does your foundation have a CRM system but is not taking full advantage of its functionality. This session will discuss the benefits and features of CRM software, including audience segmenting, event planning, and on-going contact maintenance. We will also talk about CRM dashboards and how a strategic overview of your data can help ensure that your foundation to meet its goals.</p> <p>Presenter: Michael O'Brien Senior Director of Information Technology The German Marshall Fund</p> <p style="text-align: right;">Session Liaison: Tom Irvine</p>
	3:45 pm to 5:00 pm	H	<p><i>Open Data Panel Discussion</i> The age of Web 2.0 has popularized the concepts of open data, APIs and mashups. Projects like Sunlight Foundation's Transparency Data and The World Bank's Open Data Initiative have put information previously inaccessible to the public into the hands of developers, who have in turn built applications and tools that provide valuable insight into the forces that influence the world around us. How can we as foundations contribute to this open data movement? Or should we sit this one out? We'll discuss the implications (both pros and cons) of open data with experts from the government, for-profit and foundation worlds.</p> <p>Moderator: Jason Ricci Chief Information Officer The Energy Foundation</p> <p>Panelists: TBD TBD</p> <p style="text-align: right;">Session Liaison: Jason Ricci</p>
	6:30 pm to 9:00 pm		<p>Networking Reception and Dinner Birch Aquarium</p>

Wednesday, November 10, 2010 • Day Three (Conference) • Estancia La Jolla Hotel & Spa

8:00 am to 9:00 am		Breakfast
9:15 am to 10:00 am	M	<p>Plenary: Top Ten Things you Need to Know About TAG This session will provide you with an overview of TAG's programs and activities, with emphasis on the IT Survey results, TAG's web site and some exciting new awards TAG is launching. You must be in attendance to receive a prize!</p> <p>Presenters: Lisa Pool Executive Director Technology Affinity Group</p> <p>Craig Nuechterlein TAG Board President Director of Operations Greater Milwaukee Foundation</p>
10:15 am to 12:15 pm	M o r n g	<p>That Question You Always Wanted to Ask – Moderated IT Forums These moderated sessions are designed to help TAG members learn from the collective knowledge of TAG. Whether you need help with a specific problem or are interested in general foundation trends, these 100% interactive sessions will provide you with the answers!</p> <p>Attendees will be asked to select the managerial or technical session and submit questions when they register. The management session will address questions about social networking, communications, grants management software and policies/procedures while the technical session will address questions about virtualized server environments, cloud computing, smartphone support and more.</p> <p>Moderators: Lisa Pool (Management Session) Executive Director Technology Affinity Group</p> <p>Michael O'Brien (Technical Session) Senior Director of Information Technology The German Marshall Fund</p>
12:30 pm to 2:00 pm		Lunch – Networking Time/Phone/Email
2:15 pm to 3:30 pm	M	<p>Plenary: Social Media Social media is not a fad - and it is changing how the world communicates. It's a cheap and simple way for grantmakers to connect with key audiences and help move forward their agendas for change. So why hasn't everyone in philanthropy embraced it? Hear from talented leaders in philanthropy who are utilizing social media to harness the power of social networks to increase awareness of and support for their work. And hear from skeptics in the field who believe social media creates unnecessary risk around message control and consumption of staff time.</p> <p>Moderator: William Hanson Vice President of Communications and Technology The Skillman Foundation</p> <p>Presenters: Berit Ashla Special Projects Tides Foundation</p> <p>Garlin Gilchrist II Director of New Media Center for Community Change</p> <p style="text-align: right;">Session Liaison: Lisa Pool</p>

<p>3:45 pm to 5:00 pm</p>	<p>M</p>	<p>Technology Planning – and Presenting your Plan Although technology planning is a key part of any CIO / CTO's job, it can be difficult to initiate - between the crush of daily needs and the management approval often required. In this session, you will gain increased mastery of the key concepts for strategic technology planning within the foundation environment, covering:</p> <ul style="list-style-type: none"> o What to do when doing strategic technology planning o How to do it o How to sell technology planning to staff and management <p>Presenter: Lisa Rau CEO Confluence</p> <p style="text-align: right;">Session Liaison: Edima Elinewinga</p>															
	<p>M/T</p>	<p>The Hewlett Toolbox The Hewlett Foundation took a novel approach to the grants management software problem and used the GIFTS API to build functionality that GIFTS lacks. The foundation got online with its grantees, built electronic workflows for all key processes, and moved to a digital-only grants file – all with minimal disruption and no outside consultants. This session will be provide some background information and rationale for Hewlett's design approach, share insights that have broad applicability, and show you a live demo of the system. In this session, we hope to inspire you to go where few have gone before, to save you time in your grants systems projects, and to get your feedback and suggestions for improving the Hewlett Toolbox.</p> <p>Presenters: Patrick Collins Chief Information Officer and Director of Grants Administration The William and Flora Hewlett Foundation</p> <p>Kathy Nicholson Manager, Application Development and Support The William and Flora Hewlett Foundation</p> <p style="text-align: right;">Session Liaison: Jason Ricci</p>															
<p>7:00 pm</p>		<p>Meet in Hotel Lobby for Networking Dine-around Dinners in Downtown La Jolla</p>															
<p>7:30 pm +</p>		<p>Dinner on your own - Participants can sign up at the conference to join colleagues at one of the following restaurant selections or you can make your own plans. All restaurants are within walking distance of the hotel.</p> <table border="1" data-bbox="483 1556 1455 1724"> <thead> <tr> <th>Restaurant</th> <th>Type</th> <th>Host(s)</th> </tr> </thead> <tbody> <tr> <td>Crab Catcher Restaurant & Seaside Grill</td> <td>Seafood</td> <td></td> </tr> <tr> <td>Piatti ristorante & Bar</td> <td>Italian</td> <td></td> </tr> <tr> <td>Roppongi Restaurant & Sushi Bar</td> <td>Asian Fusion</td> <td></td> </tr> <tr> <td>Whisknldl</td> <td>American Bistro</td> <td></td> </tr> </tbody> </table>	Restaurant	Type	Host(s)	Crab Catcher Restaurant & Seaside Grill	Seafood		Piatti ristorante & Bar	Italian		Roppongi Restaurant & Sushi Bar	Asian Fusion		Whisknldl	American Bistro	
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8:00 am to 9:00 am		Breakfast Roundtables
9:00 am to 10:15 am	M	<p><i>Listening in Social Media: Tools and Strategies for Monitoring Your Reputation and Causes</i> Every day, the world creates about eight times more information than is held in all of the US libraries combined, and you need to keep on top of it all to find the latest research and thinking in your field. Every second, 1.4 new blogs are created, and you need to know if any of them are talking about your foundation, leaders, programs, grantee or issues. Making sense of all the content and conversation out there is challenging, but social media tools can be put to work to focus you on the relevant conversations. In this session, richly illustrated with case studies from foundations that listen hard and effectively, we will explore strategies and tools to find out who's talking about your foundation and what they are saying; identify potential opportunities for collaboration with other funders and between grantees; integrate all of this into your workflow so you are not overwhelmed; and share insights so your foundation can respond effectively.</p> <p>Presenters: Holly Ross Executive Director N-TEN</p> <p>Adam Coyne Director of Public Affairs and Social Media Robert Wood Johnson Foundation</p> <p style="text-align: right;">Session Liaison: Michael Keats</p> <hr/> <p><i>Cloud Computing – The Reality Beyond the Hype</i> Cloud computing is the most hyped topic in the computer industry today. It promises to revolutionize the way information is accessed, stored and used, but is it ready for your foundation's mission-critical data? Before going through cycles of inflated expectations and disillusionment, find out what benefits and limitations you can expect today. This session will discuss the hype and the reality of cloud computing and what it means for you, your organization, and your mission.</p> <p>Presenters: Brad Helies Senior Manager, Client Development NPower NY</p> <p>Anand Sethupathy Senior Manager, Solutions NPower NY</p> <p style="text-align: right;">Session Liaison: David Binder</p>
10:30 am to 12:00 pm	M/T	<p><i>Closing Plenary: Emerging Technologies</i> Change 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?</p> <p>In this closing session, presenters will give you their insights into where the foundation sector is heading. And, they will explore some key technologies that even small foundations should be tracking during the next year.</p> <p>Presenters: Mark Bolgiano President & CEO XBRL US</p> <p>Gavin Clabaugh Vice President, Information Services C. S. Mott Foundation</p> <p>Tim Dechant Director of Technology W.K. Kellogg Foundation</p> <p style="text-align: right;">Session Liaison: Lisa Pool</p>
12:00 pm		Conference Closed