Nonprofit Technology Network

Your Voices:

2009 NTEN Community Survey Report

An NTEN Report
October 2009

By Annaliese Hoehling, NTEN Membership and Outreach Manager

NTEN | 1220 SW Morrison St. #535 | Portland, OR 97205 | p) 415.397.9000 | f) 415.814.4056

About NTEN: The Nonprofit Technology Network

What we believe

NTEN aspires to a world where all nonprofit organizations skillfully and confidently use technology to fulfill their missions. As the membership organization for the nonprofit technology community, NTEN plays a unique role in this field. Our work is to connect our members and provide you with learning and professional development. We give a bird's-eye view of the trends, issues, and opportunities that influence nonprofits' use of technology. Our ability to see the big picture and context allows us to identify areas of common opportunity and organize for action.

What we do

NTEN is a community of peers who share technology solutions across the sector and support each other's work. We enable our members to embrace advances in technology confidently through on- and off-line knowledge sharing, hands-on trainings, and research and industry analysis. Our discounts help our members stay up-to-date with changing technology and valuable resources. We offer news and pioneering industry research and are a channel for the dissemination of innovation and learning in this field.

NTEN WEBINARS / nten.org/webinars

NTEN hosts many online trainings and discussions each month on topics related to nonprofit technology.

ONLINE NETWORKING / groups.nten.org

Do you want to connect with other nonprofit webmasters, talk about open source CMS tools, or learn ways to use Flickr in your next campaign? Then join one of these NTEN Affinity Groups (or a few of the more than 90 others) and start talking.

NTEN EVENTS / nten.org/events

Attend our conferences and local meet-ups where people like you come together to share experiences, learn, network, make deals, and have some fun.

NTEN Research / nten.org/research

Our industry-leading research is growing and expanding. We have recently published studies on Donor Management Software and Nonprofit Social Network Use. We cover policy issues such as IT leadership, open software and data, and social and mobile media.

NEWSLETTERS / nten.org/signup

NTEN Connect is your opportunity to read about the latest issues from a variety of viewpoints. For each issue we ask leaders in the nonprofit technology community to sound off on a topic that's impacting the field.

NTEN BLOG / nten.org/blog

NTEN's blog is the place to find out about the latest resources, nonprofit tech news, and buzz from the NTEN community.

NTEN BOOK / www.meetyourmission.org

How do you make technology decisions at your nonprofit without a tech background? This book has the answers. It was written by NTEN members who have wrestled with all the issues, from staffing to security, themselves.

Designed by Quilted.org

About the Survey

From the Community

I love NTEN! After 20 years in high tech, it's easy to feel isolated in a nonprofit, when you may be the only techie. Having a ready-made community with people/ tools/expertise/nonprofit experience is wonderful!

We conduct an annual Community Survey to find out more about the individuals and organizations in the NTEN community, to learn about how they use technology in their work, and to gauge the impact of NTEN programs and services on their professional development and their organization's missions.

The NTEN Community is made up of dues-paying members and program participants, with just over 7000 individuals represented in membership and a total of 15,000 members and participants who engage with NTEN programming and resources.

We received responses from 1,000 individuals in the spring of 2009. A little over half of respondents were NTEN members (56.48% answered that they were members, 34.4% said they were not members, and 9.2% did not know whether they were members).

Key Findings

- Satisfaction with NTEN programming overall, among members and non-members, is up over previous years
- 84.7% of NTEN members feel that their membership helps them be more effective in their work, an increase of nearly 5% over 2008 responses.
- 93% of NTEN members would (or have) recommend membership to their colleagues.
- There is an "**NTEN Effect**" among respondents when it comes to Technology Adoption and Leadership levels: NTEN members are likely to rate themselves and their organizations higher along the adoption spectrum as compared to their nonprofit colleagues. NTEN members are also more likely to have leadership roles at their organizations when it comes to technology planning and implementation.
- "Running effective email campaigns" has supplanted "Managing my web site" as the highest-rated challenge area among respondents.

Technology and Your Work

In this section, we look at how respondents use technology in their work.

1. As an Organizational Challenge/Significant Focus

Rate the significance of the following issues as challenges for your organization (scale of 1-5).

	Rating Average	Members	Non-Members
Running effective email campaigns	3.54	3.46	3.69
Online fundraising	3.45	3.33	3.60
Determining ROI of tech investments	3.42	3.41	3.48
Deploying social media (facebook, twitter, etc.)	3.38	3.36	3.43
Measuring/analyzing web/email statistics	3.25	3.22	3.30
Keeping up to date with tech trends	3.21	3.21	3.23
Data exchange between applications	3.21	3.34	3.04
Managing my web site	3.19	3.20	3.19
Training staff: software	3.17	3.21	3.13
Convincing leadership to invest in tech	3.01	2.96	3.10
Understanding social media (facebook, twitter, etc.)	2.96	2.93	3.01
Training staff: hardware	2.88	2.88	2.87
Finding tech staff	2.55	2.61	2.43
Network security	2.42	2.45	2.37
Finding consultants	2.38	2.39	2.38
Retaining tech staff	2.32	2.31	2.30

This year, "Running effective email campaigns" has supplanted "Managing my web site" as the highest-rated challenge area among respondents. "Retaining tech staff" was the lowest-rated challenge among respondents, the same result as the 2008 survey.

Among nonprofits, organizational type did seem to affect organizational challenges reported here, as the graph on page 5 shows. Note, for example, that "Online Fundraising" is the highest-rated challenge area for Advocacy Network organizations, but the lowest-rated challenge for Public Sector/Government

Agency respondents. Interestingly, organizational budget size did not seem to make a significant impact on respondents' ratings of challenge areas.

The NTEN Effect

Non-Members tended to generally rate issues as more significant challenges than Members, indicating similar challenge areas but with higher intensity of the challenge for each area. For example, the highest average rating from Members was 3.46, while the highest rating from Non-Members was 3.69, but both members and non-members gave their highest challenge rating to the same issue: "Running Effective Email Campaigns."

Even though Non-Members tended to rate issues with a higher intensity, some issues were rated higher by Members. When taking a closer look at the type of issue where Members and Non-Members diverge most in their ratings, we suspect that a difference in technology expertise and experience levels may be indicated. For example, Members rated "Data exchange between applications" 0.30 points higher than Non-Members. We suspect that the difference here may come from more awareness of this issue area among Members than Non-Members.

2. Your Role at Your Work

What is your role in strategic technology planning and implementation for your organization?

	All	Members	Non-Members
None - I'm an innocent bystander for now	4.4%	2.8%	5.4%
Some - I make recommendations and engage in brainstorming discussions	21.9%	19.4%	24.8%
Quite a bit - I help translate ideas into plans, and help put plans into effect	33.2%	34.3%	33.5%
Leader - I manage planning and implementation for my organization	37.0%	40.4%	32.2%
N/A	3.5%	3.1%	4.1%

Perhaps not surprisingly, NTEN members are more likely to have a role in technology planning or implementation for their organizations than Non-Members, but the NTEN community in general (70.2%) plays more than "Some" role in the planning and implementation process.

The NTEN Effect

The largest gap between Member and Non-Member responses here are those who play a Leadership role at their organizations when it comes to tech planning or implementation. Members are +3.4% more likely to do so than the NTEN community in general, while Non-Members are -4.8% off the average response here when it comes to playing a Leadership role at their organizations.

What is your role in terms of purchasing software or services?

	All	Members	Non-Members
Evaluation	7.6%	6.4%	9.1%
Recommendation	43.2%	41.7%	46.9%
Purchasing Authority	37.4%	41.4%	30.7%
N/A	11.8%	10.5%	13.3%

Again, NTEN Members are more likely to have more authority in software decisions for their organizations than Non-Members.

We are pleased to see, however, that in general, the NTEN community plays some role in the software and technology service decisions at their organizations.

What is your role in terms of purchasing hardware or networking?

	Response Percent	Members	Non-Members
Evaluation	7.5%	7.1%	9.2%
Recommendation	29.2%	25.8%	35.7%
Purchasing Authority	30.7%	34.0%	25.6%
N/A	32.6%	33.1%	29.4%

The NTEN Effect

Similarly, as we move up the spectrum in authority for making Hardware or Networking decisions, respondents who are not NTEN members are more likely to have less authority, while NTEN members are more likely to have more authority, with the most significant gap between Members and Non-Members, again, coming at the top of the authority spectrum.

3. Tech Use By Program Area

Please indicate how much each area of your organization's work uses tech (which includes anything from databases to social media) to support your mission. (Scale of 1-5)

	Average Use	Members	Non-Members
Communications and Marketing	3.89	3.99	3.71
Fundraising/Development	3.15	3.25	2.97
Programs/Services	3.36	3.48	3.13
Administration	3.54	3.65	3.33

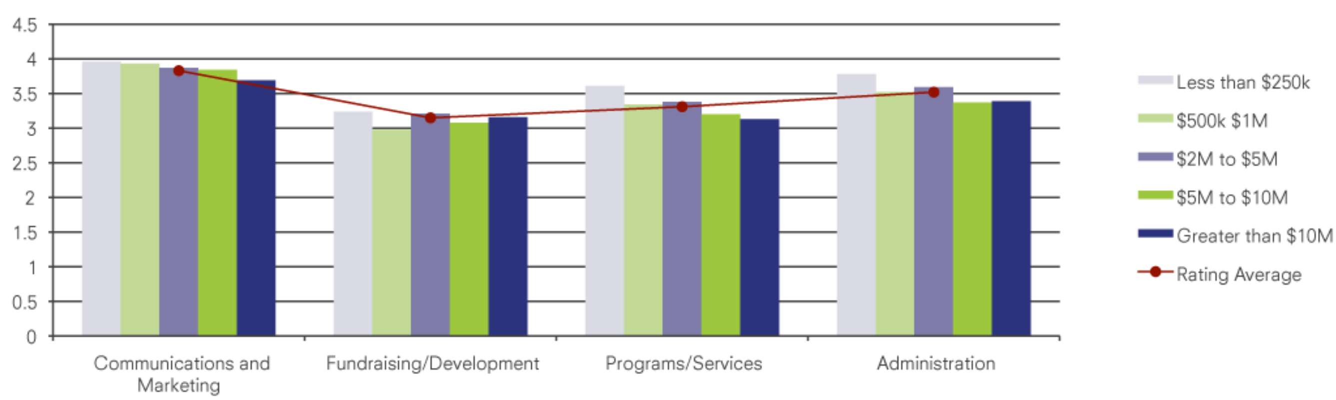
Respondents indicated that Communications and Marketing functions were most likely to use technology. Fundraising and Development was the department least likely to be deploying technology.

Interestingly, when we looked at the responses by organizational budget size, we noticed that the smallest budget category organizations reported the most use of technology in all organizational departments (see graph, below). This is not surprising to us when we consider that a smaller organization will probably make more use of technology to reduce staffing costs and increase efficiency of program delivery.

The NTEN Effect

In general, NTEN members reported more technology use across each department than Non-Members. Where the average rating of tech use did not drop below 3.25 among Member respondents, Non-Members dropped below 3.00 for the Fundraising/Development department's use of technology.

Please indicate how much each area of your organization's work uses tech (which includes anything from databases to social media) to support your mission:



4. Your Changing Role Over the Next Year

How do you see your personal contribution in your organization regarding technology changing over the next year? (Check all that apply)

	All	Members	Non-Members
None	7.3%	7.3%	7.9%
Decreasing	3.7%	3.4%	4.6%
Increasing Usage	41.5%	40.6%	42.3%
Increasing Leadership	63.4%	65.5%	60.2%
N/A	4.9%	4.6%	5.0%

We are pleased to see that a majority of NTEN participants (63.4%) feel that they will increase their Leadership roles when it comes to technology at their organizations.

The NTEN Effect

NTEN member respondents were more likely to indicate increasing Leadership in technology roles at their organizations than Non-Members.

5. Your Tech Adoption Level Compared to Nonprofit Sector

How would you describe your personal level of technology adoption in relation to your colleagues in the nonprofit sector?

	All	Members	Non-Members
In Trouble	0.1%	0.0%	0.4%
Lagging Behind	4.0%	3.8%	3.6%
Average	23.7%	21.4%	29.6%
Fast Follower	41.3%	43.5%	36.0%
Leader/Early Adopter	30.8%	31.3%	30.4%

When asked to compare their personal level of Tech Adoption in relation to their nonprofit colleagues, respondents were most likely to consider themselves "Fast Followers" (41.3% of all respondents).

The NTEN Effect

NTEN member respondents were more likely to consider themselves higher along the adoption spectrum, with 74.8% choosing "Fast Follower" or "Leader/Early Adopter," while 66.4% of Non-Member respondents indicated those levels.

6. Your Org's Technology Adoption Level Compared to the Nonprofit Sector in General

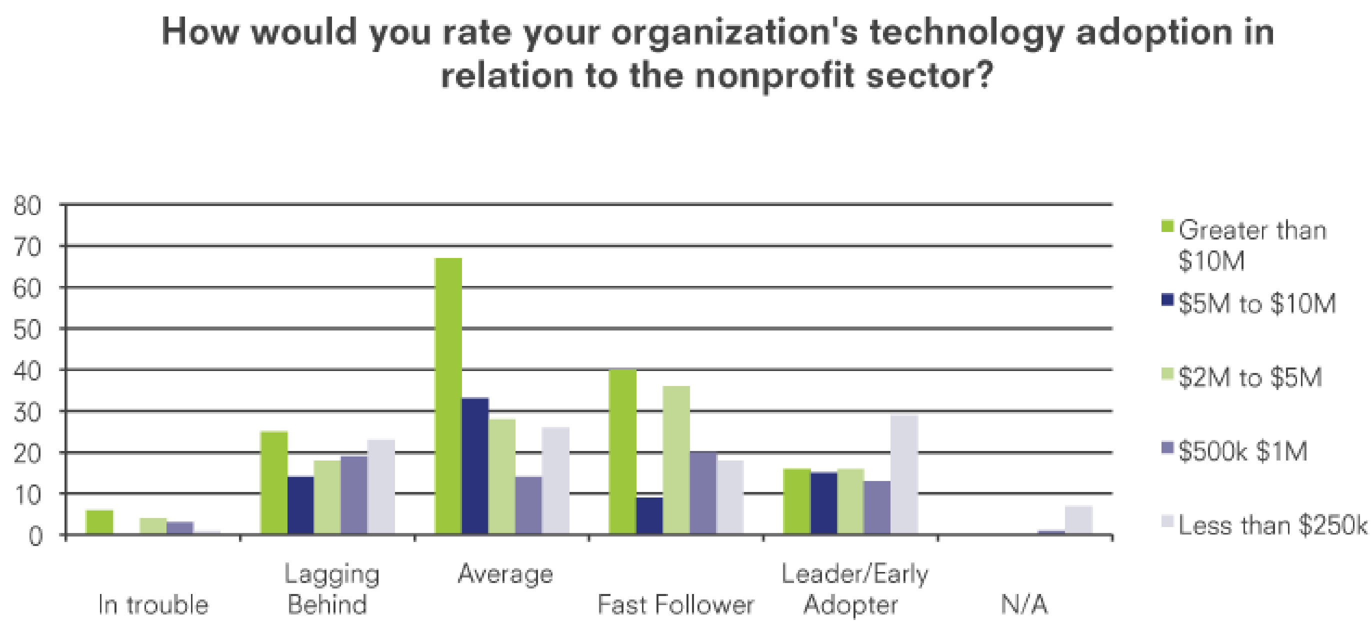
How would you rate your organization's technology adoption in relation to the nonprofit sector?

	All	Members	Non-Members
In Trouble	2.4%	1.6%	3.2%
Lagging Behind	18.4%	16.9%	23.0%
Average	33.7%	31.8%	37.9%
Fast Follower	25.1%	25.9%	23.0%
Leader/Early Adopter	17.3%	20.0%	10.5%
N/A	3.1%	3.8%	2.4%

While individually the NTEN community seems to consider themselves at the higher end of the Tech Adoption spectrum, when they are asked to consider their organizations, their confidence seems to drop off. Respondents were most likely (33.7%) to indicate their organization's Tech Adoption level, as compared to other nonprofits, as Average.

Only 17.3% consider their organizations as Leaders/Early Adopters.

Interestingly, when we looked at the responses by organizational budget size, we saw that smaller organizations were more likely to consider themselves Leaders/Early Adopters than other organizational categories, while the largest budget organizations were most likely to consider themselves as average. (See graph on page 11.)



The NTEN Effect

Strikingly, by almost 2 to 1, NTEN Members are more likely to consider their organizations as Leaders/ Early Adopters (20.0%) than Non-Member respondents (10.5%).

Your Satisfaction with NTEN Programs and Membership

In this section, we look at feedback about NTEN programs and services.

A. Members

How long have you been a member of NTEN?

	Response Percent	Response Count
< 1 year	42.4%	192
1 year	10.8%	49
1-2 years	18.1%	82
2-5 years	22.7%	103
> 5 years	6.0%	27

Most Member respondents indicated they were new members, with 42.4% indicating this was their first year of membership (<1 year), and more than half (52.9%) indicating their length of membership was 1 year or less.

Considering NTEN is relatively young (under 10 years old ourselves!), it's not surprising that the smallest segment of Member respondents was the >5 year tenure category.

A further consideration of tenure length among NTEN Member respondents is the rapid growth over the last few years (we've doubled in size since 2007, for example).

What would you say is the main reason you became a member of NTEN? (You can choose more than one, but please limit to your top 3.)

	Response Percent
Discount on the Nonprofit Technology Conference (NTC)	33.0%
Discount on other events and training (like Webinars)	25.9%
General professional development and training	54.2%
To access NTEN research and report data for free	39.8%
To be part of the community of nonprofit technology leaders	64.6%
Other (please specify)	6.4%

Members indicate, overwhelmingly, that their top reason for becoming a Member of NTEN is "To be part of the community of nonprofit technology leaders," with "General professional development and training" a second priority reason.

The Nonprofit Technology Conference has moved down the list of priority reasons for becoming a Member, a response we believe is due to NTEN's increased year-round programming and resources for Members.

When we looked at priority reasons by job role, we found that staff and leaders of nonprofits as well as at for-profit entities indicated the community was the driving force behind their decision to be Members of NTEN.

How valuable are the following NTEN programs and services to your work/professional development? (Scale of 1-5)

	Rating Average
501 Tech Clubs (informal local groups)	2.46
NTEN Affinity Groups (NTEN email lists)	3.01
Webinars	3.89
Ask the Expert Q&A Sessions	3.13
Nonprofit Technology Conference	4.17
NTEN eNewsletter	3.75
NTEN Blog	3.20
NTEN Research (e.g. the IT Staffing Report)	3.93
Webinar Multi-Passes	2.94
NTEN Office Hours	2.23
Jobs Forum/Jobs Page	2.53

The Nonprofit Technology Conference (NTC) continues to be our highest-rated program, followed by NTEN Research, when it comes to professional development value.

When we analyzed responses by membership tenure, we found that the longer the tenure, the more valuable the Affinity Groups/Email lists get for respondents.

The newer Members find the Ask-the-Expert Sessions the most valuable among Nember respondents, while the >5 years members rated Ask-the-Expert Sessions as lower in value: 42.5% of <1yrs rated Ask-the-Expert sessions as 4 or 5 in value, while 50% of the >5yrs rated it at 2 or 1, on scale of 1-5. The 1-5 yr categories, however, seem to be pretty even (mostly at the 3 or 4 level) on the subject.

Newer Members also value the Webinar Passes more than the longer-tenured folks. Considering the Webinar Passes and Ask-the-Expert sessions are newer benefits, it may be that newer Members are more aware of and interacting with the newer offerings, while the longer-tenured Members are either not learning about or are not interested in the newer Member services and programming.

Please rate the following statements (scale 1 to 5):

	Rating Average
I am satisfied with the RANGE of benefits NTEN provides for members.	4.05
I am satisfied with the QUALITY of benefits NTEN provides for members.	4.10
I have taken advantage of several of the benefits of NTEN membership.	3.52
I plan to take advantage of my member benefits often over the next months.	3.63

We are pleased to see that respondents' satisfaction ratings have increased this year, with a +0.11 average response increase in satisfaction with the Range of Member benefits, and an equal +0.11 increase in satisfaction with the quality of Member benefits.

We also see a slight increase in the reported rating of Members taking advantage of their benefits (+0.05 over 2008 data).

Interestingly, we did not see any significant difference among responses when comparing Members by length of tenure, except that the longest tenured Members (>5 years) tend to rate their satisfaction levels generally higher than the new Members, which is a positive trend for us.

We are not surprised to see that the newest Members were most likely to indicate they have not taken advantage of their benefits yet.

Do you agree with this statement: NTEN membership helps me be more effective in my job.

	Response Percent
Strongly agree	37.5%
Somewhat agree	47.2%
Neutral	13.9%
Somewhat disagree	0.7%
Strongly disagree	0.7%

We are pleased to see that 84.7% of members Somewhat or Strongly agree that their membership helps them be more effective on their job, and that this is a 4.7% increase in agreement over last year's survey.

Though length of tenure doesn't seem to have too much correlation to responses here, it does look like longer-tenured folks are slightly more likely to agree that their membership makes them more effective: 55% of those with >5yr tenure "Strongly agree," their most common response, while 49.5% of the <1yr members "Somewhat agree," that group's most common response.

When we analyzed responses by job roles, we found that Fundraising/Development staff were most positive in their response, with 96.3% indicating that they Somewhat or Strongly Agree that their membership helps them be more effective on their job.

Do you agree with this statement: NTEN membership helps my organization (or my cause) more effectively work towards achieving our mission.

	Response Percent	Response Count
Strongly agree	28.7%	124
Somewhat agree	51.2%	221
Neutral	14.6%	63
Somewhat disagree	1.2%	5
Strongly disagree	0.5%	2
N/A	3.9%	17

When asked if their membership helps their organizations be more effective, we found that 80% indicate they Somewhat or Strongly Agree.

This marks a sharp increase in positive response over last year's data, when 60% of respondents indicated that they somewhat or strongly agree that their membership helps their organizations be more effective, and 30% were neutral. This is a positive trend for us that we hope to see continue.

Fundraising/Development staff were the most likely constituency to "Strongly Agree" that their membership helped their organizations be more effective, however Marketing/Communications and Executive Director constituencies were the most likely to report positive agreement overall: 86.3% of Marketing/Communications staff "Somewhat" or "Strongly" agreed, +6.3 points over the average response from members; and Executive Directors indicated +4.8 points above the average response of "Somewhat" or "Strong" agreement.

Please rate your response to the following question on a scale of 1 (not at all likely) to 10 (extremely likely);

	1	2	3	4	5	6	7	8	9	10	Average Rating
How likely are you to recommend NTEN to a friend or colleague?	3	1	3	2	20	30	59	90	55	163	8.35

We were pleased to see that 93% of NTEN Members were likely (or more) to recommend membership to their colleagues.

We were "extremely" pleased to see that nearly 40% chose the rating of "10," indicating that they were Extremely Likely to recommend membership to their colleagues.

When we compared responses by length of membership tenure, we saw that >5 year Members were the most likely, by a significant margin, to recommend membership to colleagues, but there doesn't seem to be a direct correlation between length of tenure and likeliness to recommend NTEN to their colleagues.

When we compared responses by job roles, we found that Consultants were the most likely to recommend membership (42.5% choosing "10"), followed very closely by Marketing/Communications staff (42.1% choosing "10").

B. Non-Members

How valuable are the following NTEN programs and services to your work/professional development? (Scale of 1-5)

	Rating Average
501 Tech Clubs (informal local groups)	3.18
NTEN Affinity Groups (NTEN email lists)	3.43
Webinars	3.97
Nonprofit Technology Conference	3.78
NTEN eNewsletter	3.85
NTEN Blog	3.46
NTEN Research (e.g. the IT Staffing Report)	3.80
Webinar Multi-Passes	2.46
NTEN Office Hours	3.02
Jobs Forum/Jobs Page	2.23

We saw some shift in responses to this question this year, with non-members rating all NTEN programs generally higher (in 2008, the highest average rating for a program was 3.68, for example, and four programs were rated below 3.00; while this year the highest rating is 3.97, a nearly +0.30 change, and only one program fell below the 3.00 mark).

Another shift this year: non-members rated Webinars highest, on average, of all NTEN programs; in 2008 non-members rated the NTEN eNewsletter highest in value. A contributing factor to this could be the increase in webinar programming overall this year, and especially an increase in the availability free webinars.

NTEN Constituencies: A Closer Look

The NTEN community's major constituencies continue to be IT Staff, Marketing/Communications Staff, Consultants, and Executive Directors/CEO's. This year, we're also adding the Fundraising/Development constituency to these profile analyses, which has grown over the last year. And finally, we decided to take a closer look at the profile of a Tech Leader in this section as well.

IT Staff

IT Staff continues to be our largest constituency in the NTEN community, making up 24.9% of this year's survey respondents. They are also the constituency most likely to be participating in the NTEN community as Members, with 66% indicating they are current Members. Like the rest of the NTEN community, they are more likely to be newer Members (37% indicated <1 year, the most selected tenure category), but IT Staff also has more long-tenured Members than all other constituencies except the ED/CEOs (32.5% IT Staff indicate 2+ years of membership).

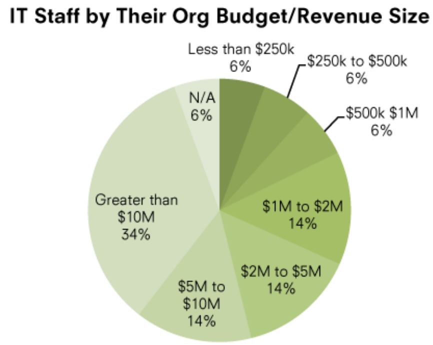
When it comes to comparing their tech adoption levels with their nonprofit colleagues, 40.2% consider themselves "Fast Followers" and 29.1% consider themselves "Leaders/Early Adopters." When asked to rate their organizations in comparison with the nonprofit sector as a whole, IT Staff were most likely to consider their organizations "Average" (35%), and next likely to rate their orgs as "Fast Followers" (31.7%). Only 15.6% considered their organizations to be "Leaders/Early Adopters."

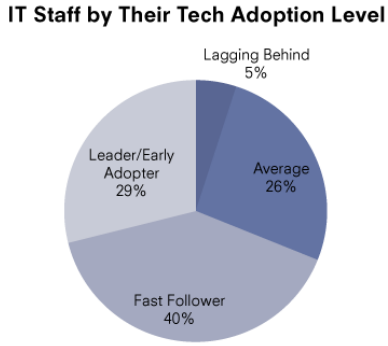
Like the general NTEN community, IT Staff are most likely to work at organizations with a programmatic focus on education (30.5%). They are least likely to work at religious organizations (2.3%). They also tend to come from very large organizations, with 34% reporting their organization's budget size to be greater than $10M and 33% coming from organizations with 101+ staff members.

IT Staff gave their highest average rating to "Running effective email campaigns" (3.45, on a scale of 1 to 5), followed by "Determining ROI of tech investments" (3.36), when scoring the significance of technology challenges to their organizations.

Not surprisingly, more than 80% of IT Staff respondents indicate that they have a significant role in technology planning and implementation at their organizations, with 50.6% indicating they play a Leadership role in this area. IT Staff were also the most likely of all constituents to indicate that they expect to see their roles as Leaders at their organizations increase in the next year (67.2%).

IT Staff were likely to indicate that they did not belong to any other associations or professional organizations (27.4%). TechSoup and TechRepublic were the other resources most cited by IT Staff, and to a lesser degree this group also cited SlashDot and Mashable as outside sources they refer to.





Marketing/Communications

Marketing/Communications staff continues to be our second-largest constituency in the NTEN community, and 60% participate in the community as Members. This group indicated that they are newer Members (40.4% <1 year tenure), and only 3.2% reported a membership tenure of >5 years.

Like the IT Staff group, about 29% consider themselves “Leaders/Early Adopters” when it comes to technology and their nonprofit colleagues, and 43.4% consider themselves “Fast Followers.” Marketing/ Communications staff were also most likely (39.5%) to consider their organizations’ tech adoption level as “Average” when compared to other nonprofit organizations. The next most-cited response here was “Lagging Behind,” by 21.7% Marketing/Communications staff.

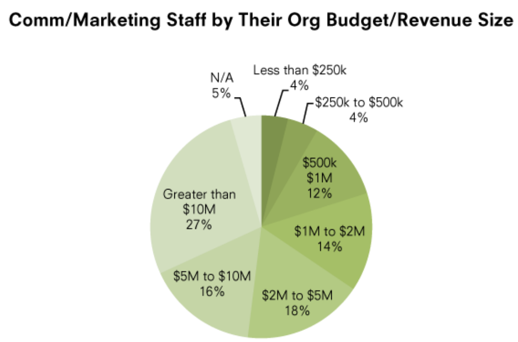
Marketing/Communications staff in the NTEN Community tend to work at health oriented organizations (25.5%), which slightly edged out education organizations, where 23.5% of Marketing/Communications group indicated was their organization’s programmatic focus. This group was least likely to come from legal organizations (only 2%). Like the rest of our nonprofit community participants, this group works at large organizations, with 27.5% working at organizations with greater than $10M annual budgets and staffs larger than 101 employees (32.3%).

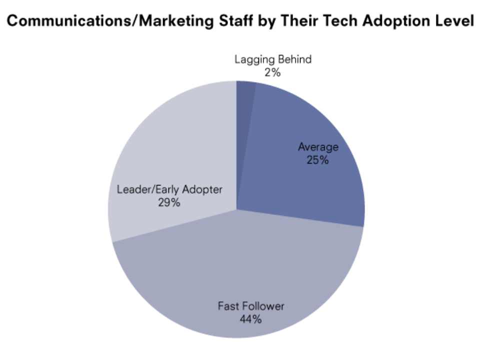
Surprisingly, the Marketing/Communications group flip-flopped their top-rated tech challenges with the IT Staff constituency, with their highest average rating going to “Determining ROI of tech investments” (3.74 on scale of 1 to 5), and their second-highest average rating going to “Running effective email campaigns”

(3.62). It could be that this group still needs to lobby for tech investments at their organizations, and they find this a greater challenge than actually implementing their communications work.

Our Marketing/Communications constituency is most likely to have "quite a bit" of a role in strategic technology planning and implementation at their organizations, and 32.5% say they have "Some" role in the planning or implementation. Only 19.5% of this group indicated they play the "Leader" role in this area at their organizations. We are pleased to see, however, that 65.8% of this group see "Increasing Leadership" for their roles at their organizations when it comes to technology.

This group was also most likely (26.7%) not to belong to any other association or professional organization. Beth Kanter's Blog and Katya Andresen's Nonprofit Marketing Blog were the most cited additional online resources for this group; the Chronicle of Philanthropy was the most-cited magazine subscribed to.





Executive Directors/CEOs

We were pleased to see this constituency grow in representation in this year's survey, from 9.5% of respondents last year to 10.4% this year. Over 60% of this group participates in the community as Members, and they have been Members longer than the average respondent, with 34.1% indicating 2+ years as NTEN Members.

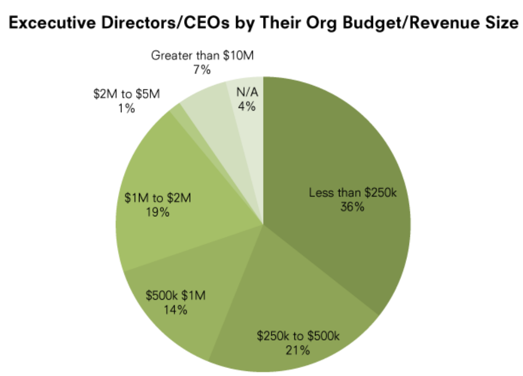
This group considers themselves to be "Leaders/Early Adopters" when it comes to their technology adoption level compared to their nonprofit colleagues (39.2%), and they also consider their organizations as "Leaders/Early Adopters" when it comes to technology adoption in comparison with other nonprofit organizations. They were the most likely to rate their organization at the top of the tech adoption spectrum (33.3%).

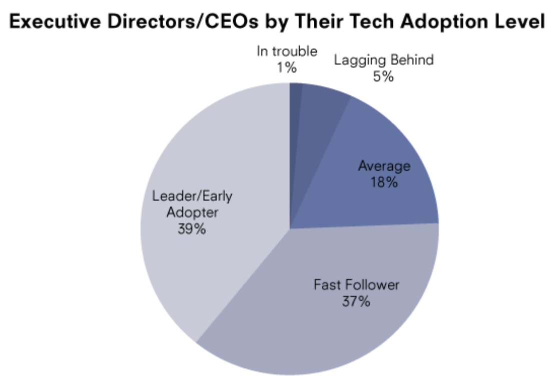
Unlike the majority of the NTEN community, this group comes from small organizations, with 35.6% indicating their organization's annual budget is less than $250k, and 33.8% indicating organizational staff size of 1-2 employees. These statistics are not surprising, however, when we assume that smaller organizations will more likely be represented in the NTEN community by their leadership staff, while the larger organizations are more likely to be represented in the NTEN community by departmental staff.

This group rates "Online fundraising" highest (3.71 on a scale of 1 to 5) as an organizational challenge, followed by "Running effective email campaigns" (3.57). Not surprisingly, their lowest-rated challenge is "Convincing leadership to invest in tech" (2.25).

ED/CEOs also overwhelmingly play leadership roles in strategic planning and implementation of technology projects for their organizations (71.6%). This group is most likely to indicate that most of their organizations work uses tech in all departments. We assume this tendency is related to their small organizations, which we noted earlier as also more likely to use more technology across departments. This group believes their roles as leaders when it comes to technology at their organizations increasing over the next year (60.3%).

ED/CEOs were most likely to also belong to their state association of nonprofits (31.4%) in addition to NTEN. There were no noticeably common outside online resources this group refers to, but this group does tend to subscribe to the Chronicle of Philanthropy and NonprofitTimes.





Consultants

Consultants made up 8.8% of this year's community survey respondents and are more likely to participate in the community as Members (62.9%). They boast the longest tenure as Members, with 36.6% indicating 2+ years as NTEN Nembers.

Consultants consider themselves Leaders/Early Adopters (49.2%) or Fast Followers (37.7%) when it comes to personal levels of technology adoption; they also rate their organizations as Leaders/Early Adopters (29%).

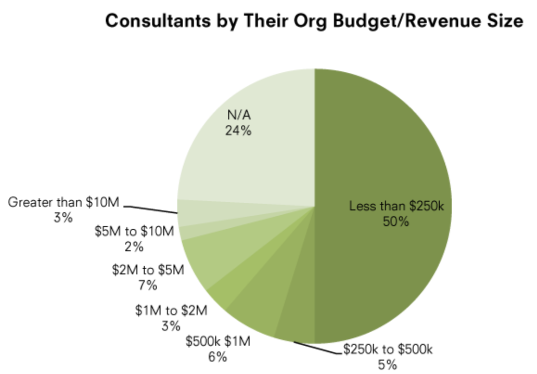
They come from small organizations, with 50% reporting annual budget/revenue size less than $250k and 52.5% reporting a staff size of 1-2 employees.

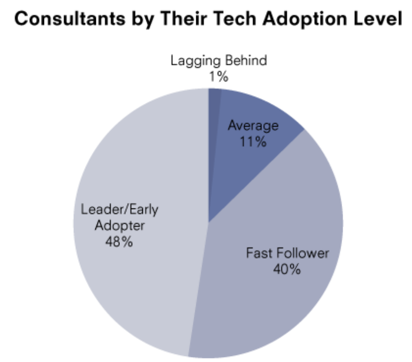
Not surprisingly, Consultants generally rated the technology challenges low, but gave their highest rating to "Keeping up to date with tech trends" (3.27 on a scale of 1 to 5). Because the challenges listed in the survey are understandably geared toward nonprofit organizations, we should note here that one of most cited challenges in the "Other" write-in response to this question from Consultants was "communicating" with the leadership and IT staff at nonprofits.

More than half (52.6%) of the Consultants believe their technology Leadership role will increase over the next year.

Consultants are most likely to not belong to any other association or professional organization (36%), but 22% do belong to their state association of nonprofit organizations.

When looking for other online resources, Consultants are most likely to refer to TechCrunch, TechSoup, and Beth's Blog. Like the nonprofit staff respondents, Consultants are likely to subscribe to the Chronicle of Philanthropy, but they also subscribe to PC World.





Fundraising/Development Staff

The Fundraising/Development constituency has also grown since last year's community survey, up about 1% in representation among survey respondents to 8.8% this year. They have not made the move towards membership yet, however, and are more likely (51.6%) to be Non-Members than Members.

Perhaps the lower participation as members accounts for their lower tech adoption level, with only 26.6% considering themselves Leaders/Early Adopters, compared to 31.3% of member respondents rating themselves as Leaders/Early Adopters on the tech adoption spectrum. This group is also the most likely to consider their organizations as Lagging Behind (32.8%) when it comes to tech adoption compared to other nonprofit organizations.

Fundraising/Development staff in the NTEN community are more likely to work at health oriented organizations (30.2%) more than other types, and are least likely (1.6%) to work at legal organizations.

They are more likely to work at large budget organizations, but to a lesser degree than other nonprofit staff constituencies, with 22.6% selecting "Greater than $10M" annual budget size, and 19.4% selecting "$2M to $5M" budget size.

This group rated "Running effective email campaigns" highest as an organizational tech challenge (3.93 on a scale of 1 to 5), followed closely by "Online fundraising" at 3.90.

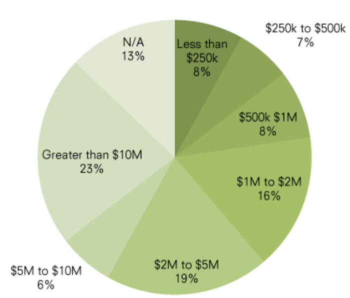
This group is most likely to play "Quite a bit" of a role in strategic technology planning and implementation at their organizations, but they were the least likely constituency to indicate a Leadership role in this area, with only 12.9% indicating they did.

We are pleased to see, however, that 63.3% of this group believes their Leadership role at their organization regarding technology will increase over the next year.

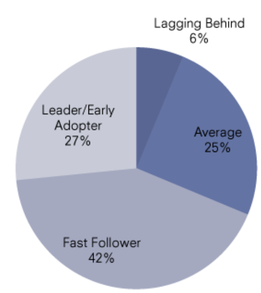
This group is likely to belong to the Association of Fundraising Professionals (AFP), with 52.6% indicating they were members.

Not surprisingly, this group refers to GuideStar and the Chronicle of Philanthropy when looking for other resources.

Fundraising/Development Staff by Their Org Budget/Revenue Size



Fundraising/Development Staff by Their Tech Adoption Level



Nonprofit Tech Leaders

Because part of NTEN's mission is to help nonprofit professionals become effective technology leaders at their organizations, and to help nonprofit organizations become more effective with the help of technology, we decided to take a closer look at those who indicated that they or their organizations are "Leaders/Early Adopters" as compared with the rest of the nonprofit sector, so that we might learn what differentiates them from those "Lagging Behind" or who are "In Trouble."

As we found throughout the survey, the data shows that there is an NTEN Effect, meaning whether a respondent was a current Member of NTEN tended to have an impact on their responses. Looking at the Leaders/Early Adopters constituency, we see that they are overwhelmingly Members: 68% of the leader organizations are Members, and 60% of those who rated themselves as leaders compared to their colleagues are Members. Furthermore, 61% of Leaders/Early Adopters are Nembers at the nonprofit organizational level, compared to 20% who are Members at the individual level, suggesting that organizations with multiple staff engaging with NTEN programs are more likely to be (or have on staff) Leaders/Early Adopters.

Not surprisingly, 71% of this group indicated that "Being part of the community of nonprofit technology leaders" was the main reason they became a Member of NTEN. When asked how their membership affected their work, 80% indicated that their membership helped them be more effective on their job, and 82% indicated that their membership helped their organization to be more effective.

Leaders/Early Adopters are most likely to be IT Staff (24.6%), followed by Marketing/Communications staff (20.7%). Like the NTEN community as a whole, they tend to work at organizations with an education focus (25.7%), followed by health-oriented organizations (22.1%).

They also are more likely to work at large organizations, with budget size greater than $10M (21%), but note that the second-most likely budget-size indicated is the smallest, Less than $250K (17.2%), suggesting that budget size does not directly relate to technology Leadership capacity.

Leaders/Early Adopters gave their highest rating (3.36, on a scale of 1 to 5) to both "Running effective email campaigns" and "Determining ROI of tech investments."

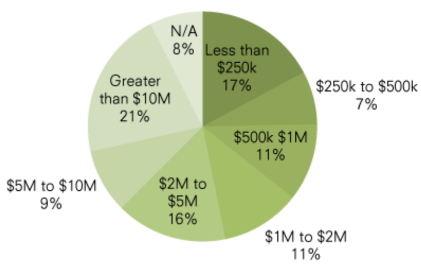
Interestingly, 39% of Leaders/Early Adopters responded that 100% of their Communications and Marketing functions at their organizations are implemented or supported by technology.

Tech Leaders were most likely to say they did not belong to any other professional or membership organization

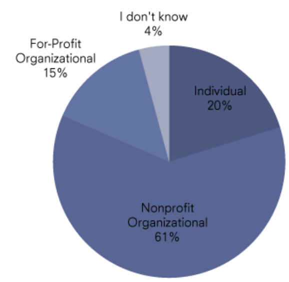
(29.3%), and next likely (23.6%) to also belong to their state's association of nonprofit organizations.

When asked to name other websites or blogs they refer to more than once per week for nonprofit tech resources, Beth Kanter's blog was the most cited. It was also interesting to note that many Tech Leaders indicated that their Twitter network of colleagues and nonprofit and technology experts were their most-used online resource. And the Chronicle of Philanthropy was the most cited periodical when Tech Leaders were asked to list the resource their organization most often refers to or subscribes to.

Tech Leaders by Their Org Budget/Revenue Size



Tech Leaders by Their NTEN Membership Type



Demographics

A. Organizational Types

Which of the following most accurately describes your organization?

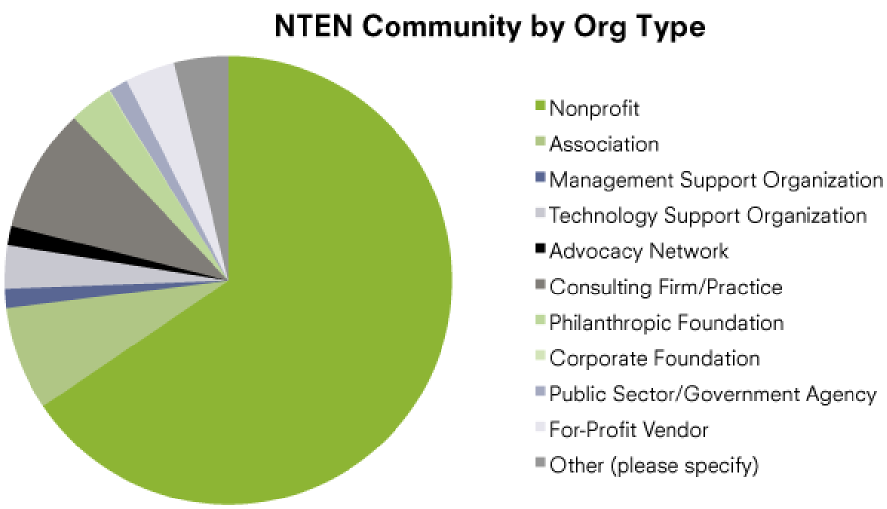
	All Responses	Members	Non-Members
Nonprofit	65.6%	63.0%	70.2%
Association	7.5%	8.5%	6.5%
Management Support Organization	1.4%	1.7%	1.2%
Technology Support Organization	3.1%	4.7%	0.8%
Advocacy Network	1.4%	1.2%	1.2%
Consulting Firm/Practice	9.0%	9.9%	7.3%
Philanthropic Foundation	3.1%	3.8%	1.6%
Corporate Foundation	0.1%	0.0%	0.4%
Public Sector/Government Agency	1.4%	0.7%	2.4%
For-Profit Vendor	3.6%	3.8%	3.2%
Other (please specify)	3.9%	2.7%	5.2%

The percentage of the NTEN community made up by nonprofit organizations and their staff continues to grow, up 3 percent from 2008 data.

Interestingly, nonprofit make-up among Members has also increased about 3% from 2008, from 60.6% to 63% this year. This suggests that new nonprofit participants in the NTEN community are likely to also become Members.

Associations, Support Organizations, Consulting Firms, and Philanthropic Foundations all tend to participate as NTEN Members, while Public Sector organizations are more likely to participate as Non-Members.

The participation of Philanthropic Foundations has seen the most change since 2008, when participation was more likely to be as Non-Members. In 2008, Philanthropic Foundations made up a similar percentage of our general community respondents (3.2%, compared to 3.1% this year) but only 1.9% of our Members, which means that Philanthropic Foundations have doubled their representation over the last year among NTEN membership (increased to 3.8%). See graph, page 27.



B. Job Role/Title

Which of the following most accurately describes your organization?

	All Responses	Members	Non-Members
Executive Director/CEO	10.4%	10.8%	8.9%
Fundraising/Development	8.8%	6.6%	13.3%
Finance/Administration	4.7%	4.0%	5.6%
Program/Direct Services Staff	7.6%	5.6%	10.5%
IT Staff (includes web staff)	24.9%	27.9%	20.2%
Marketing/Communications	21.7%	22.2%	21.8%
Sales/Business Development	0.7%	0.9%	0.4%
Consultant	8.8%	9.6%	7.3%
Foundation Program Officer/Grantmaker	0.8%	0.2%	1.2%
Other (please specify)	11.6%	12.2%	10.9%

IT Staff continues to be our most represented constituency, in both the general NTEN community and in our membership. IT Staff are also more likely to participate in the community as Members.

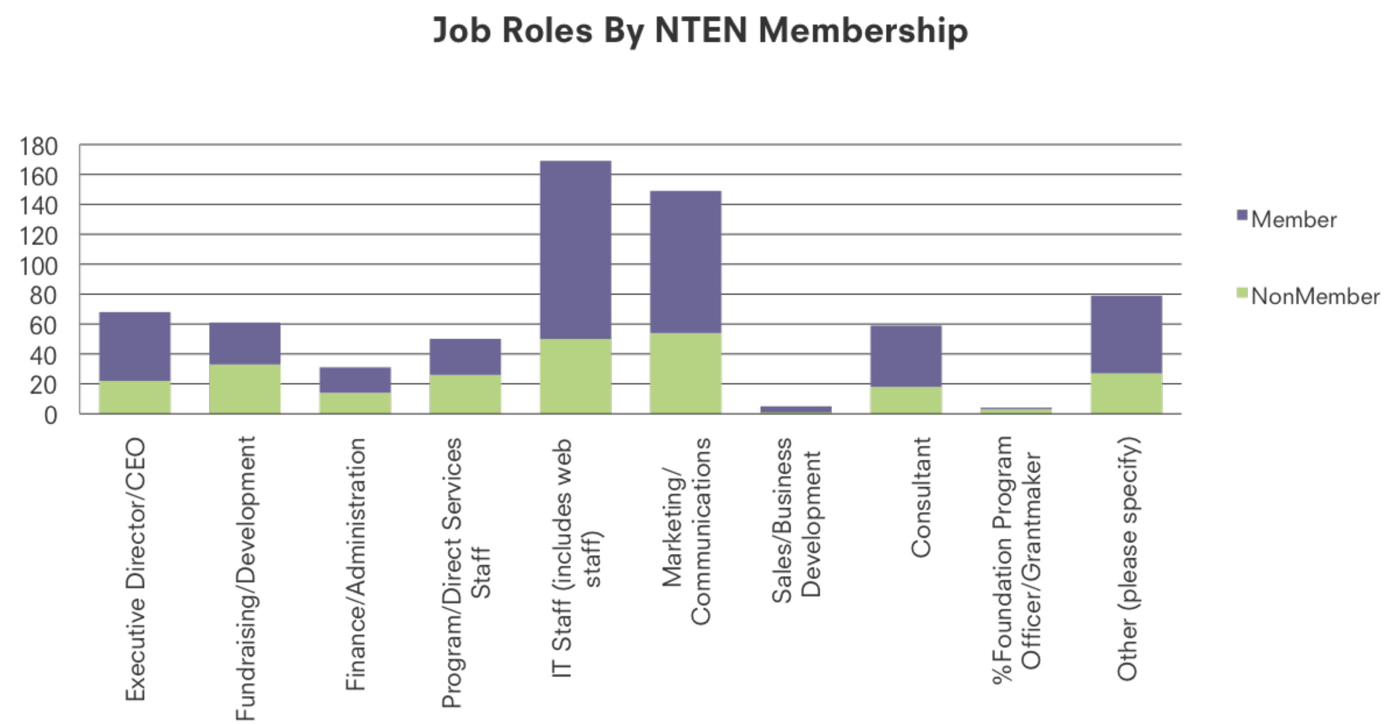
Marketing/Communications Staff continues to be a close second in constituency, and are more likely to participate in the community as Members than as Non-Members. Note that even though this constituency makes up a similar percentage of Members as it does of the Non-Member respondents, when looking at total respondents and the absolute numbers, we see that there are more Members than Non-Members of this job role, by almost 2 to 1. See graph, below.

Consultants continue to participate in the community as Members more than Non-Members, but not by as significant a gap as in previous years. In 2008, Consultants made up 12.7% of our Member respondents and only 5.9% of our Non-Member respondents, a difference of 6.8%, compared to a difference of only 2.3% this year.

The most postive trend we see this year is that Executive Directors/CEO's are more likely to participate in the community as Members than Non-Members, a clear shift from previous years. In 2008, ED/CEO respondents made up 9.5% of Members and 12.4% of Non-Members, a difference of nearly 3%, while this year we see the difference at almost 2% in the opposite direction, making up a larger percentage among Member respondents.

Fundraising/Development staff continue to participate in the community as Non-Nembers more than as Members, but we are pleased to see their represenation overall increase (up almost 1% over last year overall, and up 0.8% in representation among Member respondents compared to 2008 data).

When comparing participation by job roles, we also wanted to find out whether organizational budget size had an effect on who from the organization participated in our community, and found that smaller organizations are more likely to be represented in the NTEN community by their ED/CEO, while larger organizations are more likely to be represented in the NTEN community by their IT or Marketing/Communications staff. See graph, below.



C. Budget Size

What is your organization's annual budget/revenue size?

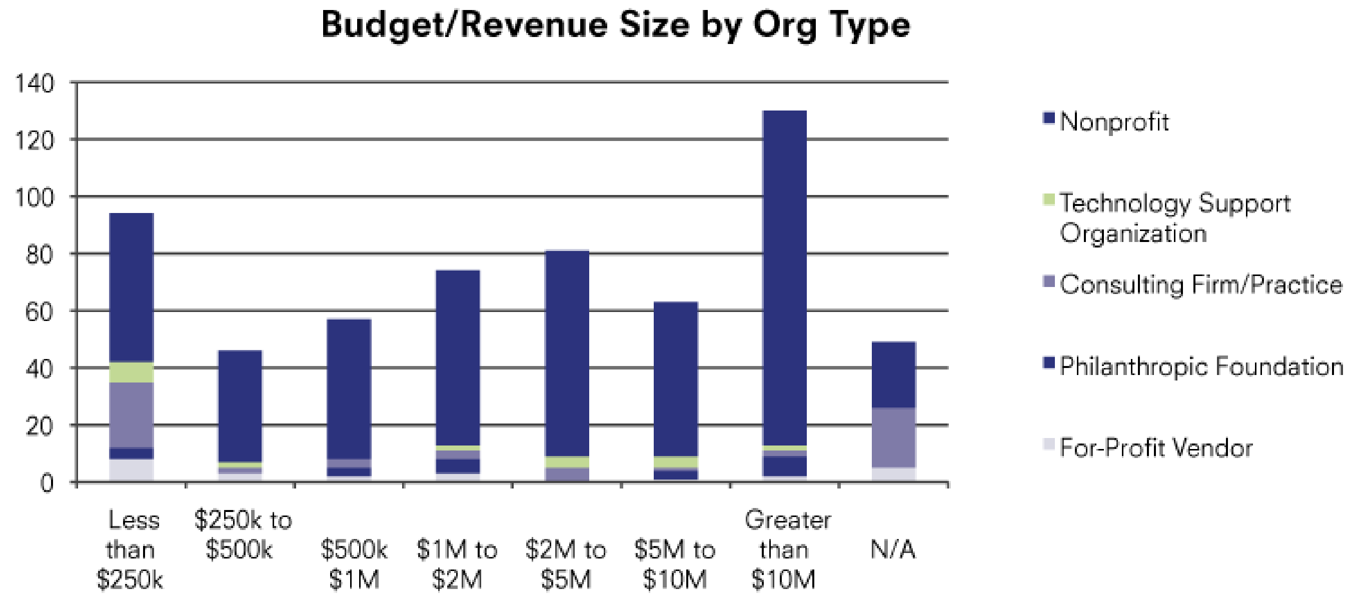
	All Responses	Members	Non-Members	Nonprofits
Less than $250k	14.4%	12.1%	16.1%	11.1%
$250k to $500k	8.1%	6.7%	10.3%	8.4%
$500k $1M	9.9%	9.5%	11.2%	10.5%
$1M to $2M	12.4%	12.9%	12.0%	13.1%
$2M to $5M	14.4%	14.3%	14.9%	15.4%
$5M to $10M	10.0%	10.5%	9.1%	11.6%
Greater than $10M	21.9%	26.0%	17.4%	25.1%
N/A	8.8%	8.1%	9.1%	4.9%

The NTEN community distribution by organizational budget size has remained consistent, with the largest constituency being at the top of the spectrum (21.9% from organizations with Greater than $10M), and secondary concentration being at the middle (14.4% at $2M-$5M) and bottom (14.4% from organizations with Less than $250k) of the spectrum.

Also consistent with previous years, the NTEN community budget size distribution does not mirror the budget-size representation among the nonprofit sector as a whole. According to the National Center for Charitable Statistics, 76.9% of organizations filing Form 990 report a budget size under $250k, while only 2.3% report greater than $10M (The Urban Institute, http://nccsdataweb.urban.org).

Perhaps not surprisingly, those from organizations with higher budgets are more likely to be participating in the NTEN community as Members, a trend we've seen over the years. Most notably, the smallest-sized organizations represent 14.4% of the general NTEN community, but only 12.1% of our Members, while conversely the largest organizations make up 21.9% of the general NTEN community, but 26% of NTEN Member respondents.

It's also important to note that NTEN is made up of many different types of organizations, including nonprofits, foundations, consulting firms, and technology providers, which also affects the budget size break down among the community. To see the distribution along the budget spectrum from some of our key organization types, refer to graph, page 30.



D. Staff Size of Org

How many full-time staff members are employed by your organization?

	All Responses	Members	Non-Members
0	3.7%	1.7%	6.6%
1-2	12.9%	11.7%	14.3%
3-4	6.3%	6.2%	6.6%
5-6	7.2%	6.4%	7.8%
7-10	7.3%	7.4%	7.8%
11-15	7.7%	8.1%	8.2%
16-30	14.5%	16.7%	11.5%
31-100	17.7%	17.1%	8.9%
101+	22.6%	24.8%	18.4%

Distribution of NTEN community organizations by organizational staff size this year is also similar to the distribution reported in previous annual surveys, with larger organizations being more represented among the community.

And similar to what we see with the organizational budget-size break down, the larger organizations tend to participate in the community as Members more than as Non-Members, while the reverse is true for smaller organizations.

We are pleased to see, however, that the gap is closing, and where in 2008 the difference between the Members and Non-Members reporting 0 staff was 6.8 points, this year we see a difference of 4.9 points.

And as with the organizational type consideration with the budget size distribution, we should also note that Nonprofits and Foundations in the NTEN community tend to report larger staffs, while Consulting Firms and For-Profit Vendors tend to report smaller staffs.