



Nonprofit Technology Enterprise Network

2004 Community Survey Analysis

N-TEN, the Nonprofit Technology Enterprise Network, conducted its second annual Community Survey to get feedback on N-TEN programs and membership. The online survey was promoted directly to N-TEN members, resulting in 271 member responses, and promoted to non-members via various nonprofit email groups, resulting in 292 non-member responses.

Below we'll explore the responses to specific questions and draw some initial conclusions from those results. In addition to reviewing the initial assessment below, we encourage you to review the raw survey data at <http://www.surveymonkey.com/Report.asp?U=60830345901>.

We plan to conduct our next survey in the summer of 2005, but in the meantime, please feel free to submit feedback to us directly. Thanks for your interest in N-TEN!

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I. Respondent Demographics

A. Which of the following most accurately describes your organization?

	Members	Non-Members
Nonprofit	50%	68%
Association	2%	6%
Management Support Organization	3%	2%
Technology Support Organization (TSO)	14%	3%
Advocacy Network	1%	2%
Consulting Firm/Practice	16%	7%
Philanthropic Foundation	2%	4%
Public Sector/Gov't Agency	1%	1%
For-Profit Vendor	8%	2%
Other	4%	7%

Based on the demographics of survey respondents, nonprofit organizations are N-TEN's largest constituency, representing half of all members and two-thirds of non-members. Nonprofits are more likely to be non-members than members, but the gap is closing (down from 31 percentage points in 2003 to 18 this year). This suggests that N-TEN's strategy to attract nonprofits by focusing on the Regional Conference series (where attendees are generally 50% nonprofit staff) is working. There is significant opportunity to further improve the member to non-member ratio, especially considering that this is the largest pool of potential members. Consulting Firms, TSOs, and to a lesser extent, For-Profit Vendors, are three other notably sized membership constituencies, and we will provide detailed data for each of these groups where possible.

B. Which of the following most accurately describes your position?

	Members	Non-Members	Nonprofits	TSOs	Consulting Firms	For-profit Vendors
Executive Director/CEO	12%	13%	11%	21%	13%	24%
Fundraising/Development	2%	11%	9%	0%	0%	4%
Finance/Administration	4%	8%	8%	0%	2%	4%
Program/Direct Services Staff	14%	9%	11%	28%	0%	0%
IT Staff	26%	27%	37%	12%	2%	8%
Marketing/Communications	7%	8%	8%	7%	3%	12%
Sales/Business Development	2%	1%	0%	0%	5%	20%
Consultant	18%	11%	4%	19%	68%	20%
Circuit Rider	8%	2%	3%	14%	5%	0%
Program Officer/Grantmaker	0%	1%	0%	0%	0%	0%
Other	8%	10%	9%	0%	3%	8%

N-TEN's largest constituency by job title is IT staff, representing approximately 26% of all survey respondents, regardless of membership status. Many IT staffers work for nonprofits, with 37% of nonprofit respondents identifying

themselves as IT staff. This suggests an opportunity to recruit nonprofit members more effectively by focusing on the specific needs of nonprofit IT staff. Consultants and program staff are the second and third largest groups within the N-TEN membership respectively, and are more likely to be members than non-members. Fundraising and administrative personnel are more likely to be non-members.

C. If your organization has a programmatic focus, which of the following represents your focus area? (Check all that apply)

	Members	Non-Members	Nonprofits
Arts/Culture	18%	15%	12%
Civil Rights/Advocacy	27%	19%	16%
Education	29%	33%	28%
Employment	9%	10%	8%
Environmental	24%	14%	15%
Health	28%	20%	19%
Housing	11%	13%	11%
Human Services	35%	34%	33%
International	14%	10%	9%
Legal	5%	8%	7%
Public/Social Benefit	36%	30%	27%
Religious	7%	6%	6%
Youth	20%	25%	23%

Organizations within the N-TEN community work in a wide range of program areas, with Public/Social Benefit, Human Services, and Education cited most frequently. Groups that are more likely to be members than non-members include those with a programmatic focus on Arts/Culture, Civil Rights/Advocacy, Environmental, Health, International, and Public/Social Benefit. Organizations focused on Youth and Education are more likely to be non-members.

D. What is your organization's budget?

	Members	Non-Members	Nonprofits	TSOs	Consulting Firms	For-profit Vendors
Less than \$250k	25%	27%	12%	23%	73%	36%
\$250k to \$500k	11%	11%	16%	18%	4%	14%
\$500k to \$1mil	12%	16%	28%	18%	5%	5%
\$1mil to \$2mil	18%	15%	8%	15%	14%	9%
\$2mil+	34%	30%	15%	28%	4%	36%

More than a third of N-TEN members have annual budgets exceeding \$2 million. Nonprofit budgets are smaller comparatively, with a plurality of respondents indicating a budget size of \$500k to \$1 million. Consulting firms have the smallest budgets, which makes sense given staff size (below). For-profit vendors

are the most disparate group: 36% have budgets less than \$250k and 36% have budgets exceeding \$2 million.

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

	Members	Non-Members	Nonprofits	TSOs	Consulting Firms	For-profit Vendors
0	4%	7%	5%	7%	7%	0%
1 to 2	17%	15%	9%	14%	62%	28%
3 to 4	9%	8%	8%	14%	5%	0%
5 to 15	26%	29%	27%	33%	15%	28%
16 to 30	14%	11%	12%	14%	5%	12%
31 to 100	16%	18%	22%	14%	5%	8%
100+	15%	13%	18%	5%	3%	24%

As we would expect, organizational staff size in the N-TEN community varies across a broad spectrum. Consulting firms are generally smaller than other organizations. For-profit vendors are once again the most disparate group.

F. Which of the following areas represent significant challenges for your organization? (on a scale of 1 to 5)

	Members	Non-Members	Nonprofits	TSOs	Consulting Firms	For-profit Vendors
Raising Grant Funds for Technology	3.6	3.7	3.9	3.9	2.5	2.3
Fundraising from Donors	3.5	3.9	4.2	3.7	2.0	2.6
Generating Earned Income	3.8	3.4	3.5	4.1	3.9	3.9
Communications and Marketing	4.0	3.8	3.9	4.1	3.8	4.2
Building/Maintaining Technology Infrastructure	3.7	3.7	3.8	3.5	2.9	3.8
Training Myself	3.6	3.1	3.6	3.1	3.8	3.1
Training Staff	3.5	3.6	3.7	3.3	2.5	2.8
Finding Relevant Technology Information	3.6	3.5	3.6	3.1	4.0	2.9
Connecting with Peers	3.7	3.4	3.4	3.6	4.1	4.0
Evaluating/Purchasing Technology	3.4	3.5	3.5	2.9	3.6	2.7
Buy-In from Leadership and/or Staff	3.2	3.3	3.5	2.5	2.4	2.6

Diverse N-TEN constituents share many of the same challenges. Fundraising from donors is the biggest challenge for nonprofits and non-members alike, and nonprofits and TSOs are specifically interested in raising technology funds. Generating earned income is a challenge across the board, but surprisingly, nonprofits rank this lower than most other constituent groups. Nonprofits are more interested in staff training, technology information, evaluating/purchasing technology, and connecting with peers. Building and maintaining technology infrastructure is a major challenge for everyone with the exception of consultants. Consulting firms and for-profit vendors are interested in connecting with peers. Communications and marketing represent a significant challenge to all groups.

II. Membership

A Are you, or is your organization, an N-TEN member?

	Member	Non-Member
Nonprofits	40%	60%
TSOs	81%	18%
Consulting Firms	68%	32%
For-profit Vendors	80%	20%

Most respondents from technology support providers, for-profit vendors, and consulting firms are N-TEN members. Nonprofits are more evenly divided, but the majority of nonprofit respondents are not N-TEN members. Nonprofits represent a large pool of potential members.

B. What kind of N-TEN membership do you have? (members only)

	Nonprofits	TSOs	Consulting Firm	For-profit Vendor
Individual	34%	14%	67%	35%
For-profit	0%	6%	26%	60%
Nonprofit	64%	69%	5%	0%
Funder	0%	3%	0%	0%
Don't know	2%	9%	2%	5%

Two-thirds of nonprofits, TSOs, and for-profit vendors join N-TEN as organizational members, while only a third of consultants do the same. A high proportion of individual membership makes sense for consultants, considering that 68.9% of consultants indicate that their staff size of 2 or smaller. Interestingly, the ratio of individual to organizational memberships for all other constituencies represents a complete reversal from 2003, when roughly two-thirds of nonprofits and for-profits joined as individuals. We have effectively communicated the benefits of organizational membership over the past year, but there is still room for improvement.

C. To which of the following associations or professional organizations do you or your organization currently belong?

	Members	Non-Members	Nonprofits	TSOs	Consulting Firm	For-profit Vendor
None	34%	35%	38%	30%	36%	38%
Alliance for Nonprofit Management	12%	10%	7%	19%	14%	21%
Association of Fundraising Professionals	13%	14%	8%	11%	24%	25%
Council on Foundations	5%	7%	3%	5%	3%	0%
CTCNet	13%	10%	13%	22%	2%	4%
Grantmakers for Effective Organizations	3%	3%	0%	5%	2%	4%
Independent Sector	8%	5%	5%	8%	3%	8%
Local/State Association of Nonprofits	28%	25%	35%	24%	16%	13%
Regional Association of Grantmakers	3%	5%	2%	5%	0%	0%
Social Enterprise Alliance	4%	2%	6%	3%	5%	4%
TechFundors Collaborative	2%	1%	1%	5%	0%	0%
Technology Affinity Group (TAG)	9%	4%	7%	5%	10%	4%
Other	30%	27%	28%	27%	31%	25%

The most notable finding here is that N-TEN is the only professional membership for a third of our members. A third of non-members have no professional memberships at all, but the percentage of respondents with no other affiliation is on the decline. For example, 43% of members in 2003 had no other membership compared to 35% this year, and non-members went from 51% to 34%. This suggests that regardless of N-TEN membership, respondents are choosing to join fewer organizations overall. It's difficult to know the reasons behind declining membership, but the trend suggests that N-TEN is doing a fairly good job recruiting and retaining members in a challenging environment.

III. Awareness and Usage of N-TEN Programs & Services

A. Which of the following N-TEN programs and services are you aware of? (Check all that apply)

	Members	Non-Members	Nonprofits	TSOs	Consulting Firm	For-Profit Vendor
Regional Conferences	89%	80%	77%	88%	85%	92%
NTC	95%	86%	86%	88%	90%	76%
Online Access to Conference Materials	68%	50%	45%	65%	57%	76%
Member Discounts	72%	53%	51%	67%	58%	68%
501 Tech Clubs	68%	54%	45%	65%	88%	56%
N-TEN Email Groups	69%	59%	54%	74%	75%	60%
N-TEN Member Directory	58%	38%	30%	63%	62%	68%
N-TEN Reports & Resources	35%	26%	22%	42%	40%	24%
TechFinder	65%	47%	40%	70%	63%	60%
N-TEN Forecast	19%	13%	8%	16%	38%	12%

Awareness of N-TEN programs and services is generally high, particularly regarding the conferences. The N-TEN Forecast, one of the newer programs, suffers from low awareness, as do N-TEN Reports and the Member Directory. TechFinder has remarkably high awareness for a new program, particularly among members and TSOs. Awareness of member discounts is up considerably compared to last year, awareness of 501 Tech Clubs is up slightly, and interestingly, N-TEN email group awareness is on the decline. Awareness among nonprofits continues to lag behind other constituencies, suggesting that there are significant opportunities to improve communication about our programs and services.

Overall, awareness of N-TEN programs is satisfactory, considering that we have devoted almost no resources to marketing.

B. How often have you attended the following N-TEN events in the last 12 months?

	0 times	1 time	2 times	3 times	4+ times
Regional Conferences	68%	28%	3%	1%	0%
NTC	59%	37%	3%	1%	0%
501 Tech Clubs	80%	7%	4%	4%	5%

	0 times	1-3 times	4-6 times	7-9 times	10+ times
Online Access to Conference Materials	56%	36%	6%	1%	1%
Member Discounts	82%	17%	0%	0%	0%
N-TEN Email Groups	46%	22%	8%	3%	21%
N-TEN Member Directory	73%	21%	5%	0%	1%
N-TEN Reports & Resources	71%	20%	7%	1%	0%
TechFinder	66%	26%	5%	2%	2%
N-TEN Forecast	89%	8%	2%	0%	1%

These responses generally correspond with results from Question A – programs with high awareness are used more frequently. The 501 Tech Clubs are an exception, with mid-level awareness but very little use. This makes sense given the Clubs’ geographic limitations and lack of consistent activity in many Clubs. TechFinder and the conference materials are the most frequently used online services (once again, this is remarkable because TechFinder is so new).

The general correlation of usage with awareness continues to suggest that more work needs to be done to raise awareness before we can make conclusions regarding usage. There are a few impossible responses (such as attending the annual conference twice in one year, which must be the result of user error or a misunderstanding of the question).

C. For N-TEN programs and services you have NOT attended or used, please indicate why. (Check all that apply.)

Table 1: Actual survey responses from non-users only

	Not Aware of It	Need More Information	Too Expensive	Not in the Right City	Not Interested
Regional Conferences	27%	17%	17%	34%	13%
NTC	24%	11%	30%	34%	12%
501 Tech Clubs	49%	23%	0%	14%	16%
Online Access to Conference Materials	69%	16%	0%	0%	16%
Member Discounts	49%	30%	4%	1%	19%
N-TEN Email Groups	64%	23%	0%	0%	15%
N-TEN Member Directory	64%	16%	1%	0%	21%
N-TEN Reports & Resources	72%	24%	1%	0%	6%
TechFinder	61%	22%	0%	1%	18%
N-TEN Forecast	76%	20%	0%	0%	7%

Table 2: Table 1 cross-referenced with Question B (for % of all respondents)

	Not Aware of It	Need More Information	Too Expensive	Not in the Right City	Not Interested
Regional Conferences	18%	12%	12%	23%	9%
NTC	14%	6%	18%	20%	7%
501 Tech Clubs	39%	18%	0%	11%	13%
Online Access to Conference Materials	39%	9%	0%	0%	9%
Member Discounts	40%	25%	3%	1%	16%
N-TEN Email Groups	29%	11%	0%	0%	7%
N-TEN Member Directory	47%	12%	1%	0%	15%
N-TEN Reports & Resources	51%	17%	1%	0%	4%
TechFinder	40%	15%	0%	1%	12%
N-TEN Forecast	68%	18%	0%	0%	6%

As the two charts above indicate, it’s important to recognize that the actual survey responses from Question C are only from those people who did NOT use

these programs and services. As a result, these figures are cross-referenced with the “0 time” column from Question B to determine their incidence among all respondents. For example, the number of respondents who never attended a Regional Conference in Question B (68%) is multiplied by the number who felt it was too expensive in Question C (17%). The conclusion is that 12% of ALL respondents did not attend a Regional Conference because of cost.

Overwhelmingly, the leading reason for not using N-TEN programs and services was lack of awareness. The conferences are an exception with “not in the right city” as the most common reason for not attending. It’s interesting to note that the 501 Tech Clubs, where we would expect low usage due to geographic limitations, suffered far greater from the lack of awareness. Online offerings, such as the N-TEN Forecast, Reports & Resources, and the Member Directory all have extremely low awareness, suggesting the need to improve visibility, usability, or both. 25% of all respondents want more information on member discounts.

IV. Perceived Value of N-Ten Programs & Services

A. How valuable are the following CURRENT N-TEN programs and services to your professional development? (on a scale of 1 to 5)

	Nonprofits	TSOs	Consulting Firm	For-Profit Vendor
Regional Conferences	3.2	3.1	3.4	3.2
NTC	3.3	3.1	3.9	4.0
Online Access to Conference Materials	3.1	2.9	3.2	3.0
Member Discounts	2.9	2.3	2.6	2.4
501 Tech Clubs	2.7	2.5	2.9	2.4
N-TEN Email Groups	3.0	2.9	3.2	3.4
N-TEN Member Directory	2.5	2.3	2.9	3.2
N-TEN Reports & Resources	2.9	2.8	2.9	2.3
TechFinder	2.8	2.3	2.7	2.6
N-TEN Forecast	2.2	2.0	2.8	1.9

As we would expect, N-TEN conferences have the highest perceived value across all groups. Nonprofits and TSOs assign the same value to both the NTC and Regional Conferences, while Consultants and For-profit Vendors rank the NTC higher – probably because the larger event increases reach to potential clients/customers.

B. How valuable would the following POTENTIAL N-TEN programs and services be to your professional development? (on a scale of 1 to 5)

	Nonprofits	TSOs	Consulting Firm	For-Profit Vendor
Additional Regional Conferences	3.2	2.4	2.7	2.7
Additional Member Discounts on Products	3.4	2.7	3.0	2.3
Additional Member Discounts on Trainings	3.6	2.9	3.1	2.7
More Original Research and Articles	3.4	3.2	3.6	3.5
Additional 501 Tech Clubs	2.7	1.9	2.4	2.3
Quarterly Print Newsletter	2.5	1.8	2.0	2.1
Searchable Database of Conference Materials	3.5	3.2	3.5	3.4
Affinity Groups/Special Interest Groups	3.2	3.2	3.8	3.7
Web Conferences/Audiocasts	3.0	2.4	3.3	3.1
Policy Advocacy	2.8	2.9	2.8	2.3

Nonprofits list additional member discounts as the most desired potential service, with searchable conference materials close behind. This suggests that nonprofits want both cost-savings on products, as well as access to information and education, suggesting two complementary methods to recruit nonprofit members. TSOs are interested in searchable conference materials, while consultants and for-profit vendors are interested in affinity groups.

V. Attitudes Regarding N-TEN and N-TEN Membership

A. Please rate the following statements. (on a scale of 1 to 5)

	Members	Non-Members	Non-profits	TSOs	Consulting Firms	For-Profit Vendors
N-TEN membership is valuable compared to other professional memberships	3.5	2.7	3.5	3.1	3.8	3.4
I am satisfied with the RANGE of programs and services N-TEN offers	3.5	3.0	3.5	3.2	3.6	3.6
I am satisfied with the QUALITY of programs and services N-TEN offers	3.7	3.2	3.7	3.4	3.8	3.8
N-TEN is a conduit for information sharing and networking among nonprofit technology professionals	4.0	3.5	3.9	3.7	4.1	4.4
I plan to attend an N-TEN conference within the next year	3.9	2.9	3.8	3.6	4.2	4.1

Currently, perceived value of N-TEN and N-TEN membership is highest among consulting firms and for-profit vendors, TSOs are the least satisfied, and nonprofits fall somewhere in the middle. Not surprisingly, members are more likely to view N-TEN favorably than non-members.

B. Overall, how satisfied are you with N-TEN (on a scale of 1 to 5; asked of members only)

1 – Not Satisfied at All	2	3	4	5 – Very Satisfied
0%	6%	27%	39%	27%

N-TEN members are generally satisfied, with 94% indicating a neutral to positive level of satisfaction with N-TEN. We are successfully meeting members' expectations.

C. Please rate the following statement: I plan to renew my N-TEN membership (on a scale of 1 to 5; asked of members only)

1 – Less True	2	3	4	5 – More True
0%	4%	19%	23%	54%

Most N-TEN members plan to renew, with 96% indicating a neutral to positive attitude toward renewal. We can draw a couple of conclusions from this: either we are doing a good job meeting member needs and are likely to retain members once they join, or that our members represent an extremely dedicated core, and we need to work to prevent satisfaction/renewal rates from declining as we expand out of that core.

VI. Conclusions Regarding N-TEN Constituencies

A. Nonprofits

Nonprofits are N-TEN's largest constituency, and largest pool of potential members. Happily, member recruitment within this group is on an upward trend. Within the nonprofit community, IT staff represent the largest sub-category and development staff are the most underrepresented sub-category. Also underrepresented are youth and education organizations. Nonprofits need help with fundraising, marketing and communications, and building and maintaining technology infrastructure. Their awareness of N-TEN programs is low relative to other groups. Nonprofits rank member discounts and online access to conference materials as the two most valuable potential programs.

B. Technology Support Providers

TSOs are represented in the N-TEN community primarily by Program Staff, Executive Directors, Consultants, and Circuit Riders. Generating earned income and communications and marketing both ranked high as challenges, with fundraising for technology not far behind. The majority of TSO members join as organizational nonprofit members. Awareness of all N-TEN programs is relatively high, except for awareness of the N-TEN Forecast. Regional conferences are seen as the most valuable existing program, and a searchable database of conference materials is seen as the most valuable potential program. TSOs are likely to be members, but they are the least satisfied (even though generally speaking members are more satisfied than non-members).

C. Consulting Firms

Consulting firms are typically individual N-TEN members, representing organizations with small staff and budget. Their major concerns are connecting with peers and finding relevant technology information. Awareness across all programs is generally good, with NTC ranked as the most valuable current program. Affinity groups are seen as the most valuable potential program. Overall, consultants are the most satisfied N-TEN constituency.

D. For-profit Vendors

Vendors are primarily represented by CEOs, sales staff, and consultants, and typically join as for-profit organizational members. Most have budgets that are either very small or very large, with not much middle ground. Vendors need help with communications and marketing, connecting with peers, and generating income. Regional conference awareness is very high, but awareness of other N-TEN programs is low, including the NTC. Curiously, given the lower than average awareness, vendors ranked the NTC as the most valuable existing program. Affinity groups are seen as the most valuable potential program. For-profit vendors generally have a more favorable view of N-TEN than nonprofits or TSOs.