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2006 Community Survey Analysis

NTEN, the Nonprofit Technology Enterprise Network, conducted its third Community Survey (after its 2005 hiatus) to get feedback about NTEN programs and our community's needs. We were most interested in understanding *who* are community is and *what* they need from a nonprofit technology community. We surveyed 516 people, roughly half of whom were NTEN members (of 477 respondents, 53.9% answered that they were members, 46.1% said they were not members, and 39 did not answer the question).

Below is (I.) an analysis of the nonprofit technology community's needs, based on the survey results, followed by (II.) a summary of the demographics data.

I. Analysis of our technology community's needs

Based on our 2006 survey, we found that our technology community has diverse needs, which NTEN seeks to meet through our programs and services. We have categorized our community into the following: New/accidental techies; IT staff; Senior staff (ED's, Program Directors, etc.); Consultants/Providers; and International IT/Organizations.

New/Accidental Techies:
Those who fit into the new or accidental techie category have told us that they feel overwhelmed by their tasks and technological decisions because they don't have detailed knowledge of what they should do or how they should do it. They would like to tap in to a knowledgeable community for information and support. These individuals also seek training, research, and other support resources that would be immediately accessible and applicable to their work. The most important need particular to this group is general direction and support in all technology areas; they have trouble even articulating what it is they need and often don't know where to start.

IT Staff:
Those who categorize themselves as IT Staff cite having access to a jobs network as one of their biggest needs. This group is also interested in staying on top of trends, research, and applications that will help their career development, and they seek a community of peers to both learn from and share information with. This group appreciates the technology issues particular to the nonprofit community and wishes to both keep abreast of the trends and policies in nonprofit technology and apply their knowledge and experience in this area to assist the nonprofit community's technology practices. Like the

accidental techies, IT Staff want fast, easy access to information, resources, and training that will help them and their organizations. Particular to this group are the need to convince supervisors and staff of technology investments and the desire to compare their work and compensation to other IT Staff.

Senior Staff:
As might be expected, those in the senior staff category are primarily concerned with financial issues: Can technology help them meet their organization's goals more cost-effectively? Can technology help them raise more funding? How can they maximize their organization's use of technology with a minimized or non-existent technology budget? In addition to these questions, senior staff would like to keep up with the trends in technology used by the nonprofit sector and would like access to training and information for their staff. Senior staff would also like to network with other senior staff to share resources and find out how other nonprofits are applying technology to their programs. Access to information such as reports and analysis is sought by this group for the purpose of making technology investment decisions. Other concerns particular to this group are access to technology vendors, knowledge of sector standards so they can measure their progress, enough knowledge to determine which projects they should outsource and then enough information to work with IT consultants confidently, and the ability to keep up with organizations with bigger budgets.

Consultants/Providers:
Those in the consultants and providers category share with the rest of the nonprofit technology community the desire to: have access to a jobs network; keep up with the trends and tools of the nonprofit sector, including access to reports; and access to training and resources for their professional development. Unique to this group is the need to reach out to the nonprofit sector in particular in order to contribute their resources and services. This group also is very concerned with understanding what the specific needs of the nonprofit sector are, including specific tools that will help nonprofits reach their goals. Consultants and providers also express the challenge of having to spend more time convincing nonprofits of their value than they'd like; they'd rather spend their time and resources helping the sector instead of marketing themselves.

International IT/Organizations:
We also found that there is a unique category of needs from our international constituents that includes a sense of community as a priority: these individuals would like to have more access to a support system and community events. Also cited in this category is the challenge of organizations with staff around the globe to stay connected with each other. Senior staff in this category need help with managing their international IT staff.

II. Respondent Demographics

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

	% Members	% Non-members	% All Responders
Nonprofit	53.4	67.1	59.6
Association	5.6	10.1	7.7
Management Support Organization	2	1.4	1.8
Technology Support Organization	7.6	3.9	5.9
Advocacy Network	0.4	1.4	0.9
Consulting Firm/Practice	16.1	4.3	10.7
Philanthropic Foundation	1.6	1.4	1.5
Corporate Foundation	0	0	0
Public Sector/Government Agency	0.8	2.9	1.8
For-Profit Vendor	6.4	1.9	4.4
Other	6	5.3	5.7

Compared to data from the two previous NTEN community surveys, the percentage of our community who are nonprofits is increasing each year, and the gap between the percentage of NTEN members and non-members who are nonprofits continues to close (down almost 5 percentage points from the 2004 data).

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

	% Members	% Non-members	% All Respondents
Executive Director/CEO	13.6	15.5	14.5
Fundraising/Development	4	8.3	5.9
Finance/Administration	5.6	5.8	5.7
Program/Direct Services Staff	8.4	11.2	9.6
IT Staff	24	18	21.3
Marketing/Communications	12.4	9.7	11.2
Sales/Business Development	0.4	0	0.2
Consultant	13.6	12.1	12.9
Circuit Rider	2.4	0	1.3
Foundation Program Officer/Grant maker	1.2	1	1.1
Other	14.4	18.4	16.2

NTEN's largest constituency continues to be those who label themselves as IT Staff. Interesting changes from the 2004 data are that the percent of NTEN members in the ED/CEO category has increased slightly (roughly 1.5 percentage points) while the percent of NTEN members in the consultant category has decreased (4.4 percentage points). These three categories (IT Staff, ED/CEO's, and Consultants) continue to be our biggest groups, followed by those who fit into the Marketing/Communications category, which is the fastest growing group in our community (up 5.4 points in our members, almost 2 points in our non-members).

C. *If your organization has a programmatic focus, which of the following represents your focus area?*

	% Members	% Non-members	% All Respondents
Arts/Culture	10.7	10.6	10.7
Civil Rights/Advocacy	15.8	10.1	13.1
Education	33.7	34.6	34.1
Employment	10.7	10.1	10.4
Environmental	21.9	16.8	19.5
Health	27.6	26.8	27.2
Housing	8.7	12.8	10.7
Human Services	31.6	30.7	31.2
International	12.2	12.3	12.3
Legal	6.6	3.4	5.1
Public/Social Benefit	32.7	32.4	32.5
Religious	7.7	6.7	7.2
Youth	21.4	19	20.3

Programmatic focus in our community has shifted slightly since 2004 from Human Services to Education, though Education, Human Services, and Public/Social Benefit continue to make up the majority of focus among our community. Where there are noticeable gaps between members and non-members, those who focus on Legal, Civil Rights/Advocacy, Environmental, and Youth issues are more likely to be members than non-members while those who focus on Housing are more likely to be non-members.

D. *What is your organization's budget?*

	% Members	% Non-members	% Nonprofits	% All Respondents
Less than $250k	20.4	24.2	13.9	22.1
$250k to $500k	9.6	10.1	9.4	9.8
$500k to $1 mil	10.8	14.1	13.5	12.3
$1 mil to $2 mil	17.9	12.6	15.4	15.5
$2mil +	41.2	38.9	47.9	40.2

The percentage of NTEN members with budgets exceeding $2 million has increased over 7 points since 2004 while the percentage of members with budgets below $250k has decreased nearly 5 points. The biggest change since collecting our 2004 data has been budget sizes among nonprofits: in 2004, nonprofits were most likely to have budget sizes in the $500k to $1 million category while now we see that nonprofits in our community are most likely to have budgets exceeding $2 million.

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

	% Members	% Non-members	% Nonprofits	% All Respondents
0	3.7	4.5	3.4	4
1-2	13.1	16.8	7.5	14.8
3-4	9.4	8.4	8.6	9
5-6	8.6	5	6.4	7
7-10	11.1	12.9	10.9	11.9
11-15	7	4	4.1	5.6
16-30	11.1	8.9	12.4	10.1
31-100	13.9	19.8	19.9	16.6
101 +	22.1	20.8	27	21.5

Across the board, the percentage of our community with staff of more than 100 has increased since 2004 (roughly 7 points increase from 2004 in each group).

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

	Members (ave response)	Non-members	Nonprofits	All Respondents
Raising Foundation Grants for Technology	3.34	3.61	3.76	3.46
Fundraising from Individual Donors	3.42	3.72	4.05	3.55
Generating Earned Income	3.44	3.38	3.40	3.41
Communications and Marketing	4.01	3.89	4.03	3.95
Sharing Data within My Organization	3.47	3.45	3.66	3.46
Sharing Data Between Organizations		3.10	3.12	3.11
Building/Maintaining Technology Infrastructure	3.63	3.64	3.80	3.63
Training Myself	3.70	3.70	3.81	3.70
Training Staff	3.60	3.56	3.84	3.59
Finding Relevant Technology Information – What's Important?	3.72	3.63	3.76	3.68
Making Strategic IT Leadership Decision	3.60	3.29	3.63	3.46
Connecting with Peers	3.56	3.23	3.45	3.42
Evaluating/Purchasing Technology	3.40	3.41	3.50	3.40
Buy-In from Leadership and/or Staff	3.37	3.28	3.55	3.33
Learning about Policy Issues	2.98	2.83	3.03	2.91
Working with Technology Consultants	3.09	3.02	3.01	3.06
Understanding the Tech Policy Issues that Affect My Work	3.23	3.123.76	3.29	3.19

Our survey respondents were most likely to site Communications and Marketing as their biggest challenge, with nonprofits only slightly more likely to site Fundraising from Individual Donors as their most significant challenge. This represents a slight shift of major concerns among our community: in 2004, non-members and nonprofits were both slightly more likely to site Fundraising from Donors as their most significant challenge, and consultants were more likely to site "Connecting with Peers" as a more significant challenge than Communications and Marketing.