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Nonprofit Management*

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Southwestern
Pennsylvania
Nonprofit Technology
Survey
2004

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September 23, 2004

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Introduction

In the summer of 2004, the Bayer Center for Nonprofit Management reprised survey research that we've conducted in 2000 and 2002 to enhance the understanding of how nonprofits in the region use technology to accomplish their missions. This year's data collection was shifted earlier in the year to summer, as opposed to fall in previous years. This schedule has enabled us to release the survey results much closer to when the data was collected, which is always a virtue when disseminating research on the fast-moving field of technology. The current survey pool tracks closely with past pools, which enables meaningful comparisons. We received 257 responses from a diverse sample organizations in western Pennsylvania, compared to 175 in 2000 and 266 in 2002.

Comparing trends via three snapshots over a four-year period allows us to sort out the stable aspects of nonprofit technology from those that are evolving. The survey data gives us reason to celebrate noticeable progress and cause to be vigilant about technology use that is hovering or regressing. The Bayer Center's particular interest in this research is the impact of technology on management and vice versa. As the survey instrument has evolved and the data set has grown both deeper and broader, we are more convinced that quantitative data against which to test our assumptions makes a real contribution to the professional development of the sector.

The Bayer Center is grateful to the Heinz Endowments and the Buhl Foundation for their continued support of the Technology Initiative. In addition, the members of our Technology Advisory Group continue to lend their expertise and influence to our efforts. Finally, there would be no results to report without the dedicated staff and volunteers at nonprofit organizations in our region. We are indebted to all of the organizations that responded to this year's survey, particularly our 42 "charter survey" organizations who have responded every year and the 110 organizations that have responded in two out of three.

Responding Organizations

Each survey pool has returning and new members in it. This year, the majority of organizations (60%) have participated in at least one of the Bayer Center's prior technology surveys.

This section of the report will detail the types of organizations that responded to the survey, including characteristics of organization type, geographic location, budget size, and staff size.

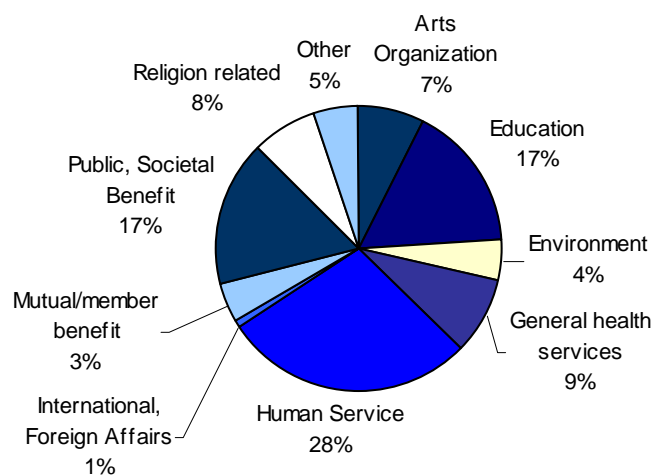
Repeat Status	Orgs	%
Charter Member (2000, 2002, 2004)	42	16%
2002 Repeat (2002, 2004)	91	35%
2000 Repeat (2000, 2004)	22	9%
New in 2004	102	40%

Organization Type

The survey allowed organizations to choose from the "major 10" categories from the National Taxonomy of Exempt Entities. Because some organizations work in multiple categories, they were allowed to choose as many options as they considered valid. The overwhelming majority of organizations chose one (50%) or two (30%) categories. Several organizations chose more than that, including one that chose six.

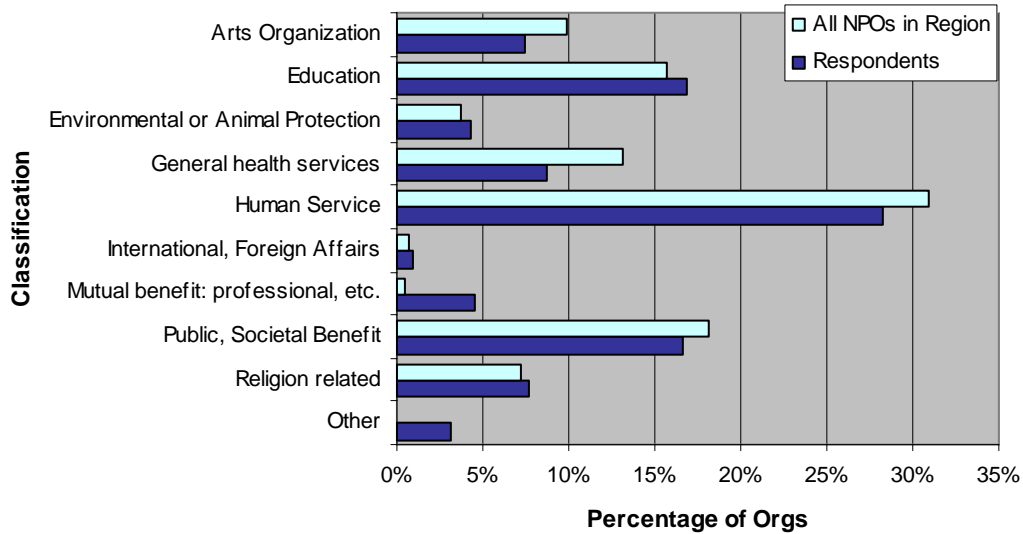
More than half of all survey respondents fall into three categories: Human Service, Education and Public/Societal Benefit. The smallest categories include Environmental, Mutual Benefit and International and Foreign Affairs.

Respondents by Organization Type



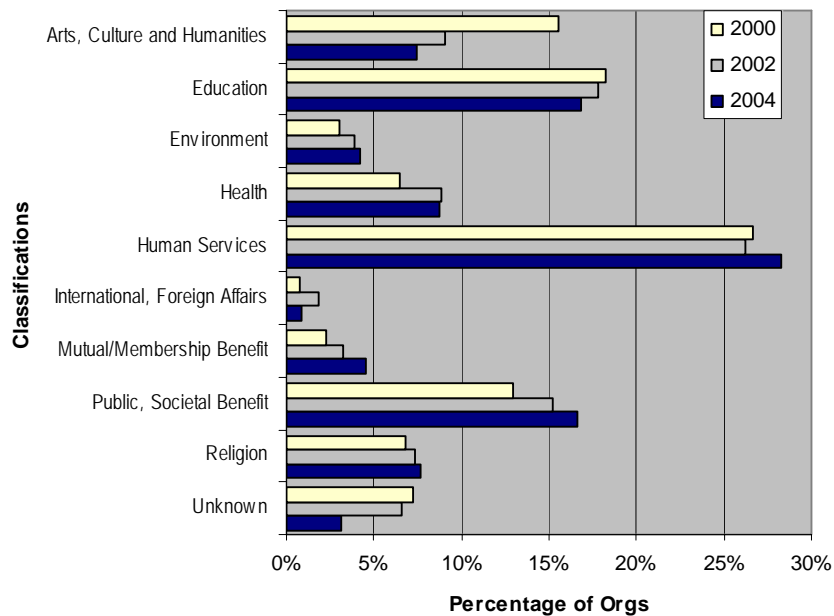
The breakdown of survey respondents aligns in most categories with the regional pool of nonprofit organizations. A notable exception includes Health Care organizations (9% versus 18%).

Survey Respondents vs. Regional Organizations



The 2004 breakdown of organization type maps closely with the breakdowns in previous years. In 2000, Arts organizations were disproportionately represented. Arts Organizations represent a more right-sized portion of the total in 2002 and 2004.

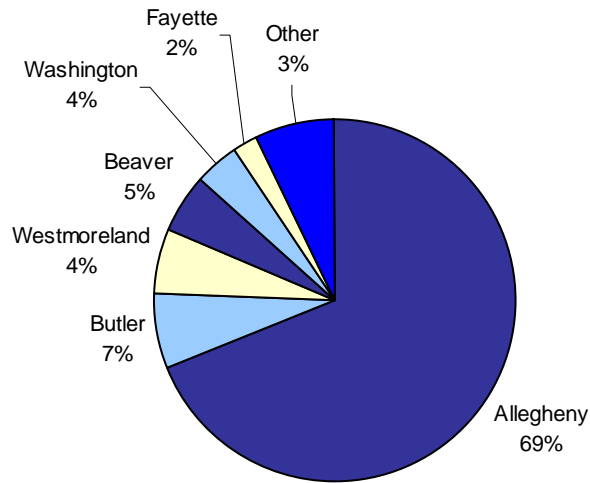
Survey Respondents by Type: Biannual Comparison



Geography

The majority of responding organizations in 2004 (69%) are located in Allegheny County, which is very similar to 2002 (68%) but far less than the 85% in 2000. Of the remaining organizations, 24% are located in the adjacent counties of Beaver, Butler, Fayette, Washington and Westmoreland. The remaining three percent come from outside the immediate Pittsburgh metropolitan area.

Respondents by County

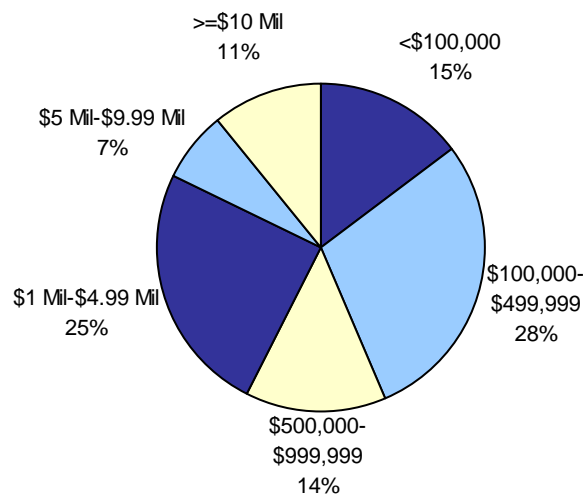


Budget Size

The organizations in the respondent pool tend to be small as are most nonprofit organizations

nationally. Over 50% of the organizations have annual budgets of less than \$1 million, and 80% have annual budgets of less than \$5 million. Still, there is a wide variety of budget sizes from an animal protection group with a budget of \$2500 and no staff to a multi-faceted educational agency with a \$115 million budget.

Survey Respondents by Budget Size

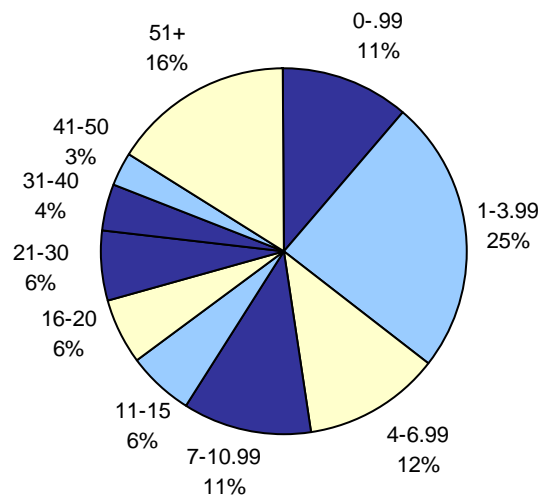


In comparison to previous respondent pools, 2004 slots between 2000's median budget of \$500,000 and 2002's median of \$700,000 at \$645,000.

Staff Size

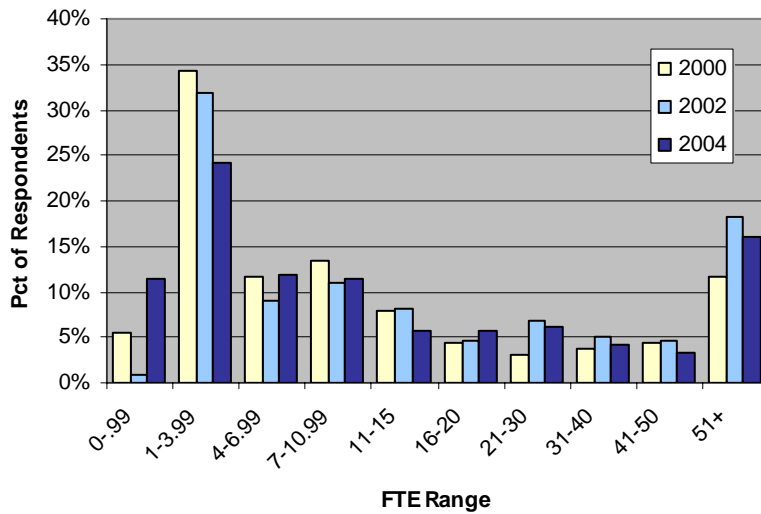
A similar profile of mostly small nonprofits emerges when the staff size of responding organizations is examined. Over 45% of respondents employ 7 or fewer full time equivalent (FTE) employees. An additional 17% of organizations have more than 7 but fewer than 15 employees. Some organizations are run entirely by volunteers or with as little as one part-time staff person. As with budget size, however, the range of staff sizes is immense; the largest organization that responded to the survey employs 1700 FTEs.

Survey Respondents by Staff Size (FTEs)



Staff sizes line up fairly closely between the three data sets, although it's worth noting that 2002 and 2004 are marked by fewer tiny organizations and more of the largest organizations than in 2000. These staff sizes are indicative of nonprofits across the country; the civil sector is an industry made up of very small units.

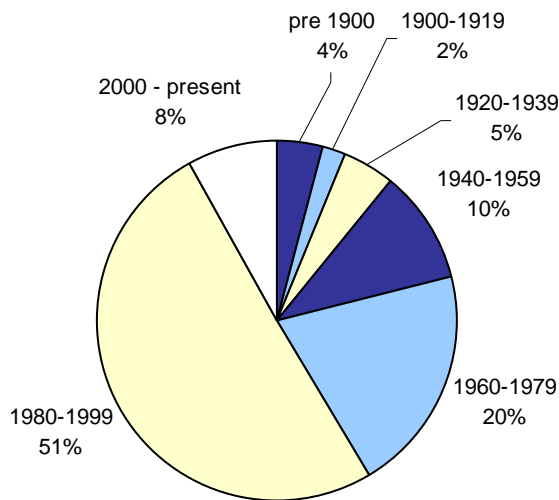
All Respondents by FTE Range



Age of Organization

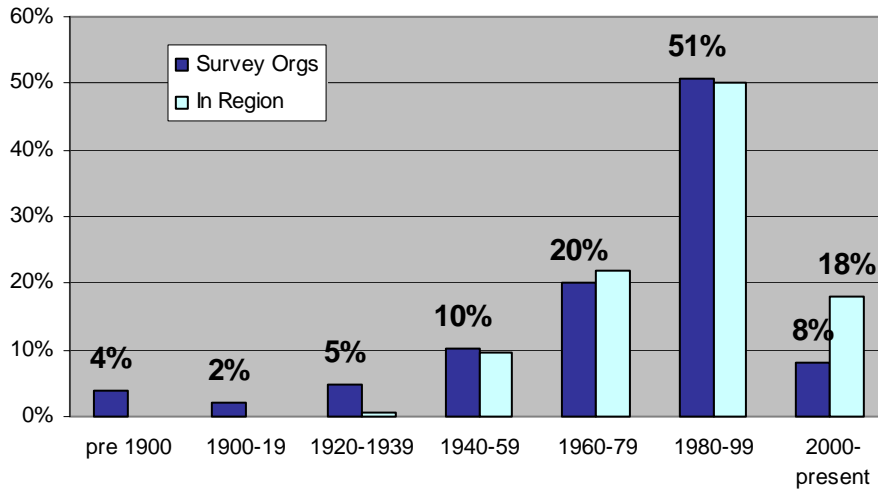
A new question featured on the 2004 survey is the year the organization was founded. The vast majority of organizations were founded since 1960. Specifically, over half the organizations were founded in 1980-1999. The median age of organizations is 21 years. The period from the 1950s to the present has seen tremendous expansion in the ranks of nonprofits in this country, from around 30,000 organizations to 1½ million.

Respondents by Founding Year



The breakdown of survey organizations by age mirrors the general pool of nonprofits in the region very closely.

Survey Orgs Founding Year vs. Region



1

One of the key reasons why the Bayer Center repeated the technology survey in 2002 was to create a second data set to compare to our baseline data. We were interested in how the technology resources in use in nonprofits in the region is changing over time. The next three sections will not only present snapshot data from 2002 but also differences between the 2000 and 2002 results.

¹ from the National Center for Charitable Statistics Business Master File from April 2004. The Business Master File contains all organizations all active organizations registered with the IRS. The region is defined as the following 8 counties: Allegheny, Armstrong, Beaver, Butler, Fayette, Greene, Washington, Westmoreland.

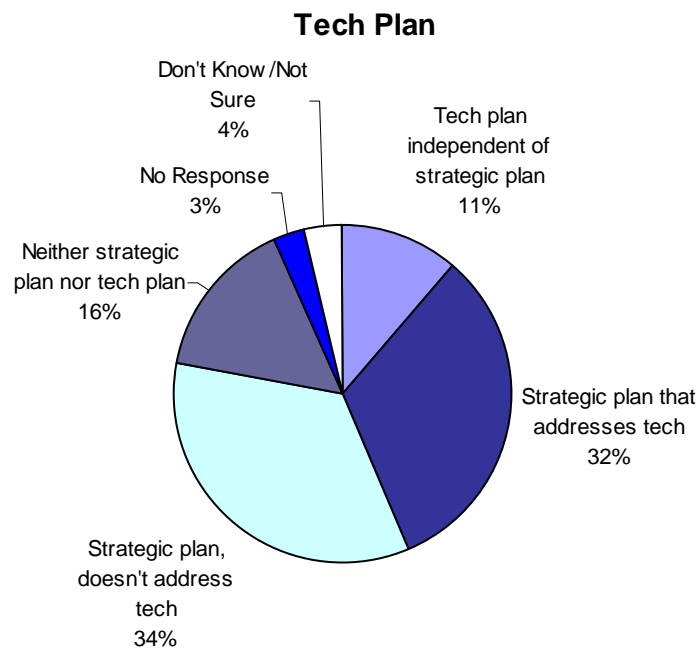
Technology Policy

In addition to facts and figures about hardware, software and networking, several survey questions explored the management of technology in achieving nonprofits missions. Topics such as planning, staffing and technology spending fall under this umbrella.

Technology Planning

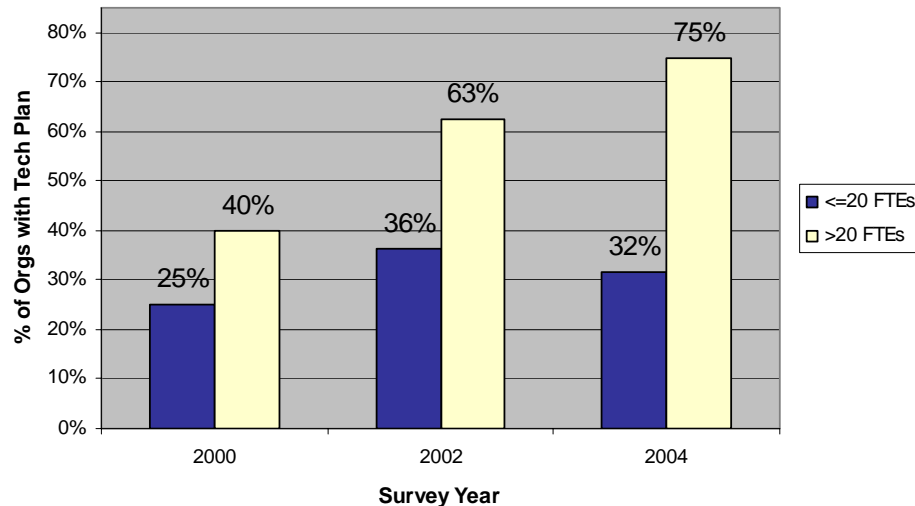
A vital ingredient to effective use of technology is organized planning for its acquisition, maintenance and use. Technology planning is characterized by shorter time horizons than general strategic planning due to the constant development of new hardware and software. The best technology planning grows from a basis of broader strategic planning. Technology solutions tend to be an integral part of implementing new programs and work processes that arise from overall strategic direction.

Although our survey indicates that fewer than half of nonprofit organizations plan strategically for the technology function, the proportion held steady from 2002 (43%) to 2004 (42%), maintaining the increase from 28% in 2000. The majority of these organizations have included technology planning in broader planning processes.



The evidence continues to grow from survey to survey that larger organizations are more likely to plan. In 2004, among organizations with more than 20 employees, 75% have a technology plan.

Tech Plan by FTE Size



Technology Management

The notion of the “accidental techie” has become a commonplace in nonprofits. One or more employees who demonstrate interest or competency in one area of IT become the *de facto* technology staff for the organization. A significant but decreasing number of organizations in our survey pool staff their technology function in this manner.

Respondents were asked to identify from among the options in the graph “the primary source of technology decision-making; who decides what gets purchased and what gets thrown away?”

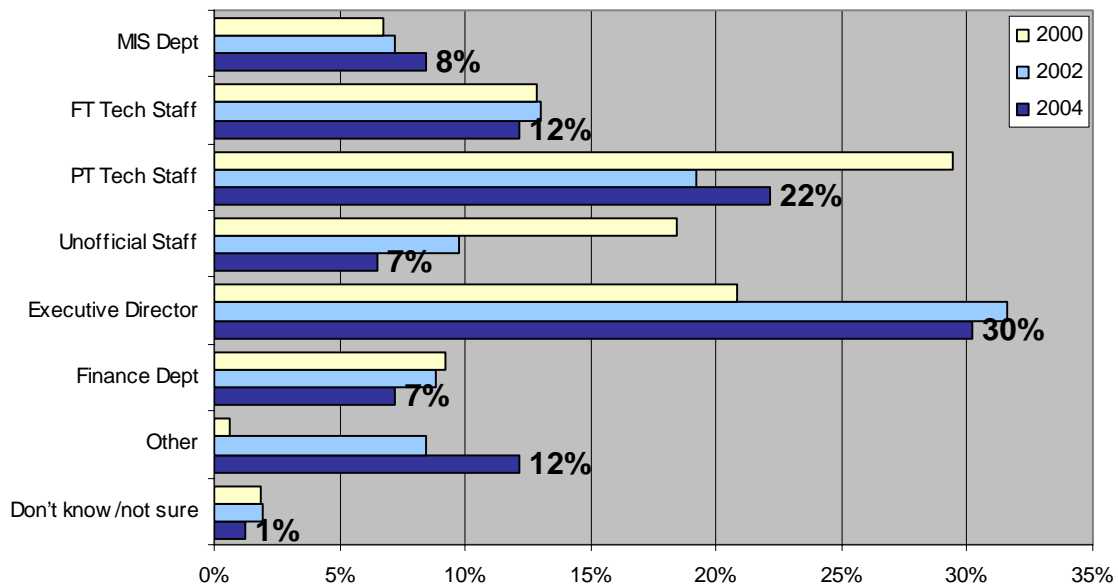
The proportion of organizations with an MIS department (defined as having two or more employees) increased slightly to 8% of organizations, and these organizations tend to be larger. The overwhelming majority (76%) of

C O N T E X T

Technology planning continues to be done by a minority of nonprofits. While fewer than half of respondents plan for technology, nearly two-thirds have a strategic plan. Although strategic planning has been in use longer and its process and outputs are better understood than tech planning, tech plans support the implementation of strategic goals. Many organizational planning processes would be leveraged much more effectively and immediately if the needed technology improvements were assessed and interwoven into strategic objectives.

respondents with an MIS department have more than 50 employees. Similarly, the number of organizations with a full-time technology person held steady. In 30% of organizations, executive directors make the “buy or pitch” decisions. Although one might assume that the executive director manages the technology function only in small organizations, some executive directors of organizations with hundreds of employees and several-million-dollar budgets are still making technology decisions.

Technology Management



2

Technology Support

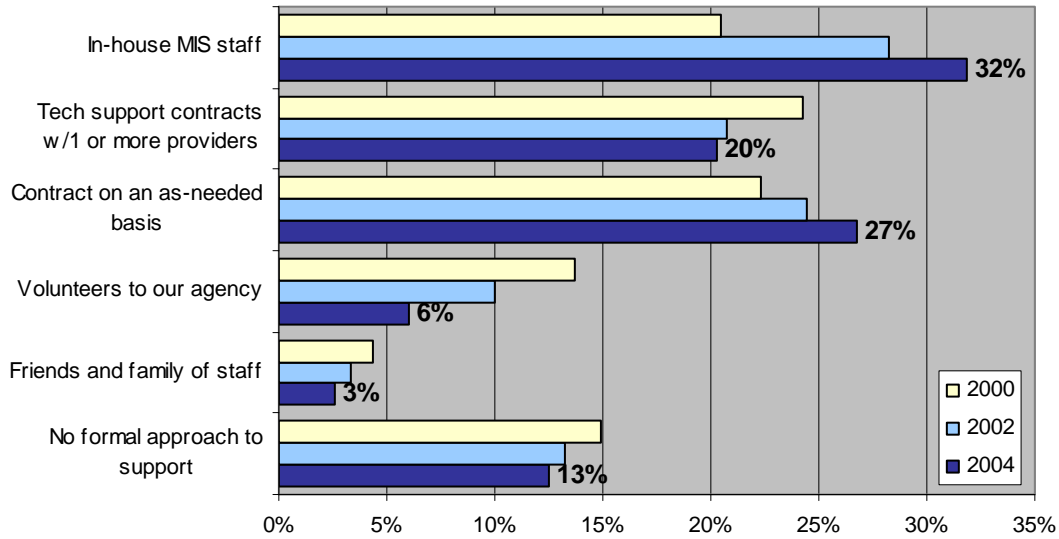
Of course, organizations need to do more than make decisions about technology. Infrastructure needs to be maintained and upgraded. Users need assistance with troubleshooting and break-fix, tasks we generally group under the heading of “support.” There is typically a breakdown in any given organization between the support tasks that are routine enough to be done by staff and the tasks that require outside assistance. Many respondents, therefore, use more than one provider for support; for example, In-house MIS Staff supplemented by contracting for assistance in emergencies or for more technical tasks. The survey responses about who provides support to the agency is showing progress. The graph below shows the breakdown of primary providers of support³ over the last three years. The use of MIS staff has increased from 20%

² Other responses includes Board/Volunteer (6%) and Outsourced (2%)

³ Primacy is determined in the following order: In-house MIS Staff, Tech Support Contracts, Contract on an as-needed basis, volunteers, friends, no formal approach. For example, an agency that lists both MIS staff and as-needed contracting is counted as MIS staff in the graph.

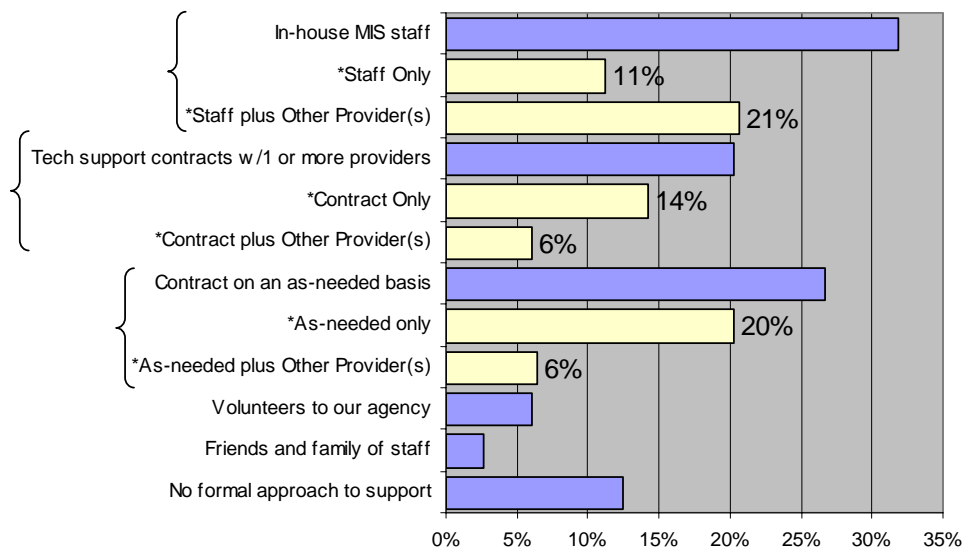
to 28% to 32% while the use of volunteers and friends and family has declined steadily. Outsourced support has held steady, albeit with some shifting between ongoing support relationships and as-needed contracting.

Tech Support Provision



Drilling down into the detail for 2004, the majority of organizations that identify staff as their primary support also use outside providers. This may include an ongoing tech support contract, as-needed consulting assistance or volunteers. Those who use outside support tend to use that source on its own, although some organizations combine their contract support with other providers.

Tech Support Provision - 2004 Detail



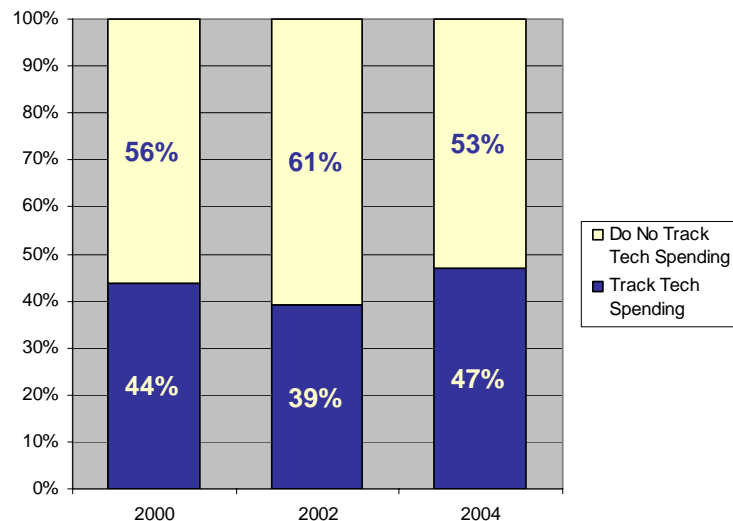
Technology Spending

Maintaining an annual budget line item for technology helps to ensure that hardware remains in working order and supports current software. The survey indicates that there have been nominal changes in the proportion of organizations in the region that have a specific technology budget but that over time, the number is inching toward 50%. The organizations that do track

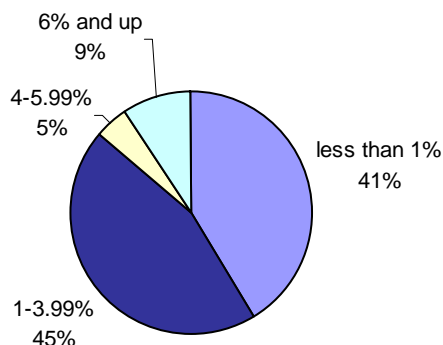
technology expenses separately tend to be slightly larger than those that don't. Median staff size of the former group is 11 FTEs versus 5 for the latter and overall agency budgets are more than twice as large in those that budget.

Survey respondents who do budget for technology retained the same profile relative to technology spending benchmarks. One benchmark is that technology spending should be about 6% of overall annual spending. The survey organizations that have technology budgets tend to spend 1-4% of their annual budget on technology.

Technology Budgeting



Tech Budget as % of Total Budget

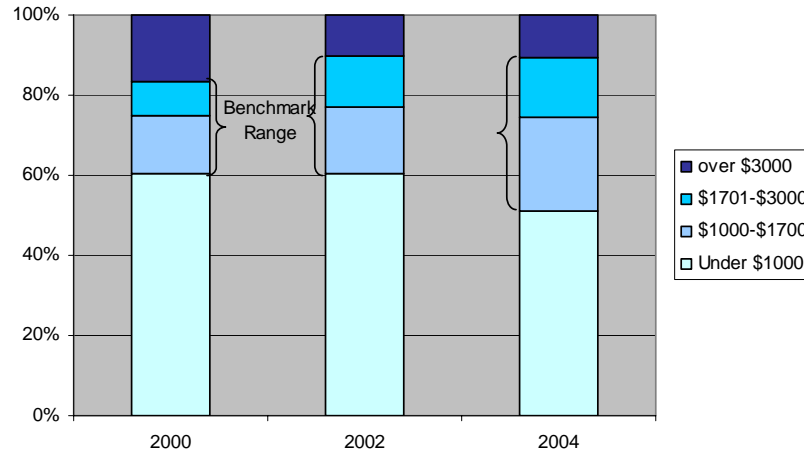


C O N T E X T

Of course, budget or no budget, money gets spent on technology. Whether the dollars are being counted in the budget or not, they're going to be spent. The presence of a specific technology line item (or items) signifies the level of priority placed on technology. Where your budget goes, there your heart shall go also. Without a delineated tech budget, organizations find ways to get by but when it comes time to cut overhead, tech upgrades are often a victim.

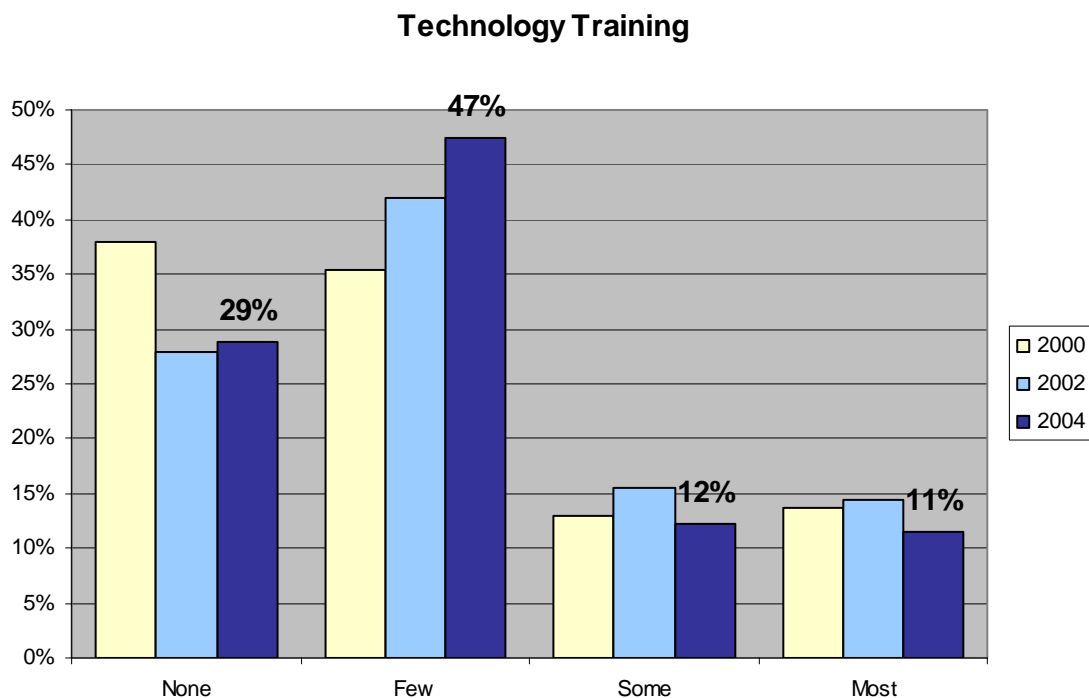
Guidelines for spending per machine per year vary, but most experts say that organizations should budget \$1000 to \$1700 per year with some placing the top end of the range at \$3000 annually. The median survey organization spends just under \$1000 per computer, which is an increase from previous surveys. The amount of technology spending per computer has been increasing; almost 50% of organizations now spend more than \$1000 per computer per year.

Technology Spending per Computer



Staff Training

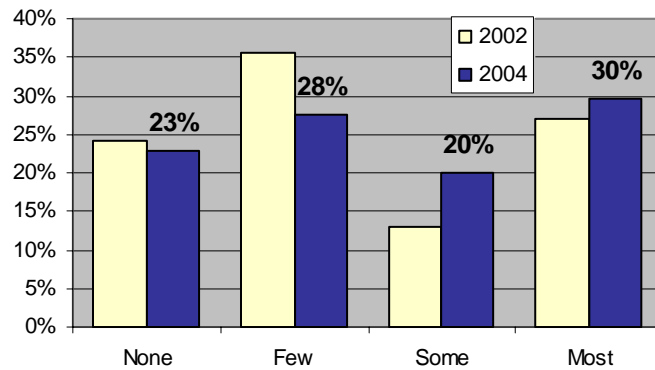
The survey indicates that while more nonprofit employees received formal technology training in 2004 than in prior years, on a case by case basis, the changes are more ambiguous. A weighted average based on the employees and training rates represented in the sample indicates that approximately 27% of employees in Pittsburgh area nonprofits received technology training in 2004, compared to a steady 23% in 2000 and 2002. As a weighted average, this overall number is increased by larger organizations increasing their training proportion. The number of organizations sending 1/3 or fewer staff to training increased, while organizations sending the majority of staff to training decreased.



Technology Skills in Job Descriptions

Including technology skills in job descriptions and performance evaluation is a best practice that, unfortunately, many nonprofits have not adopted. The current and 2002 surveys pose the question with the same the same rate categories used above in the question about employee training, while the 2000 survey posed the question as a simple yes or no. The 2000 survey results indicated that less than a third (31%) of organizations included technology skills in job requirements. While there is more nuanced data in the newer data, the rate has held steady: an estimated 31% of nonprofit *jobs* in the region have tech skills in their job descriptions in 2004.

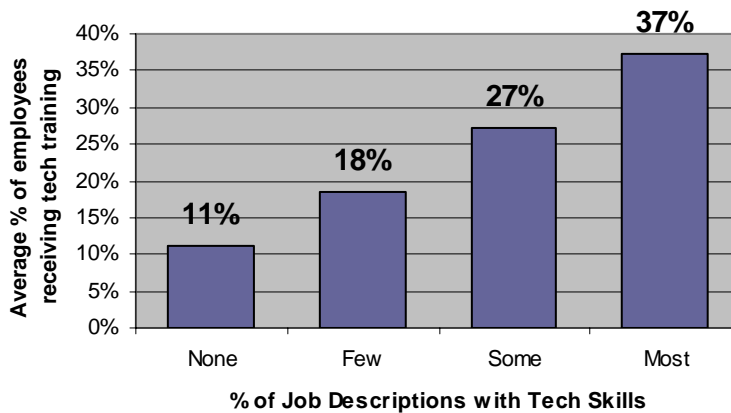
Tech Skills in Job Descriptions



Tech Skills in Job Descriptions Related to Training Rate

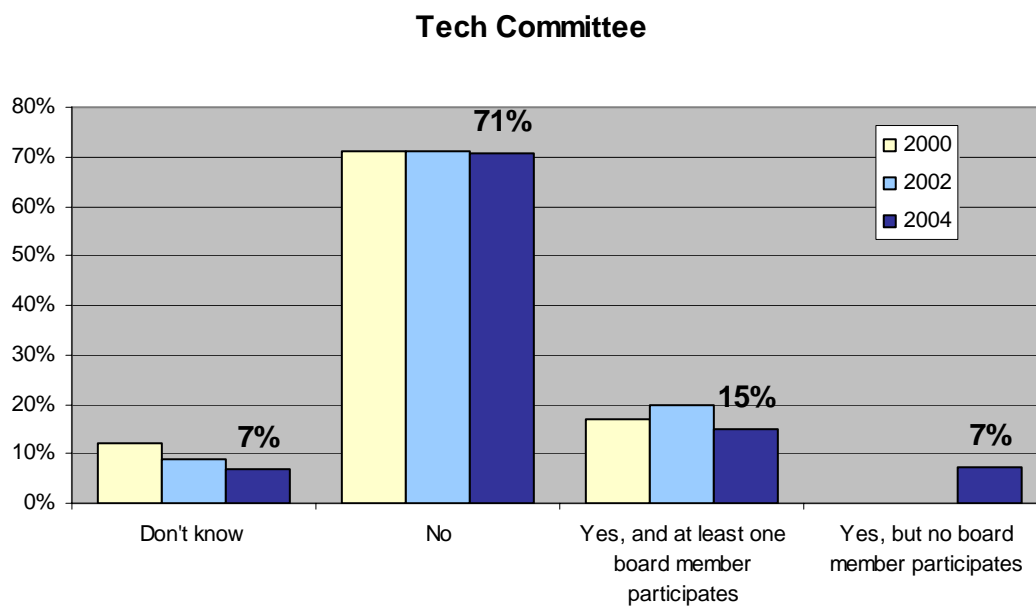
The proportion of jobs with technology skills is directly related to the tech training rate. An organization with tech skills in more job descriptions sends more of its staff to formal technology training. Increased professional development in any area, including this one, is intuitively linked to the hiring and evaluation processes that flow from the composition of job descriptions.

Tech Skills in Job Descriptions vs. Training



Technology Committees and the Board

A key finding from the original survey was that the existence of a board technology committee was highly correlated with best practices in technology management. The presence of a technology committee increases accountability and makes anticipation of needs more possible because decisions have a process. An agenda requires preparation and consideration; technology, like any area of nonprofit management, benefits from such scrutiny. As such, the nominal decrease from 20% to 15% of organizations with board participation in a technology committee is bad news.

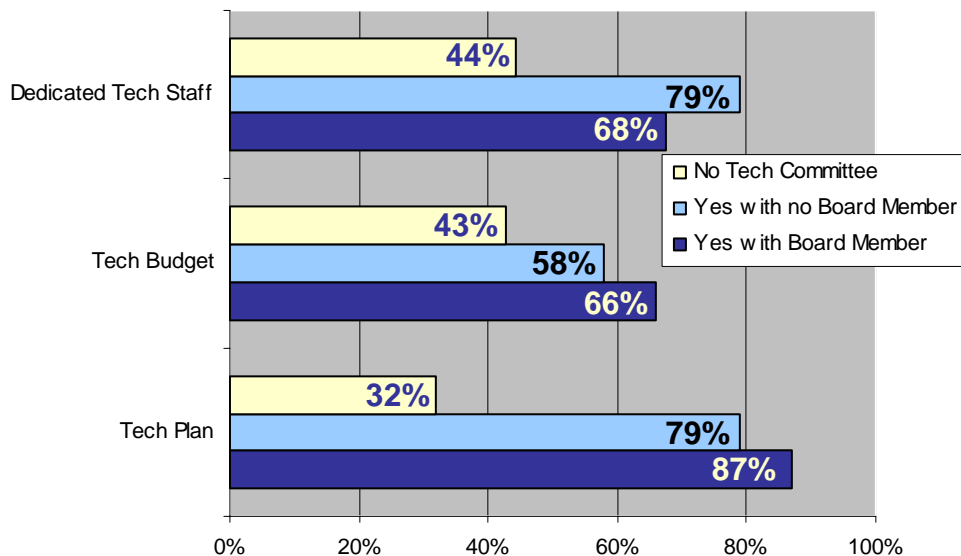


This cloud may have a silver lining, however. An option was added to the survey question in 2004, allowing respondents to acknowledge the presence of a technology committee, even without board participation. The Bayer Center has seen several highly functioning and successful staff technology committees that are empowered to make technology decisions because they represent the interests of a cross-section of the functional areas of the organization. In addition to the 15% of organizations with a board member on their tech committee, 7% of organizations have a tech committee composed of staff.

In 2000, the organizations that had a board technology committee tended to be smaller than those that didn't. In 2002 that profile flipped, and the size difference persists in the general question of tech committees. The median budget size for organizations with a tech committee is \$2.4 million versus \$527,000 for those that do not. A distinct size difference is not apparent between those that have a board member on the committee and those that do not.

Survey results continue to indicate resoundingly that a technology committee can have a significant positive influence on technology use and policy. Board participation on such a committee especially enhances technology management. Absent a technology committee, 44% of organizations have dedicated (at least part-time) tech staff; the proportion jumps to 79% of organizations with a staff committee and 68% where a board member participates. The proportion in the third category is deceptively low because 75% of these respondents have 7 or fewer FTEs, which means even a part-time techie would be a major resource allocation. With a staff committee, 58% track technology expenses in the budget versus 43% with no committee. Board participation increases the proportion to 66%. In organizations with board input on a tech committee, a whopping 87% have a written tech plan versus a strong 79% in staff committee organizations and 32% of organizations with no committee.

Tech Committee vs. Best Practice

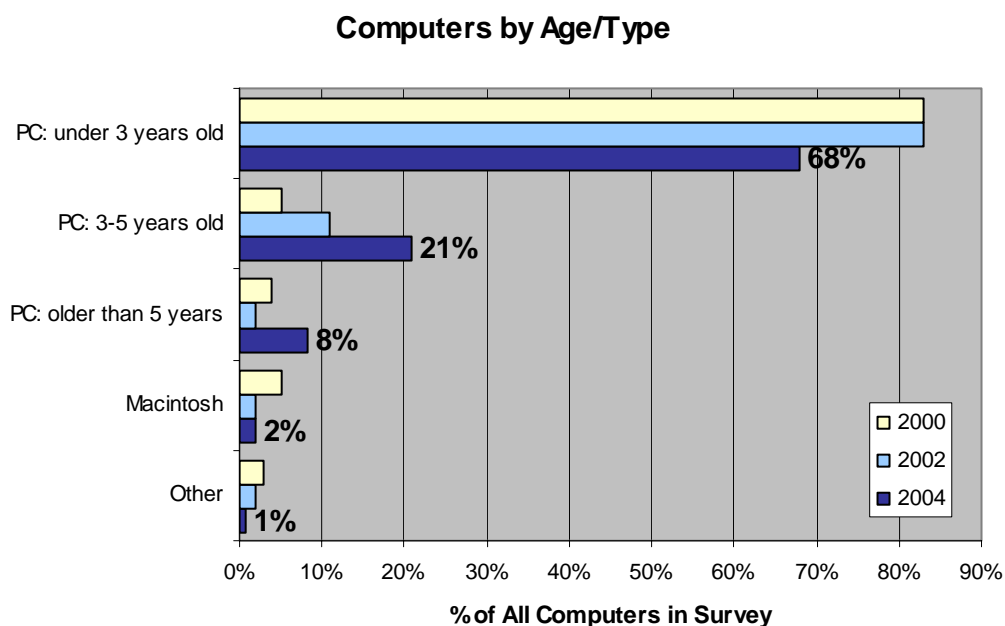


Computer Systems

The common perception that all nonprofit organizations have outdated equipment is too simplistic. There is a tremendous range of information technology tools in use in area nonprofits, with some organizations adopting the state of the art while others maintain a “make do” stance. Again in 2004, some survey respondents lag behind in hardware, software and networks, while others consider a high standard for technology tools non-negotiable.

Hardware

The 2004 survey uses a different set of response options to collect information about end user hardware. Previous surveys used the amount of RAM in machines as a proxy for their age and position along the path to obsolescence. In 2004, the question focuses directly on the age of the computers in use. The best practice for cost-effective operation of workstations is to replace them every three years. We’re able to measure organizations against this benchmark to determine whether their computers are in the window of optimal utility. For comparison’s sake, we have applied the same age estimates to the computers in previous surveys based on their specifications at the time of the survey.



In terms of age, the majority of the computers in our survey pool (68%) are current enough (under three years old). Of the remainder, 2 out of 10 machines are beyond optimal age (3-5 years), and 8% of computers are totally outdated (over 5 years).

The graph shows a decrease in the number of current machines with an accompanying increase in the 3-5 year and over 5 year categories. While a portion of this change may be explained by the fact that there are different organizations in the survey pools, there are two environmental factors that might explain a step backward in the currency of machines. First, the hardware inventories depicted in both 2000 and 2002 had been enhanced by widespread replacement of workstations to avoid Y2K problems. Second, the general recession and funding environment of the two years between 2002 and 2004 also likely lead nonprofits to try to extend the life of existing hardware for cash flow reasons.

Continuing to use computers that are several generations old is an indicator that an organization may be behind trends across the board. In organizations that use 5-year-old machines, they account for 16% of all computers. In addition, in these organizations, only 54% of their computers are the highest level Pentiums versus 68% in the general survey pool.

The number of Macintosh computers in area nonprofits dropped from 5% in 2000 to 2% in 2002 and held steady there in 2004. In organizations that use them, however, they account for 5% of all computers. Organizations that use Macs tend to also use current standard PCs (75% versus 68%). In addition, the wider trend of Mac prevalence in educational organizations is borne out; they account for 27% of organizations using Macs. A pattern from previous surveys regarding Macs is broken in 2004: Arts organizations are not disproportionately represented among Mac users as they have been in the past.

Donated Computers

The 2004 survey seeks to discover how many computers in area nonprofits are donated by asking each organization what percentage of their machines were donated. Because of the way the question appeared on the survey, definitive answers are more difficult for this aspect than others (see Appendix A), but we can conservatively state that 21% of organizations in the region use donated computers.

C O N T E X T

Is the Bayer Center on the side of hardware manufacturers who want everyone to ditch their old computer and buy a new one as often as possible? Not exactly. Regular replacement of hardware relates to good management because older machines are more demanding to operate:

- ☞ Staff or consultants who keep old machines on life support could be making better use of the nonprofit's time.
- ☞ Older machines often can't run the latest operating systems and software; beyond 5 years, versions are likely no longer supported by its manufacturer.
- ☞ Having widely varying specifications makes it much more difficult to roll out new software across an agency.

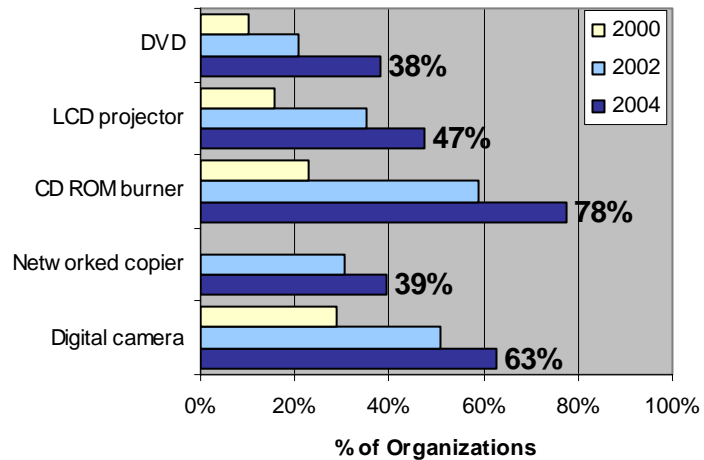
Donated machines account for less than half in the majority of organizations (54%), although a handful (11) have all donated computers. Nonprofits that use donated computers tend to use fewer machines (median 10 vs. 15.5) but are no smaller in median staff or budget size. Like old hardware, donated hardware tends to correlate with fewer current computers (65% versus 68% overall).

Peripherals

Aside from workstations themselves, there are some changes to report in other computing and communications devices in nonprofits from 2002 to 2004. CD burners remain popular, increasing to 78% after a big leap from 2000 to 2002. An even greater proportional increase is visible in DVD player/burner ownership, up 83% to 38% of nonprofits. Networked copiers increased to 39%. Well over half of the respondents now have a digital camera, and nearly half own their own LCD projector.

Accessories that dropped in popularity include specialty printers, tape backups and the removable media Jazz and Zip drives.

Peripheral Gainers



	2000	2002	2004
Specialty printers	9%	15%	12%
Tape backup	48%	53%	45%
Jazz/Zip drives	49%	47%	39%

Connectivity

Local Area Networks

Over the course of the survey, local area networks have become more pervasive in area nonprofits. The proportion of organizations with entirely stand-alone computers has decreased from 28% to 14% to 12%. While client-server networks held steady from 2002 to 2004, a drop in peer-to-peer networking from 2000 (14%) to 2002

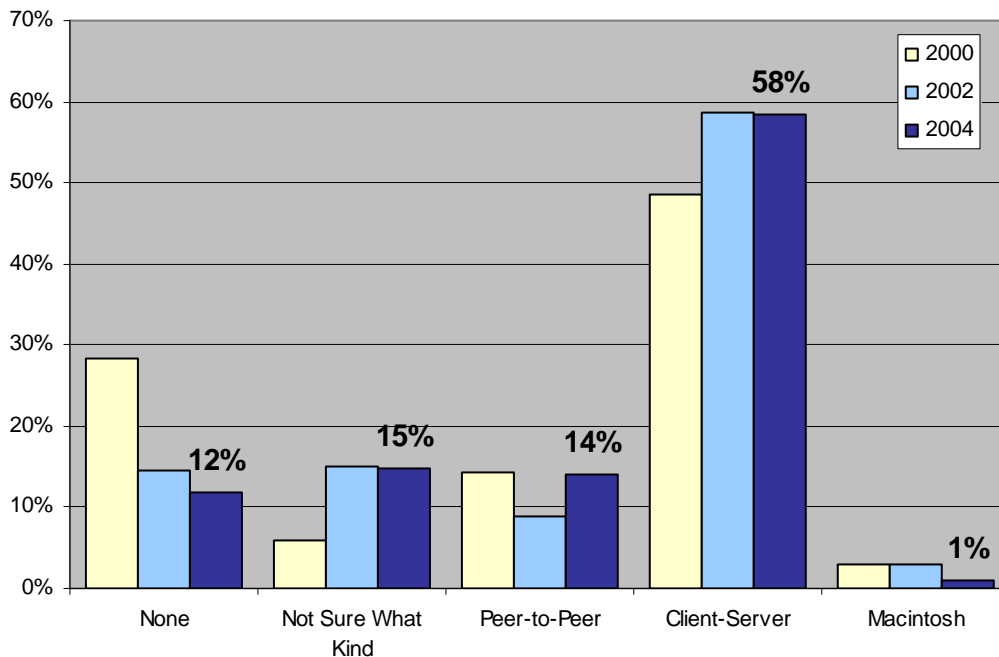
C O N T E X T

The successful installation and operation of a local area network typically marks a true milestone for workplace efficiency. In our survey pool, 75% of organizations with client server networks agreed or strongly agreed with the statement "Technology has substantially changed how we operate." versus 50% with no network and 47% with a peer-to-peer network.

(9%) has been reversed in 2004 (14%). This indicates that the increases in networking have been made at the low end of staff size, where a peer-to-peer network can fulfill the needs of the limited number of users.

Survey Respondents use a variety of network operating systems. Most client-server networks run Windows 2000 (40%) or Windows NT (26%). The migration away from Novell networks continues, dropping from 34% in 2000 to 18% in 2002 to 15% in 2004. A very small number of organizations use Linux (3%).

Local Area Networks



Internet Connection

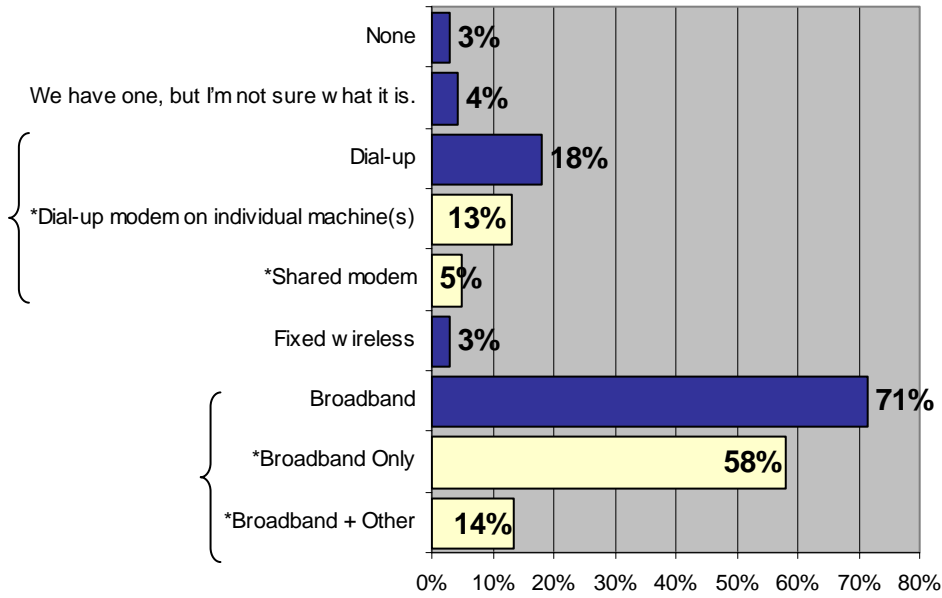
Despite the fact that our first survey occurred well into the Internet boom, each survey has depicted enhanced Internet connections and more intensive use of the Internet by nonprofit staff.

Broadband connectivity continues to become more pervasive in area organizations. Respondents with broadband connections increased from less than a third (32%) in 2000 to 58% in 2002 and to 71% in 2004. The data suggests that these connections are replacing dial-up connections one for one.

A small but steady 3% of organizations use fixed wireless connections. The majority of this connectivity is being provided by a nationally-recognized

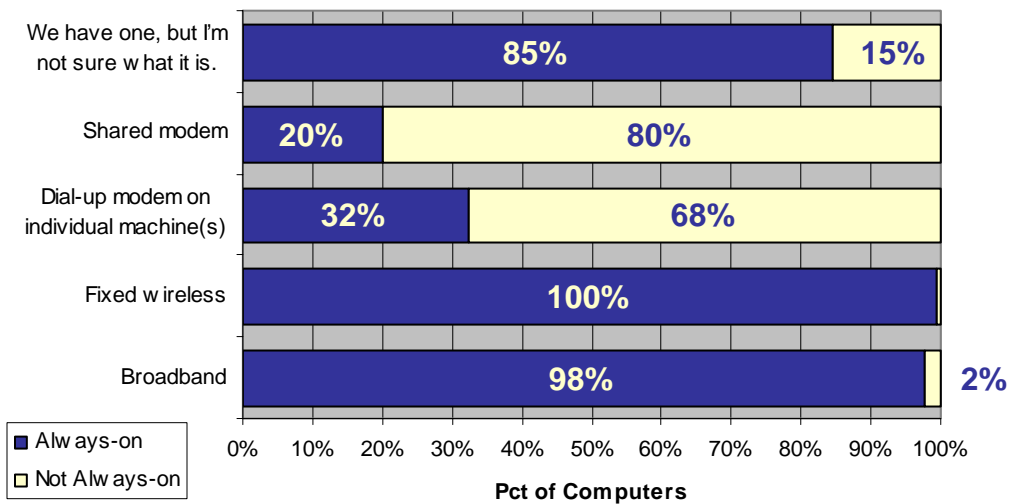
innovative partnership called Wireless Neighborhoods, which not only brings more bandwidth and dependability but also new collaboration among neighborhood organizations.

Internet Connection



The structure of the question also enables us to analyze how many computers are connected to the Internet on demand, even if the connection is dialup. As expected, the presence of a broadband connection is highly correlated with nearly universal always-on connectivity.

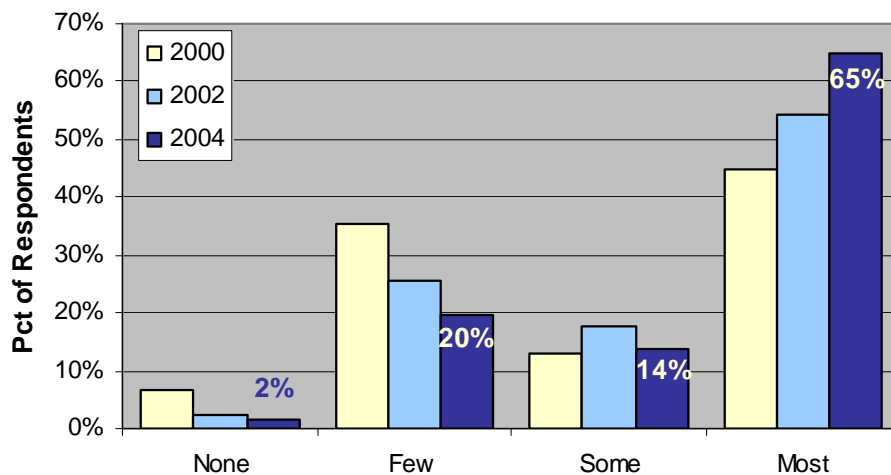
Connection Continuity vs. Connection Type



Internet Use

If more users are connected via always-on and high speed connections, as the above data indicate, we expect to see a similar increase in employees using the Internet for work. That expectation is met in the survey responses. From over 40% in 2000, the number of organizations that indicated that few or none of their employees used the Internet in their jobs dropped to 28% in 2002 and to just over 20% this year. The estimated overall average rate of Internet use among nonprofit employees passed half this year. Over four years, the rate increased from 33% in 2000 to 56% in 2004.

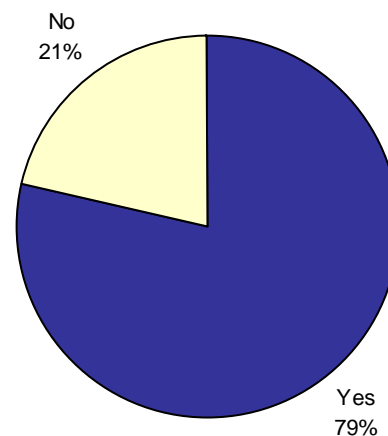
Internet Use



Internal Email

Internal Email

Respondents were asked for the first time in the 2004 survey whether they provide internal email addresses to staff, and the overwhelming majority of organizations in the survey pool do. Organizations that do not provide internal email are generally smaller (median 2.3 FTEs) than those that do (9.0), although there are a handful of staffs in the upper double figures that do not have standard, organization-specific email addresses.



Remote Access

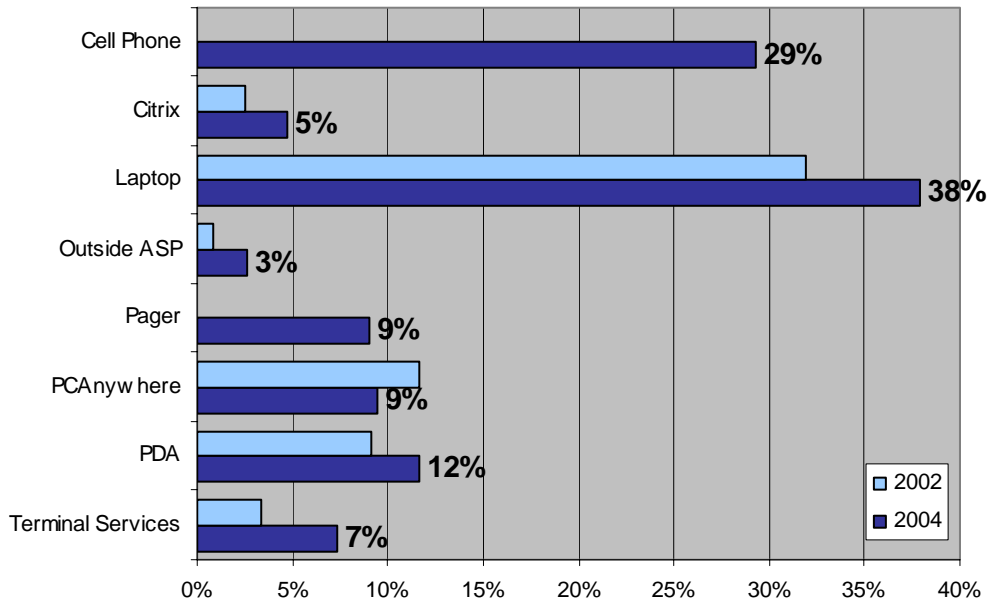
The two most recent surveys have included the question “Do you provide remote access for truly mobile staff members?” The most common tools provided to staff on the go are laptops and cell phones. A small minority of organizations grant their staff remote access to file servers or databases through always-on connections like Citrix and Terminal Services or through as-needed connections like PCAnywhere.

C O N T E X T

Internal email enhances efficiency and staff coordination, but the addresses themselves serve an important role as well: marketing. Every email sent from an agency can drive traffic to the web site if the web site’s domain name follows the “@” in every email address.

4

Remote Access Tools



⁴ Cell Phone and Pager were added as explicit response options on the 2004 survey after several respondents wrote them into the “other” option in 2002.

Communication Modes

The Internet is not the only mode of communication that nonprofits use to stay in touch with their constituencies. Telecommunications provided some of the biggest changes in how organizations contact their staff, clients and volunteers.

The question about modes of communication shows the value in having trend data over time. Three data sets tell a more complete story about established and emerging technology. The stable to slightly increased use of interactive web sites and video conferencing from 2000 to 2002 has been dwarfed by huge capability increases in 2004. Broadcast fax, online chat and text messaging also showed large

gains. One-to-one fax, phone and even email have remained steady over three surveys.

In 2004, we not only asked whether organizations used a given channel to

communicate, but with what frequency. While emerging technologies grew in the number of organizations using them, online chat and video conferencing are rarely used. Old standbys like print, phone and email (a young standby) are very frequently used. There remains a difference between capability or occasional use and dependence on a mode of communication.

Communication Channel	2000	2002	2004
Broadcast Fax	19%	27%	61%
Conference calls	42%	46%	74%
E-Mail	84%	90%	91%
Fax	88%	80%	89%
ICQ, Chat, IM, etc.	1%	4%	46%
Interactive/e-commerce Web page	5%	9%	44%
Phone	95%	92%	91%
Print	95%	93%	95%
Text Messaging		6%	39%
Video Conferencing	3%	2%	41%
Voice Mail	59%	67%	85%
Web page	55%	59%	80%

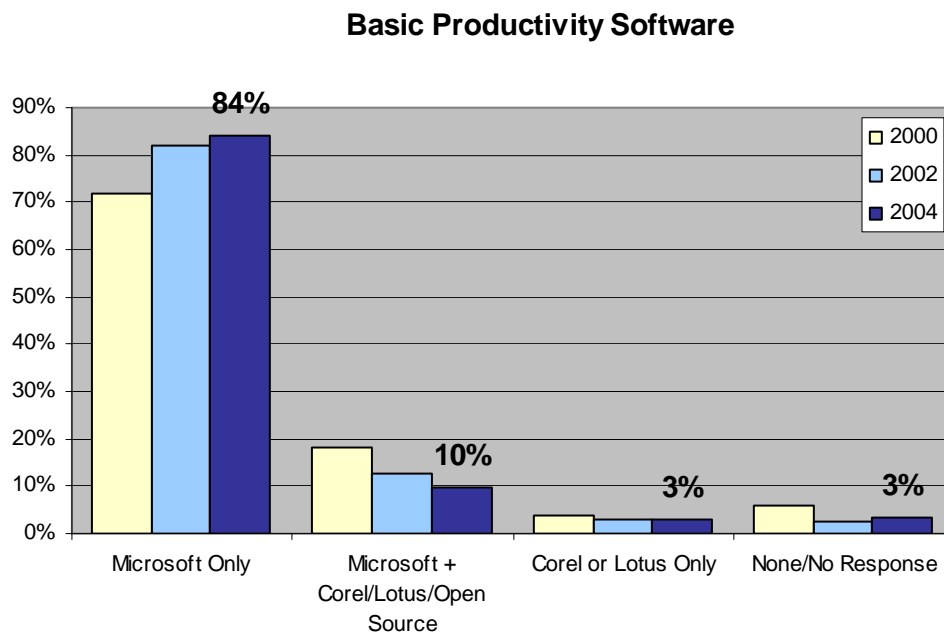
Communication Channel	Frequently	Regularly	Rarely
Broadcast Fax	18%	23%	59%
Conference calls	7%	37%	56%
E-Mail	71%	27%	2%
Fax	27%	44%	29%
ICQ, Chat, IM, etc.	0%	11%	89%
Interactive/e-commerce Web Page	15%	35%	50%
Phone	79%	20%	1%
Print	52%	42%	6%
Text Messaging	4%	4%	92%
Video Conferencing	7%	14%	79%
Voice Mail	42%	49%	9%
Web page	38%	45%	18%

Software

The survey covered four categories of software: basic productivity, accounting tasks, database or list management and network/data management tasks. While basic productivity software use is relatively uniform, the other three categories are handled in a variety of ways, including manual systems, spreadsheets and outsourcing.

Basic Productivity Software

Microsoft Office continues to dominate the basic productivity market. All but 6% of organizations use Microsoft Office (Word, Excel, PowerPoint, Access). Some Microsoft users also use Corel Office (WordPerfect, Paradox, QuattroPro, Presentations) or the Lotus Suite (Approach, 1-2-3, WordPro), although these combinations are less frequent with each survey. Open source office packages were an explicit choice on the 2004 survey, but this option garnered exactly 2 responses.



Accounting Tasks and Software

In fulfilling the obligations of accounting tasks, organizations use solutions ranging from manual systems to spreadsheets to accounting software. The period from 2002 to 2004 saw little change in the breakdown of tools. The largest changes are greater adoption of specific accounting software to manage budgets and cash flow.

Organizations tend to use one software package across the accounting functions of general ledger, receivables, payables and cash flow. That said, there are only two packages that have appreciable market share in this pool: QuickBooks (~50%) and Peachtree (~10%). Payroll remains the most likely function to be outsourced. Inventory remains a function that many organizations don't see the need to perform.

Accounting Tasks 2000							
Task	No Response	N/A	Manually	Manually + Spreadsheet	Spreadsheet	Specific Package	Outsourced
General Ledger	12%	2%	6%	1%	7%	60%	12%
Accounts Receivable	17%	6%	7%	3%	7%	51%	10%
Accounts Payable	16%	3%	5%	2%	7%	56%	11%
Payroll	17%	4%	5%	1%	6%	23%	44%
Budgeting	19%	1%	6%	11%	25%	35%	3%
Cash Flow	22%	6%	5%	4%	17%	37%	8%
Inventory	29%	26%	12%	6%	10%	16%	2%

Accounting Tasks 2002							
Task	No Response	N/A	Manually	Manually + Spreadsheet	Spreadsheet	Specific Package	Outsourced
General Ledger	10%	2%	7%	1%	6%	68%	7%
Accounts Receivable	11%	7%	5%	1%	10%	62%	4%
Accounts Payable	9%	4%	7%	1%	7%	67%	5%
Payroll	12%	5%	4%	0%	6%	32%	41%
Budgeting	9%	2%	6%	3%	38%	40%	2%
Cash Flow	14%	7%	9%	1%	24%	40%	5%
Inventory	19%	27%	11%	1%	16%	24%	3%

Accounting Tasks 2004							
Task	No Response	N/A	Manually	Manually + Spreadsheet	Spreadsheet	Specific Package	Outsourced
General Ledger	7%	4%	4%	2%	8%	70%	6%
Accounts Receivable	9%	6%	3%	1%	11%	63%	6%
Accounts Payable	8%	6%	5%	1%	10%	64%	5%
Payroll	11%	9%	2%	0%	5%	31%	41%
Budgeting	5%	2%	6%	3%	35%	45%	3%
Cash Flow	14%	5%	8%	1%	22%	46%	4%
Inventory	21%	23%	12%	0%	19%	22%	4%

Bold indicates an increase from prior year.

Shaded responses in each table indicate the most frequent response.

Database/List Tasks

The general category of database and list tasks includes the information management connected to the organization's programs and support. Ironically,

the majority of these tasks, which are perfect database applications, are not managed with databases. First, each task has some group of organizations for which the task does not apply or for which they did not respond in the survey. In the main three tasks – client management, fundraising and volunteer management, roughly 30-40% of organizations indicated that the task didn't apply to them. In the three additional tasks on the right, 75-85% of organizations indicated that they did not do ticketing, quality assurance or contract performance tracking. It is difficult to draw conclusions about the systems used for these tasks due to the low response rates.

Database Tasks 2000							
Task	No Response	N/A	Manually	Manually + Spreadsheet	Spreadsheet	Database Software	Outsourced
Client Management	18%	16%	12%	2%	8%	43%	2%
Fundraising	18%	13%	19%	2%	15%	33%	1%
Volunteers	20%	21%	28%	2%	8%	21%	0%
Ticketing/Point of Sale	33%	47%	8%	5%	1%	5%	1%
QA/RA Accreditation	34%	54%	6%	1%	1%	3%	0%
Contract Performance	33%	41%	12%	6%	3%	4%	0%

Database Tasks 2002							
Task	No Response	N/A	Manually	Manually + Spreadsheet	Spreadsheet	Database Software	Outsourced
Client Management	12%	10%	10%	3%	10%	55%	0%
Fundraising	13%	11%	14%	2%	15%	44%	1%
Volunteers	18%	18%	21%	2%	13%	27%	0%
Ticketing/Point of Sale	28%	47%	6%	1%	4%	13%	1%
QA/RA Accreditation	34%	54%	6%	0%	2%	4%	0%
Contract Performance	29%	42%	12%	1%	7%	8%	1%

Database Tasks 2004							
Task	No Response	N/A	Manually	Manually + Spreadsheet	Spreadsheet	Database Software	Outsourced
Client Management	16%	13%	8%	3%	11%	49%	1%
Fundraising	15%	13%	11%	3%	16%	41%	0%
Volunteers	17%	18%	20%	3%	15%	27%	0%
Ticketing/Point of Sale	29%	50%	8%	1%	3%	7%	1%
QA/RA Accreditation	33%	53%	6%	3%	5%	0%	0%
Contract Performance	30%	43%	9%	0%	9%	8%	0%

Bold indicates an increase from prior year
 Shaded responses in each table indicate the most frequent response.

The three most common list and database tasks, however, deserve some additional examination. If we remove the organizations for which the task does not apply, we see a more realistic breakdown of how organizations manage vital information.

Database Tasks 2000					
Task	Manually	Manually + Spreadsheet	Spreadsheet	Database Software	Outsourced
Client Management	18%	3%	12%	64%	3%
Fundraising	28%	3%	21%	47%	1%
Volunteers	47%	3%	14%	36%	0%

Database Tasks 2002					
Task	Manually	Manually + Spreadsheet	Spreadsheet	Database Software	Outsourced
Client Management	12%	3%	13%	71%	1%
Fundraising	18%	2%	20%	58%	1%
Volunteers	33%	3%	21%	43%	0%

Database Tasks 2004					
Task	Manually	Manually + Spreadsheet	Spreadsheet	Vertical Market	Outsourced
Client Management	11%	4%	15%	69%	1%
Fundraising	15%	4%	23%	58%	1%
Volunteers	31%	4%	23%	41%	1%

In client management, use of database software has increased. More organizations use custom databases (58%) than vertical market software, specific to managing client and program information (42%). Managing client information often drives organizations to use a custom database solution (built in Access or FileMaker for example) because the combination of reporting requirements and the development of new programs make it difficult to meet all needs through off-the-shelf software. There is no leading vertical market product used for client management.

In fund-raising, more than half of organizations manage their donor information with database software. Manual and spreadsheet systems have declined proportionally. Again, nonprofits are split between using vertical market (51%, and custom applications (49%). The market leader in this group is Blackbaud's Raiser's Edge (35% of vertical market users), but there are 20 other fund-raising packages also in use. Both of these figures are completely unchanged from 2002.

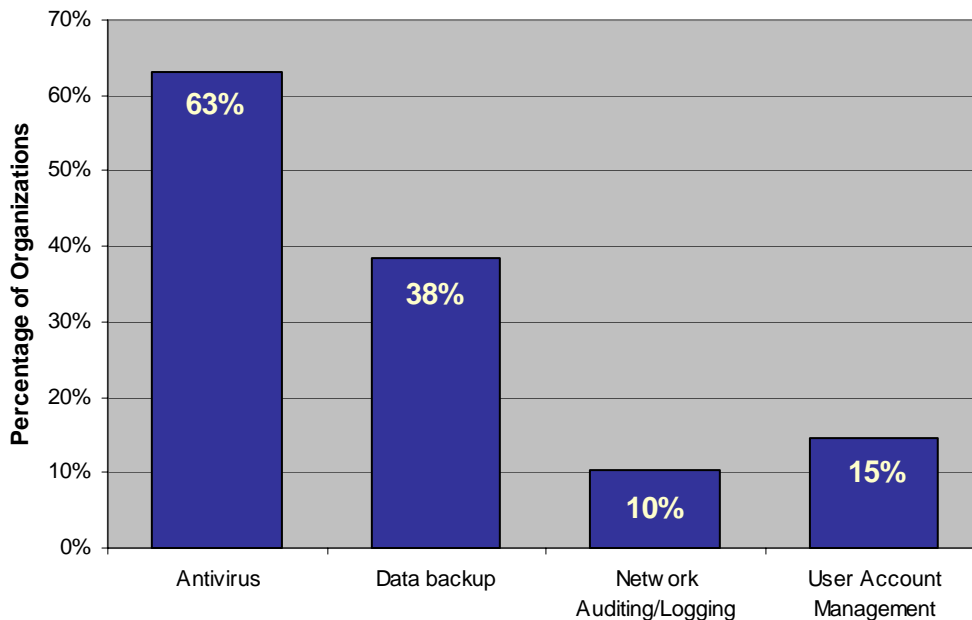
Manual systems for volunteer management remain at a third or organizations. The majority of applications for volunteer management tend to be custom-

designed (68%). The majority of vertical market volunteer solutions are a module of an overall fundraising package.

Network and Data Management Tasks

The 2004 survey includes a grid of questions similar to the above two questions about accounting and database tasks that focuses on network and data management tasks. Regardless of internal networking, anti-virus protection is vital for any environment in which computers are connected to the Internet. Similarly, even the smallest office with one computer should develop a systematic way to regularly back up data and files in a format from which they can be recovered. While a majority (63%) of organizations practice the former, a minority (38%) do the latter. Based on the pervasiveness of networking in survey organizations, network auditing and managing user accounts are tasks that should be carried out by all organizations, but our survey indicates that small minorities are doing so.

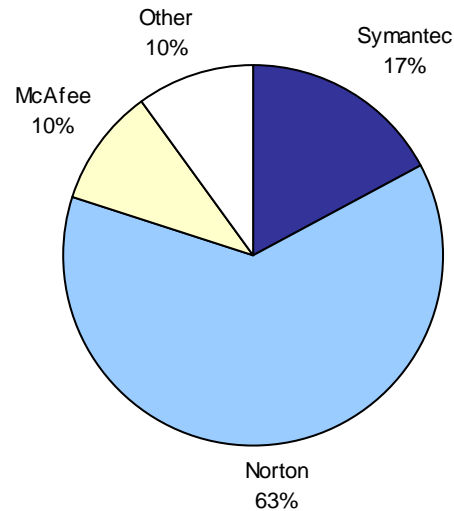
Network/Data Management Tasks



Of the small number of organizations doing network auditing, the majority (64%) use tools built into their server operating system, while 28% use specific auditing software. Due to the prevalence of Windows networking, the majority (60%) of organizations that utilize user account management tools use Windows user management. Nearly a third (31%) use Directory Services, either Active or Novell. The final few employ Linux or a combination of the above solutions.

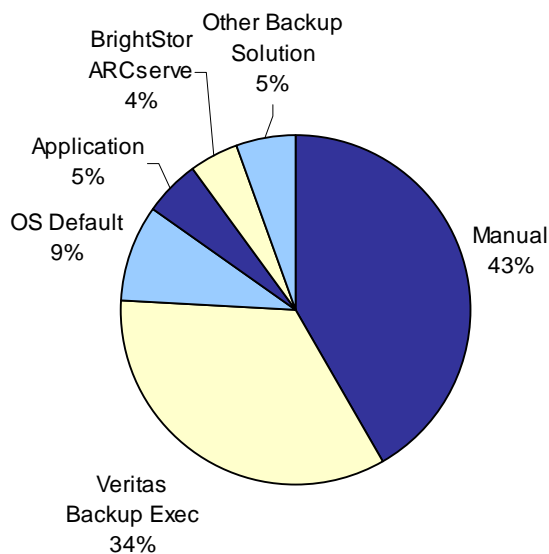
The market for anti-virus software shows similar market domination to that of basic productivity software. Symantec and Norton are two versions of anti-virus software targeted at different scales of networks (Symantec for large, Norton for small), but they are produced by the same company, with 80% of market share in our sample.

Antivirus Solutions



The vitality of data backup tends only to become apparent when the system that is being depended upon fails. A plurality of survey respondents (43%) who back up their data do so manually. The backup software leader is Backup Exec from Veritas (34%). Others depend on backup tools included in their operating system or in a key application, such as database or accounting software.

Data Backup Solutions



C O N T E X T

Two problems with so much data being backed up “manually” are the dependence on busy humans and the unsystematic manner in which manual backups are typically carried out. When dependent on staff, backups go on vacation when the key staff person does, or backups are made at irregular intervals. Also, complex data in database applications has to be locked in order to be backed up in a recoverable manner. Backups should work like clockwork in order to be prepared for data loss, which usually occurs suddenly and without warning. Regardless of the solution, organizations should conduct a data “fire drill” to ensure that they can recover their vital data should the worst happen.

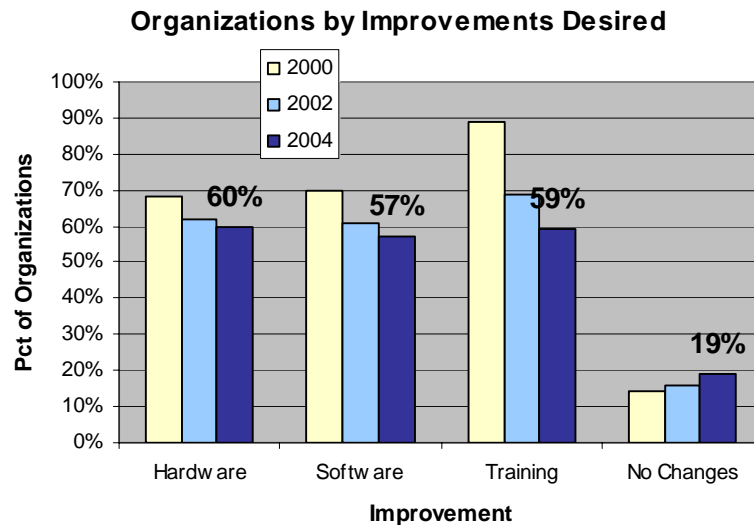
Areas for Improvement and Resource Needs

The survey also gathered information on the perceived needs in the organization for improvement in technology management.

Improvements to Computer Systems

Respondents were asked about changes they would like to see their organizations make in computer systems. The majority of organizations continue to identify desired changes to computer systems. The options are minor or major changes to their hardware, software and training and utilization. Needs were felt virtually identically across the three areas.

The proportion of organizations choosing the option "No changes are necessary; everything is under control" increased to its highest point in 2004. Still, only 19% elected this option. With the exception of a handful of organizations



with more than 50 employees, the organizations that were content tended to be quite small. Median staff size was 3, and median budget was \$552,700.

The evidence continues that needs for improvements are correlated with organization size. A range of scale produces different barriers to better technology use in different places. Larger organizations feel that they need minor hardware improvements and major training

Improvements by Organization Size			
Improvement Area	Degree	Budget Size	Staff Size (FTEs)
		Median	Median
Hardware	Minor	\$ 475,000	7.0
	Major	\$1,000,000	10.0
Software	Minor	\$ 985,500	10.1
	Major	\$1,000,000	10.5
Training	Minor	\$ 602,000	9.5
	Major	\$1,078,494	15.5

improvements. Smaller organizations feel the reverse: major hardware needs and minor training improvements. Software improvements show no discernible organization profile. At any given scale, its possible to have adequate software for a nonprofit's needs or to have outgrown the software in place.

Biggest Challenge

The survey includes open-ended questions, including "Our biggest challenge with technology is...". While it is difficult to quantify the responses to such questions, an evolution can be sensed in comparing this year's questions to previous years. The knee-jerk response that having the money to maintain technology resources shares more attention in the current survey with other issues including staff technology training and adoption, staying current with ever-evolving tools and having appropriate and adequate database software.

Technology Dreams

The survey asks about the respondent's technology dream or next big step. A large number of responses focus on the infrastructure of technology – specific desires for new PCs or local and wide-area networking. Other large categories of responses include introducing or improving databases, integrating technology into program (through a lab, for example) and enhanced use of the web, including interactive and e-commerce capabilities.

Appendices

Appendix A: Survey Instrument

Organizational Technology Self Assessment

Thank you for participating in this survey. The Bayer Center for Nonprofit Management is updating benchmarks around different combinations of agency type, size and other factors. We may also wish to contact you to follow up on questions or to let you know about products and services that address problems you've noted in your responses. **(Please return completed form by July 9, 2004)**

718 FIFTH AVENUE, 4TH FLOOR • PITTSBURGH, PA 15219-3009 • 412-227-6814 FAX: 412-227-4097 • WWW.RMU.EDU/BCNM

Organization Name _____ Date _____

Completed by _____ Title _____

Address _____

Web Site URL: _____ E-mail: _____

Phone: () _____ Fax: () _____

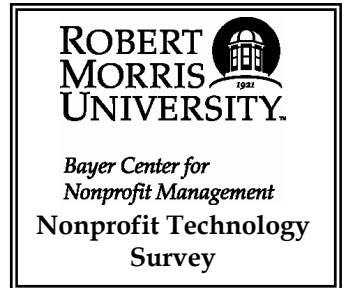
Part A: About your organization: Please complete this section to the best of your knowledge. For questions 1 through 4, your answers should be consistent with your agency's IRS Form 990 filing.

- 1) Our overall agency operating budget is \$ _____ for the fiscal year ending (month/year) ____/____.
- 2) Our technology budget is \$ _____ or We don't track technology expenses separately.
- 3) Number of Full-time Equivalent (FTE) employees (FTE = total hours worked by all staff/40) _____.
- 4) Organization can best be classified as: (Check all that apply. These categories are taken from the National Taxonomy of Exempt Entities (NTEE). Additional information is at <http://nccs.urban.org/ntee-cc/index.htm>)

<input type="checkbox"/> Arts, Culture, and Humanities	<input type="checkbox"/> International, Foreign Affairs
<input type="checkbox"/> Education	<input type="checkbox"/> Mutual/Membership Benefit
<input type="checkbox"/> Environment and Animals	<input type="checkbox"/> Public, Societal Benefit
<input type="checkbox"/> Health	<input type="checkbox"/> Religion Related
<input type="checkbox"/> Human Services	<input type="checkbox"/> Unknown, Unclassified
- 5) Our founding year/ 501(c)(3) ruling year is _____.
- 6) Organizational innovation: Compared with others in our field, our organization tends to be: (check all that apply)

<input type="checkbox"/> First to initiate new services	<input type="checkbox"/> First to develop new ways to incorporate technology into operations
<input type="checkbox"/> First to identify new client populations	<input type="checkbox"/> At the leading edge of technological innovation
- 7) We have a written technology plan that is integrated into the overall strategic plan and mission of the organization. (check only one)
 - We have a strategic plan that addresses technology
 - We have a strategic plan, but it doesn't address technology
 - We have a technology plan independent of our strategic plan
 - We have neither a strategic plan nor a technology plan
 - Don't know/not sure
- 8) Internally, technology management in our organization is the responsibility of: (Identify the primary source of internal technology decision making; who decides what gets purchased and what gets thrown away? Check all that apply)

<input type="checkbox"/> Don't know/not sure	<input type="checkbox"/> A designated staff person with part-time technology responsibilities
<input type="checkbox"/> MIS Dept with two or more employees	<input type="checkbox"/> Unofficial staff interested in technology
<input type="checkbox"/> Finance Department	<input type="checkbox"/> Executive Director
<input type="checkbox"/> A staff person with full-time technology responsibilities	<input type="checkbox"/> Other _____
- 9) We wish to make the following changes in our computer systems: (check all that apply)
 - No changes are necessary; everything is under control.



	Hardware	Software	Training and Utilization
Minor improvement in:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Major improvement in:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 10) For what percentage of staff positions are required technology skills listed in job descriptions and included in employee evaluations. (Count positions if the required technology skills are a written part of their job description, and their supervisor regularly evaluates those skills.)
- None 1-33% 34-66% 67-100%
- 11) My organization would be interested in learning more about: (Please indicate the products and services you believe are important to your organization in the future.)
- Creating an overall technology plan and budget Technical support providers/resources
 Creating a communications/marketing plan addressing issues and opportunities of the Internet Creating a networked office
 Purchasing hardware Accessing the Internet
 Purchasing specific software packages Creating a disaster recovery plan for our Information Technology in case of fire, flood, theft or virus attack
 Staff training for specific applications Group purchasing with other nonprofits to leverage costs
- 12) Do you have a technology evaluation and planning committee? (Choose the first Yes option if your agency has a technology committee AND at least one board member participates in any capacity.)
- Yes, and at least one board member participates Yes, but no board member participates No Don't know
- 13) Technology has substantially changed how we operate: (Check only one box where 1 = strongly disagree and 6 = strongly agree.)
- Strongly Disagree 1 2 3 4 5 6 Strongly Agree
- 14) Our biggest challenge with technology is: (Describe the issues and challenges facing your organization's use of technology.)
- _____
- _____
- 15) What is your organization's technology dream or next big step?
- _____
- _____

Part B: Technology Inventory and Resources: If you feel that you have a good understanding of how technology is used in your organization, please complete this section. If you are unsure, please place a check mark in question #1 and return the survey.

- 1) I am not comfortable answering these questions and am returning the survey at this time.
- 2) Last year, what percentage of staff received some formal technology training as part of their job? (Training can be classroom or computer based, but there needs to be a curriculum. Check only one.)
- None 1-33% 34-66% 67-100%
- 3) What percentage of staff use the Internet (Web and e-mail) as part of their jobs? (What percentage of staff both require and use Internet access as part of their work for the agency? Check only one.)
- None 1-33% 34-66% 67-100%
- 4) We use the following types, ages and quantities of computer(s): (Indicate the number of machines in use in any administrative or program delivery capacity – including client-oriented computer lab. Age should indicate date of manufacture, not date received.)
- | Type of Computer | Desktops | Laptops | 5a) What percentage of your computers were donated to your organization? _____ |
|------------------------------|----------|---------|--|
| Macintosh | _____ | _____ | |
| PC: older than 5 years | _____ | _____ | |
| PC: 3-5 years old | _____ | _____ | |
| PC: 1-3 years old | _____ | _____ | |
| PC: under 1 year old | _____ | _____ | |
| Other (please specify) _____ | _____ | _____ | |
- 5) What percentage of your computers use the following operating system(s):
- _____ % Windows 98 or older _____ % Windows 2000 _____ % Windows ME
_____ % Windows XP _____ % Mac OS _____ % Other (specify) _____
- 6) Do you provide remote access for truly mobile staff members? (Those who work the majority of their time in the field, not in a satellite office.)
- Laptop PDA Cell Phone
 Citrix Data Access through ASP Pager
 Terminal Services PCAnywhere Other (specify) _____

7) What type of Internet connection does your organization have?

<input type="checkbox"/> We don't have an Internet connection at this time.	# of computers with always-on access	# without always-on access	Speed
We have one, but I'm not sure what it is.	_____	_____	_____
Dial-up modem on individual machine(s)	_____	_____	_____
Shared modem (multiple staff share modem from their desks)	_____	_____	_____
Fixed wireless	_____	_____	_____
Broadband (ISDN, DSL, Cable, T1, etc.)	_____	_____	_____
Do you have a firewall? _____	If yes, what kind of firewall? <input type="checkbox"/> Hardware <input type="checkbox"/> Software		

8) We provide internal email addresses to staff. (Check Yes if staff have addresses with a standardized domain name (e.g. userid@orgname.org))
 Yes No Don't Know/Not Sure

9) We use the following Local Area Network (LAN) Network Operating System(s): (How are computers connected for file and print sharing? If more than one fixed site, indicate number of sites that use the particular NOS)

- | | |
|---|---|
| <input type="checkbox"/> None | <input type="checkbox"/> We have a LAN, but I'm not sure what kind it is. |
| <input type="checkbox"/> Novell Netware | <input type="checkbox"/> Windows peer-to-peer |
| <input type="checkbox"/> Windows NT | <input type="checkbox"/> Windows 2000 |
| <input type="checkbox"/> Windows 2003 | <input type="checkbox"/> Macintosh |
| <input type="checkbox"/> Linux | <input type="checkbox"/> Other _____ |

10) What hardware does your organization use? (Check all that apply)

- Telephone system with voice mail (Check if your organization uses voice mail)
- Telephone call management/automation (Call center, automated attendant, or other advanced telephone system features.)
- Fax machine (At least one stand-alone fax machine – combination printer/fax machines qualify.)
- Scanner (Any scanner for Optical Character Recognition (OCR) or imaging.)
- CD ROM burner (Can you make your own CDs anywhere in the agency?)
- Single bin laser printer (Any laser printer that uses only one tray at a time.)
- Multi bin laser printer – including envelope feeders (Users can specify one of several available paper trays for their print jobs.)
- Ink jet or other color printers (Any ink jet or bubble jet type printer)
- Specialty printers (Any ticket printing, label or other printers built for a specific task.)
- Networked copier (Copier that allows printing capability from users desk)
- LCD projector (Any projectors for computer or video)
- Digital camera (Any still or motion picture camera producing electronic images)
- Jazz/Zip drives (Any removable high-density storage)
- Tape backup (The ability to back up data from one or more computers to tape)
- DVD (Digital Video Disk burner or player)
- Other (please specify) _____

11) We use the following communication channels to maintain contact with key constituent groups (organization members, donors, clients, board, staff, advocates, etc.). (Please check one and only one box to indicate your level of use for outgoing communications. If your organization does not use a given channel, please check N/A.)

	Frequently	Regularly	Rarely	N/A		Frequently	Regularly	Rarely	N/A
Print	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Phone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fax	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	E-mail	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Voice Mail	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Web page	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Broadcast Fax (one fax to many people)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Interactive or e-commerce oriented web page	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ICQ, Chat, IM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Video Conferencing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conference Calls	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Text Messaging	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12) What basic productivity software packages are in regular use? (Check all that apply – if you have standardized on a package, check only one.)

- Microsoft Office (Word, Excel, etc.) version: _____
- Corel Office (WordPerfect, Quattro, etc.) version: _____
- Lotus Office (WordPro/AmiPro, 123, etc) version: _____
- Open Source package (Star Office, Open Office) _____

For the next three questions, indicate how your organization handles accounting (13) database management (14) and technology management (15) issues. If you don't do a task, place an "X" in N/A; Xs are appropriate for manual (paper and pencil) and spreadsheet solutions. Please indicate the software or vendor for Software and Outsourced solutions.

13) How does your organization manage the following **accounting** tasks? (See instructions above. Common software packages include Great Plains, QuickBooks, Peachtree and others.)

Accounting Tasks	Tools					
	N/A	Manually	Spreadsheet	Accounting Software (specify)	Outsourced (specify)	Other (specify)
General Ledger	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____	_____
Accounts Receivable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____	_____
Accounts Payable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____	_____
Payroll	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____	_____
Budgeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____	_____
Cash flow	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____	_____
Inventory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____	_____

14) How does your organization manage the following **database/list management** tasks? Common software packages include Donor Perfect, GiftMaker Pro, ResultsPlus, MSAccess, and others. The task QA/RU refers to Quality Assurance/Resource Utilization; Contract Performance refers to any performance-based or other contractual reporting tasks.)

List Management Tasks	Tools					
	N/A	Manually	Spreadsheet	Database Software (specify)	Outsourced (specify)	Other (specify)
Client Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____	_____
Fundraising	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____	_____
Volunteers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____	_____
Ticketing/point of sale	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____	_____
QA/RU accreditation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____	_____
Contract Performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____	_____
Other _____ (specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____	_____

15) How does your organization handle the following **technology management** tasks?

Tech Management Tasks	Tools					
	N/A	Manually	Software (specify)	Outsourced (specify)	Frequency	
Data Backup	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____	_____	
Antivirus	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____	_____	
User Account Management (network/workstation)	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____	_____	
Network Auditing/Logging	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____	_____	

16) We use the following resource(s) for technology training: (Where does staff go for training on the technology they use in their jobs?)

- We don't have a formal training plan; people learn on their own.
- Peer support
- Commercial classroom-based providers (specify: _____)
- Internet-based or distance learning training providers (specify: _____)
- Computer Based Training (CBT) or video (specify: _____)
- Books, periodicals, self-paced learning (specify: _____)

17) What Technical Support Providers do you use? (What's the go-to solution for any problems with technology?)

- We have no formal approach to support; staff do the best they can.
- We contract for technical support on an as-needed basis.
- Technical support contracts with one or more providers (specify: _____)
- In-house MIS staff
- Volunteers to our agency
- Friends and family of staff

Please return completed survey by July 9 in the enclosed postage-paid envelope or via fax to 412-227-4097.

Thank you for your assistance.

Appendix B: Respondent Organizations

Organizations in **bold print** responded in 2000, 2002 and 2004. Organizations in *italics* responded in 2000 or 2002 and 2004

3 Rivers Connect

A Second Chance, Inc.

Achieva

Addison Behavioral Care, Inc.

Affordable Comfort, Inc.

Alcoa Foundation

All of Us Care

Allegheny Intermediate Unit

Allegheny Valley Association of Churches

Allegheny Valley School

Alle-Kiski Area HOPE Center, Inc.

Anonymous

APEX Consortium

Armstrong Educational Trust

ASSET, Inc.

Auberle

Beaver County Foundation

Beaver County Historical Research & Land

Marks Foundation

Bethlehem Haven

Better Business Bureau

Beulah Land, Inc.

Big Brothers Big Sisters Of Butler County

Big Brothers, Big Sisters Of Beaver County

Bloomfield-Garfield Corporation

Borough Of New Stanton

Boys & Girls Club of Western Pennsylvania

Breezewood Child Care Task Force

Building New Hope

Building Owners & Managers Assn

Butler Arts Council

Butler County Community College

Butler County Federated Library System

Butler County Symphony Assoc.

Calliope: The Pgh. Folk Music Society

Carnegie Library of Pittsburgh

Carnegie Science Center

Center For Independent Living Of SC PA

Center for Nonprofit Excellence

Center for Spirituality

Center for Victims of Violence and Crime

Charleroi Area School District

City of Duquesne

Clearfield County Area Agency On Aging

Clearwater Conservancy

Communities in Schools

Communities in Schools

Community Development Corporation of
Butler County

Community Foundation of Westmoreland
County

Community Human Services Corporation

Community LIFE

Community Resources for the Youth of
Washington County

Contact Beaver Valley

Cool Space Locator

Coro Center for Civic Leadership

Cranberry Township

Crisis Center North

DeBence Antique Music World

Dollar Energy Fund, Inc.

Domestic Abuse Counseling Center

Dorothy Day Apartments

Early Learning Institute

East Allegheny Community Council

East End Cooperative Ministry

East Liberty Presbyterian Church

Eastminster Presbyterian Church

Eastside Neighborhood Employment Center

Elder-Ado, Inc.

Ellwood City Area Chamber Of Commerce

Emmanuel Christian Church

Erie County Health Department

Every Child, Inc.

Executive Service Corps of Western PA

Faith Christian School

Faith In Action Caregivers

Findlay Township

FISA Foundation

Flying Mammal Wildlife Rehabilitation Center

Forest Hills Borough

Friendship Development Association

Friendship Ridge

Gabriel Project

Garfield Jubilee Association, Inc.

Gateway to the Arts

Generations Together

George Junior Republic

Girl Scouts - Trillium Council

Girl Scouts of Beaver and Lawrence County

Girls Hope of Pittsburgh, Inc.

Glenshaw Public Library

Good Grief Center

Grace Youth And Family Foundation Inc.
Greater Pittsburgh Arts Alliance
 Greater Pittsburgh Community Food Bank
Greater Pittsburgh Convention & Visitors Bureau
Greater Pittsburgh Literacy Council
 Group Against Smog and Pollution
Habitat for Humanity of Beaver County
Harmonie Associates, Inc.
 Hill House Association
Holy Family Child Care Center
 Holy Family Institute
Hope Network
Human Services Center Corporation
 Indiana Free Library
Innovation Works, Inc.
Institute for Entrepreneurial Excellence
Intestinal Disease Foundation
Jefferson/Clarion Head Start
Jewish Association on Aging
Jewish Family & Children's Service of Pittsburgh
 Job Training For Beaver Co., Inc.
 Just Harvest
Latin American Cultural Union
 Lauri Ann West Memorial Library
Lawrence County Tourist Promotion Agency
 Lawrenceville Corporation
Leadership Pittsburgh, Inc.
 League of Women Voters of Greater Pittsburgh
 Life's Work of Western PA
Lifespan, Inc.
Ligonier Valley YMCA
 Little Sisters Of The Poor
 Manchester Citizens Corporation
Mars Home for Youth
Marshall County Schools
Ma's Pantry Food Bank
 McCune Foundation
 Mental Health Association in Westmoreland County
 Mental Health Association of Washington County, Inc.
Mental Health Association of Allegheny County
Mental Health Association of Butler
Mentoring Partnership of Southwestern PA
Meridian Area United Presbyterian Church
Meridian U.P. Church Day Care
Miryam's
Mon Valley Initiative

Monessen Business Development Center
 Montour Run Watershed Association
 Monumental Mission Ministry
Mt. Ararat Community Activity Center
Mt. Lebanon Montessori School, Inc.
 Mt. Lebanon United Presbyterian Church
 Multiple Sclerosis Service Society
 National Flag Foundation
 National Slovak Society
 Nazareth Housing Services
 NEED
Neighbors In The Strip
 Nine Mile Run Watershed Assoc.
North Hills Community Outreach
 North Side Coalition for Fair Housing
 North Side Saints
Northside Common Ministries, Inc.
 NPO InfoTech Services Inc.
 Obsessive Compulsive Foundation of Western Pennsylvania
 Onala Club, Inc.
 P.O.W.E.R.
 PA Biodiversity Partnership
PA Cleanways
 PA Cleanways of Beaver County
PA Cleanways Westmoreland County
 PA Legal Services
Pace School
 Partners in Progress
 Paul Laurence Dunbar Community Center
 Penn Hills Football Boosters
Pennsylvania Environmental Council
Pennsylvania West Soccer Association
Peoples Library
Peoples Oakland
Pittsburgh Action Against Rape
Pittsburgh AIDS Task Force
Pittsburgh Ballet Theatre
 Pittsburgh Ceili Club
Pittsburgh Children's Museum
 Pittsburgh Community Services, Inc.
 Pittsburgh Film Office
Pittsburgh Foundation
 Pittsburgh International Children's Theater
Pittsburgh Mediation Center
Pittsburgh Musical Theater
Pittsburgh Police American Legion Post 710
Pittsburgh Region Clean Cities, Inc.
 Plum Senior Community Center
Point Park University
 POISE Foundation
 Presbyterian Senior Care

Pressley Ridge

Propel Schools

Radio Information Service

Rainbow Kitchen Community Services

Reading is Fundamental Pittsburgh

Rivers of Steel National Heritage Area

Rx Council Of Western Pennsylvania

Samaritan Counseling Center

Sarah Heinz House

Schenley Heights Community Development

Seton-La Salle High School

Sewickley Borough

Shaler Area EMS

Sharon Lifelong Learning Council

Sickle Cell Society

Sisters of St Francis of Millvale

Sisters Place, Inc.

SMC Business Councils

Society of St. Vincent de Paul

Sojourner House

Southern Alleghenies Conservancy

Southwestern PA Human Services, Inc.

Specialty Outreach Services, Inc.

Staunton Farm Foundation

Steel Valley Authority

Stepping Stones Children's Center

Sustainable Pittsburgh

The Allegheny Regional Asset District

The Buhl Foundation

The Emmaus Community of Pittsburgh, Inc.

The Lighthouse Foundation

The Pittsburgh Experiment

The Pittsburgh Project

The Wagner Family Charities

The Wellness Alliance

Three Rivers Adoption Council

Three Rivers Community Foundation

Three Rivers Youth

Touchtone Center for Crafts

Transitional Employment Consultants

Transitional Services, Inc.

Traveler's Aid Society of Pittsburgh

Tuesday Musical Club

United Cerebral Palsy of Pittsburgh

United Cerebral Palsy of Western PA, Inc.

United Way of Allegheny County

United Way of Armstrong County

United Way of Butler County

United Way of Westmoreland County

University of Pittsburgh - Office of Child Development

Urban League of Pittsburgh

Urban Youth Action, Inc.

Valley Players of Ligonier, Inc.

Volunteer Pilot's Association

Ward Youth and Family Services

Washington County Health Partners

West Penn Hospital Foundation

Western Pennsylvania Conservancy

Westmoreland County Federated Library System

Westmoreland Human Opportunities, Inc.

Westmoreland Museum of American Art

Windwalker Farm

Wireless Neighborhoods

With A Golden Spirit

Women's Center and Shelter of Greater Pittsburgh

Women's Center Of Beaver County

Woolslair Elementary Gifted Center

YMCA University Chapter

Young Life

YWCA of Westmoreland County

Appendix C: Bayer Center Advisory Board, Tech Advisory Group, Staff

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