

*Bayer Center for
Nonprofit Management*

Southwestern Pennsylvania
Nonprofit Technology Survey
2006

Presented at



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Introduction

When the Bayer Center for Nonprofit Management set out to survey the use of technology in nonprofits in our region in 2000, there was no plan to repeat the analysis. We found such a ready audience, however, among the organizations we seek to serve and among our peers around the country, that we have surveyed organizations biannually since then. The data collected in the summer of 2006 is our fourth and largest data set. This report is based on 285 nonprofits that represent a broad cross section of the sector in the region around Pittsburgh, PA.

Comparing trends via biannual snapshots over a six-year period has shown the uneven progress of technology use by a sample of nonprofits. That trend analysis moved to a higher academic plane earlier this year with the publication of an article entitled “Indicators of Information and Communication Technology Adoption in the Nonprofit Sector: Changes between 2000 and 2004” in the Spring 2006 issue of the Case Western’s journal *Nonprofit Management & Leadership*. Using Jeff Forster’s data set and baseline analysis, Robert Morris faculty Seth Finn and Jill Maher performed statistical tests that go beyond the descriptive data contained in this report. We are especially pleased because a collaboration between the Bayer Center and RMU faculty leveraged the data set for both a practitioner audience and an academic one.

What do we conclude six years into examining these trends? The survey data indicate that the technology infrastructure available to most nonprofits has improved significantly overall. That said, the report points out several places in which the curve is not inexorably upward. In addition, there is a difference between having the infrastructure and being able to make good use of it. At the intersection of technology, information and good decision-making, there are still some low-hanging fruit and some persistent, complex challenges. We believe there is room for improvement in technology’s impact on nonprofit mission and management.

In an attempt to keep up with the pace of technology change, we have altered the survey instrument slightly each year, while keeping a core set of questions. This year’s new questions focus on whether nonprofits include tech costs in their foundation proposals and contracts to deliver services. The complete survey instrument is an appendix to the report. You may find it helpful to review the survey instrument and the response options before reading the analysis. The Bayer Center welcomes the use of the survey instrument in other regions for the sake of comparison.

The Bayer Center’s Technology Initiative is grateful for the consistent and generous support of the Heinz Endowments and the Buhl Foundation. We thank our peer organizations that have promoted the survey to their member organizations, particularly the Community Technical Assistance Center and the United Way of Allegheny County. 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 25 “charter survey” organizations that have responded every year and the 164 organizations that have responded more than once.

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 describe the types of organizations that responded to the survey, including characteristics of organization type, geographic location, budget size, and staff size. Although no sample is perfect, we feel confident in our results due to the scale and diversity of the respondent pool.

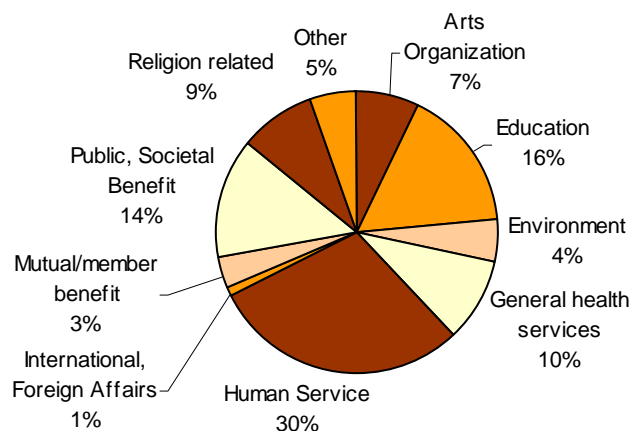
Repeat Status	Orgs	%
Charter Member ('00, '02, '04, '06)	25	9%
Three Years	70	25%
Two Years	94	33%
New in 2006	96	34%

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 (51%) or two (32%) categories. Several organizations chose more than that, including one that chose eight.

More than half of all survey respondents fall into three categories: Human Service, Education, and Public/Societal Benefit. Public/Societal Benefit – the least intuitive name among these three categories – includes advocacy, community development and philanthropy. The smallest categories include Environmental, Mutual Benefit, and International and Foreign Affairs.

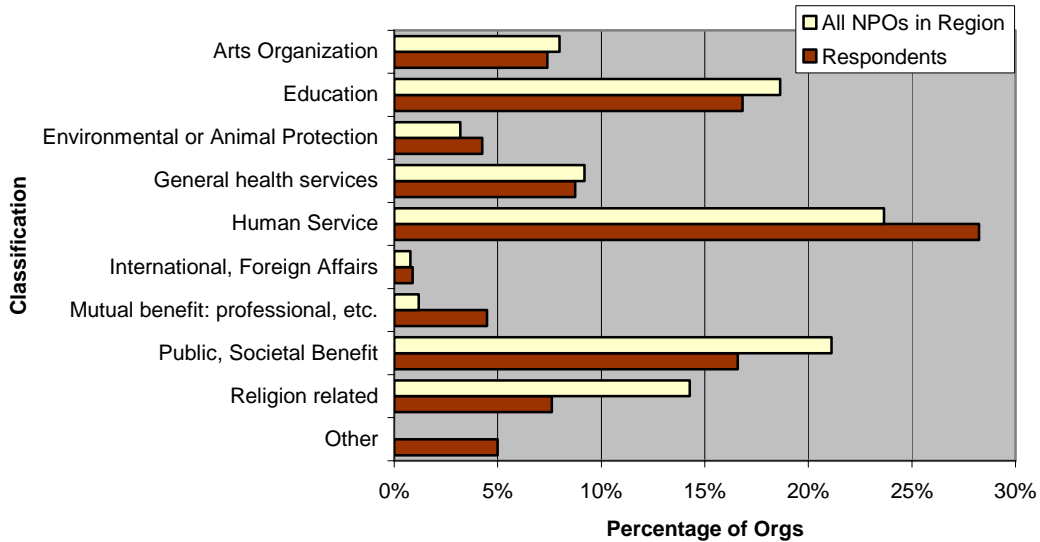
Respondents by Organization Type



The breakdown of survey respondents aligns in most categories with the regional pool of nonprofit organizations. Slight discrepancies include the over-representation of Human Service (28% vs. 24%) and Mutual Benefit organizations (4% vs. 1%) and the under-representation of

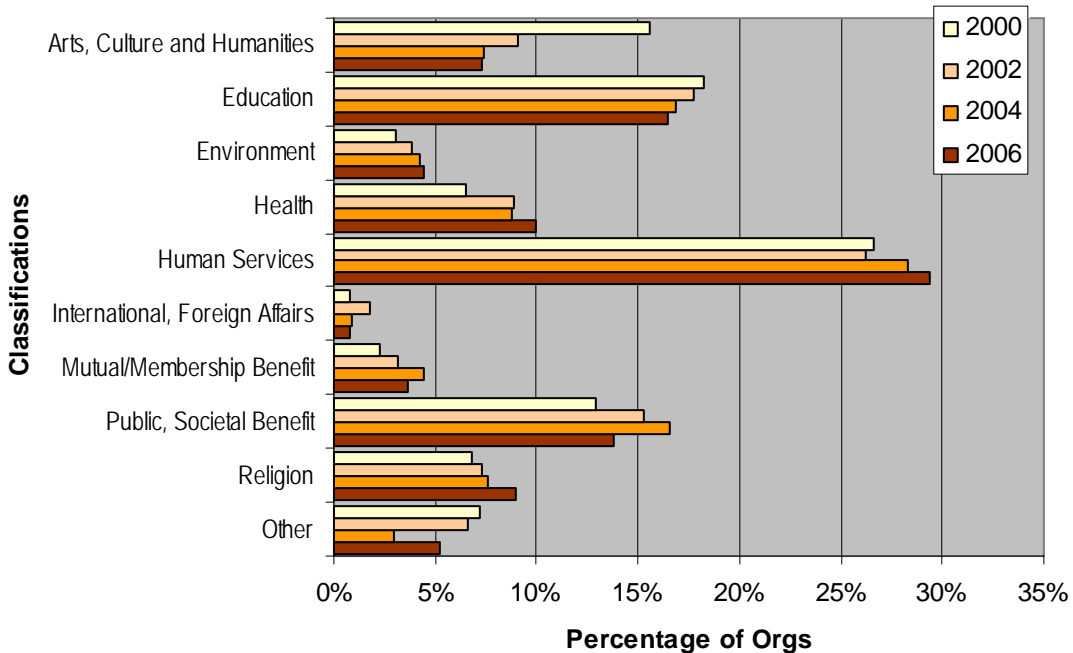
Religion-Related organizations (8% vs. 14%).

Survey Respondents vs. Regional Organizations



The 2006 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 subsequent years.

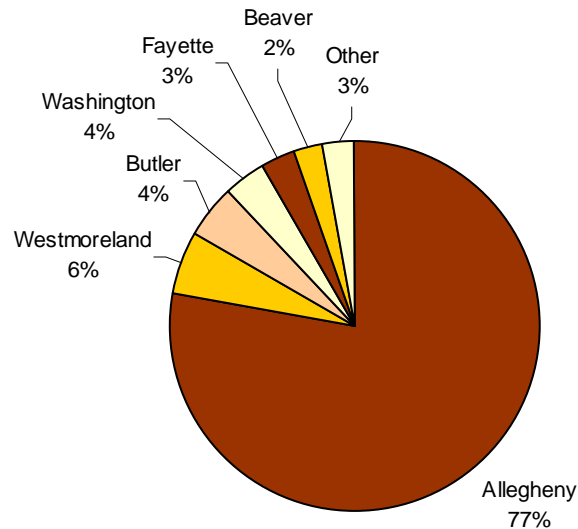
Survey Repondents by Type: Biannual Comparison



Geography

The vast majority of responding organizations in 2006 (77%) are located in Allegheny County, which places this survey between the 85% Allegheny County tilt of 2000 and the 69% of 2002 and 2004. Of the remaining organizations, 19% 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.

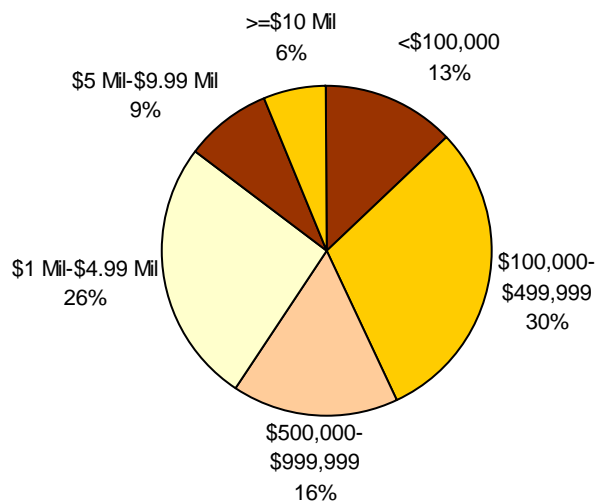
Respondents by County



Budget Size

Like nonprofits nationally, the organizations in the respondent pool tend to be small. Nearly 60% of the organizations have annual budgets of less than \$1 million, and 85% 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 \$3000 and no staff, to a multi-faceted human service agency with a \$90 million budget.

Survey Respondents by Budget Size



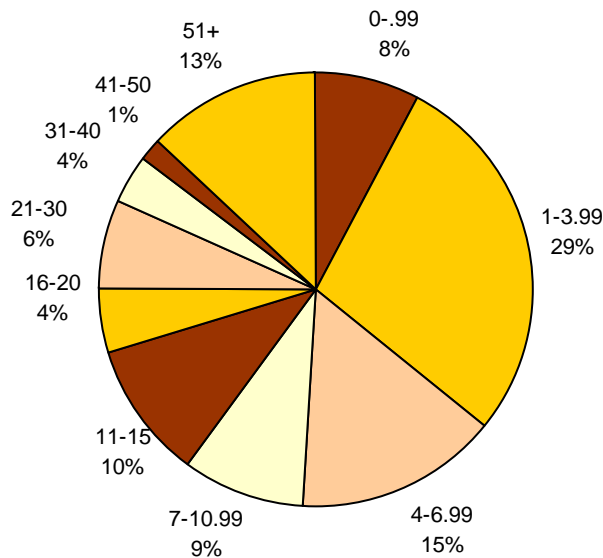
Each survey after 2000 has had a similar budget profile; over 50% of the organizations in the original survey had budgets below \$5 million. This year's median range is very close to the prior two surveys. Compared to 2004, the distribution of budgets is slightly lower at each end of the bell curve (<\$100K and >\$10M) and slightly higher in each of the other brackets.

Year	Median Budget
2000	\$500,000
2002	700,000
2004	645,000
2006	700,000

Staff Size

While the constrained budgets of nonprofit organizations are much discussed, perhaps more relevant to good use of technology is that so many of them have such small staffs. Over 50% of respondents employ 7 or fewer full time equivalent (FTE) employees. An additional 19% 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 2500 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 had fewer tiny organizations and the most truly large organizations of any year. These staff sizes are indicative of nonprofits across the country; the civil sector is an industry made up of very small units.

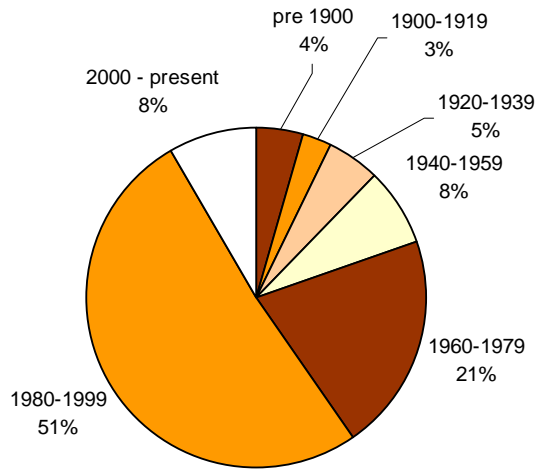
Year	Median Staff Size
2000	6
2002	10
2004	7
2006	6.5

Age of Organization

One factor that can influence the use of technology is how old an organization is. Presumably, the younger an organization is, the more of its existence has coincided with using computers as a tool to improve business practices. Again in 2006, the vast majority of organizations have been founded since 1960. Specifically, over half the organizations were founded in 1980-1999. The median age of organizations is 22 years. The period from the 1950s to the present has seen

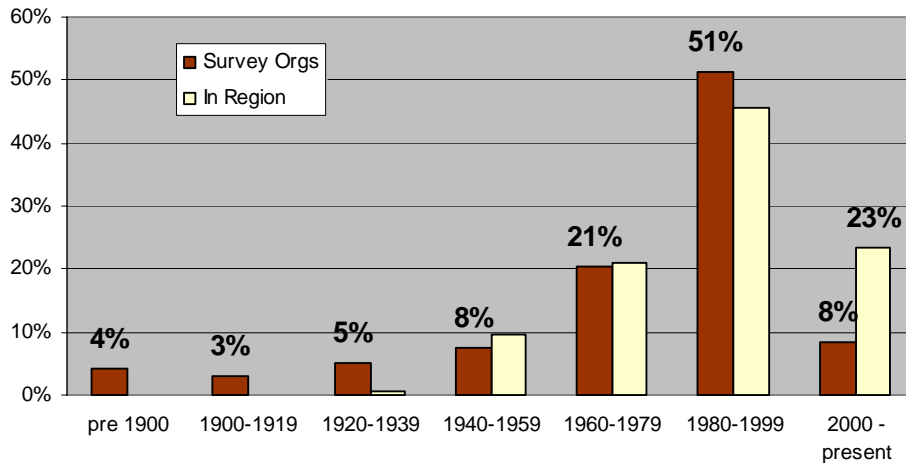
tremendous expansion in the ranks of nonprofits in this country, from around 30,000 organizations to 1½ million.

Respondents by Founding Year



The breakdown of survey organizations by age mirrors the general pool of nonprofits in the region very closely. The comparison data is based on the 501(c)(3) ruling year of organizations, which may be more recent than the widely accepted founding date of the organization. This discrepancy between any given organization’s founding and ruling date partially explains the paucity of pre-1940 organizations in the regional comparison data set.

Survey Orgs Founding Year vs. Region



¹ From the National Center for Charitable Statistics Business Master File from May 2006. The Business Master File contains all organizations all active organizations registered with the IRS. The region is defined as the following 10 counties: Allegheny, Armstrong, Beaver, Butler, Fayette, Greene, Indiana, Lawrence, Washington, and Westmoreland.

The respondent profile is worthy of this level of detail in order to demonstrate that the snapshots produced by each survey derive from the attributes of similar organizations. More detailed respondent profile data is available upon request. A complete list of this year's respondents appears as an appendix to this report. The remainder of the report gets far more interesting: a focus on how nonprofits are currently using technology in our region and comparisons that show us a mix of progress, stasis and regress.

Technology Policy

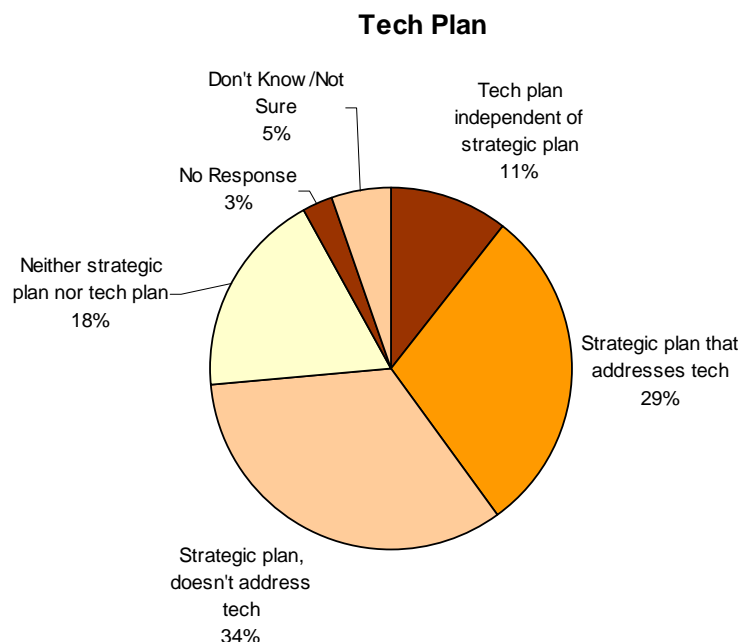
The Bayer Center has developed a mantra regarding nonprofits and technology: good management = good technology. That is, we do not expect to find strong and innovative uses of technology in organizations that are otherwise poorly managed. Unfortunately, it is not true that all organizations that are managed well overall also use technology to advantage. It is only those organizations, however, that can sustain broad, deep IT success. We examine first, therefore, nonprofits' policies and practices around tech planning, support and spending.

Technology Planning

In the nonprofit environment with tight budgets that depend primarily on fundraising, minimizing mistakes with IT tools is paramount. Planning for which tools to acquire and how to maintain and use them can decrease such mistakes. The exercise of developing a tech plan – or even a specific IT project plan – can pay other dividends as well. First, the planning team can help to carry out the implementation and ensure that the utilization of new equipment or software is maximized. Second, nonprofits produce much more compelling cases for foundation support when they have worked through a structured process to plan how a new solution will improve performance.

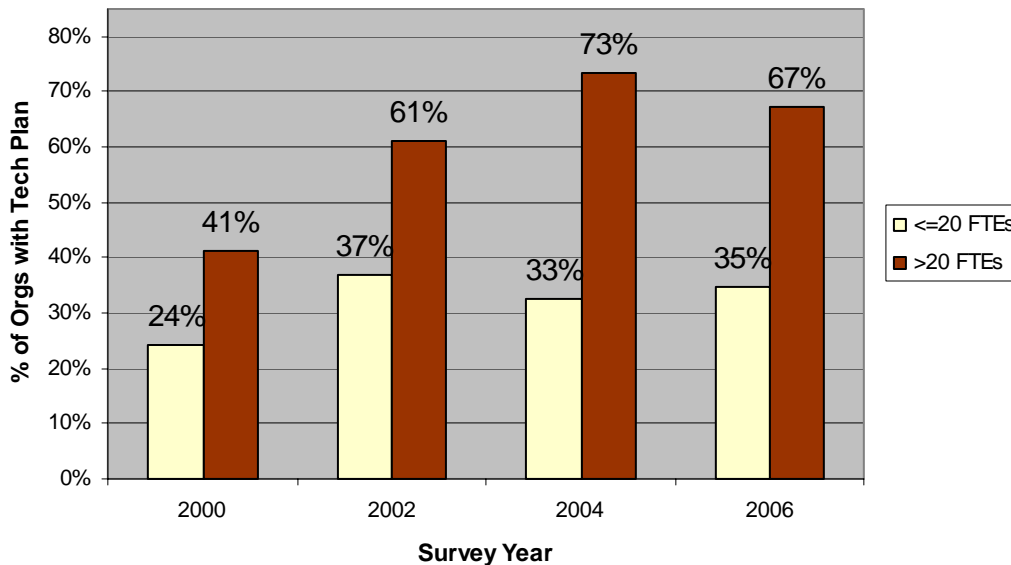
If good management begets good technology, then the best technology planning grows from a basis of broader strategic planning. In fact, without a firm grasp on the organization's strategic direction, there is little chance of developing a relevant technology plan.

After the technology planning rate jumped from 28% in 2000 to the low 40s in 2002 (43%) and 2004 (42%), the proportion dipped to 39% in 2006. The decrease is nominal, but any decrease halts what had looked like steady progress. The majority of organizations that have tech plans have included IT in broader planning processes, which we view as optimal.



The evidence grew steadily from the 2000 to 2004 surveys that larger organizations are more likely to plan for technology. In 2006, the curve reverses slightly, but the differential is still sizable. Among organizations with more than 20 employees, 67% have a technology plan. Organizations with a tech plan have a higher median staff size (12 vs. 4) and average staff size (54 vs. 29) than those with no tech plan.

Tech Plan by FTE Size



Technology Management

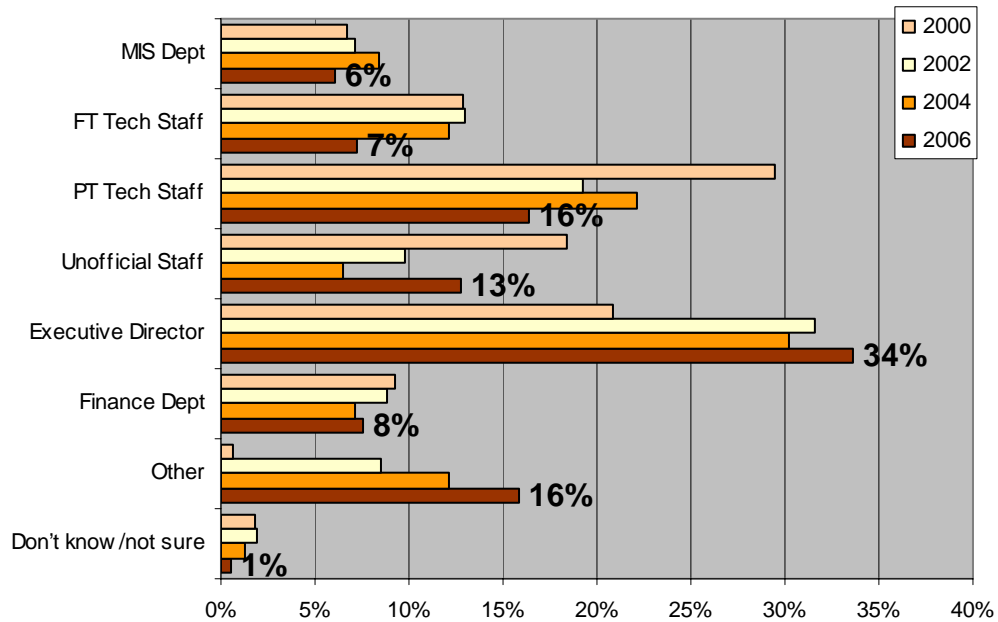
Although we often slip into talking about “techies” and “non-techies”, there are actually a variety of roles and responsibilities in the techie realm. One important task is to authorize the “buy or pitch” choices. Respondents were asked to identify from among the options in the graph “the primary source of technology decision-making; who decides what gets purchased and what gets thrown away?”

In 2006, tech staff are losing ground in decision-making to groups with less official responsibility. The survey differentiates between dedicated staff tech positions (MIS department, full-time tech staff, part-time tech staff) and the classic “accidental techie”, the employee who has a “real job” but also coordinates the IT function by virtue of skill or personal interest. Two other groups crop up in the “Other” responses to this question. When we examined the responses from outside the pick-list, we found the largest growth among board members/volunteers and outside consultants.

The increased decision-making by volunteers and consultants is offset by decreases in decision-making by IT staff. Although sampling variability could easily explain the drop in MIS Departments to 6%, the drops in Full-time Tech Staff (to 7%) and Part-time Tech Staff (to 16%) are more significant. All three of these numbers are low points in the six years of survey data.

The majority (62%) of respondents with an MIS department have more than 50 employees. In 34% of organizations, executive directors make the “buy or pitch” decisions. Although one might assume that only small organization chief executives make these choices, some executive directors of organizations with hundreds of employees and several-million-dollar budgets are still making technology decisions.

Technology Management



2

Technology Support

Another key area of “techie” responsibility is support. Once an IT solution is acquired, it needs to be maintained, troubleshot, repaired and upgraded. These duties are typically divided between the support tasks that are routine enough to be done by staff and those that require outside assistance. Many organizations, 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.

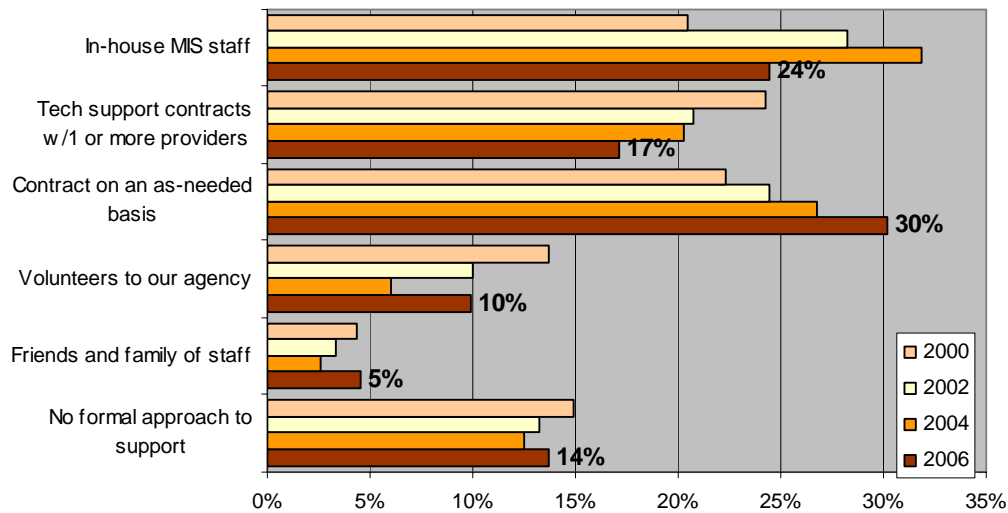
The survey responses about who provides support to the agency show a similar pattern to tech decision-making. Support is being moved away from staff and toward people “outside” nonprofits. The graph below shows the breakdown of primary providers of support³ over the last six years. Support by MIS staff has rebounded to a pre-2002 24% rate while the use of volunteers and friends and family has spiked back up. When an agency’s friends and volunteers support its technology, they are often generous with their time and well-intentioned. Dependence on these sources, though, tends to orphan nonprofits when those donating their time and talent get busy or move on. Outsourced support has held steady overall, although there are more as-needed arrangements and fewer ongoing relationships. Is this good news or

² Other responses includes Board/Volunteer (6%) and Outsourced (5%)

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.

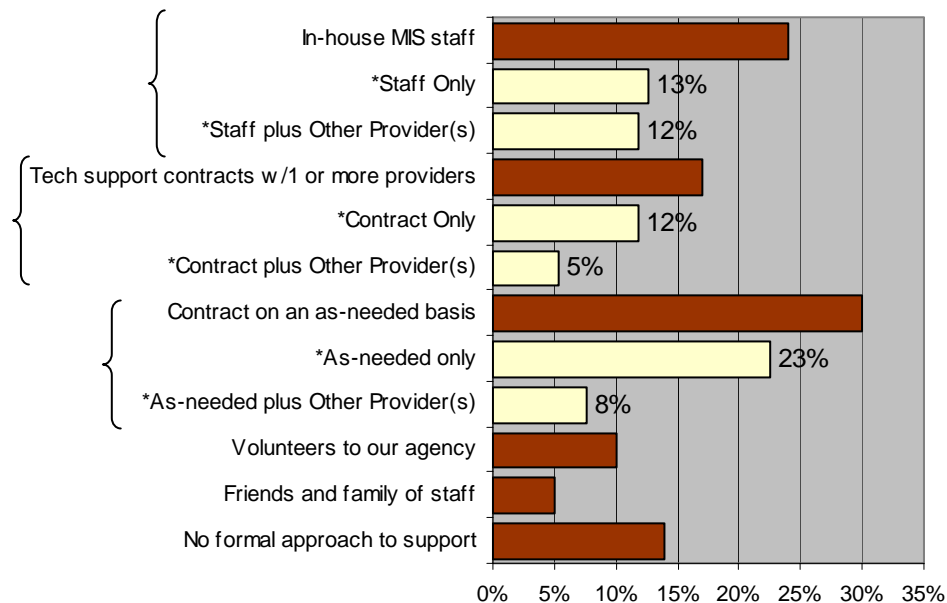
bad news? Perhaps stable IT solutions only need to be supported occasionally. On the other hand, this may be a sign of nonprofits trying to save money by calling for help only in the case of emergency. This approach may be pennywise and pound foolish. Ongoing relationships are far more likely to link IT to strategic direction. It is striking that as “outside” decision-making has increased, ongoing support relationships with providers have decreased.

Tech Support Provision



A more detailed examination indicates that 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.

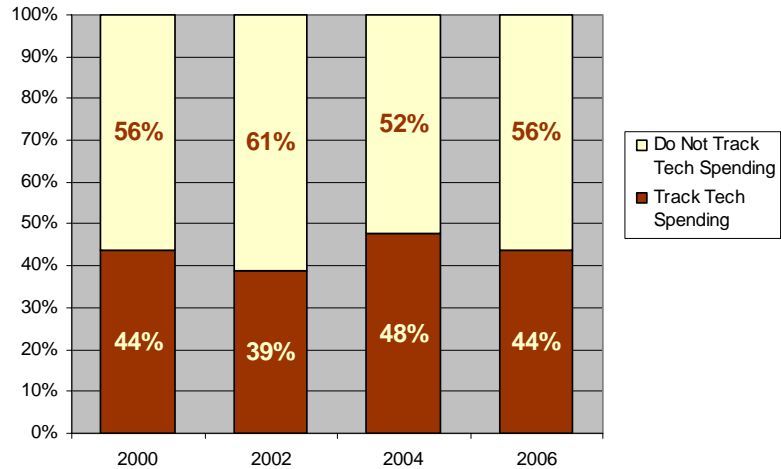
Tech Support Provision - 2006 Detail



Technology Spending

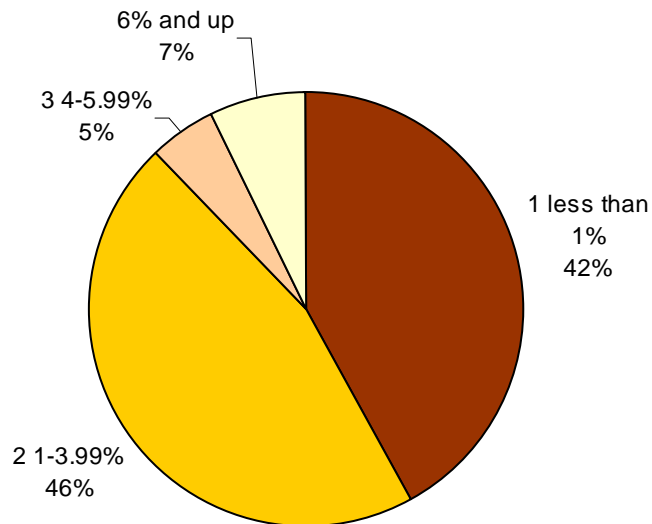
Technology, like most functions, benefits from care and feeding through consistent budgeting. The proportion of organizations with a specific technology budget has vacillated over six years only to return to the level of the first survey. The organizations that do track technology expenses separately continue to be slightly larger than those that don't. Median staff size of the former group is 10 FTEs versus 5 for the latter and overall agency budgets are more than twice as large in those that budget.

Technology Budgeting



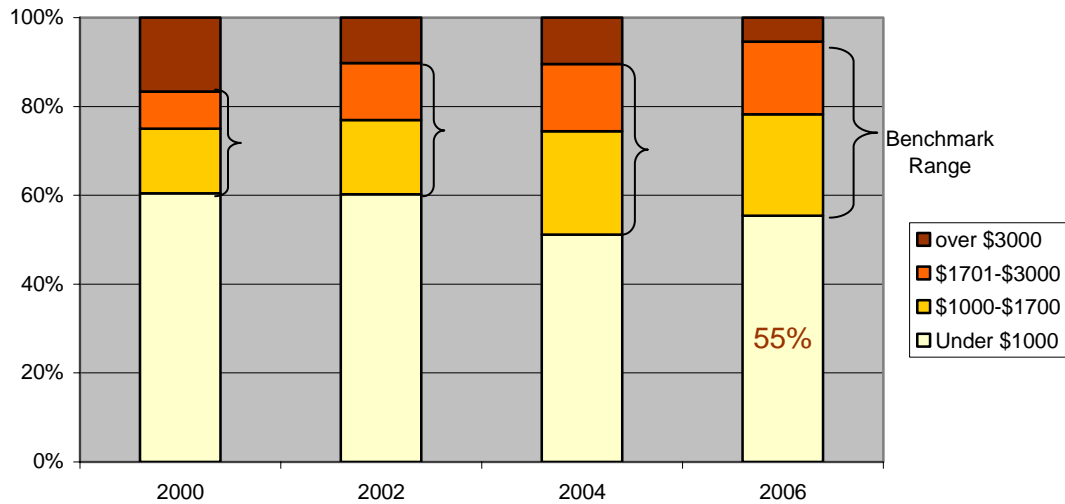
Survey respondents who budget for technology align similarly to technology spending benchmarks this year as in prior years. One benchmark is that technology spending should be about 6% of overall annual spending. A plurality of survey organizations that have technology budgets spend 1-4% of their annual budget on technology, but almost as many spend less than 1%.

Tech Budget as % of Total Budget



Guidelines for annual spending per machine vary, but 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 reversed its increasing trend; 45% of organizations budgeted more than \$1000 per computer in this year's survey.

Technology Spending per Computer

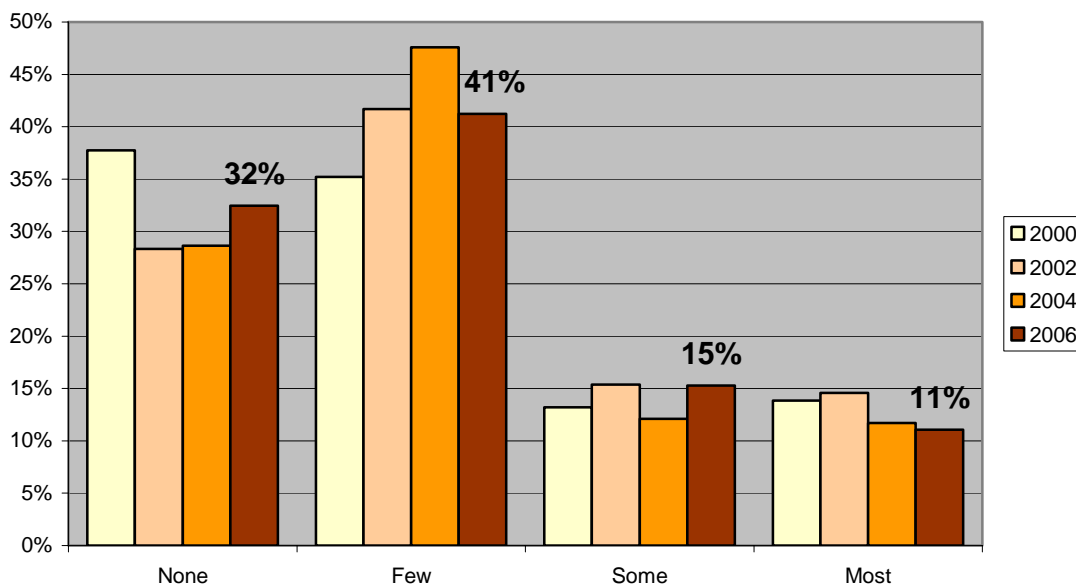


Staff Training

There has been a steady increase in the overall number of nonprofit employees receiving formal technology training each survey. At the organizational level, however, the trend is more ambiguous. A weighted average based on the employees and training rates represented in the sample estimates that 30% of employees in Pittsburgh area nonprofits received technology training in 2006. Because it's a weighted average, this overall number is likely increased by larger organizations sending a higher proportion of their employees to training. The variation in responses is small and does not depict an overall pattern.

Year	Overall Training Rate
2000	23%
2002	23%
2004	27%
2006	30%

Technology Training

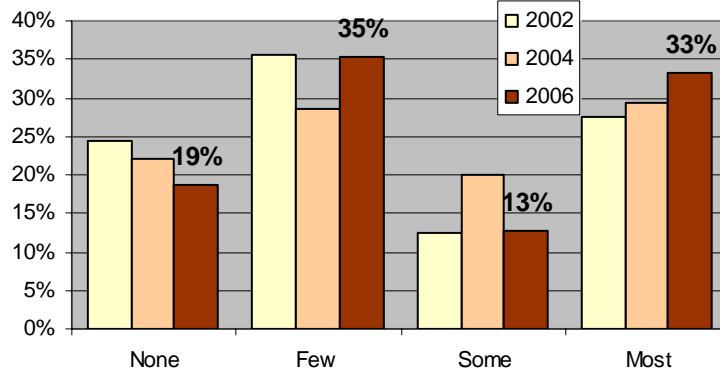


Technology Skills in Job Descriptions

After holding steady at 31% in the first three surveys, the estimated number of nonprofit jobs in the region that have tech skills in their job descriptions in 2006 is up to 36%. Although we would prefer to see identifying the technology skills that are required for positions become a majority practice, we celebrate the fact that the rate has at least increased.

The trend in specific brackets (none, few, some, most) is mixed, but we can say again that there were fewer organizations with tech skills in no job descriptions and more organizations including them in most (67-100%) of their job descriptions.

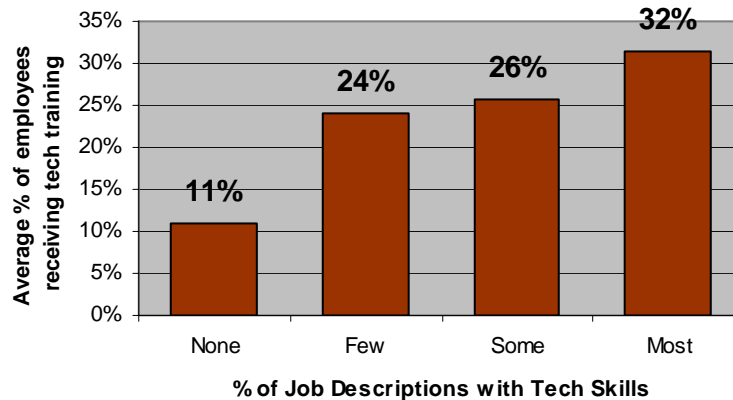
Tech Skills in Job Descriptions



Tech Skills in Job Descriptions Related to Training Rate

Although the majority of our findings are descriptive, we do seek to make causal connections between attributes of our respondents. Again in 2006, we can definitively say that organizations that list tech skills in job descriptions are more likely to send their employees to tech training.

Tech Skills in Job Descriptions vs. Training



Foundation Proposals

After discussing the topic with nonprofits and foundation program officers with some frequency, we wanted to examine the question of whether nonprofits include technology costs in their fundraising proposals. The answers are surprising.

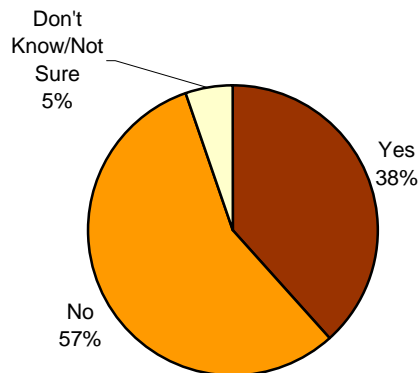
The fact that 38% of respondents had included had included tech costs in a foundation proposal is not surprising. This rate tracks closely with the rate of budgeting for technology. We had a hypothesis regarding the relationship between tech budgeting and tech in foundation proposals: that those that track tech spending are more likely to include tech costs in proposals. The data show a small correlation between the two factors: 43% of the organizations that include tech costs in foundation proposals have tech line items in their budgets; the rate is 36% among those that do not include such costs in their proposals.

The survey went beyond a yes/no question on this topic. Those that said yes to the question above were asked how much of the proposal was for technology. We found concentrations at the two extremes. In almost half of the proposals, tech constituted less than a third of the costs. We would like to think that those proposals are using a 4-6% benchmark referenced in the section on overall tech budgeting. At the other extreme are the all-tech proposals (33%).

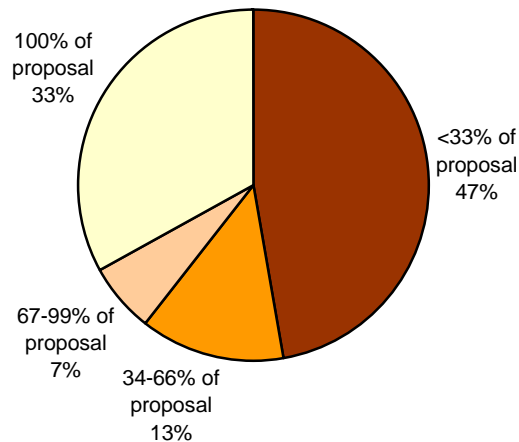
Finally, we asked about the success of these proposals. It was apparently a good year for tech proposals: 75% had the tech portion funded. More than half received the full amount requested.

In considering the above two questions, we again had a hypothesis: the lower the size of the tech portion of a proposal, the more likely the tech portion was to be funded. Here, finally, was the surprise. According to our

Included Tech in Foundation Proposal (this year)



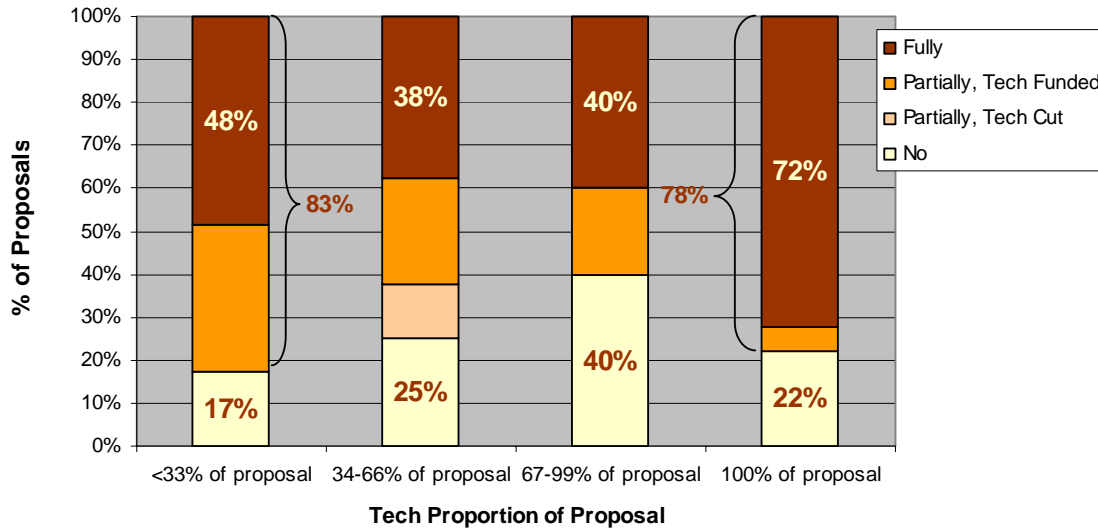
Tech Proportion of Foundation Proposal



Was Proposal Funded?	%
Fully	52%
Partially, Tech Funded	23%
Partially, Tech Cut	2%
No	23%

sample, the proposals that were most often funded in full were 100% technology proposals. This runs counter to what program officers have told us anecdotally is their practice. It should be noted that the smallest tech proportions (<33% of amount) most frequently had tech portion was funded (83%) whether the entire proposal was funded in part or in full.

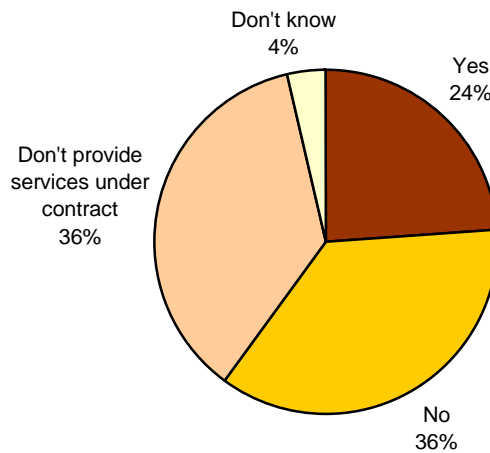
Tech Proportion of Proposal vs. Was Proposal Funded?



Tech Costs in Contracts

Of course, grants are not the only way nonprofits receive funds. Many offer services under contract, for instance to government agencies. We were also interested in whether nonprofits accounted for the cost of technology in these contracts.

Tech Costs in Contracts to Provide Services

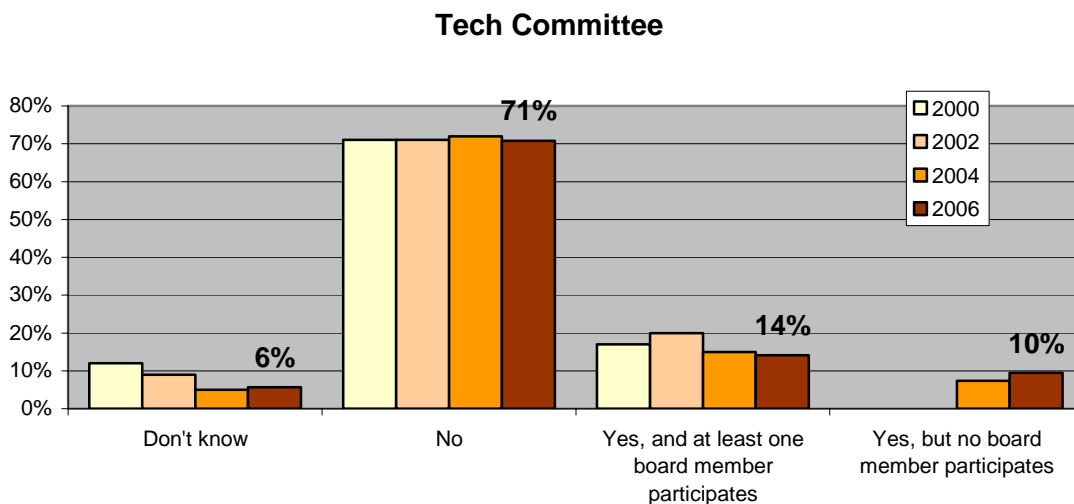


As the chart shows, many organizations do not provide services under contract. If we focus only on those that do (i.e. a Yes or No answer to the question), we find a similar rate to tech in foundation proposals:

40% of service-providing organizations include tech costs in those contracts. Again, budgeting for tech correlates with working costs into contracts: 53% of nonprofits that include tech costs in contracts have a tech budget, versus 47% of those that do not include tech costs in contracts.

Technology Committee

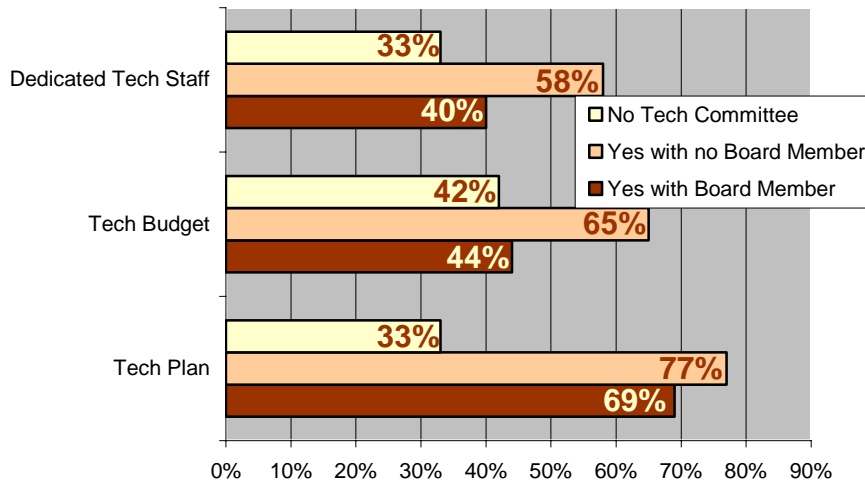
A key finding from the original survey was that the existence of a board technology committee was highly correlated with best practices in technology management. When board members are accountable to their peers for any management area, the chances of success in that area improve. As such, the nominal decrease from a high of 20% in 2002 to 14% in 2006 of organizations with a board member in a technology committee can be perceived as negative.



Because the Bayer Center has seen several highly functioning and successful staff technology committees that are empowered to make technology decisions, we have added staff tech committees to this question. The combination of 14% of organizations with a board member on their tech committee and 10% of organizations with an all-staff tech committee means that 24% of organizations have a committee, a high point for all four surveys.

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 staff size for organizations with a tech committee is 14 versus 5 for those that do not. In 2006, a distinct size difference emerged between those that have a board member on the committee and those that do not. Board tech committees have a lower median staff size (7) than staff tech committees (21.5). A similar ratio exists in budget (\$500K vs. \$1.8M)

Tech Committee vs. Best Practice

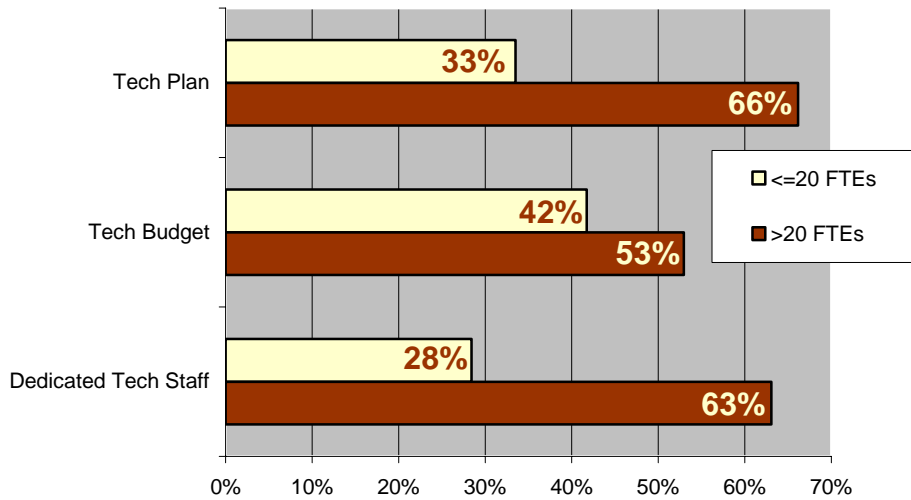


The size analysis matters because this year’s survey indicates that while a board technology committee is better than no committee, a staff committee is best. The chart below shows this good/better/best pattern on three best practices. In the 2004 survey, board committees had shown superior performance to staff committees.

This change in the success rate of board vs. staff committees led us to delve deeper into the question. If larger organizations are more likely to have a staff tech committee and staff tech committees perform better, perhaps size is a more powerful factor than the committee. Board members may be helping out most frequently on the tech committees of the small and the struggling.

Because it would be difficult to analyze the micro effects of staff size along the increments laid out in the Respondent Profile section, we set a threshold of 20 full-time equivalent employees and analyzed best practices on either side of that line, ignoring whether the organizations had a tech committee or not. The result showed significant gaps between the large and the small.

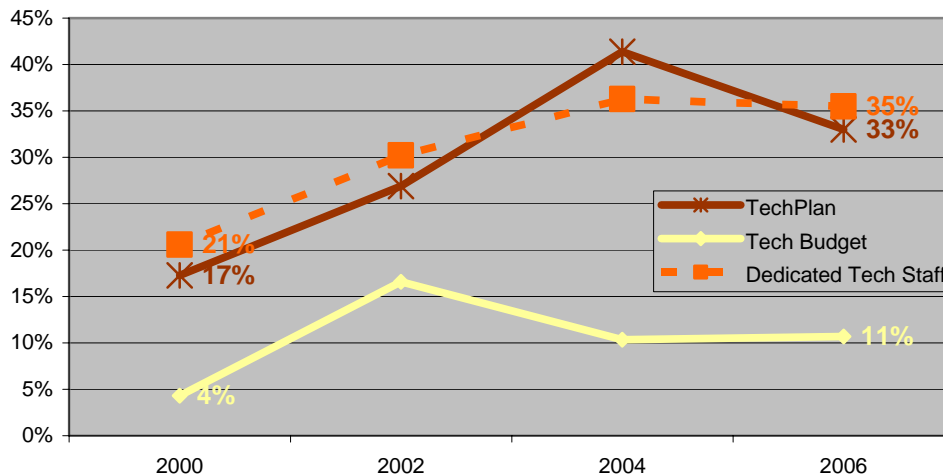
Staff Size vs. Best Practice



Although previous surveys had analyzed best practices in relation to this threshold without such clear results, we next examined the trend in the gap between over-20 performance and under-20 performance over time. The chart below shows how the percentage point gap has widened over the years of the survey. In other words, it is becoming more true over time that the larger the organization, the more likely they are to follow best practices in technology management.

Tech Best Practice vs. Staff Size Threshold

Pct. Point Difference: Orgs with >20 FTEs - Orgs with <=20 FTEs



None of this analysis changes the original finding that organizations with a tech committee of any kind show a higher incidence of best practices than those without. Forming a tech committee is

still a bellwether of strong performance. As has been the case in past surveys, we continue to ask which comes first – the good practice or the committee.

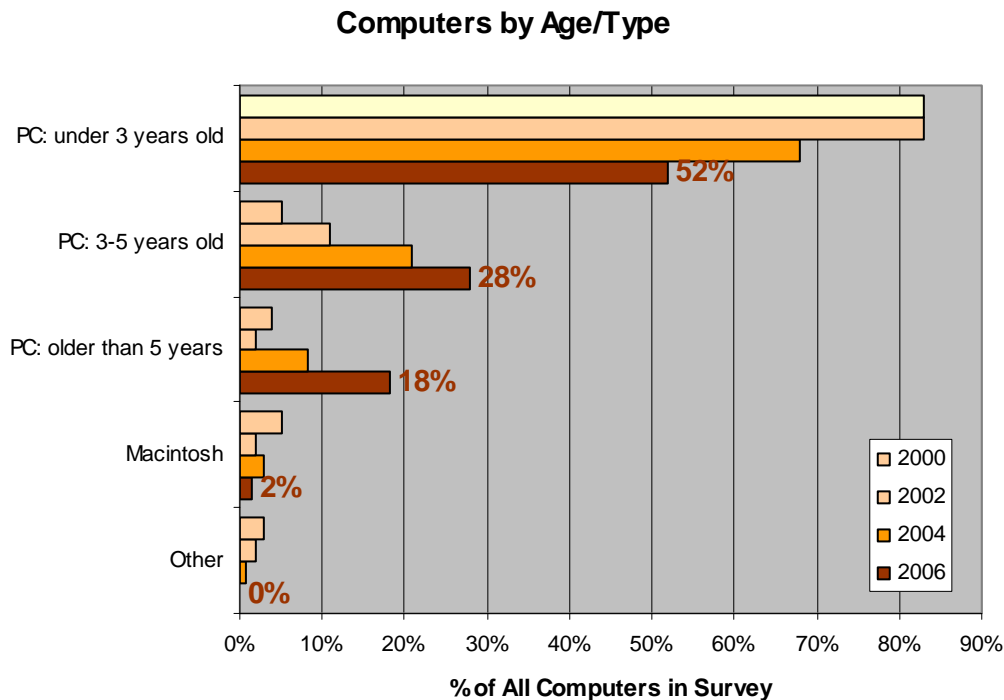
Computer Systems

Management is important. What about “the stuff”? When we analyze the computers, software and networks that nonprofits are using, we find that the breadth of success that exists in technology policy carries over into the systems themselves.

Hardware

For 2004, we altered the response options about end user hardware. The first two surveys used the amount of RAM in machines to estimate their age and proximity to obsolescence. Since 2004, the question has focused directly on computer age. 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.

Although the majority of the computers in our survey pool (52%) are current enough (under three years old), this majority has diminished starkly from a high of 83% in the first two surveys. Of the remainder, more than a quarter of the computers are beyond optimal age (3-5 years), and 18% of computers are totally outdated (over 5 years).



The graph shows a clear pattern: a portion of the machines that were current at the time of the first survey has aged in place to the 3-5-year and over-5-year categories. While sampling variability partially explains change, environmental factors likely explain a step backward in the currency of machines. First, the hardware inventories depicted in both the first two surveys had been enhanced by widespread replacement of workstations to avoid Y2K problems. In 2004,

we blamed the post 9/11 recession and funding environment of the preceding years for forcing nonprofits to try to extend the life of existing hardware for cash flow reasons. Because individual and foundation giving lags behind economic recoveries, the recent rebound of the stock market may still not have paid enough dividends – literally – to help organizations update their hardware inventories. If the trend continues, the higher percentage of older machines will lead to increased software incompatibility and higher support costs.

The trend continues, however, that keeping very old computers is an indicator that an organization may be behind trends across the board. In organizations that use 5-year-old machines, they account for a disproportionate 28% of all computers. In addition, in these organizations, only 44% of their computers are “current” versus 52% in the general survey pool.

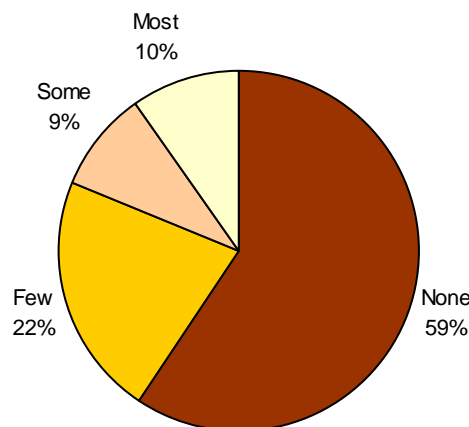
The fraction of Macintosh computers in area nonprofits dropped from 5% in 2000 to 2% in 2004 and held steady there in 2006. In organizations that use them, however, they account for 18% of all computers. The data suggests that Mac-friendly nonprofits are replacing some of their PCs with Macs. Whereas in past surveys, Mac-using organizations had more current PCs than the general population, this year, they track very closely: 50% of their computers are current. In addition, the wider trend of Mac prevalence in educational organizations is borne out; they account for 26% of organizations using Macs. A pattern from previous surveys returns in 2006: Arts organizations are disproportionately represented among Mac users (13%).

Donated Computers

In the past two surveys, we have investigated how many computers in area nonprofits are donated. Because of the way the question appeared on the 2004 survey, definitive statements were difficult to make, but we conservatively estimated that 21% of organizations in the region use donated computers.

In this year’s survey, while the majority of nonprofits do not use donated machines, the percentage that accept them (41%) is about twice our 2004 estimate. Donations account for more than a third of computers in less than 20% of organizations.

Proportion of Computers that are Donated

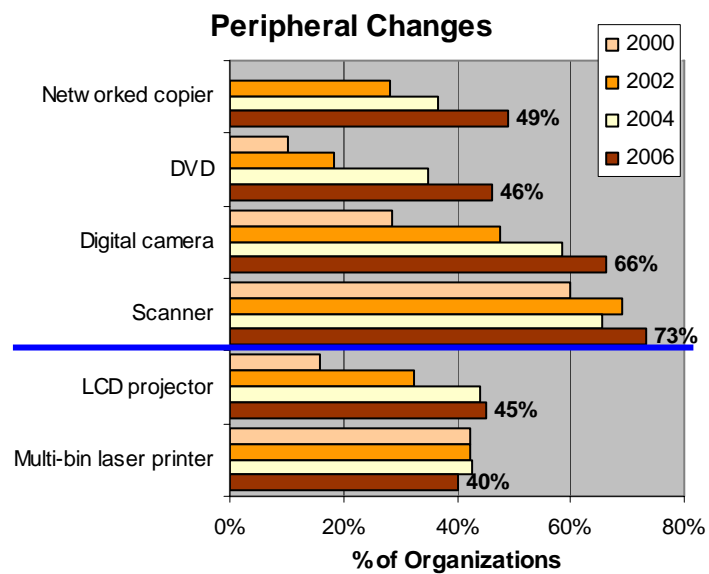


Nonprofits that use donated computers tend to have smaller budgets, staffs and numbers of computers. The one exception to the trend is the average tech budget and staff of those that use 1-33% donated computers are actually larger the averages for those that use none.

Proportion	Average			
	Budget	Tech Budget	FTEs	# of Computers
None	\$5,764,659	\$47,890	28	33
1-33%	\$2,330,839	\$66,270	47	31
34-66%	\$657,003	\$14,285	13	15
67-100%	\$336,406	\$4,800	6	9

Peripherals

Workstations are not the only hardware nonprofits are using; there have been shifts among other computing and communications devices in nonprofits from 2004 to 2006. The largest proportional increase is that 49% of nonprofits now have a networked copier, up from 37% in 2004. Nonprofits are embracing multimedia as 2/3 have a digital camera and DVD players increase.



A few items that have stagnated are LCD projectors and multi-bin laser printers, presumably being replaced by networked copiers.

The prevalence of other peripherals is essentially stable with a steady increase in phone systems with voice mail. It is worth noting that you can still only talk to a friendly automated menu in a quarter of nonprofits.

Other Peripherals	2000	2002	2004	2006
CD ROM burner	23%	55%	71%	75%
Fax machine	93%	88%	84%	90%
Ink jet or other color printers	78%	80%	67%	74%
Single bin laser printer	64%	60%	58%	60%
Tape backup	48%	50%	42%	43%
Telephone call management/automation	27%	27%	27%	26%
Telephone system with voice mail	68%	71%	74%	81%

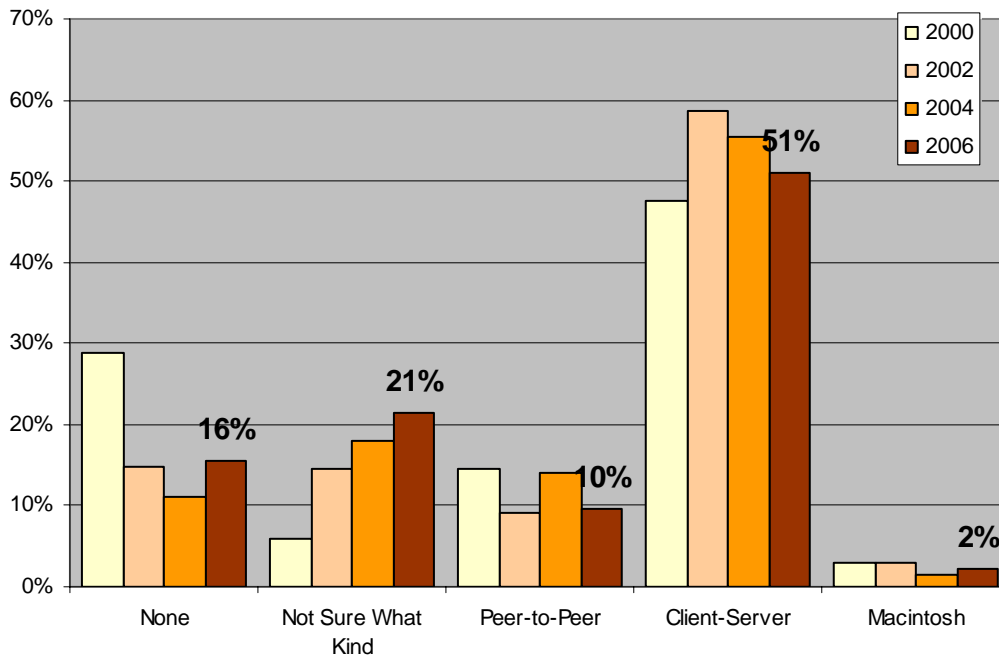
Connectivity

Local Area Networks

Over the course of the survey, local area networks have become more pervasive in area nonprofits. The downward trend of organizations with entirely stand-alone computers reversed slightly decreased from to 16%. Variations in the samples have created vacillation in the proportion of Client-server, peer-to-peer and unknown network types. The survey offers the “Not Sure What Kind” response option so that respondents who are not tech-savvy can at least state that they have some kind of network. The vast majority (70%) of these respondents have staff sizes under 10. Most likely, these are peer-to-peer networks and the balance are client-server networks.

Survey Respondents use a variety of network operating systems. Most client-server networks run Windows 2003 (39%), Windows 2000 (27%) or Windows NT (19%). The migration away from Novell networks continues, dropping steadily from 34% in 2000 to 7% in 2006. A very small number of organizations use Linux (4%).

Local Area Networks

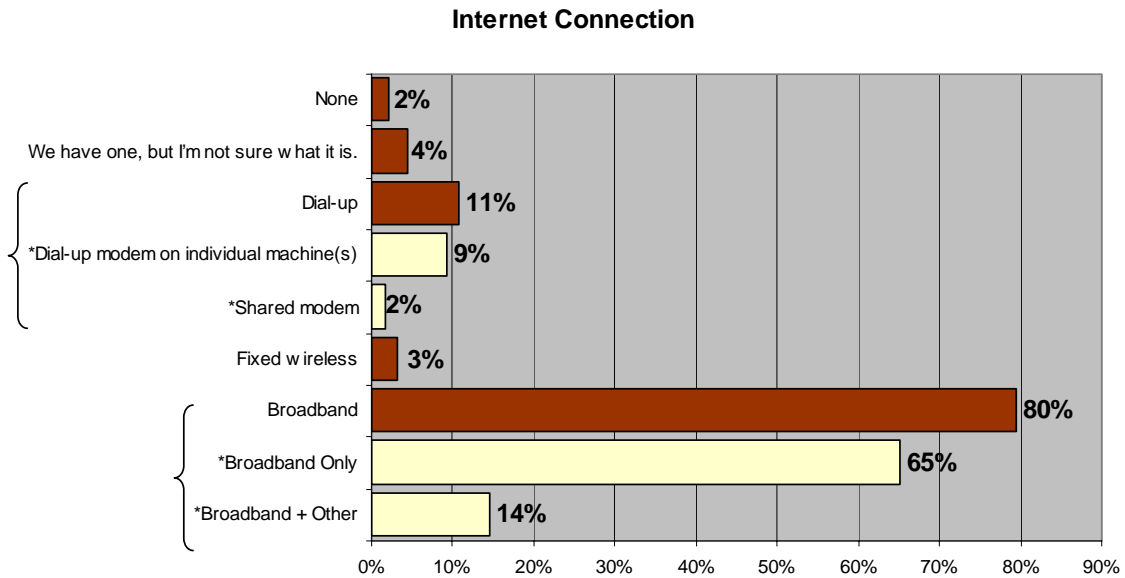


Internet Connection

Hardware and networking has certainly changed at a high rate over the course of the survey. These changes, though, pale in comparison to the continuous encroaching of the Internet into all areas of personal and professional life. Fortunately, 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 80% in 2006. The data suggests that these connections are replacing dial-up connections one for one.

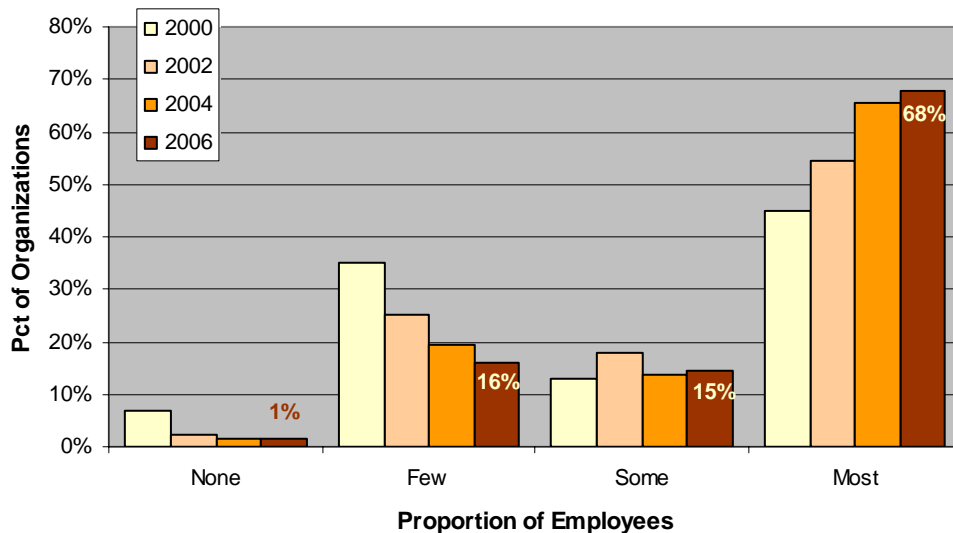
A small but steady 3% of organizations use fixed wireless connections. The majority of this connectivity is being provided by a nationally-recognized Pittsburgh partnership called Wireless Neighborhoods.



Internet Use

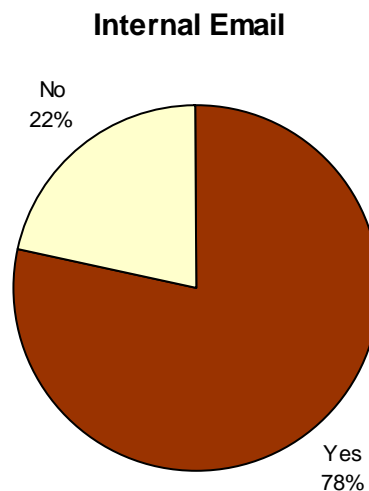
If more users are connected via high speed connections, as the above data indicate, we expect to see a similar increase in employees using the Internet for work. That expectation is met in the survey responses. From over 40% in 2000, the number of organizations that indicated that few or none of their employees used the Internet in their jobs dropped to 17% this year. After increasing from 33% in 2000, the estimated overall average rate of Internet use among nonprofit employees leveled at 56% in 2004 and 57% in 2006.

Internet Use



Internal Email

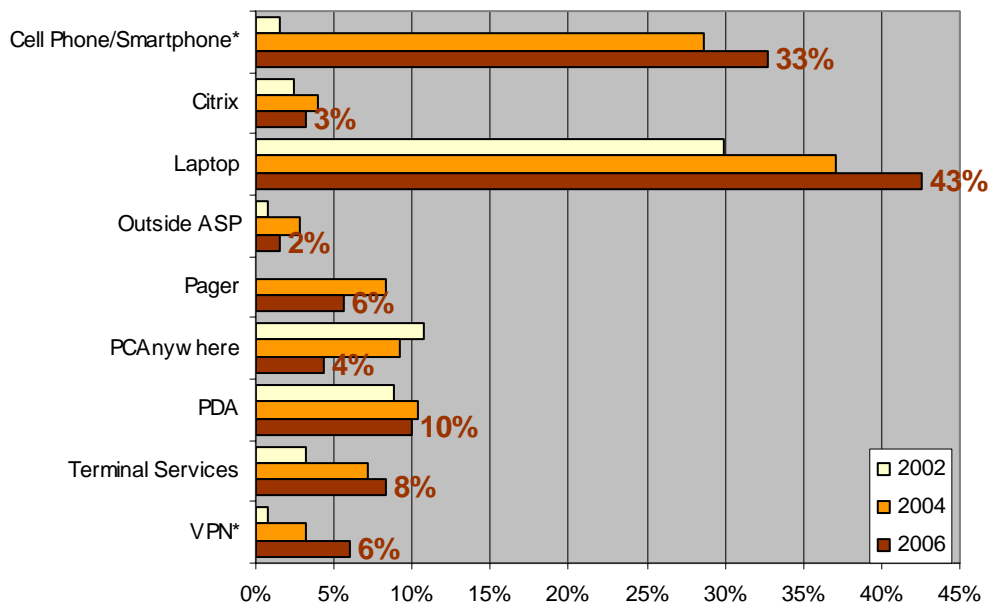
Respondents were asked in the two most recent surveys whether they provide internal email addresses to staff, and the overwhelming majority of respondents do. Organizations that do not provide internal email are generally smaller (median 2 FTEs) than those that do (9.75)



Remote Access

Since 2000, the survey has asked about remote access for truly mobile staff members. Laptops and cell phones remain the most common tools provided to staff on the go. A growing minority of organizations grant their staff remote access to file servers or databases through a variety of connections: Citrix, PCAnywhere, Terminal Services and VPNs. There has not been a rise in ASP database access, as might have been expected given the Internet access and use trends described above.

Remote Access Tools



4

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.

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. Enough “other” responses in 2006 referred to smartphones (e.g. BlackBerry, Treo) and VPNs that these responses were retroactively analyzed for all years.

While the old standbys of phone, print and voice mail have held steady, some more “emerging” technologies have gained in popularity. We identified an error in the way responses were collected for this question in 2004, which resulted in a smaller and not necessarily representative sample for that year. We take the 2004 data, therefore, with a grain of salt and focus on the trends that we can identify from the 2000, 2002 and 2006 data points. Since the first survey, use of instant messaging, text messaging, video conferencing, voice mail and web sites has increased significantly. Most other modes have been level. We added two response options this year: a majority of organizations use some managed email tool for batch mailings; a small group of organizations uses podcasting.

Communication Channel	2000	2002	2004	2006
Conference calls	41%	43%	74%	71%
Email - direct from you	82%	83%	91%	91%
Email - managed email system				55%
Fax	85%	75%	89%	88%
ICQ, Chat, IM, etc.	1%	3%	46%	21%
Interactive or e-commerce oriented Web page	5%	8%	44%	25%
Phone	92%	85%	95%	93%
Podcasting				8%
Print	92%	87%	95%	93%
Text Messaging	0%	6%	39%	19%
Video Conferencing	3%	2%	41%	15%
Voice Mail	58%	62%	85%	84%
Web page	53%	54%	80%	79%

Significant increase over prior year
Significant decrease from prior year

For the past two surveys, we have not only asked whether organizations use 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. Standard emails direct from the sender are more frequent than managed batch emails, which makes sense. It is one thing to have access to and occasionally use a mode of communication and depending on it.

CommResponse	Frequently	Regularly	Rarely
Conference calls	8%	29%	60%
Email - direct from you	71%	25%	4%
Email - managed email system	55%	30%	11%
Fax	29%	33%	38%
ICQ, Chat, IM, etc.	6%	6%	65%
Interactive or e-commerce oriented Web page	21%	26%	44%
Phone	80%	19%	1%
Podcasting	0%	5%	43%
Print	52%	41%	7%
Text Messaging	6%	10%	73%
Video Conferencing	5%	8%	70%
Voice Mail	52%	36%	12%
Web page	42%	39%	18%

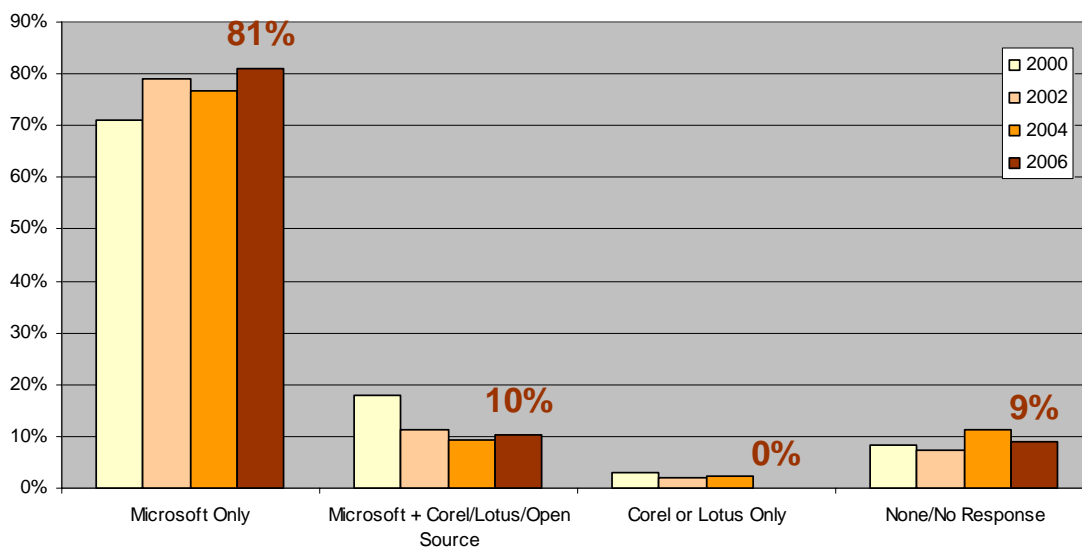
Software

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 consistently and increasingly 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. Among those who responded to the question, all but the barest minority 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. Despite offering open source office software as an explicit choice in the past two surveys, but this option garnered just 2 responses in 2004 and 11 in 2006. All organizations that use an open source package also use Microsoft Office.

Basic Productivity Software



Accounting Tasks and Software

Respondents use a variety of accounting solutions, ranging from manual systems to spreadsheets to accounting software. The key change in accounting solutions from 2004 to 2006 is a slight increase in outsourcing the key accounting functions. It would appear that those gains offset the decrease in use of accounting software.

Organizations tend to use one software package across the accounting functions of general ledger, receivables, payables and cash flow. That said, QuickBooks high market share (62%) continues to grow while Peachtree (9%) holds steady. MIP (5%) and BlackBaud (3%) are the only two other packages with shares worth mentioning. Payroll remains the most likely function to be outsourced at a remarkably consistent rate of 41%. Inventory remains a function that many organizations don't need to perform.

Accounting Tasks 2000							
Task	No Response	N/A	Manually	Manually + Spreadsheet	Spreadsheet	Accounting Software	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							
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							
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%
Accounting Tasks 2006							
General Ledger	8%	5%	4%	0%	7%	65%	11%
Accounts Receivable	10%	9%	7%	0%	8%	58%	8%
Accounts Payable	9%	7%	8%	0%	8%	60%	8%
Payroll	11%	8%	4%	0%	5%	30%	41%
Budgeting	10%	5%	5%	0%	26%	47%	6%
Cash Flow	11%	8%	7%	0%	15%	52%	7%
Inventory	14%	33%	12%	0%	11%	26%	3%

Bold indicates an increase from prior year.

Shaded responses in each table indicate the most frequent response.

Database/List Tasks

The tasks that the survey identifies as database tasks, ironically, continue to be accomplished most frequently *without databases*. In the main three tasks that we've been evaluating— client management, fundraising and volunteer management – 30-40% of organizations indicated that the task didn't apply to them. As has been the case in past years, 75-85% of organizations indicated that they did not do ticketing or quality assurance. A new task analyzed in 2006 is Outcomes Measurement. More organizations indicate that they do some outcomes tracking than ticketing or QA, but still less than fundraising, client management and volunteers. Among those who track outcomes, a slight majority report using a database software for the task.

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							
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							
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%
Database Tasks 2006							
Client Management	10%	16%	6%	1%	15%	49%	2%
Fundraising	7%	18%	12%	1%	19%	42%	1%
Volunteers	10%	26%	19%	1%	19%	25%	1%
Ticketing/Point of Sale	16%	55%	8%	1%	6%	11%	3%
QA/RA Accreditation	21%	65%	2%	0%	4%	7%	0%
Outcomes Measurement	16%	39%	9%	1%	14%	20%	2%

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 and the new Outcomes Measurement results, 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	Database Software	Outsourced
Client Management	11%	4%	15%	69%	1%
Fundraising	15%	4%	23%	58%	1%
Volunteers	31%	4%	23%	41%	1%

Database Tasks 2006					
Task	Manually	Manually + Spreadsheet	Spreadsheet	Database Software	Outsourced
Client Management	9%	2%	20%	66%	3%
Fundraising	16%	1%	26%	56%	1%
Volunteers	29%	2%	29%	38%	2%
Outcomes Measurement	27%	5%	19%	38%	10%

In managing client information, use of database software has increased over the life of the survey, although it decreased nominally from 2004 to 2006. More organizations use custom databases (58%) than vertical market software (42%) specific to managing client and program information. This ratio is exactly the same as in 2004. 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. Among the vertical market software used for client management, only RClient has a recognizable market share. We hesitate to report (because it sounds like a short-term setup for long-term problems) that 8% of organizations report using their fundraising software to manage client information.

In fundraising, more than half of organizations manage their donor information with database software. Manual and spreadsheet systems, however, have shown a short-term rebound. Again, nonprofits are split between using vertical market (58%), and custom applications (42%). The

market leader in this group is Blackbaud's Raiser's Edge (27% of vertical market users), but there are 21 other fundraising packages also in use. In terms of trends, these results indicate a rise in vertical market fundraising packages from 51% to 58% and a drop in Raiser's Edge's market share from 35%.

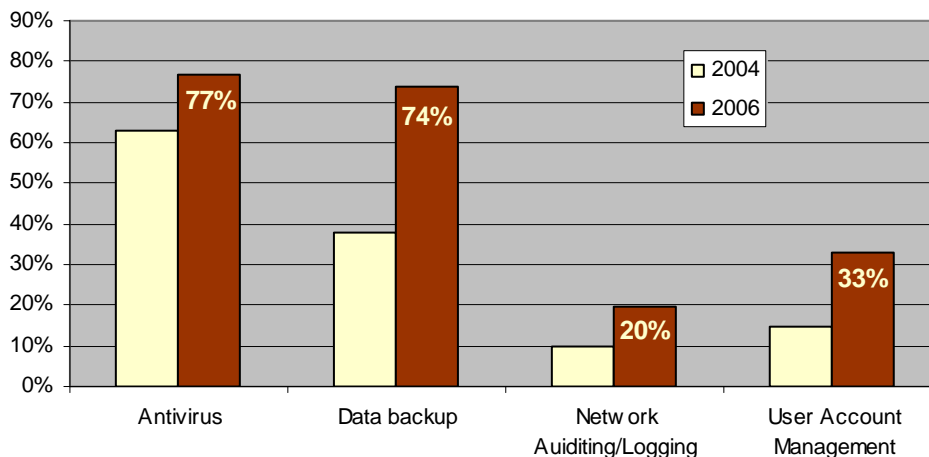
Manual systems for volunteer management remain at almost a third of organizations. There is some evidence that organizations that had been using manual systems are at least using spreadsheets to track their volunteers. The majority of applications for volunteer management tend to be custom-designed (56%). The majority of vertical market volunteer solutions are a module of an overall fundraising package, although 10% of organizations use VolunteerWorks. This is the first survey that has surfaced a "market leader" in volunteer management software.

Outcomes measurement is distinguished from the other tasks by the fact that 10% of organizations outsource this function to some third-party evaluator. The largest group (38%) of those that track outcomes in-house use a database product. Over a quarter of organizations use manual systems. A slight majority (53%) of the databases used are custom applications. Vertical market solutions that have market share are Evaluation Station (8%) and RClient (8%).

Network and Data Management Tasks

The last two surveys have included a grid of questions tasks that focuses on network and data management tasks. These include the vital functions of anti-virus protection, backup, auditing the network, and managing user accounts. The surprisingly low numbers for these measures from 2004 have improved across the board. A large majority of organizations have anti-virus and backup solutions in place. Growing minorities systematically audit their networks and manage user accounts.

Network/Data Management Tasks



Appendices

APPENDIX A: SURVEY INSTRUMENT ORGANIZATIONAL TECHNOLOGY SELF ASSESSMENT

THANK YOU FOR PARTICIPATING IN THIS SURVEY, WHICH WILL HELP THE BAYER CENTER FOR NONPROFIT MANAGEMENT UPDATE ITS BIENNIAL BENCHMARKS FOR ALL VARIETIES OF AGENCY TYPE, SIZE AND OTHER FACTORS. (PLEASE RETURN COMPLETED FORM BY JULY 31, 2006 TO BE ENTERED IN A DRAWING TO WIN AN IPOD)

718 FIFTH AVENUE, 4TH FLOOR • PITTSBURGH, PA 15219-3009 • 412-397-6814 FAX: 412-397-4097 • 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>)

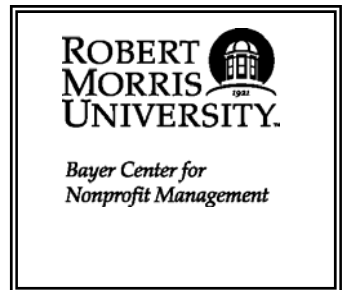
<input type="checkbox"/> Arts, Culture, and Humanities	<input type="checkbox"/> International, Foreign Affairs
<input type="checkbox"/> Education	<input type="checkbox"/> Mutual/Membership Benefit
<input type="checkbox"/> Environment and Animals	<input type="checkbox"/> Public, Societal Benefit
<input 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)

<input type="checkbox"/> We have a strategic plan that addresses technology	<input type="checkbox"/> We have neither a strategic plan nor a technology plan
<input type="checkbox"/> We have a strategic plan, but it doesn't address technology	<input type="checkbox"/> Don't know/not sure
<input type="checkbox"/> We have a technology plan independent of our strategic plan	
- 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)

<input type="checkbox"/> 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) Have you included technology expenses in a foundation proposal this year? Yes No Don't Know
- 12) If yes, what percentage of the proposal was for technology? _____%
- 13) If yes, was proposal funded?
- Fully Partially, Tech included Partially, Tech cut No Don't Know/Haven't heard
- 14) Do you include technology costs in your agency's contracts to provide services? (*e.g. with government agencies*)
- Yes No Don't provide services under contract Don't Know
- 15) 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
- 16) 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
- 17) Our biggest challenge with technology is: (*Describe the issues and challenges facing your organization's use of technology.*)
- _____
- _____
- 18) 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 |
|---------------------------------------|----------|---------|
| Macintosh | _____ | _____ |
| PC: older than 5 years | _____ | _____ |
| PC: 3-5 years old | _____ | _____ |
| PC: 1-3 years old | _____ | _____ |
| PC: under 1 year old | _____ | _____ |
| Other (<i>please specify</i>) _____ | _____ | _____ |
- 5) What percentage of your computers were donated to your organization?
- None 1-33% 34-66% 67-100%
- 6) 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) _____

- 7) 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) _____

8) 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		

9) We provide internal email addresses to staff. *(Check Yes if staff have addresses with a standardized domain name (e.g. [userid@orgname.org](mailto:user@orgname.org)))*

Yes No Don't Know/Not Sure

10) 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)*

- None We have a LAN, but I'm not sure what kind it is.
 Novell Netware Windows peer-to-peer
 Windows NT Windows 2000
 Windows 2003 Macintosh
 Linux Other _____

11) 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)*
 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)*
 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)* _____

12) 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"/>	Web page	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Email – direct from you	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Email – managed email system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Podcasting	<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 Voice 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"/>					

- 13) 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.

- 14) 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"/>	_____	_____	_____

- 15) How does your organization manage the following **database/list management** tasks? Common software packages include Donor Perfect, eTapestry, ResultsPlus, MSAccess, and others. The task QA/RU refers to Quality Assurance/Resource Utilization)

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"/>	_____	_____	_____
Outcomes Measurement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____	_____

- 16) 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"/>	_____	_____	_____

- 17) 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: _____)

- 18) 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. In-house MIS staff
- We contract for technical support on an as-needed basis. Volunteers to our agency
- Technical support contracts with one or more providers Friends and family of staff
- (specify: _____)

Appendix B: Respondent Organizations

Organizations in **bold print** responded to all four surveys. Organizations in *italics* responded in more than one.

3 Rivers Connect
Achieva
adagioHEALTH
Adams Memorial Library
Advisory Board on Autism & Related Disorders
Affordable Comfort, Inc.
Aliquippa Alliance for Unity & Development
Allegheny County Medical Society Foundation
Allegheny Valley Association of Churches
Allegheny Valley School
Alle-Kiski Area HOPE Center, Inc.
Angel's Place, Inc
ARC Manor
Armbrust Wesleyan Church
Armstrong County Community Foundation
Arts Education Collaborative
ASSET Inc.
Auberle
Azania Heritage International
Beaver County Historical Research & Land Marks Foundation
Beaver County Humane Society, Inc.
Beginning With Books
Bethlehem Haven
Beulah Land, Inc.
Big Brothers Big Sisters of Grtr PGH
Big Brothers, Big Sisters Of Beaver County
Birmingham Foundation
Blackburn Center Against Domestic & Sexual Violence
Bloomfield Business Association
Borough Of Sharpsburg
Boy Scouts of America
Breachmenders Ministries, Inc.
Brother's Brother Foundation
Brownsville Area Revitalization Corp.
Butler Arts Council
Butler County Community College
Butler County Federated Library System
Butler County Tourism and Convention Bureau
Calliope: The Pgh. Folk Music Society
Cancer Caring Center
Caregivers Institute, Inc
Catholic Youth Association of Pittsburgh, Inc.
Center for Nonprofit Excellence
Center for Spirituality
Central Northside Neighborhood Council
Child Health Association of Sewickley
Children's Home of Pittsburgh
Children's Museum of Pittsburgh
Choices Pregnancy Center
Christian Life Skills Foundation
Circle C Youth & Family Services, Inc.
Citizens Coal Council
City of Duquesne
Clearwater Conservancy
Coalition for Christian Outreach
Collier Township
Communities in Schools Academy
Communities in Schools of Southwestern PA
Community Child Development Ctr.
Community Design Center of Pittsburgh
Community Foundation of Westmoreland County
Community Human Services Corporation
Community Technical Assistance Center
Consumer Health Coalition
Contact Beaver Valley
Coro Center for Civic Leadership
Creative Nonfiction Foundation
Crisis Center North
Diakonia Ministries, Inc.
Dollar Energy Fund, Inc.
Dorothy Day Apartments
Early Learning Institute
Earth Mother Enterprises
East Allegheny Community Council
East Liberty Presbyterian Church
Easter Seal Society of Western Pennsylvania
Eastside Neighborhood Employment Center
Elder-Ado, Inc.
Emmanuel Christian Church
Every Child, Inc.
Faith Based Network
Faith Christian School
Faith In Action Caregivers
Family Resources
Family Services of Western Pennsylvania
FamilyLinks
Fayette County Conservation District
First Assembly of God
FISA Foundation
Flying Mammal Wildlife Rehabilitation Center
Focus on Renewal
Forbes Hospice
Frick Art & Historical Center
Friendship Development Associates
Gabriel Project
Gateway Rehabilitation Center
Gateway to the Arts
Gilda's Club of Western Pennsylvania
Girl Scouts - Trillium Council

Girls Hope of Pittsburgh, Inc.
 Glade Run Lutheran Services
 Global Solutions Pittsburgh
Good Grief Center
Grace Youth And Family Foundation Inc.
Grantmakers of Western PA
 Greater Pittsburgh Arts Council
Greater Pittsburgh Community Food Bank
 Greene County Habitat For Humanity
 Greene County Watershed Alliance
 Greensburg Community Development Corporation
Group Against Smog and Pollution
Harmonie Associates, Inc.
Hazelwood Initiative, Inc.
 Hilltop Health Ministries Consortium
Holy Family Institute
Holy Family Social Services
 Homeless Children's Education Fund
Human Services Center Corporation
Institute for Entrepreneurial Excellence
 Interfaith Volunteer Caregivers of Fayette, Inc.
 Interfaith Volunteer Caregivers of Southwestern PA
 Jewish National Fund
 Jewish Residential Services
 Jumonville
Just Harvest
 Kids Orthopaedic CORE Learning Center
Lawrenceville Corporation
Leadership Pittsburgh, Inc.
League of Women Voters of Greater Pittsburgh
 Lemington Community Services
Lifespan, Inc.
Lifesteps
 Light of Life Ministries
Ligonier Valley YMCA
Little Sisters Of The Poor
Long Run Children's Learning Center
 Lydia's Place
 Macedonia Family & Cmnty Enrich.Center
Manchester Citizens Corporation
Mars Home for Youth
Ma's Pantry Food Bank
Maurice Falk Fund
McCune Foundation
Mckeesport Symphony Orchestra
Mental Health Assoc. Westmoreland County
Mental Health Association Allegheny Co.
Mental Health Association of Butler
Mentoring Partnership of Southwestern PA
Meridian U.P. Church Day Care
 Metro Family Practice, Inc.
Miryam's
Mon Valley Initiative
Monessen Business Development Center

Mooncrest Neighborhood Association
Mountain Watershed Association, Inc.
 Mt. Lebanon Christian Church
Mt. Lebanon Montessori School, Inc.
Mt. Lebanon United Presbyterian Church
 Mt. Oliver Bureau of Economic Development
 Mt. Washington CDC
NAMI Southwestern Pennsylvania
 National Ovarian Cancer Coalition, Pgh Div
 Neurofibromatosis Clinics Assoc.
Nine Mile Run Watershed Assoc.
North Hills Community Outreach
 North Suburban Adult Services
 Northside Leadership Conference
Oakland Planning and Development Corporation
Onala Club, Inc.
PA Biodiversity Partnership
PA Cleanways
Pace School
Parental Stress Center
Pennsylvania Environmental Council
Pennsylvania Legal Aid Network
Pennsylvania Resources Council
Pennsylvania Trolley Museum
Pittsburgh Action Against Rape
Pittsburgh AIDS Task Force
Pittsburgh Ballet Theatre
 Pittsburgh Chess Club
Pittsburgh Community Services, Inc.
Pittsburgh Concert Chorale
Pittsburgh Film Office
Pittsburgh Glass Center
Pittsburgh Irish & Classical Theatre
Pittsburgh Musical Theater
Pittsburgh Police American Legion Post 710
Pittsburgh Theological Seminary
 Pittsburgh Urban Christian School
POWER
Presbyterian Senior Care
Prime Time Adult Care
 Problem Solvers Unlimited
 Providence Connections, Inc.
PULSE
PUMP
Rainbow Kitchen Community Services
 Rankin Community Development Corp.
Reading is Fundamental Pittsburgh
 Regional Environmental Education Ctr.
 Renewal, Inc.
Residential Care Services
River City Brass Band
 River City Youth Chorale
Rivers of Steel National Heritage Area
 Riverview Children's Center
Ronald McDonald House Charities Of Pittsburgh
Rx Council Of Western Pennsylvania

Sarah Heinz House
 Schmidt Marketing
 Scott Conservancy
 Seton-La Salle High School
 Sewickley Borough
 Shaler Area EMS
 Sisters Place, Inc.
 Smart Futures
 SMC Business Councils
 Society for American Music
 Society of St. Vincent de Paul
 Sojourner House
 South Hills Interfaith Ministries
 South Side Local Development Company
 Southwinds, Inc.
 Specialty Outreach Services, Inc.
 St. Agnes School
 Staunton Farm Foundation
 Summerbridge Pittsburgh
The Allegheny Regional Asset District
 The Buhl Foundation
The Emmaus Community of Pittsburgh, Inc.
 The Grable Foundation
 The Hispanic Center of Pittsburgh
 The Lighthouse Foundation
 The LOGOS Ministry
 The Martha Fund
 The Pittsburgh Experiment
 The Pittsburgh Project
 The Presbyterian Church, Sewickley
 The Union Project
The Wellness Alliance
 Three Rivers Adoption Council
 Time-Out Ministries, Inc.
 Tioga County Partnership for Community Health
 Traveler's Aid Society of Pittsburgh
 Tri-City Life Center, Inc.
 Troy Hill Citizens Inc.
 Try - Again Homes, Inc.
Tuesday Musical Club
 Turtle Creek Watershed Association, Inc.
 Umoja African Arts Company
United Cerebral Palsy of Pittsburgh
 United Way of Armstrong County
 United Way of Butler County
 University of Pittsburgh Office of Child
 Development
 Urban Impact Foundation
 Urban League of Pittsburgh
 Urban Youth Action, Inc.
 Ursuline Services, Inc.
 Valley Care Association
 Valley Points Family YMCA
 Veterans Leadership Program of Western PA,
 Inc.
 Vincentian Regency Nursing Home

VOICe- Victim Outreach Intervention Center
 Volunteer Pilot's Association
 Ward Home, Inc
 Washington County Health Partners
 Watchful Shepherd USA
 West Penn Hospital Foundation
 West Pittsburgh Partnership for Regional
 Development
 Western Allegheny Community Library
 Western Area Career & Technology Center
 Western PA Watershed Program
 Western Penn Hills Community Action, Inc.
 Westmoreland Casemanagement and Support
 Westmoreland Co. Community College
 Foundation
 Westmoreland Human Opportunities, Inc.
 With A Golden Spirit, Inc.
 Womansplace
 Women's Center Of Beaver County
 Working Order
 YMCA Hazelwood
 YMCA University Chapter
 Yng Men & Women's African Heritage Assoc
 Young Life

Appendix C: Bayer Center Advisory Board, Staff

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