Robert Morris University
1921

Bayer Center for Nonprofit Management

Southwestern Pennsylvania

Nonprofit Technology Survey 2010

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TECH NOW

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About the Bayer Center for Nonprofit Management at Robert Morris University

In ten years of service to the nonprofit community, the Bayer Center has completed over 900 consulting engagements and educated over 4,500 students. Our consulting clients include human service, arts, faith-based, community development, environmental and education organizations with budgets ranging from $100,000 or less to more than $50,000,000. Our intensive and customized Management, Governance, Financial and Technology consulting services are designed to educate leaders and have resulted in:

- Higher functioning governing boards
- Enhanced financial planning and management
- Heightened brand awareness
- Increased partnerships and strategic alliances
- More effective approaches to fundraising
- Better informed, evidence-based decisions for future directions
- More capable nonprofit leaders and organizations
- Effective management information systems
- Prudent software choices and website design
- A strategic approach to decision-making

In short, at the Bayer Center, we work with you: To provide effective and practical management and governance tools, information, education and research that strengthen nonprofit missions and multiply all investments of time, talent and money in regional nonprofit organizations.

For more information visit http://www.rmu.edu/bcnm

Executive Summary

Technology Policy

- More organizations budget for tech than in any prior survey, but those budgets are smaller.
- The large leap to having tech skills in half of the region's nonprofit job descriptions has given way slightly to 46%.
- Foundation proposals with tech costs were less successful (78%) in 2010 than in 2008 (89%) in 2008 but edged out 2006 (75%).
- The tech training rate slides back to its 2006 level (30%).
- Larger organizations continue to adopt tech best practices at a higher rate than smaller ones.

Computer Systems

- The aging of user workstations has reversed after halting in the last survey.
- More organizations (70%) employ mobility/remote access tools, a big leap over prior surveys.
- Windows 7 has leapfrogged Windows 7. Only 8% of computers in area nonprofits run Vista vs. 16% running Windows 7.
- Adoption of Vista and 7 has offset by reductions in Windows XP; XP, however, is still on 70% of nonprofit computers.
- Nearly half (45%) of all new computers are laptops; half of all Macs are.
- The rate of Internet use by nonprofit employees for work, which had plateaued in the upper 50s, rises again to 62%.
- Newer communications technologies – Social Networking Sites, RSS Feeds, Blogs – show big leaps in adoption.
- More than half of respondents use Social Networking Sites, but only a third of those use them frequently.
- Office 2007 supplants Office 2003 as the most popular version. Only 4% of nonprofit computers run Office 2010.
- QuickBooks's market share rebounded to its 2006 market share at 60%.
- The fundraising software market share for GiftWorks more than doubles to 12%, creating a second place tie with DonorPro behind Raisers Edge (18%)
- Norton and Symantec make up more than half of the anti-virus softwa.re market.

IT Adoption, Impact and Needs

- Human challenges are among the most-frequently-cited barriers to better IT adoption.
- IT dreams largely focus on web site improvements and gaining internal control of web updates.
- Pittsburgh area nonprofits still consider themselves ahead of the curve technologically.
- Having full-time tech staff makes a strong positive impact on perception of IT adoption.
- A vast majority of nonprofits believe that technology has substantially changed how they operate.

Introduction

When the Bayer Center first examined technology use by nonprofits in our region 10 years ago, we intoned in our report that the survey results shattered "the image of nonprofits as monolithically unsophisticated in their use of technology." Well. Glad we got that out of the way early. The thrill of repeating the survey derives from the variety and sophistication in the technology nonprofits employ and how they manage it. We're never more eager to undertake the next survey than when we finish the present one and want to see how the past translates into the future.

In that first report, we also stated that technology "should occupy the minds of executive directors and other leaders in addition to receiving attention from IT staff." The culture has largely ushered in this state of affairs, although respondents still bemoan a lack of buy-in from users and decision-makers alike. We at the Bayer Center still believe it, though. One IT evangelist cannot create change alone, especially when she's busy fixing the printer or uploading special event photos. Nonprofit executives need more than ever not only to allow tech progress but seek the mission and administrative gains that IT enables.

We are especially grateful for sponsorship support from three companies that have considerable interest and presence in the local nonprofit community. TowerCare, Inc., a dynamic provider of fundraising software (that happens to be headquartered right in our region) returns as lead sponsor for the 2010 survey. The customer base for its product – Donorpro – is building a national customer base on the foundation of its regional market share. Net Xperts LLC and Plummer-Slade help out as supporting sponsors. Both have a long track record providing IT services to nonprofits. All of our sponsors take a keen interest in the success of the nonprofit community and value quantitative measures of progress.

The first survey instrument we used has a lot more white space on it than the current one. We can't resist adding more questions and more response options because there is more to examine in nonprofit IT all the time. This year, we look at adoption tablet PCs and smart phones explicitly for the first time. In addition, we ask respondents what kind of servers they maintain for functions other than file and print sharing. The complete survey instrument is an appendix to this 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 by other researchers.

Finally, we'd have no analysis without dedicated people taking time away from enhancing their organization's IT to telling us about it. We appreciate the 8 "charter" survey organizations that have responded every year, the 159 organizations that have responded more than once and the 93 who participated for the first time this year.

Lead Sponsor

Your nonprofit organization's mission is your priority and your passion. For that very reason, it's worth your time to consider DonorPro, the software package designed exclusively for nonprofits by people with extensive nonprofit experience to help you make your mission a reality.

DonorPro effectively brings together fundraising, constituent management, donation tracking and workflow management in one extremely user-friendly package. In fact, DonorPro is so simple to use, so effective and so versatile, that 70% of the organizations that have asked to see a demo of how DonorPro works have gone on to purchase it. An adoption rate like that speaks for itself.

What about the cost? Our single fee includes the entire package, unlimited users, all updates and unlimited customer support. And you'll be surprised how little support you'll actually need, because DonorPro is so easy to learn and navigate.

Is it easy to switch? We make switching pain free. Whether you're using spreadsheets or some other program, we do all of the work required to convert your existing data into DonorPro – in as little as a week if you want to move that fast.

How much can DonorPro do for your organization? On average, DonorPro has generated a 35% boost in donations along with a 40% gain in productivity. Results like that couldn't be more welcome, especially in this economy.

Improve your fundraising.

Do what works. DonorPro identifies the cultivation processes that are working best for you and then automates these processes so you can repeat the most successful methods of converting prospects into major donors, retaining donors, and gaining corporate sponsorships and foundation grants. With DonorPro's reports, you can easily track your effectiveness.

Be efficient. DonorPro creates, tracks, and manages your fundraising campaigns and appeals whether you use direct mail or email. DonorPro provides all the tools for successful online fundraising too including campaign sites for peer-to-peer fundraising, events, team fundraising, even online auctions.

Be personal. DonorPro lets you customize your approach to each constituent. It identifies commonalities among prospect groups such as lapsed or high-net worth donors so you can better target your messages. It helps you customize your appeals to those groups for maximum effectiveness.

Make the public aware. DonorPro lets you create very personal, high quality and timely written and electronic outreach programs and public awareness campaigns.

Increase your operating efficiencies.

Easily manage recurring donations. Recurring donations and pledges are important in today's economy but can create a big administrative burden for your staff. DonorPro makes it easy with automated data entry, reminders, credit card processing, donor recognition, receipting, and reporting.

Enter donations quickly. DonorPro's screens, automated lookup, and auto-fill features reduce data entry from hours to minutes.

Make your data accurate, consistent, and easily accessible. DonorPro's centralized data repository becomes the one source for your organization's data so that everyone can access and retrieve the information critical for their decision making. DonorPro of course, protects the integrity and security of your data too and allows you to contract what each user can see and what each user can do

Don't forget. DonorPro's scheduling and task reminders allow you to better manage workflow and ensure nothing slips through the cracks. It provides built-in project management for fundraising events including, for example, customized checklists, automatic reminders, budget creating, online ticketing and automated event seating that increase productivity.

DonorPro provides so many features to improve fundraising, donor communication and internal efficiencies that listing them all on one page is next to impossible. So instead, visit our website at **www.towercare.com**, call us at **866-935-8281** or send an email to **donorpro@towercare.com** for a personal introduction to all the benefits of DonorPro and to see it in action. You'll be glad you did. You'll see how DonorPro can help make your mission a reality.

Supporting Sponsors

NET Xperts LLC

OFFICIAL NETWORK SOLUTION PROVIDER
PITTSBURGH ZOO & PPG AQUARIUM

At NET Xperts, we service numerous nonprofit organizations in the Greater Pittsburgh Area. We are very pleased to announce our partnership with the Pittsburgh Zoo & Aquarium as we've recently been named their "Official Network Solution Provider". Additionally, we are pleased to offer a discounted nonprofit labor rate. Please feel free to contact Jake Rubenstein at jrubenstein@thenetxperts.com OR 412-244-6389 for additional information.

We are a local IT firm specializing in network, desktop and printer services as well as hardware/software sales. Listed below are some of the IT Solutions and Support Services we provide:

- 24/7/365 Network Monitoring
- As needed part-time staffing (Half-Days/Full Days)
- Network Analysis, Design, Deployment & Documentation
- Network Security Solutions (Firewalls/VPN, Anti-Virus/Spam Protection)
- PC/Printer Maintenance & Support
- Hardware/Software Sales

Responding Organizations

This year's survey drew a sample of 260 organizations. Responses were collected in late summer/early autumn 2010. The descriptions and conclusions drawn in this report derive from a sample that is big and diverse enough to represent the nonprofits in Southwestern Pennsylvania. As in prior surveys, the majority of organizations had responded at least once in the past. Still, over a third had never participated before. In order to place the findings in context, this section of the report will summarize the respondents by type, size, location and age.

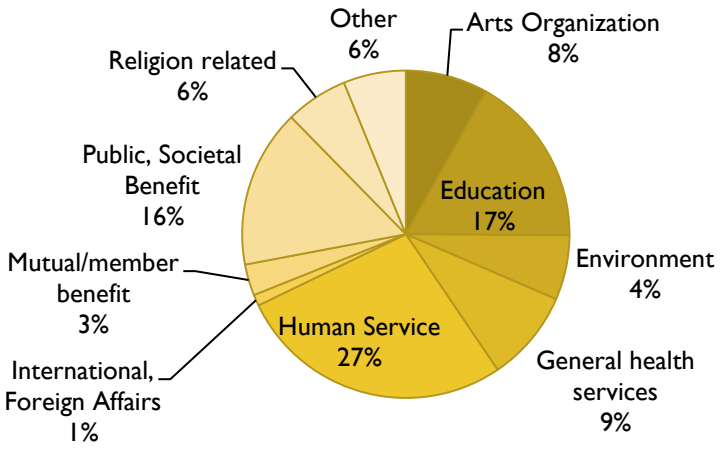
Repeat Status	Orgs	%
Six-Timers Club	8	3%
Five Surveys	26	10%
Four Surveys	41	16%
Three Surveys	34	13%
Two Surveys	58	22%
New in 2010	93	36%

Organization Type

Respondents identify themselves according to the "major 10" categories from the National Taxonomy of Exempt Entities. Because some organizations work in multiple categories, they may choose multiple categories.

The 2010 survey pool breaks down by organization type consistently with past years and with the mix of nonprofits in the region. As in prior surveys, 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.

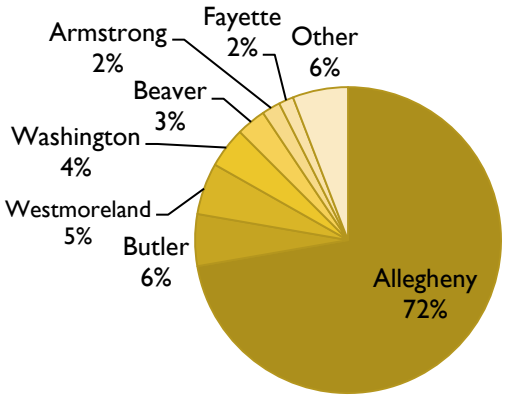
Respondents by Organization Type



Geography

The vast majority of 2010 respondents (72%) are located in Allegheny County, which falls within the range (69%-85%) of the Allegheny proportion in prior surveys. Of the remaining organizations, 21% are located in the adjacent counties of Armstrong, Beaver, Butler, Fayette, Washington and Westmoreland. The remaining six percent come from outside the immediate Pittsburgh metropolitan area.

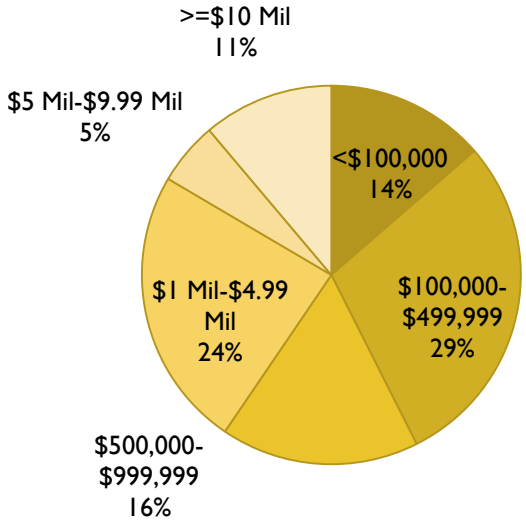
Respondents by County



Budget Size

Like nonprofits nationally, the organizations in our tech survey pool tend to be small. Over half (60%) of the organizations have annual budgets of less than $1 million, and 83% have annual budgets of less than $5 million. The size of the organization definitely influences IT need and IT adoption. Budgets range from $500 to $80 million.

Survey Respondents by Budget Size

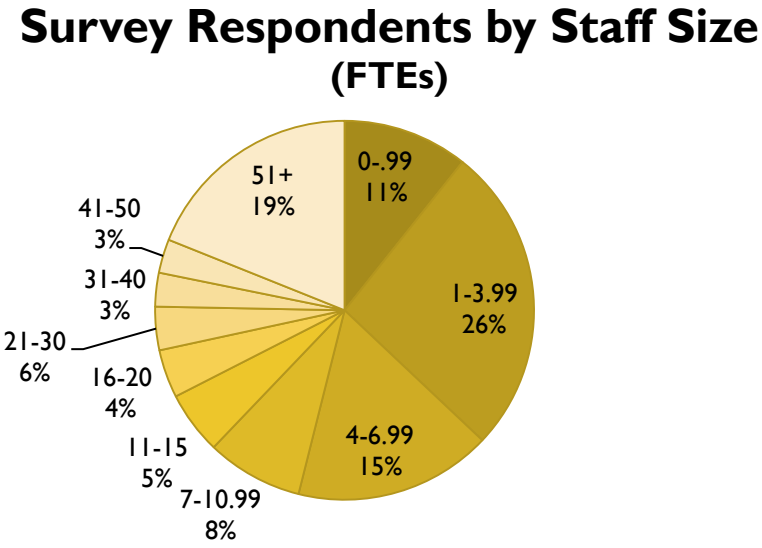


Year	Median Budget
2000	$500,000
2002	700,000
2004	645,000
2006	700,000
2008	815,000
2010	594,000

This kind of distribution fits the pattern established in prior surveys. After reaching a peak median budget in 2008, this year's median drops to the lowest since 2000. It is difficult to analyze trends at the present moment without viewing them through the lens of the global economic crisis. Nonprofit budgets tend to lag wider cycles of growth and contraction, and two years after the recession began, its effects are apparent in the sector This year's pool has more budgets over $10 million than any previous survey. At the other end of the spectrum, it has the most budgets under $100,000 since 2004 and more in the $100,000-$499,999 range than 2008. The growth in those brackets essentially offsets a decrease in the $500,000-$1,000,000 range. The upshot of this shifting mix of budgets is a median budget size smaller than any since the original survey in 2000. The average budget aligns closely with the past four years and is up incrementally from 2008.

Staff Size

When we talk about differences between for-profit businesses and nonprofits, we too often overlook size. Just as the survey pool has small budgets, they are overwhelmingly small in staff size as well. The small number of users and tight IT staff constraints go a long way to explain the differences between nonprofit and for-profit IT adoption. Just over half (54%) of this year's respondents employ 7 or fewer full time equivalent (FTE) employees. An additional 13% of organizations have 7-15 employees. At the margins, this survey has more all-volunteer organizations than any past survey (9%), and the largest organization employs 1000 FTEs.

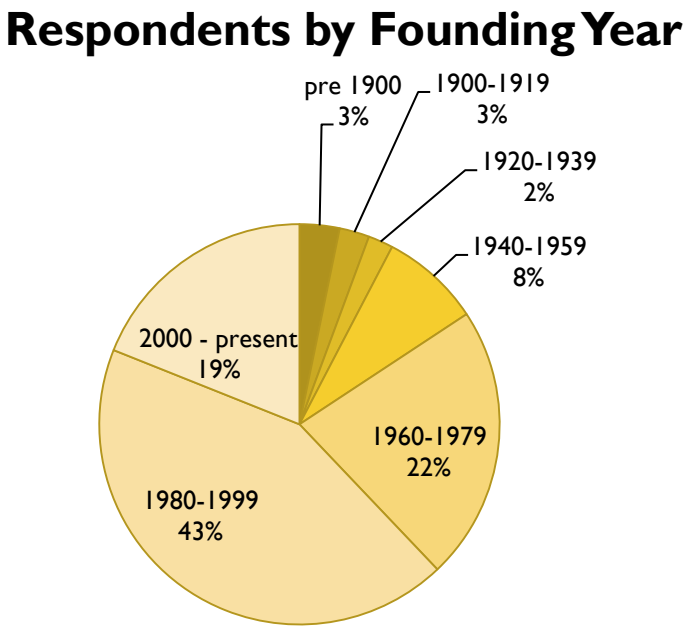


Just as the median budget size is below most prior years, this year's median staff size is the smallest in six surveys. Relative to past years, the distribution has more of the smallest and largest organizations and fewer in the middle ranges. With the largest ever proportion (19%) of 50+ staffs and above-average proportions under 7, this year's pool has fewer than average staffs in the 7-40 ranges.

Year	Median Staff Size
2000	6
2002	10
2004	7
2006	6.5
2008	7
2010	5

Age of Organization

Age can cut both ways in its impact on use of technology. On the one hand, a younger organization has not existed without IT tools being available to it. Whether a new nonprofit adopts the tools is as open a question as whether an older one does, but the recently-founded organizations have developed in an online world. On the other hand, organizations tend to grow over the years, and scale creates efficiencies and critical mass for investment in IT solutions. The 2010 survey organizations mirror the national distribution of nonprofits by age, with the vast majority having been founded since 1960. Over half the organizations were founded since 1980. The median age of organizations is 25 years, up a year from the 2008 survey. Meanwhile, the number of respondents founded since 2000 is up to 19% from just 12% in 2008. In the Pittsburgh region, we are still founding nonprofits to add to an already-robust sector.



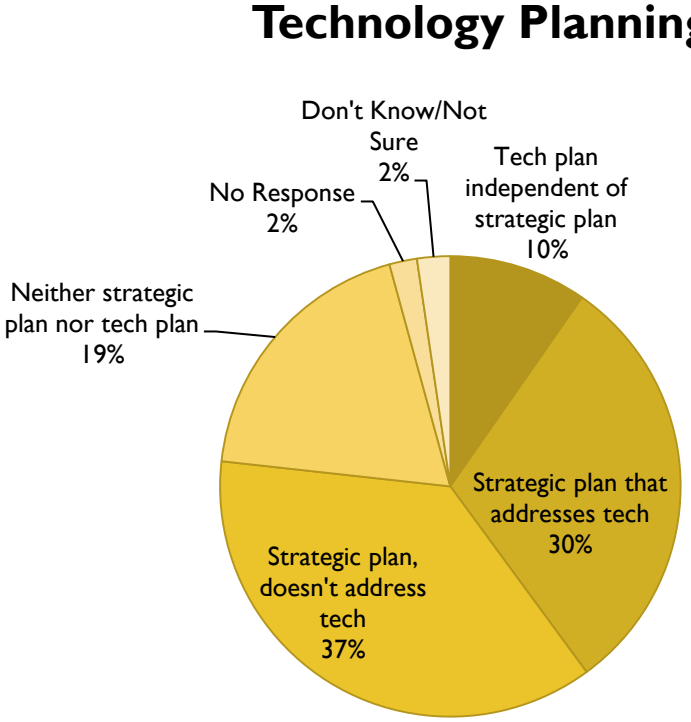
We describe these characteristics of the respondents in order to stress that the survey pool represents the breadth and diversity of the nonprofit sector. Incremental changes between survey years may create small differentiations but largely show the consistency of this survey pool. More detailed respondent profile data is available upon request. A complete list of this year's respondents appears as an appendix to this report.

Technology Policy

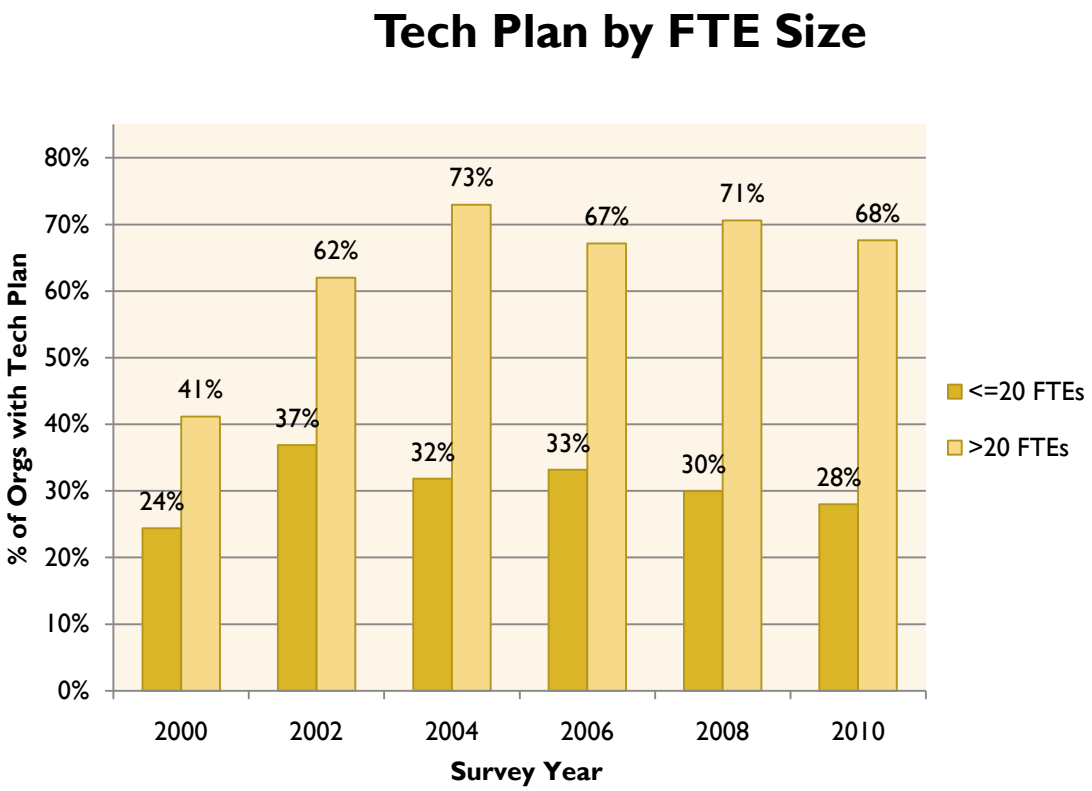
Although we call this report a technology survey, the Bayer Center's chief interest is how technology enhances the operation of nonprofits. We start, therefore, with how nonprofits manage technology.

Technology Planning

From a low in 2000 of 28%, the technology planning rate has hovered in the low 40% range since; this year's 40% continues the trend. The majority of technology plans are part of a broader strategic planning process, which is good news. The best technology planning derives from the organization's broader strategic direction.



Among all organizations, 40% had a technology plan in 2010. The evidence grew steadily from the 2000 to 2004 surveys that larger organizations are more likely to plan for technology. To simplify "large and small", we use a 20-employee threshold. Although higher than the median staff size, that number marks a place where organizations start to look different. Larger organizations plan at a much higher rate (68%) than smaller ones (28%). Over the last four years, the rate of large organization tech planning has exceeded the small-organization rate by 34-41 percentage points. Organizations with a tech plan have five times the median staff size (20 vs. 4) and nearly four times the average staff size (82 vs. 21) than those with no tech plan.

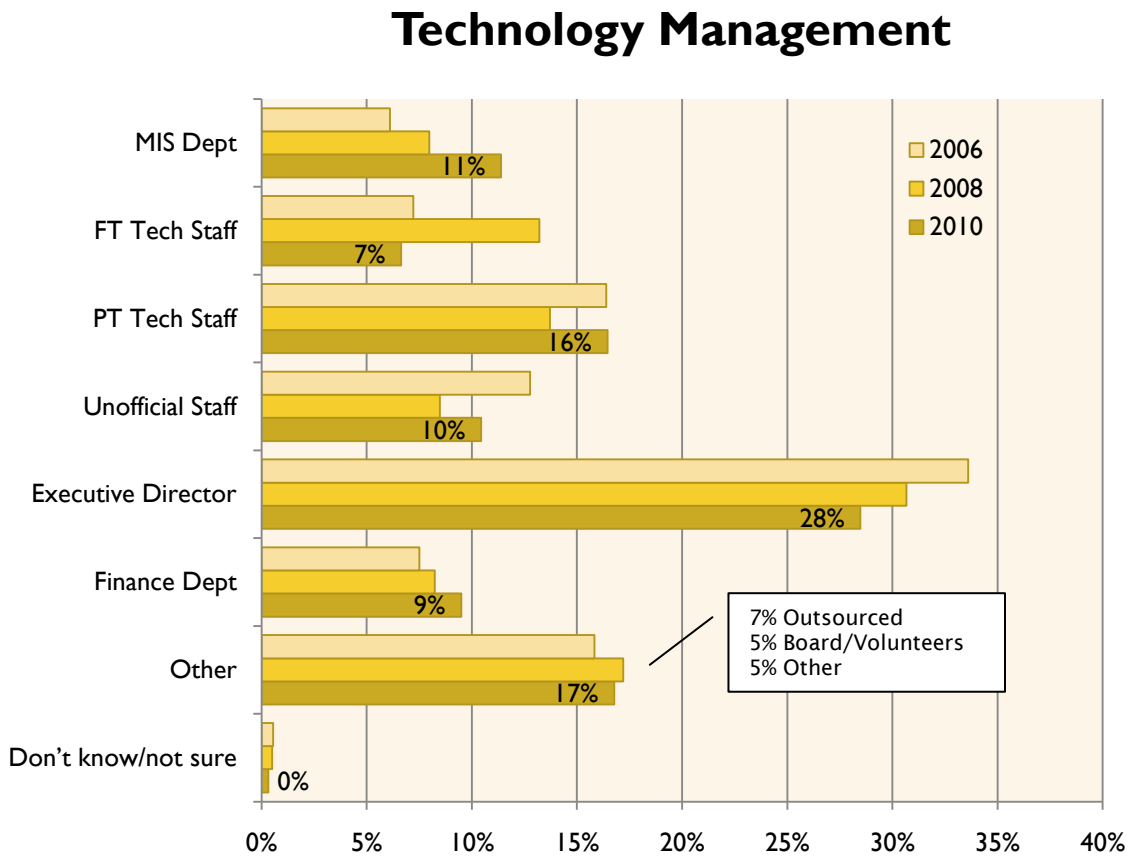


Technology Management

Tech planning speaks to the fact that all technology populates our offices to enable us people to do our work. An important "humanware" role is making the hard technology decisions. Respondents were asked to identify "the primary source of technology decision-making; who decides what gets purchased and what gets thrown away?"

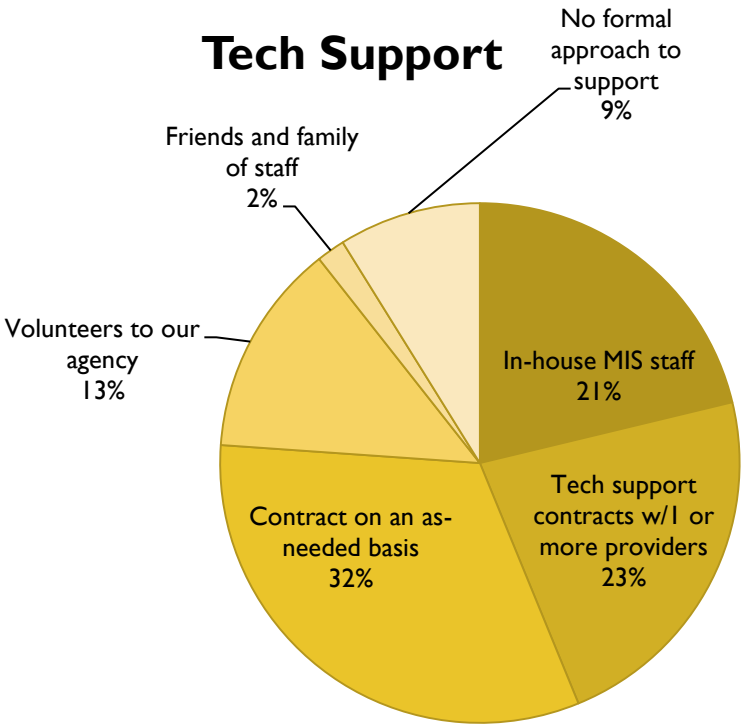
Repeating this survey analysis humbles a researcher because trends seem to emerge and then reverse themselves. Sample differences from year to year explain some of these variations. The 2006 survey indicated that tech staff were losing authority in decision-making to groups with less day-to-day

responsibility. A decrease in staff decision-making was accompanied by increased board member and volunteer decision-making. This year's survey shows continued decreases in Executive Director tech decision-making, down below 30% for the first time. The accidental techie, however, returns slightly to 10%. Meanwhile, among IT staff categories, this survey depicts more mult-person MIS departments and more part-time IT staff with fewer full-time IT staff making the decisions.



Technology Support

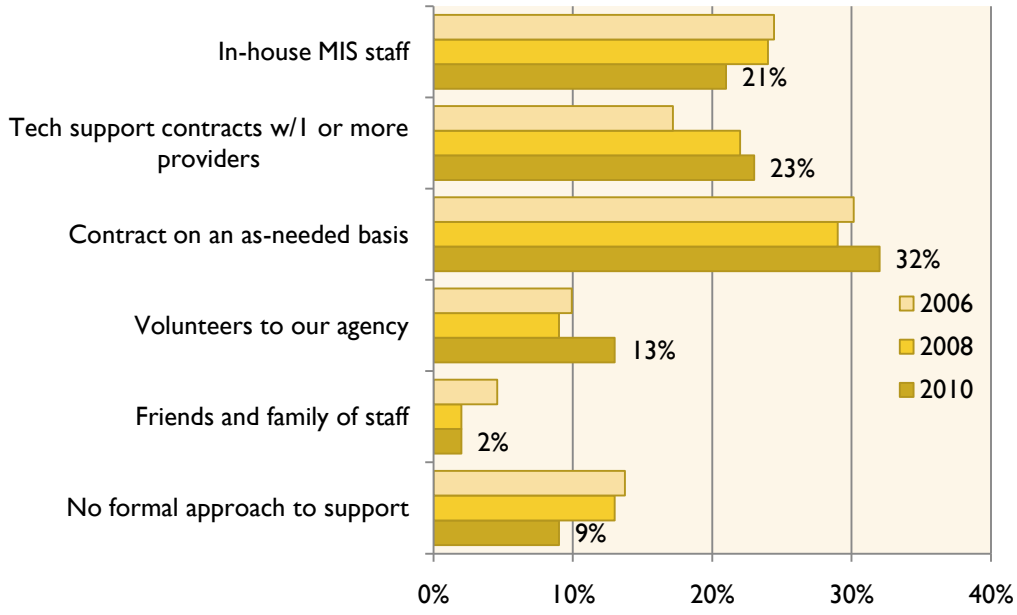
Because tech support comprises both routine tasks done by staff and specialized tasks that require outside assistance, many organizations use more than one provider for support. For example, a contractor might supplement In-house MIS Staff for assistance in emergencies, more technical tasks, or rare, more-specialized projects. Respondents can cite more than one type of tech support per organization in the chart below.



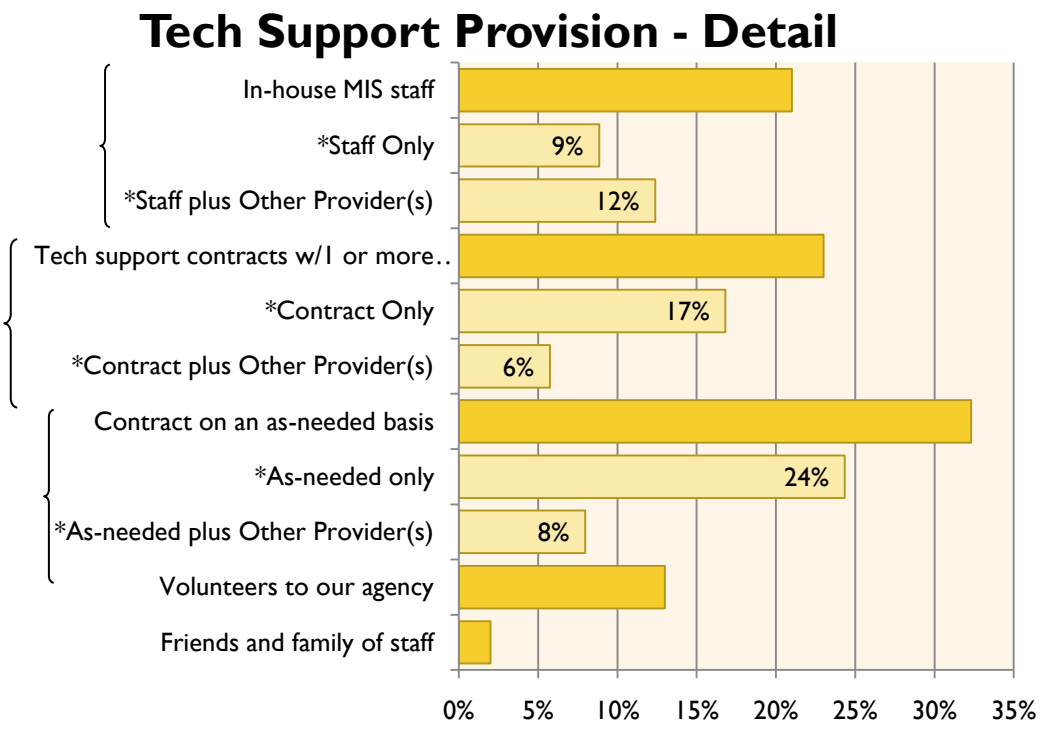
Support, like decision-making, has shifted increasingly to outsiders. The graph below shows the breakdown of primary providers of support[1] over the last three surveys. Since 2006, the survey depicts less support by staff and more by contractors and volunteers. As-needed contracts have grown faster than on-going contract relationships. We'd speculated in 2008 that more on-going agreements suggested confidence in the financial future for nonprofits at least up until what was then an undefined financial downturn. Faster growth in as-needed contracting suggests that the past two years of global financial problems have more organizations hiring outsiders more for short-term troubleshooting than long-term, planned support.

[1] 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.

Tech Support Provision



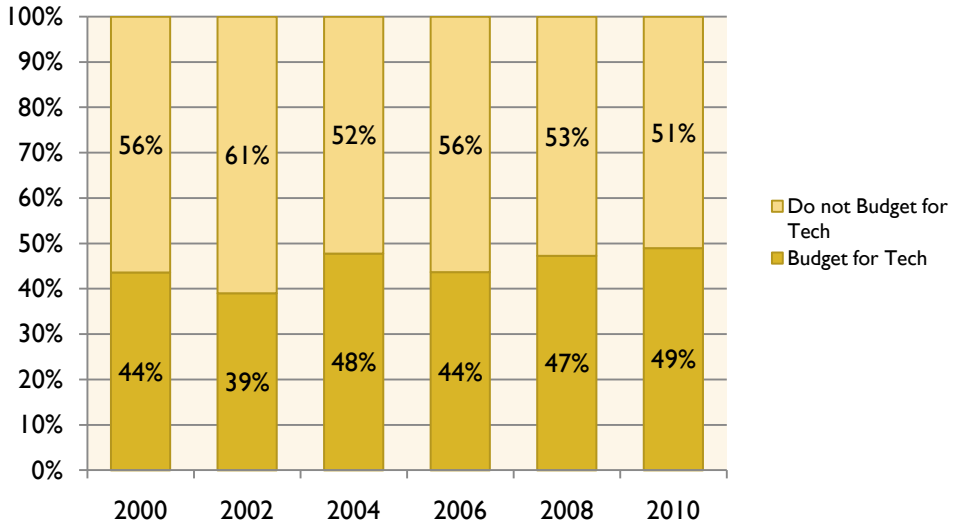
A more detailed examination indicates that the majority of organizations that identify staff as their primary support also use outside providers. This may include an ongoing tech support contract, as-needed consulting assistance or volunteers. Those who use outside support more often use that source on its own, although some organizations combine their contract support with other providers.



Technology Spending

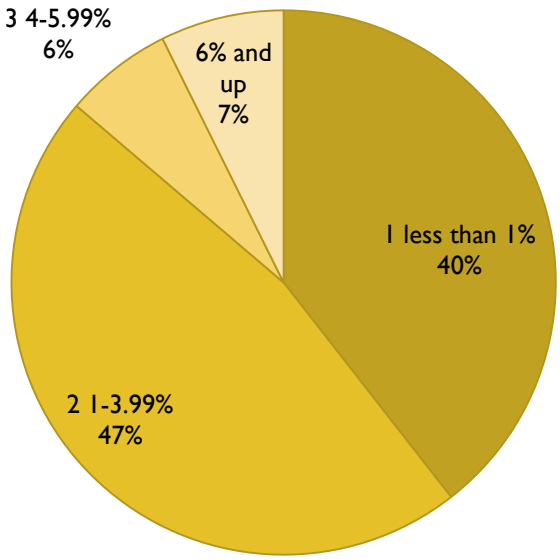
While the rate varies slightly from survey to survey, It remains true that not-quite-half of respondents budget for technology. The 49% rate is – by an eyelash – the highest in any of our surveys. The organizations that do track and budget for technology expenses continue to be slightly larger than those that don't. Those that budget are 2.75 times larger than those that don't, in budgets (11.1:4). Median budget size shows a slightly smaller gap of $1.07M to $458,000.

Technology Budgeting



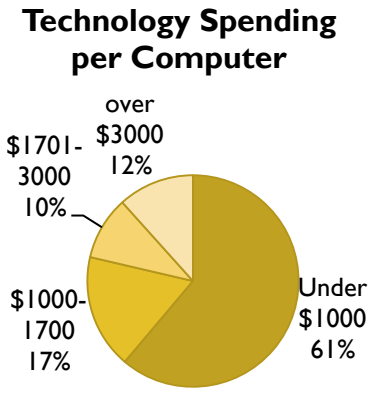
We evaluate the amount budgeted for technology in respondent organizations against recommended benchmarks. One benchmark is that technology spending should be 4-6% of overall annual spending. After celebrating an increase in that range to 10% of respondents in 2008, we bemoan a drop back to 6%. And the group below the benchmark has grown from 83% to 87% in two years.

Tech Budget as % of Total Budget



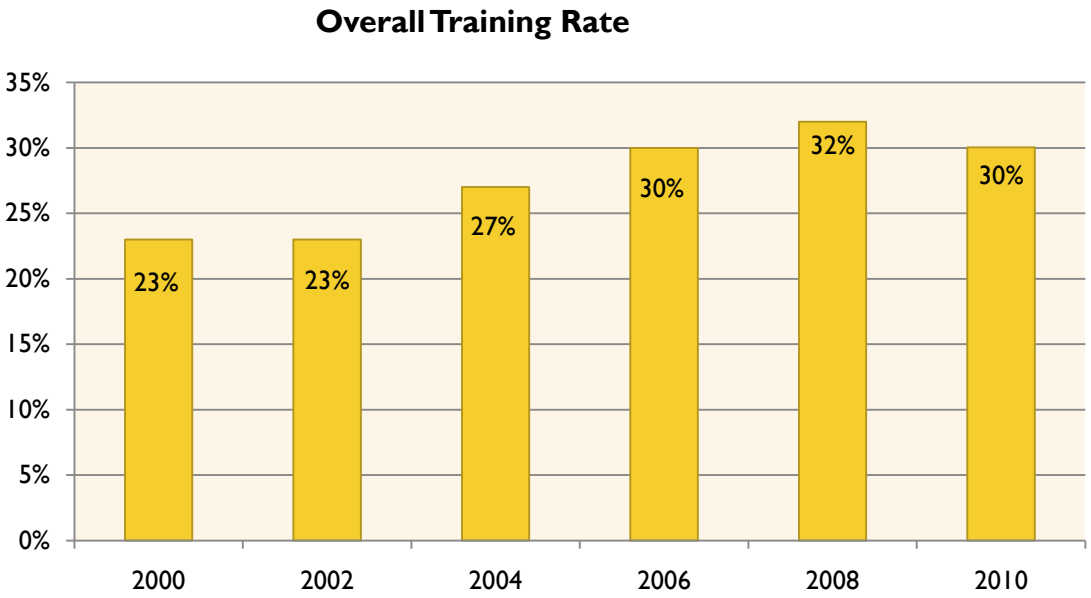
Guidelines for annual spending per machine vary, but experts say that organizations should budget $1000 to $1700 per year with some placing the top end of the range at $3000 annually. Median spending is down to $750 per computer from nearly $1000 per computer in both 2006 and 2008. This ratio echoes the tech budget to total budget ratio by skewing lower than the last three surveys.

To summarize, more organizations are budgeting for technology than in any prior survey, but they're budgeting less relative to their budgets and computer inventories than they did two years ago.



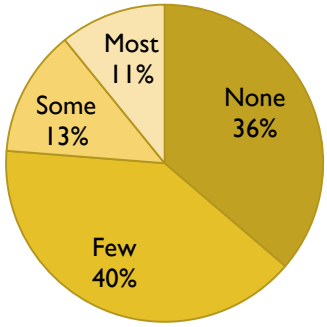
Staff Training

For four straight surveys, we'd seen a steady increase in the overall rate of tech training for nonprofit employees. This year, that weighted-average rate dips back to its 2006 level. A decrease in training is not surprising in a down economy; training budgets are often the first to get cut.



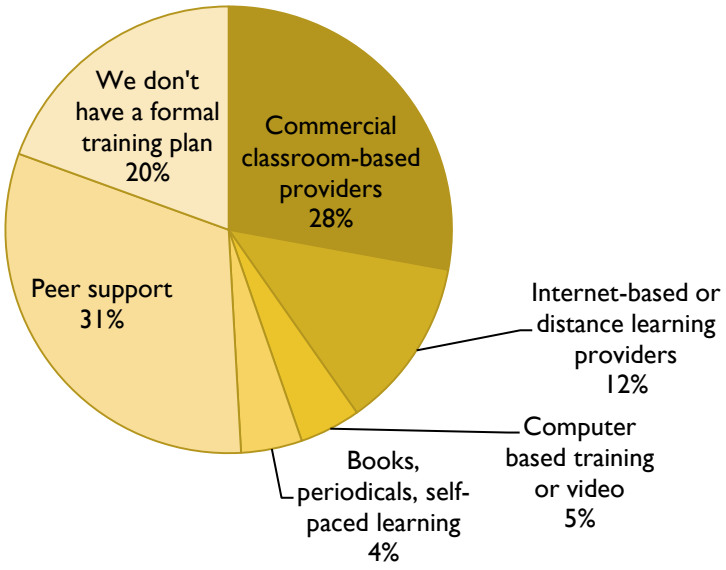
We arrive at this rate by asking what proportion of each organization's staff "received formal technology training" in the last year.[2] That breakdown for 2010 explains the overall rate decrease from 2008 because more organizations are sending none of their staff to training, and fewer are sending "few", which means 1-33% of staff.

Staff Technology Training



The survey also asks respondents what methods they use for staff technology training. This question goes beyond the "rate" question because it includes self-paced and casual training methods like books and peer support. In this arena, peer support is up, and books are down from 2008. The remainder of the breakdown remains similar to past years and virtually unchanged from 2008.

Tech Training Methods

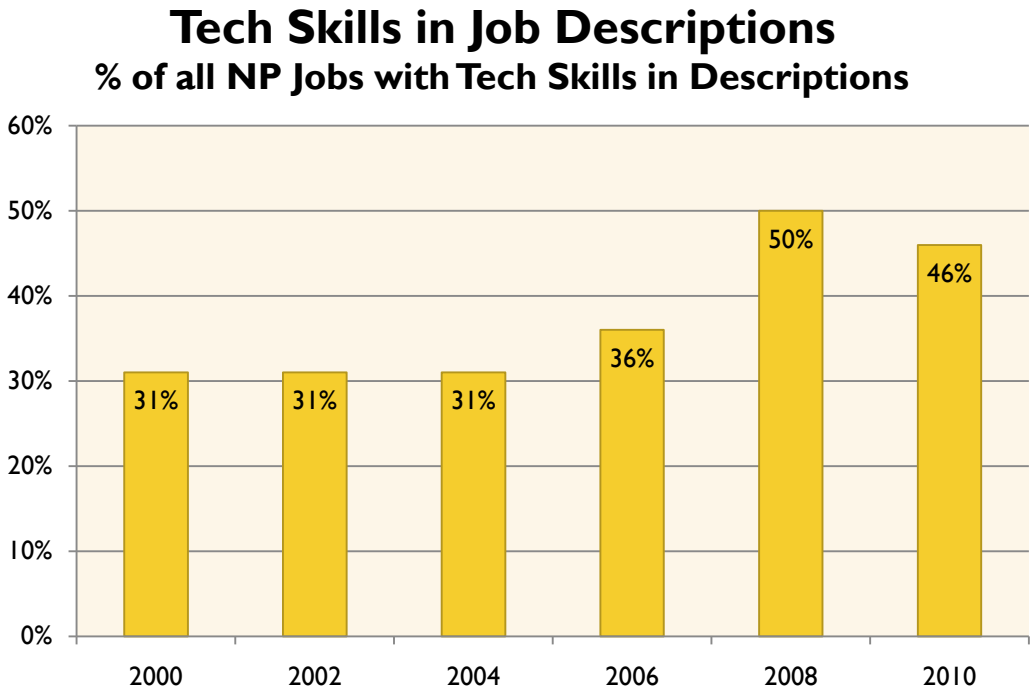


Technology Skills in Job Descriptions

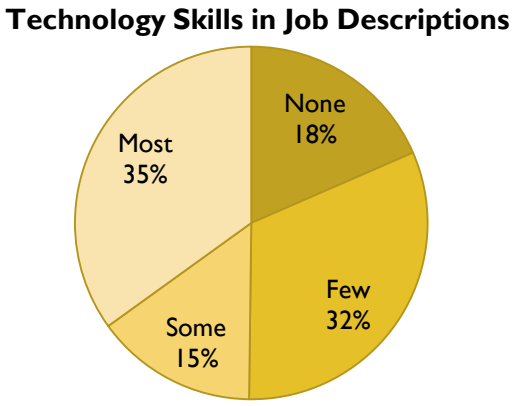
The rate of nonprofit *jobs* in the region that have tech skills in their job descriptions changed more than any other finding from 2006 to 2008. After seeing a jump from 31% to 36% in 2006, we saw a giant leap to 50% in 2008. We worried that this might be a sample anomaly even as we observed that the upward trend fro 2004 to 2008 was irrefutable. This year, the rate has dipped from 2008 but not so far that we see 2008 as a data accident. Again, this measure derives from a weighted average of responses, and upticks in the job

[2] Options for this question were: none, 1-33% of staff, 34-66% and 67-100%

description rate or the staff size of the largest organizations can exert a large influence on the overall rate. Technology infuses so much of our work today that articulating the skills necessary to carry out all kinds of jobs makes for better hiring and performance.



As with tech training, we see a slight increase in organizations that include tech skills in no jobs. Unlike training, which clearly creates an expense, tech skills in job descriptions are expense-neutral. In other words, we don't believe that organizations that had tech skills in their job descriptions removed them to save money. Rather, we observe a sample variation here. The interesting part of this variation is that "Most" (67-100%) and None have increased while Some and Few have decreased.



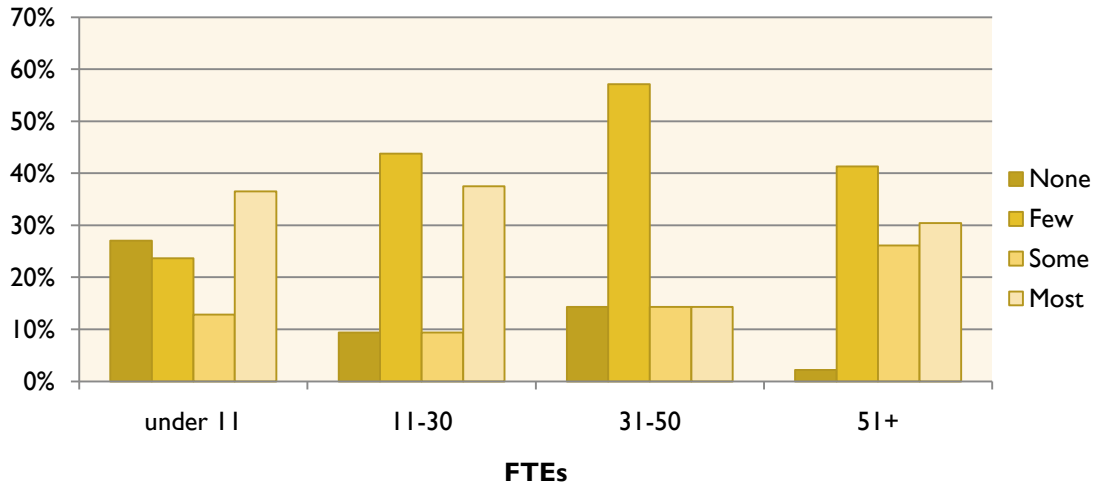
When we drill further into the data, we see a discernible difference between the state of job descriptions based on staff size. Within small variations, this trend looks identical to the 2008 data. The smallest organizations are likelier than the larger ones to show the two extreme states. Over a quarter of staffs 10 and

under have tech skills in no job descriptions. On the other hand, over 35% of them list tech skills in most job destriptions.

Two stories emerge. First, the smallest organizations may lack job descriptions altogether. Second, if they have job descriptions, they acknowledge that at that size, most everyone will be called upon to use technology in their jobs. At the other extreme in the largest organizations, we see a different profile. There are tech skills in someone's job description at virtually all of the organizations over 30 employees. The heaviest concentration is in the 1-33% bracket, though.

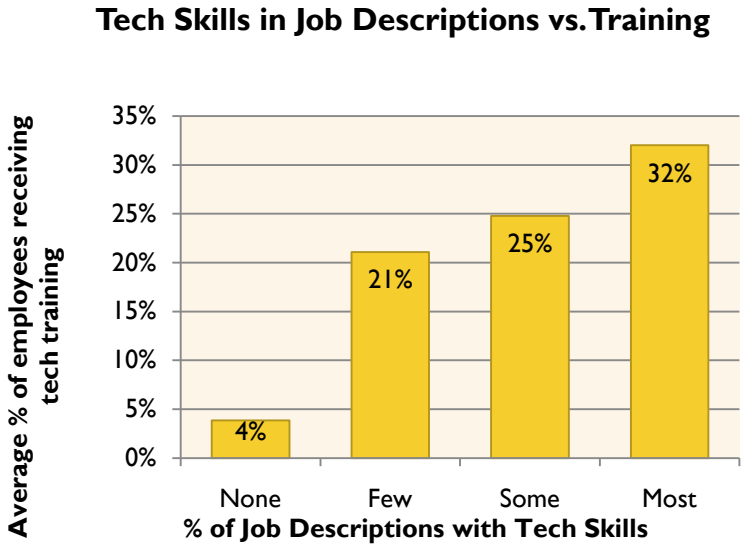
Again, two stories can be told here. First, the larger the organization, the more likely it is to have positions that are consumed with program delivery and have little office time – think performing artists, residential facility staff and tutors. Someone is supporting the technology, and many people are using it, but not everybody. Second, as the org chart grows, the functions – including technology-demanding functions – sort themselves into bureaucratic order. A smaller proportion of people having tech skills in job descriptions would be consistent with more specialized positions that can only come with scale.

Tech in Job Descriptions by Staff Size



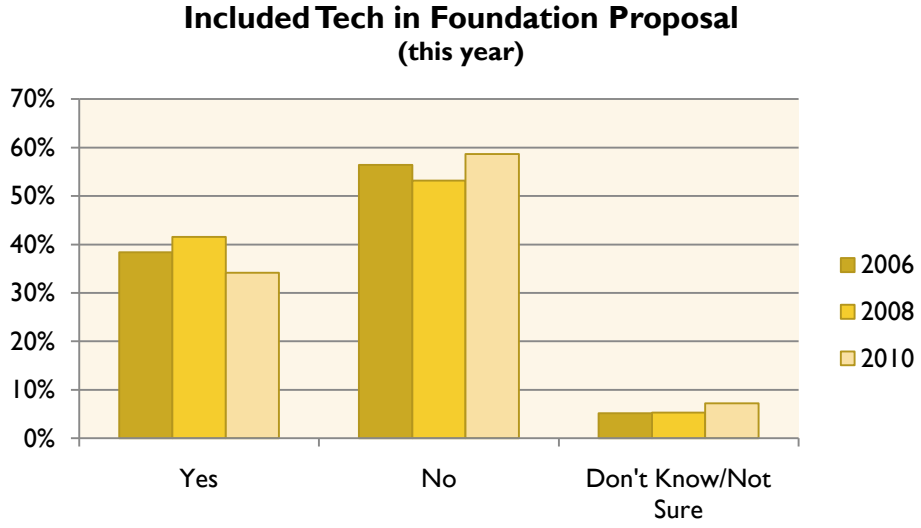
Tech Skills in Job Descriptions Related to Training Rate

Although the majority of our findings are descriptive, some causal conclusions emerge. Again in 2010, the pattern clearly shows that organizations that list tech skills in job descriptions are more likely to send their employees to tech training. The leap in the effect on the training rate between having tech skills in no job descriptions and in few of them is bigger than in past years. In organizations with tech skills in nobody's job description, only 4% of staff got IT training in the last year. Where 1-33% of staff have tech skills in job descriptions, that rate jumps to 21%. Finally, in organizations in which most job descriptions articulate required tech skills, nearly a third of employees got training.



Foundation Proposals

Given that respondents perennially cite "funding" as a barrier to better technology adoption, we added questions in 2006 to examine whether nonprofits include technology costs in their foundation proposals and what kind of success they have. In 2010 we see a drop in the proportion of organizations that have asked for technology funds in a proposal in the past year. In fact, it drops below either of the prior two surveys.

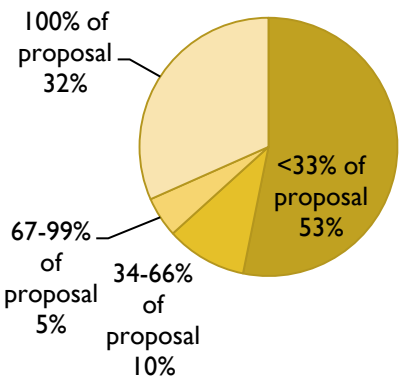


We can only speculate about what would cause a drop in tech costs in the number of organizations seeking technology funds from foundations. Perhaps the tech budget cuts echo here; organizations may be focusing on program expenses in a tighter foundation funding environment.

The pattern continues that budgeting for technology correlates with seeking technology funds from foundations. In 2010, 60% of the organizations that include tech costs in foundation proposals have tech line items in their budgets vs. 41% among those that do not put tech costs in their proposals.

Beyond whether they'd included tech in a proposal, the survey asked how much of the proposal was for technology. We found concentrations at the two extremes. In just over half of the proposals, tech constituted less than a third of the budget. We would like to think that those proposals use something like the 4-6% benchmark referenced tech budgeting section. That proportion is up to a high of 53%. At the other extreme are the all-tech proposals, slightly down at 32%.

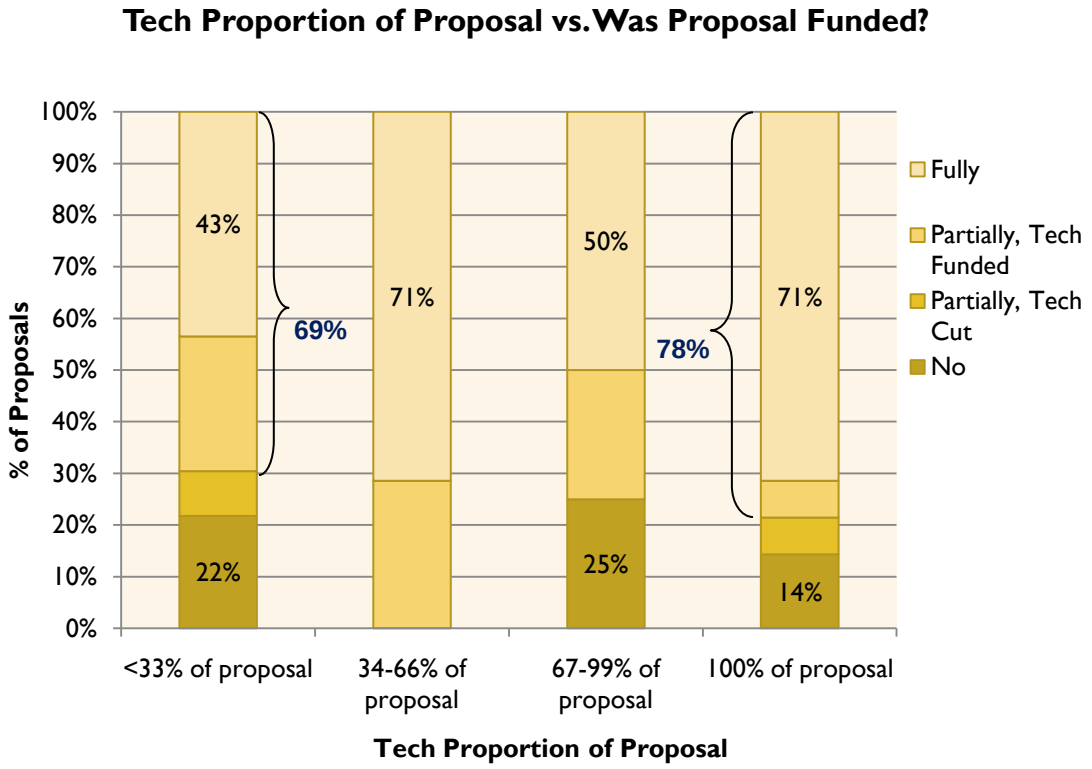
Tech Proportion of Foundation Proposal



Finally, we asked about the success of these proposals. If we were surprised at the rate of tech grant success in 2006 (75%) We were shocked in 2008 (89%). This year's survey sees the rate drop closer to the 2006 level (78%), which is sill very high. One difference this year is the number of proposals (6%) that had the tech part cut even as some of the proposal was funded.

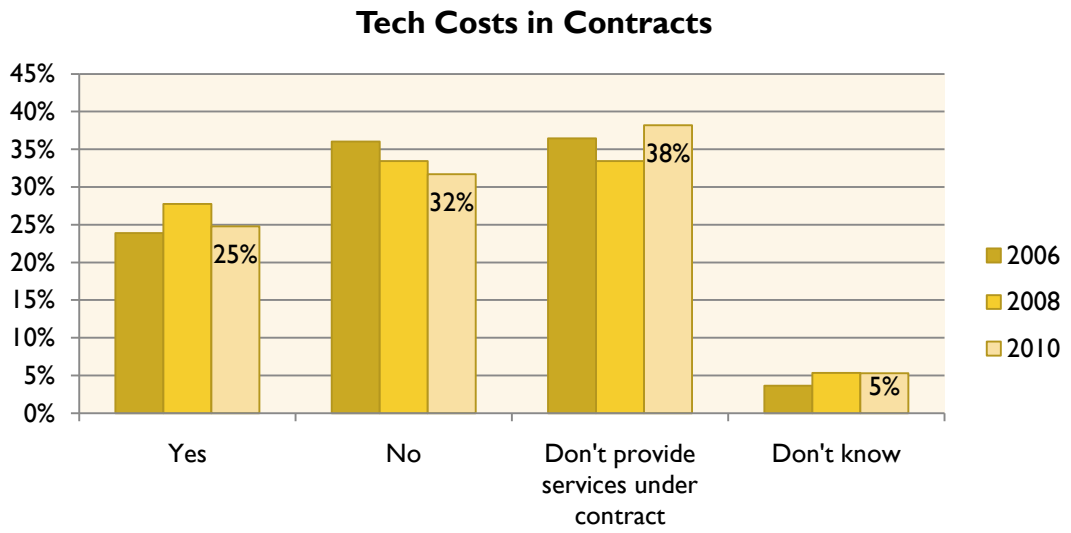
Was Proposal Funded?	2006	2008	2010
Fully	52%	60%	57%
Partially, Tech Funded	23%	29%	22%
Partially, Tech Cut	2%	1%	6%
No	23%	10%	16%

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, were surprised. In both 2006 and 2008, 100% technology proposals got funded at least as often as small portion technology proposals. In 2008, the technology in proposals was funded in 90% of both minority-tech and all-tech proposals. In this year's survey, the rates refute our theory even more completely. Minority-tech proposals are the least successful in getting the tech funded. All-tech and half-tech proposals succeed best at receiving the full requested amount. In fact, half-tech proposals, which had been least successful in prior years were 100% successful at getting the tech funded this year. Although these results look bleaker than 2006 and 2008, that's relative. The majority of tech proposals in our pool are still highly successful.



Tech Costs in Contracts

Of course, foundations are not the only revenue source for nonprofits. 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.

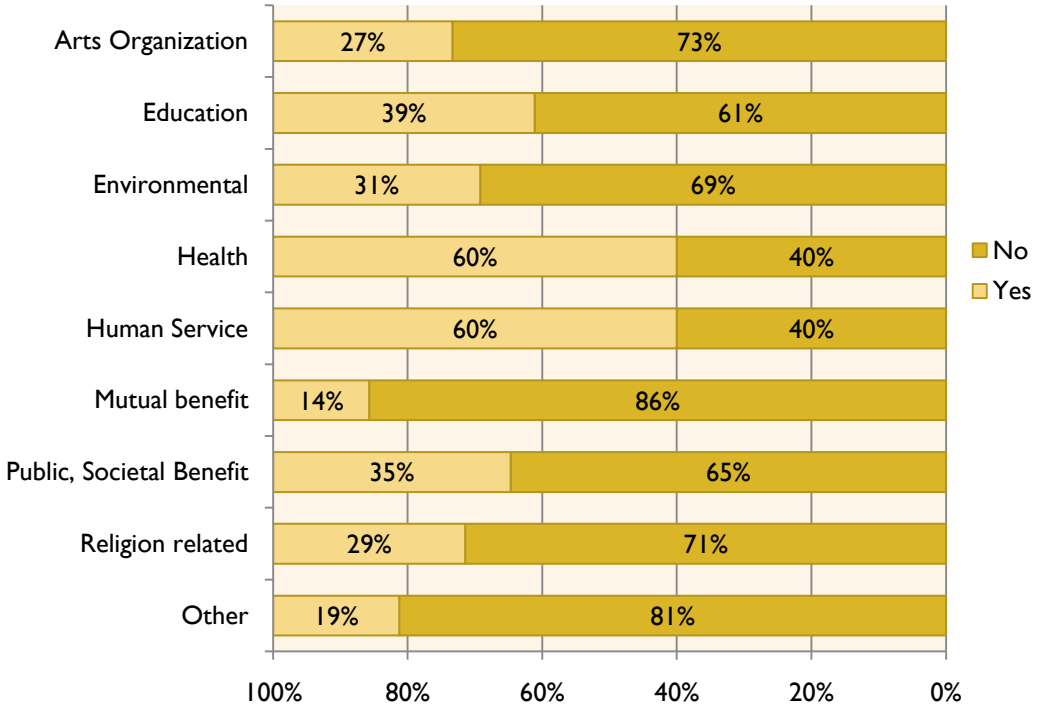


As the chart shows, a plurality of organizations does not provide services under contract. If we focus only on those that do (i.e. a Yes or No answer to the question), we find a similar rate to tech in foundation proposals: 44% of service-providing organizations include tech costs in those contracts. Again, budgeting for tech correlates with working costs into contracts: 56% of nonprofits that include tech costs in contracts have a tech budget, versus 42% of those that do not include tech costs in contracts.

Although we examine links between the mission of the organization and many measures in the survey, very few of these crosstabs produce any interesting patterns. The comparison regarding tech costs in contracts does produce some intuition-confirming correlations.

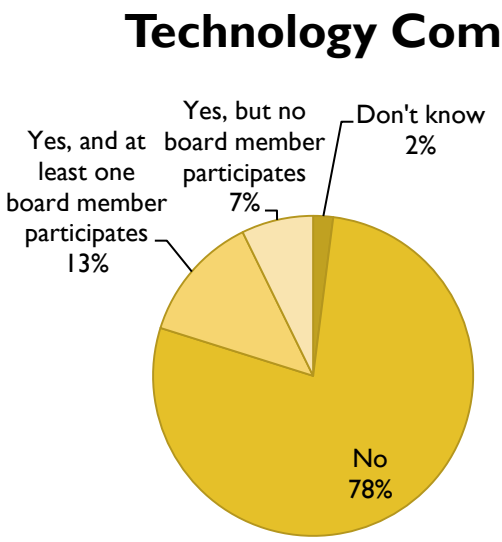
First of all, health and human service organizations are most likely to include tech costs in contracts. Nearly half of faith-based organizations do so. Arts and Environmental groups are less likely to include tech costs in contracts, and Mutual Benefit – professional/membership organizations – are least likely to do so.

Tech Costs in Contracts by Org Type



Technology Committee

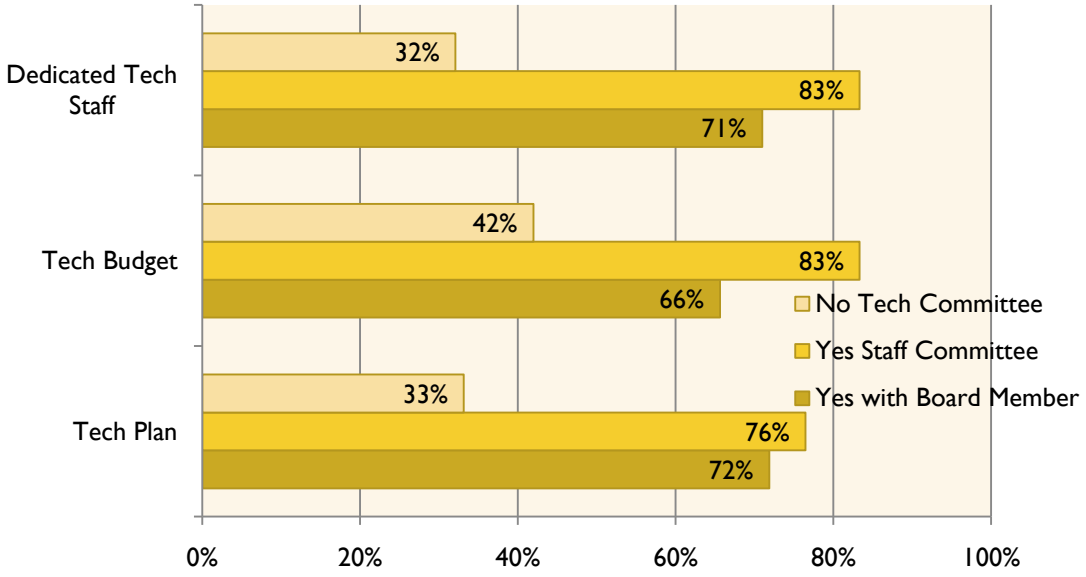
Past surveys have shown an important link between having a technology committee and adopting best practices in technology management. Tech committees can draw expertise and opinion from across the staff and from board members. If all that is true, this year's survey bears bad news. Tech committees have declined by two percentage points in each of the last two surveys to a low since 2004 of 20%.



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 whether an organization has a tech committees. The median staff size for organizations with a tech committee is 23 versus 4 for those that do not, a bigger gap than in 2008. In 2006, a distinct size difference emerged between those that have a board member on the committee and those that do not. The pattern continued in 2008 and again this year. Board tech committees align with a much lower median staff size (15) than staff tech committees (41). A similar ratio exists in budget ($1.6M vs. $3M). These two gaps are smaller than they were in 2008 but still significant. After a certain size, it seems that board members need not get involved with technology; it becomes an operational tool with adequate staff oversight.

The size analysis matters because the different committee profiles align with different adoption rates for tech best practices. After movement back and forth between staff and tech committees looking best for good IT practice, 2010 presents a uniform verdict in favor of staff tech committees. Whereas in 2008, board committees were more successful with tech budgets, this year all three of these practices align most with staff tech committees.

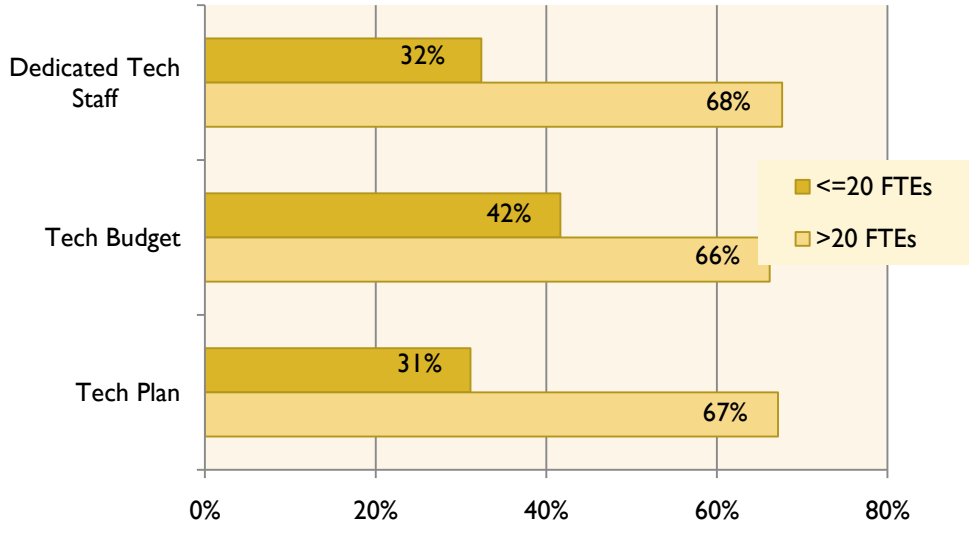
Tech Committee vs. Best Practice



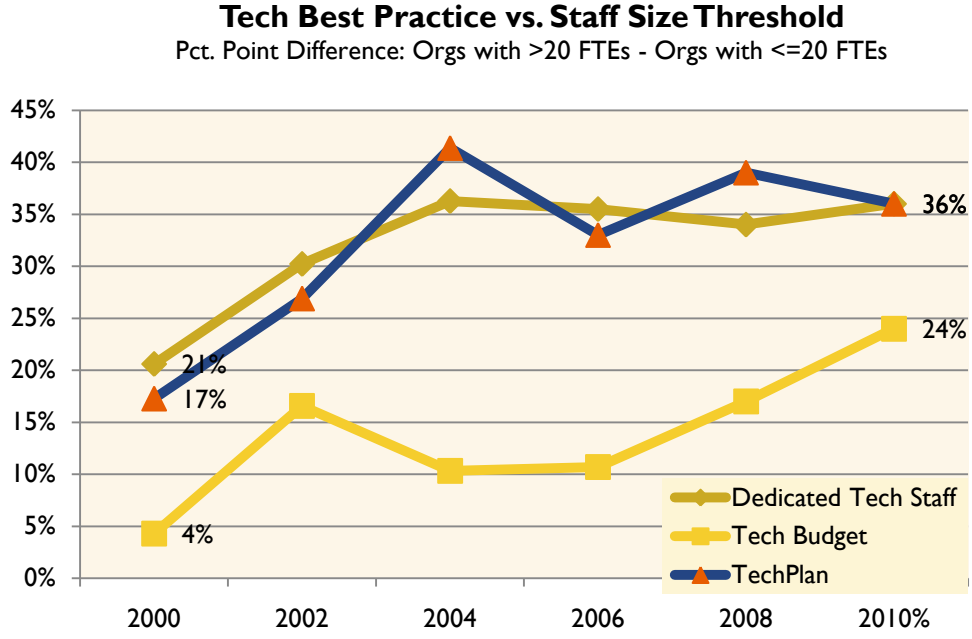
Let's review a moment: staff tech committees correlate with larger organizations. Staff tech committees also correlate with IT best practices. Is it the committee or the size of the organization influencing best practices?

Because it would be difficult to analyze the micro effects of staff size along the increments laid out in the Respondent Profile section, we again use the threshold of 20 full-time equivalent employees and analyze 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



The chart below shows how the percentage point gap has widened over the years of the survey. In other words, as time passes, the best practice adoption gap between large and small organizations grows.



We should be sure not to let this fact get lost in the detail: having a tech committee correlates with higher adoption of best practices, and yet, 78% of organizations do not have a tech committee. Founding a committee is a much easier variable to control by growing larger as an organization.

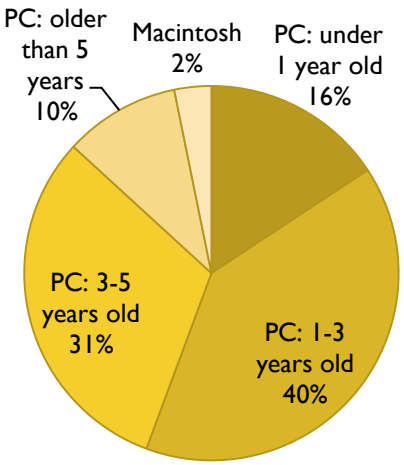
Computer Systems

Nonprofit technology decision-making consists of a constant attempt to keep the present resources working while maintaining currency and innovation. In this section, we examine core computing hardware and software and the newer technologies that nonprofits adopt. The progress in this arena often happens in fits and starts.

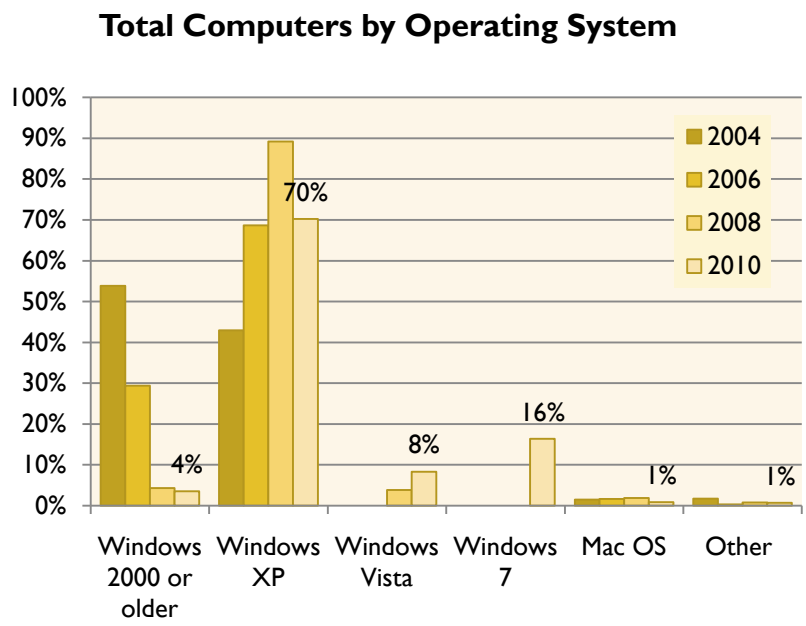
Hardware

We ask respondents to inventory their user hardware by age. With the planned obsolescence of computer technology, we know that the efficient lifetime of a workstation is 3-4 years. We could – and did in the early surveys – break workstations down by processor speed and RAM, but those attributes are difficult to summarize. Even when we collected them, we used them to proxy for age. The chart shows that more than half (56%) of the PCs in area nonprofits are under three years old. Just under a third are in that period of creeping obsolescence, 3-5 years. One in 10 (11%) defy the odds at over 5 years old. The success of the iPod notwithstanding, Macs make up a tiny sliver of user hardware in area nonprofits.

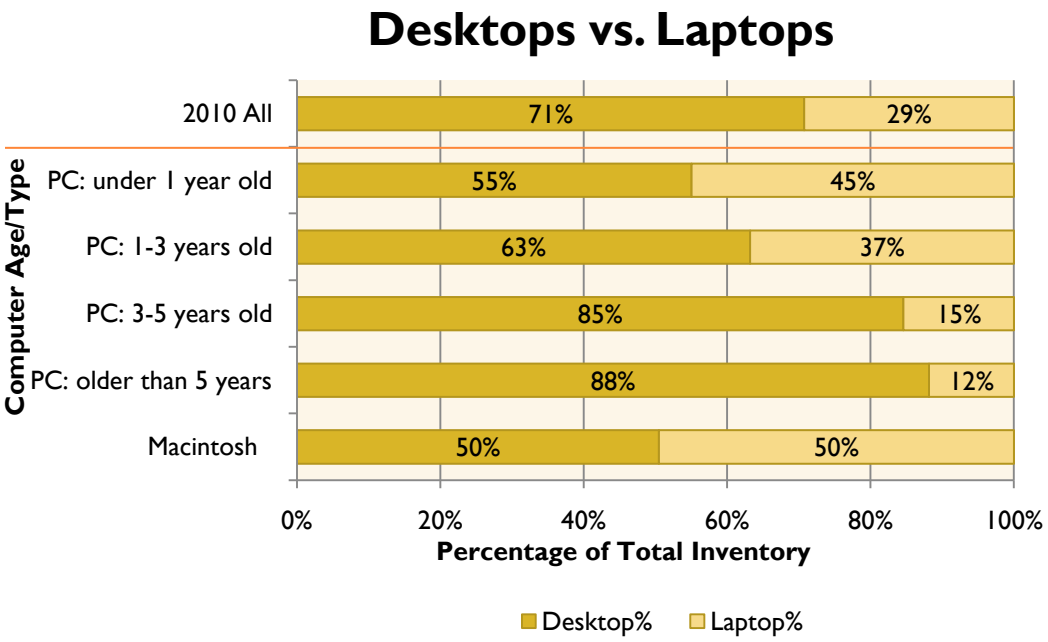
Computers by Type and Age



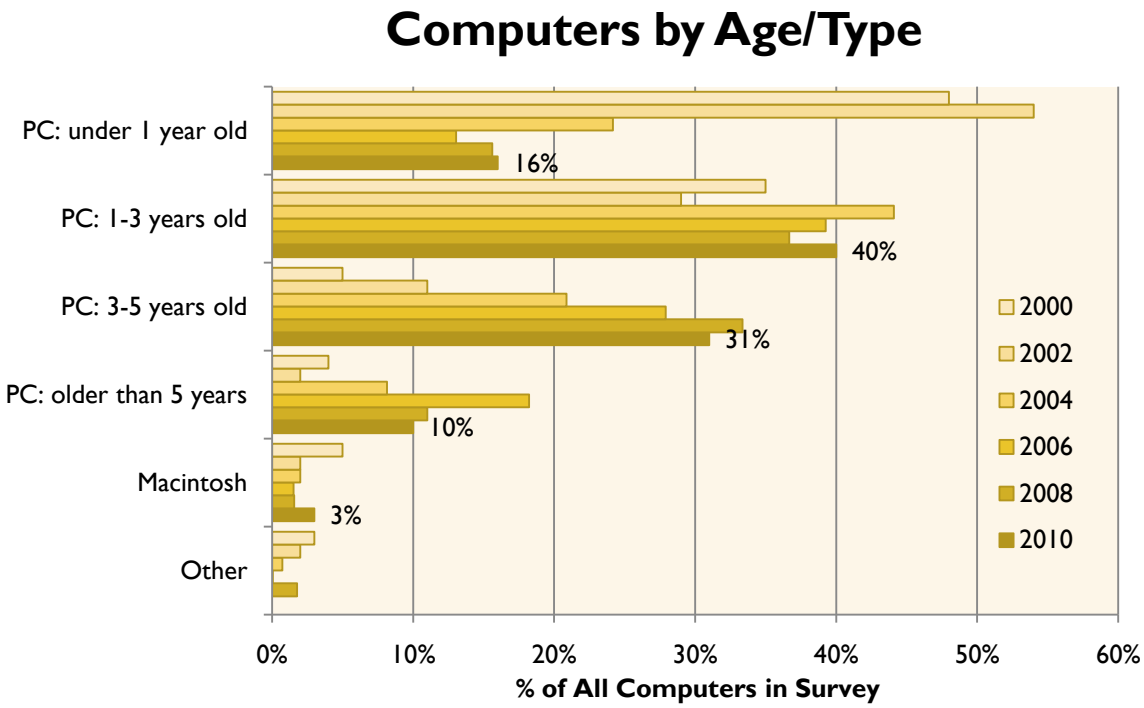
The operating systems mirror these categories of user hardware. The chart below breaks down the operating systems on all of the computers represented in the sample. Windows dominates with a few faithful Mac users. Among Windows users, versions before XP, which had some share in previous surveys, have essentially disappeared. In 2008, we saw only 4% of the computers in nonprofits in the region operating Windows Vista. This year, the Vista proportion has doubled, but it's dwarfed by Windows 7, a clear artifact of the bad press Vista received (no comment on its deservedness). A quarter of organizations have at least one Vista machine; three in ten have at least one Windows 7 machine. Organizations have clearly maintained Windows XP longer than expected. We would expect to see a stark transition from XP to 7 by the next survey.

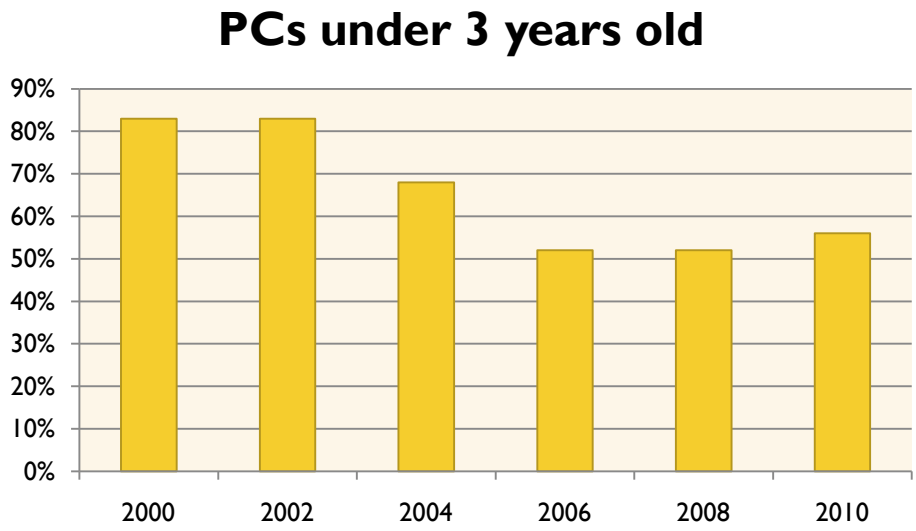


The breakdown of laptops versus desktops shows the continuation a noteworthy shift. Laptops make up 29% of all the user hardware in nonprofits in 2010, up from 22% in 2008 and 16% in 2006. The overall proportion has shifted because laptops make up nearly half (45%) of new workstations. In addition, the Mac breakdown is 50/50. Increasing numbers of laptops represent both desktop replacement and equipping mobile staff.



From 2000 to 2006, the survey depicted hardware purchased to fend off the Y2K problem aging in place in area nonprofits. Although the results were ambiguous in 2008, it appeared that we'd finally hit the bottom of that trend. In 2010, that surmise is confirmed: the proportion of machines 3 years old and younger rise slightly as older machines decline as a proportion. Education, Arts, and Public/Societal Benefit organizations have slightly more Macs than other organization types.

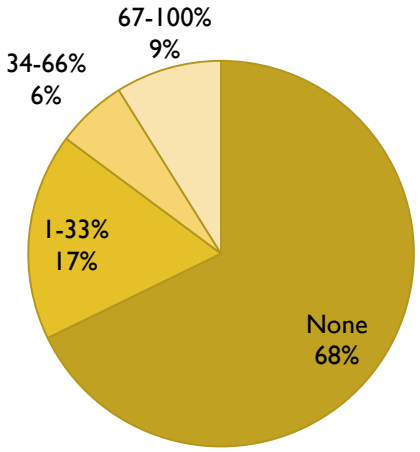




Donated Computers

Computers donated to nonprofits more often than not have run through their most dependable years in the donor's home or office. We're therefore pleased to see that the number of organizations with *no* donated computers is 68%, up from 62% in 2008. An additional 17% has donated computers, but they account for less than a third of their inventory. It's rare (9%) to see an organization with mostly donated computers.

Proportion of Computers that are Donated



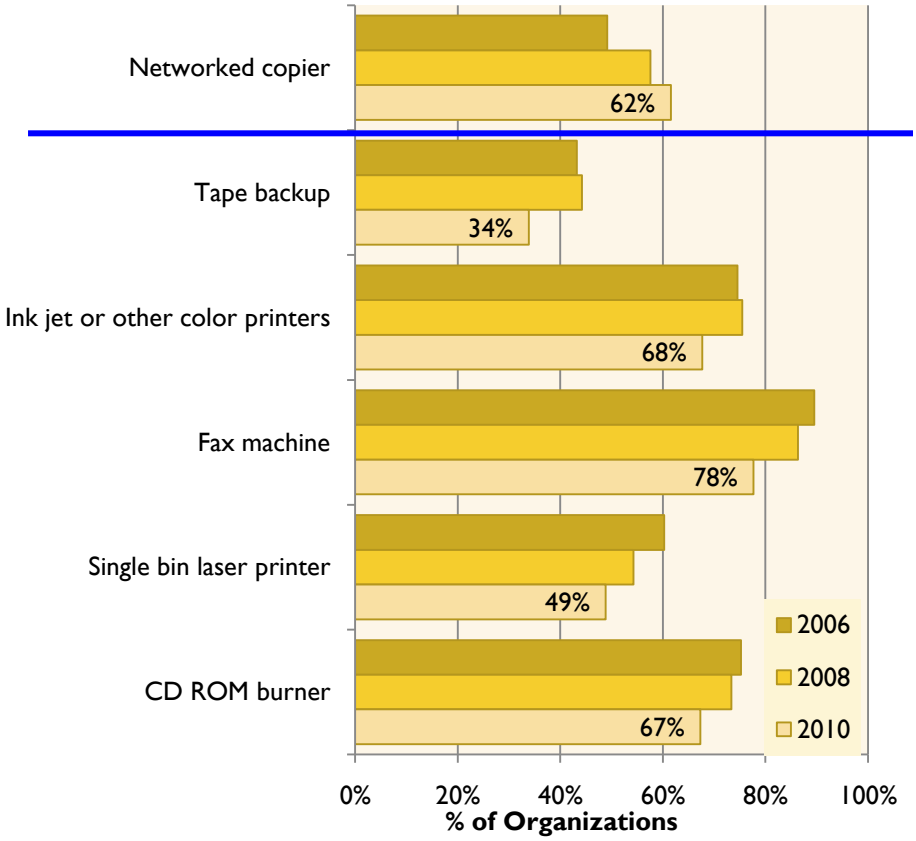
Nonprofits that use donated computers are smaller by virtually every measure: budget, staff size and number of computers. The more donated computers they use, the smaller the organizations get.

	Average			
Proportion	Budget	Tech Budget	FTEs	# of Computers
None	$4,692,549	$187,791	41	47
1-33%	4,472,682	57,169	61	36
34-66%	1,509,803	20,363	23	19
67-100%	1,002,702	5,325	20	25

Peripherals

The survey asks about a large variety of peripheral items (see Appendix for complete list). The utilization profile changes little year to year for many items. A few shifts are worth highlighting. Networked copiers are the only peripheral device whose usage rate grew significantly from 2006 to 2008. There appears to be a shift from single bin, small-volume laser printers and ink jet printers to multi-bin machines and those networked copiers. The biggest drop, however, is in tape backups, down from 44% two years ago to 34%. The slack appears to have been taken up by online backup systems. After holding steady just above a quarter of all nonprofits, call management systems dropped to 21% in 2008 and dropped a point more to 20% in 2010. Also, in the telecom arena, faxes are down to 78% of organization. As we'll discuss in more detail later, the actual deployment of fax as a communications tool has dropped off even more than depicted here.

Peripheral Changes



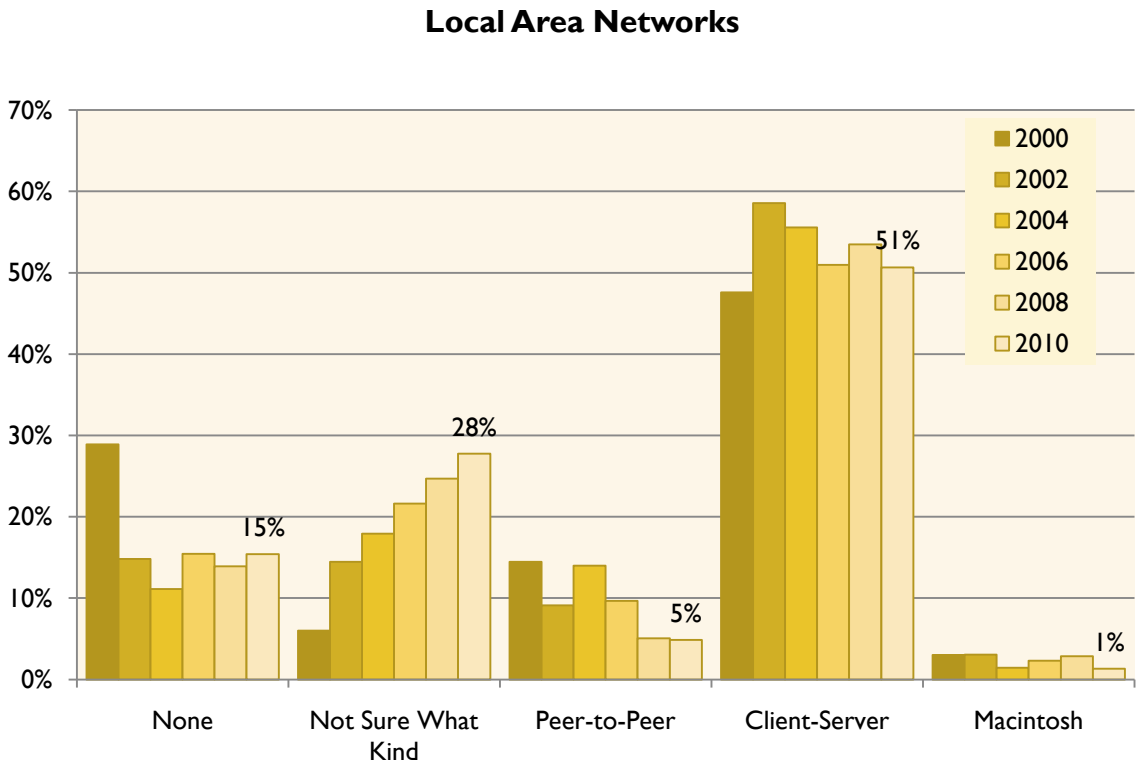
The prevalence of other peripherals is essentially stable with mostly leveling (or slightly reversed) growth.

Other Peripherals	2000	2002	2004	2006	2008	2010
Telephone call management/automation	27%	27%	26%	26%	21%	20%
DVD	10%	18%	34%	46%	52%	55%
Scanner	60%	69%	65%	73%	79%	76%
Multi bin laser printer	42%	42%	42%	40%	45%	46%
Telephone system with voice mail	68%	71%	73%	81%	80%	82%
Digital camera	28%	48%	58%	67%	70%	72%
LCD projector	16%	32%	43%	45%	59%	58%

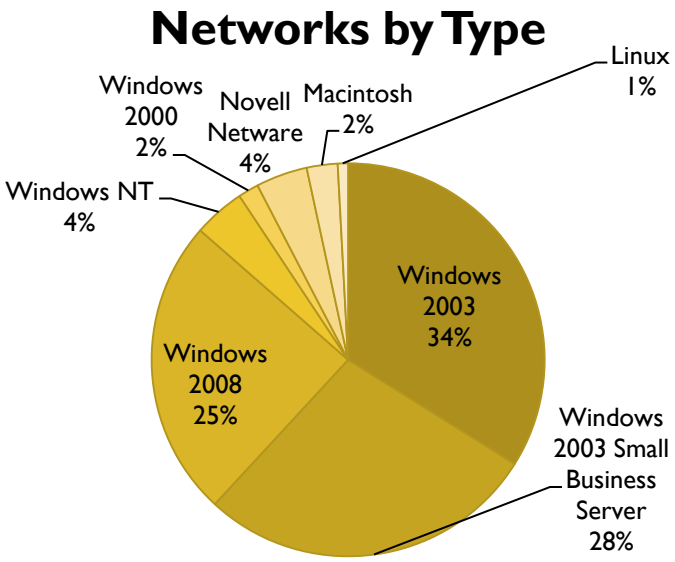
Connectivity

Local Area Networks

From an early low in 2000 of 72%, the proportion of nonprofits using a network of some kind grew to a high of 86% in 2008 and stayed essentially level at 85% in 2010. Variations in survey samples explain vacillation in the proportion of Client-server, peer-to-peer and unknown network types. The "Not Sure What Kind" response has been getting more popular as respondents who are not tech-savvy can at least state that they have some kind of network. The vast majority (69%) of "Not Sure" respondents have 10 or fewer employees. Most likely, the majority can be assumed to be peer-to-peer networks with a minority being client-server networks. Growth in the "Not Sure" category may explain the drop in reported peer-to-peer networks.



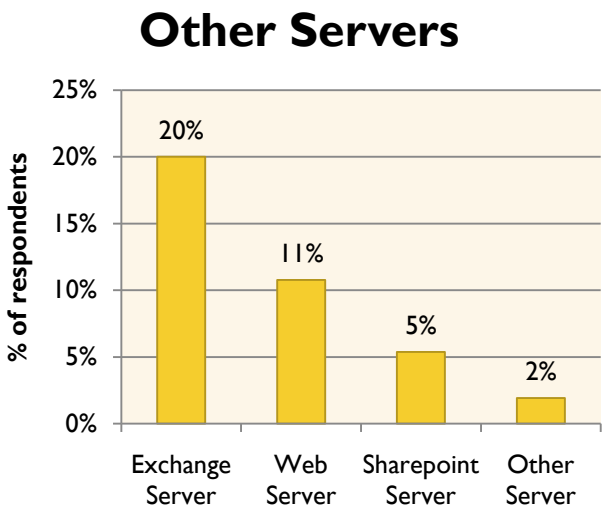
Survey Respondents use a variety of network operating systems. Windows 2003 in its standard (34%) and Small Business Server (28%) iterations dominate client-server networks Windows 2008 came on the scene since the last survey to make up 25% of networks, apparently replacing Windows NT and 2000 networks. A very small number of organizations uses Novell (4%), Mac networks (2%) and Linux (1%).

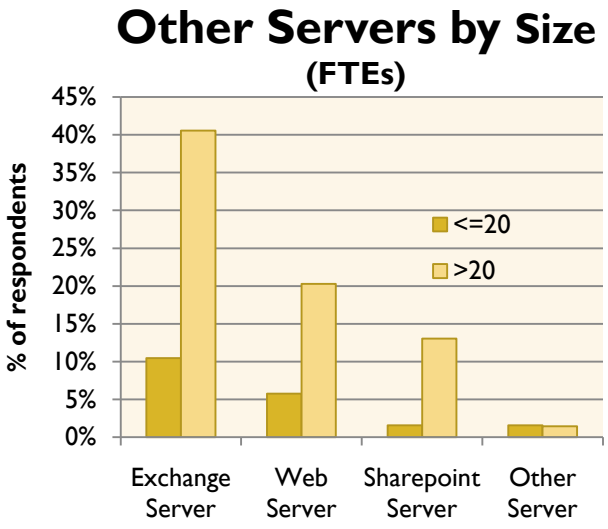


Other Servers

In 2010, for the first time, we asked respondents whether they used other server types besides file sharing. Collecting this data now makes us wish we'd had it all along in order to view changes over time. We might see that organizations are moving away from maintaining Exchange servers for email/groupware or from hosting sites on their own web servers. It's good to break down "other" responses when we can. In this case, only one respondent indicated that their "other other" servers were used to run various applications.

Seeing that some organizations have these servers makes us want to know more about which organizations have them. One clear differentiation shows up in staff size. Large organizations are at least 4 times as likely to have Exchange, Web or Sharepoint servers.

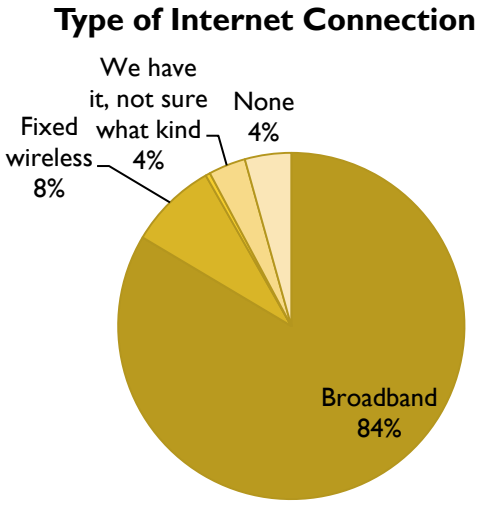




Internet Connection

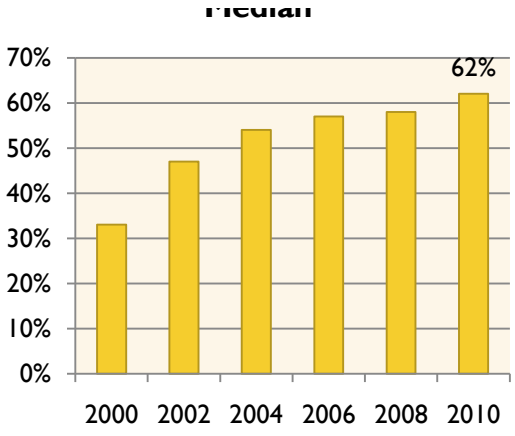
Hardware and software changes pale in comparison to the migration of work and home life to the Internet over the decade we've been surveying nonprofits. Fortunately, each survey has depicted enhanced Internet connections and more intensive use of the Internet by nonprofit staff.

Broadband connectivity continues to become more pervasive in area organizations. Respondents with broadband connections increased from less than a third (32%) in 2000 to a plateau of 79-80% in 2006-2008 and then crept further upward to 84% in 2010. In addition, 8% of this year's respondents use Wireless Internet, up from 8% holding essentially steady from 2008. Dial-up has dropped to 1 respondent in 2010, and that's at an organization that also has broadband. Dial-up must be at a satellite location.



Internet Use

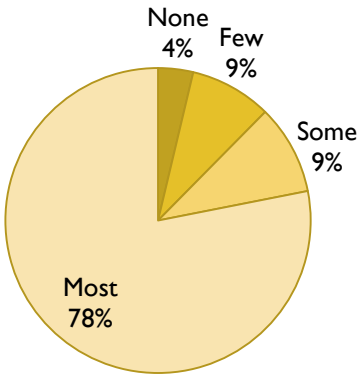
We ask organizations what proportion of their staff uses the Internet as part of their jobs. The overall rate, derived using a bracket-median estimate, had hit a plateau for three surveys, it rose again to 62%



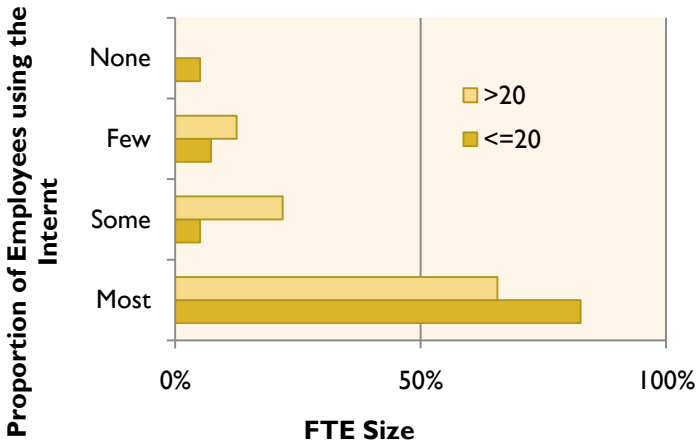
On the other hand, the number of nonprofits that report Internet use as a total minority activity among their staff has dropped steadily and virtually vanished. From over 40% in 2000, the number of organizations that indicated that few or none of their employees used the Internet in their jobs dropped to 4% this year. More than three quarters (78%) of nonprofits indicate that most of their employees use the Internet as part of their jobs, the highest rate in any survey.

How do we reconcile a steadily decreasing number of organizations in which few or none of the employees use the Internet for their work with a stalled growth of overall Internet use among all nonprofit employees? Because a bracket median estimate is a weighted average, the responses of larger nonprofits significantly affect the. Using the same technique, We estimate the Internet use rate at 75% in small (under 20 FTE) organizations versus 60% in large organizations. This derives from a unique split between small and large organizations. In larger organizations, the proportion of respondents that indicate that Most (67-100%) of their employees use the Internet as part of their jobs is much lower than in smaller organizations. A reverse gap appears in the Some and Few responses. From the Bayer Center's experience, this can be explained by the presence of front-line program staff who work more outside of office settings than in them. These field staff are reported as using the Internet less in their jobs than office-based personnel.

Proportion of Employees who Use the Internet as Part of their Jobs



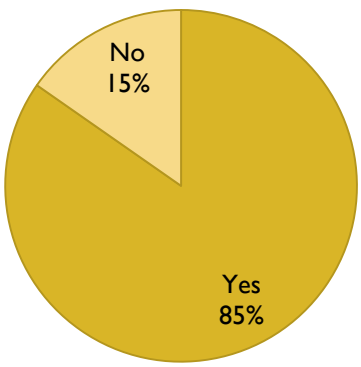
Staff Size vs. Internet Use



Internal Email

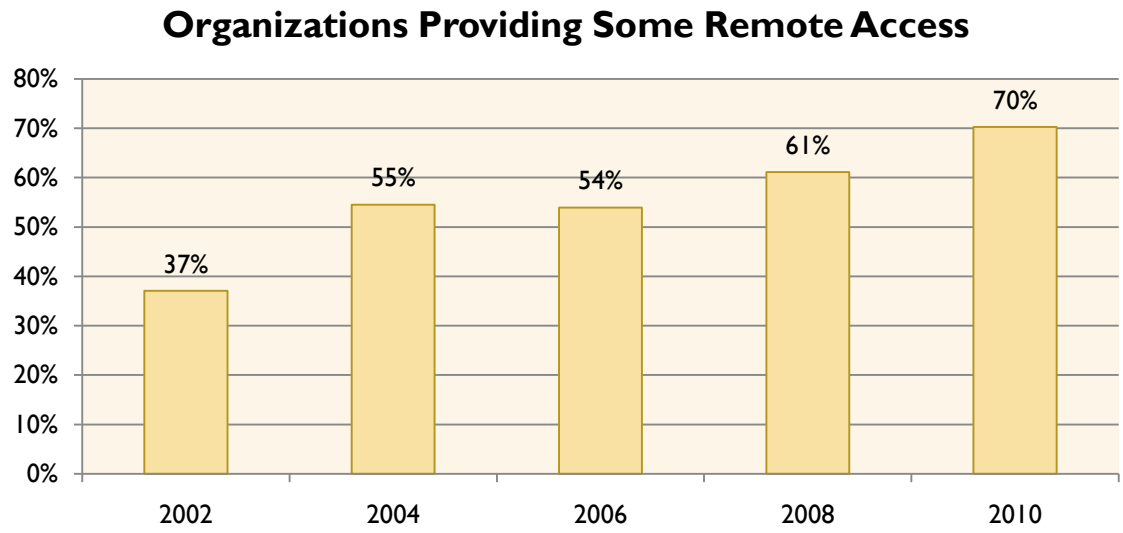
After holding steady around 78% in 2004-2006, the proportion of organizations providing internal email addresses to employees has jumped to a new plateau at 85% in 2008. Organizations that do not provide internal email are generally smaller (median 1 FTEs) than those that do (8). This gap, which had shrunk from 2006 to 2008 returns to its 2006 level in 2010.

Internal Email

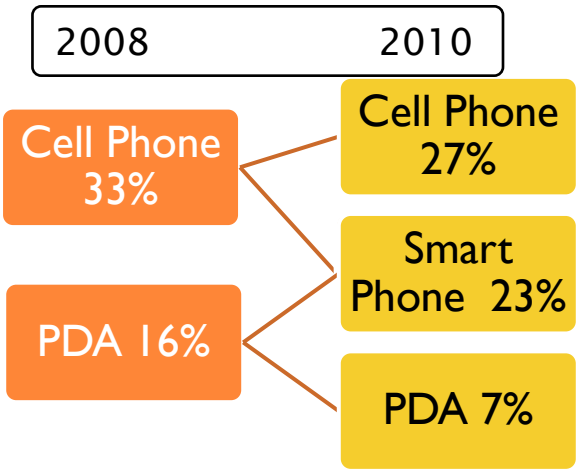


Remote Access

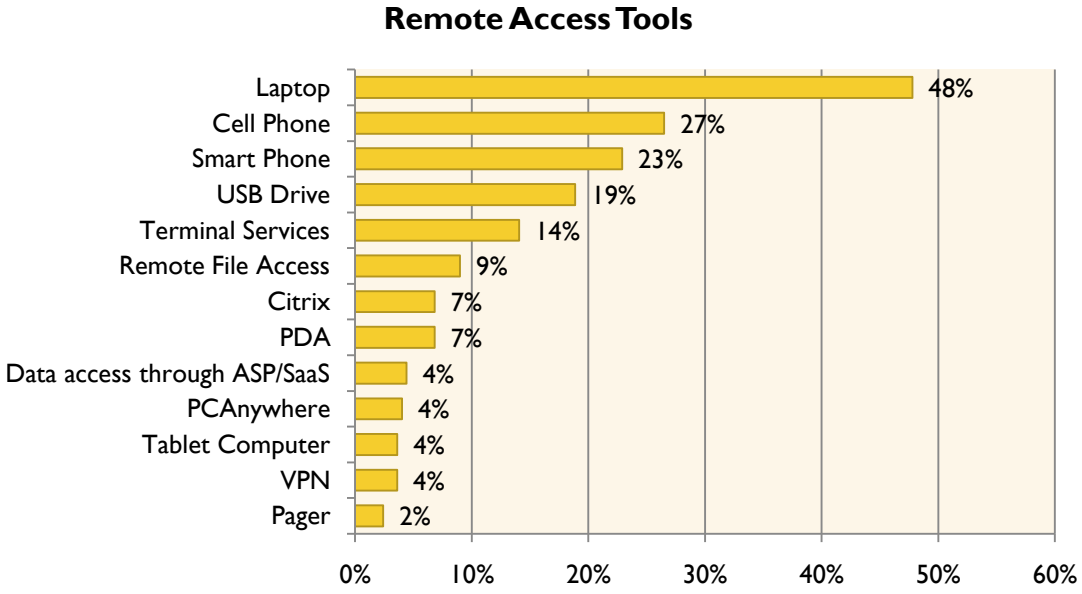
We changed the wording of our question about remote access. In past surveys, we've asked about remote access for "truly mobile staff members". This year, because of the pervasiveness of mobile access, we struck the "truly mobile" distinction. We saw a big leap in the number of organizations reporting providing some equipment/facility to enable mobility. The absence of the "truly mobile" distinction may explain the jump, or it may just reflect the reality of the current landscape for nonprofits.



We also added two devices to the list, one of which affected the results and one of which didn't…yet. Between 2006 and 2008, we'd seen a leap in organizations providing PDAs. This result struck us as odd; the term PDA (personal digital assistant) has been going the way of the dinosaur. The heyday of the Palm Pilot and its kin was closer to 2000 than 2008. Adding "Smart Phone" to this year's survey explained the leap. In the absence of a Smart Phone option in 2008, some Respondents slotted iPhones and BlackBerries into the PDA checkbox while others called them Cell Phones. The Cell Phone and PDA responses from 2008 both seem to have contributed respondents to the Smart Phone category.



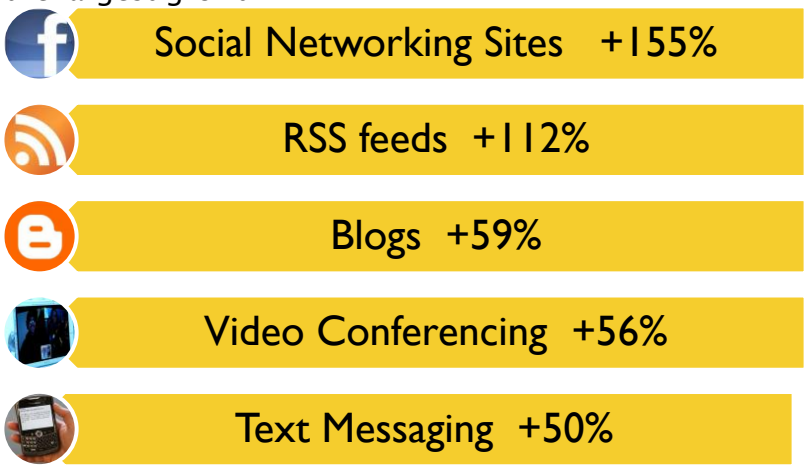
The other option we added this year was Tablet Computer, trying to gauge adoption of the iPad and its competitors. It looks like the long-forecast day of the tablet has not arrived in nonprofit offices.



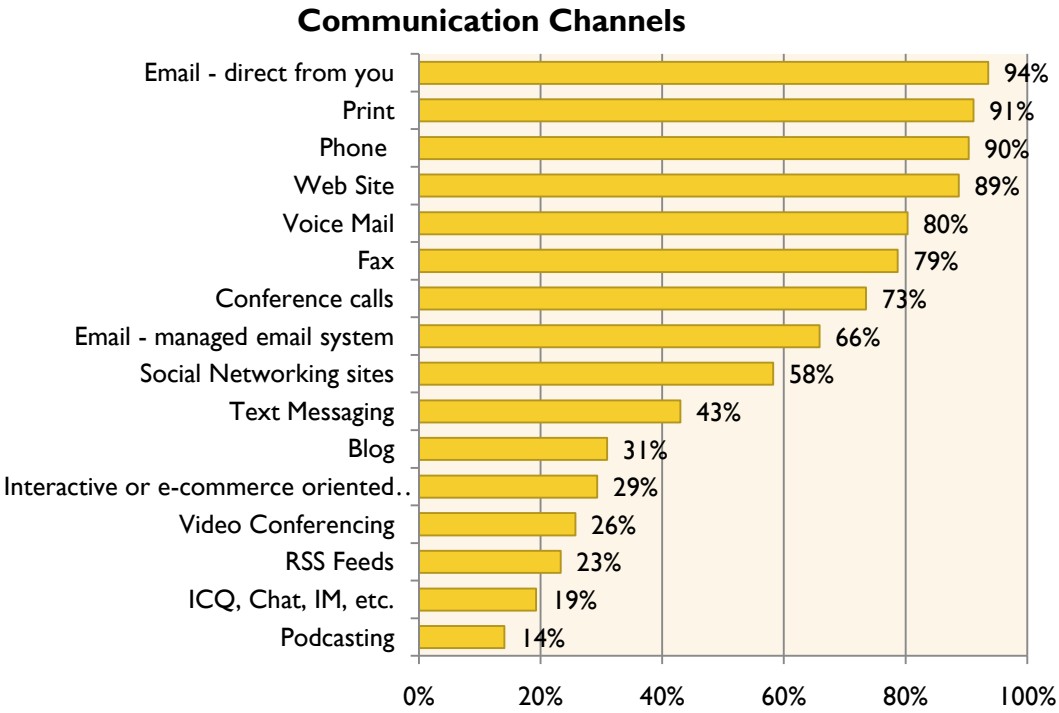
Among the remaining options that did not change for this year's survey, laptops lead the way as nearly half of all organizations provide them to some staff. USB drives increased from 16% to 19%. Up to a third of organizations provide a variety of solutions to enable remote access to files and/or employ Software as a Service databases. Terminal Services/Citrix lead the way, covering 1 in 5 organizations combined. VPNs and various commercial remote access tools are also in use in small groups of nonprofits

Communication Modes

Although the order of communication modes has not changed much from 2008 to 2010, the proportions have changed plenty. Email outpaces print for the first time after tying it in 2008. Despite still having lower adoption rates than the traditional leaders like email, print and phone, modes that we think of as newer have shown the largest growth.



Where does this big growth leave us? Social Networking is the only one of these newer media to be used by a majority (58%) of organizations. Meanwhile, four out of ten organizations text message, nearly a third blog and around a quarter use video conferencing and RSS feeds.



The survey drills down to how frequently organizations use these tools. In this analysis, again, the traditional modes lead the frequency parade, but the largest growth is in newer media. The data is difficult to summarize, but a story emerges:

- "Frequent" email is up to 77% while "Frequent" phone calls fall to 77%
- Respondents use Social Networking Sites more frequently than blogs and RSS Feeds
- Text messaging is used rarely – perhaps automated emergency alerts?
- The fax has steadily decreased in frequency of use
- Conference calls are likely scheduled at regular intervals
- Interactive or e-commerce web features are used more frequently than even in 2008
- Video conferencing is rare for most groups

Communication Mode	Frequently	Regularly	Rarely
Phone	**77%**	18%	4%
Email - direct from you	**77%**	19%	4%
Email - managed email system	**70%**	24%	6%
Web Site	**55%**	37%	9%
Voice Mail	**55%**	36%	10%
Print	**52%**	33%	15%
Interactive /e-commerce Web page	**40%**	21%	**40%**
Social Networking sites	31%	**37%**	32%
Fax	19%	39%	**41%**
RSS Feeds	19%	31%	**50%**
Blog	18%	27%	**55%**
Conference calls	17%	**43%**	39%
Text Messaging	13%	32%	**55%**
Podcasting	9%	17%	**74%**
ICQ, Chat, IM, etc.	8%	25%	**67%**
Video Conferencing	6%	27%	**67%**

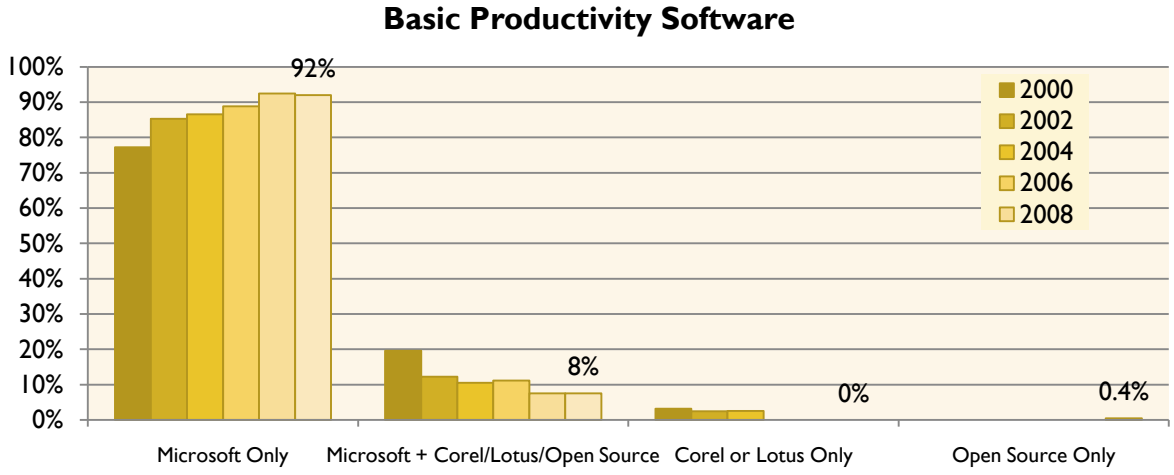
Bold indicates the most popular frequency response for each mode

Software

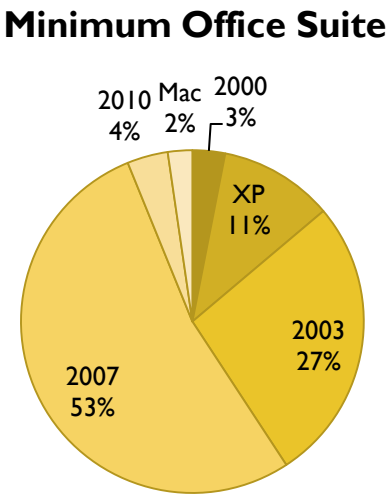
The survey covers four categories of software: basic productivity, accounting tasks, database or list management and network/data management tasks. While basic productivity software use is consistently and increasingly uniform, the other three categories are handled in a variety of ways, including manual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

Basic Productivity Software

Microsoft Office continues to dominate the basic productivity market. In 2006, we thought we'd seen the last non-Microsoft holdouts disappear. In 2010, one organization uses an open-source office package. As in past surveys, 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) or an open source solution like Open Office, although these combinations are less frequent with each survey.



The number of organizations using multiple versions of the Office suite decreased from 21% in 2008 to 8% in 2010. They use a variety of combinations. To summarize the data simply, the chart to the right captures the minimum Office package being used. Whereas in 2008, half of organizations (49%) use a minimum of Office 2003, and just under 20% used 2007, this year, the proportions have more or less flipped. More than half of respondents use 2007 at minimum, and just over a quarter have held onto 2003. One in five uses 2007. The most popular single arrangement is 52% of organizations using only Office 2007. At the margins, 4% have only Office 2010 while 3% still use Office 2000.

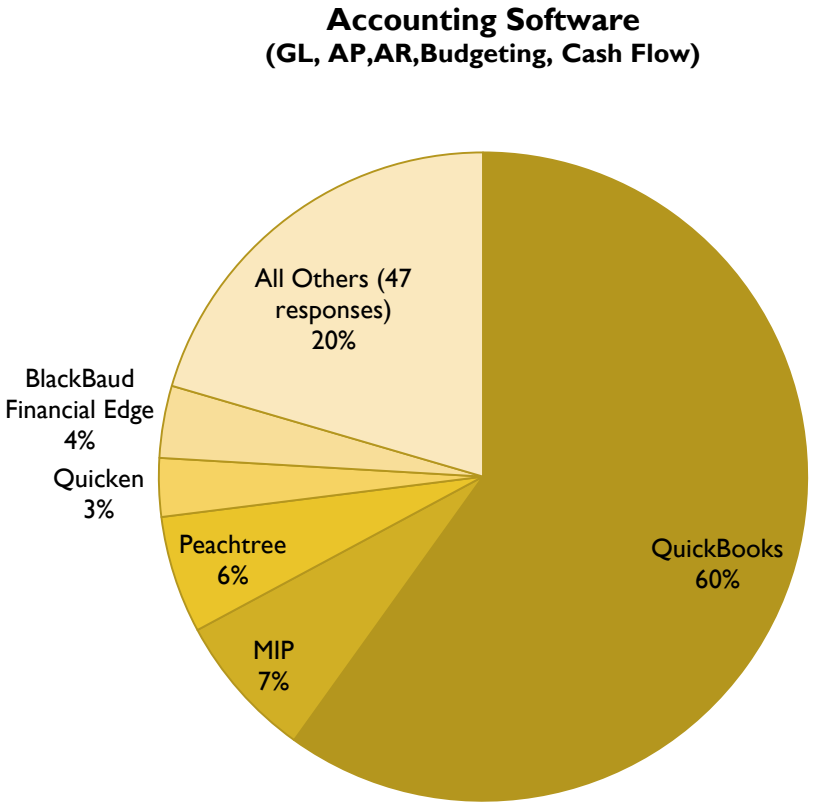


Accounting Tasks and Software

Respondents use a variety of accounting solutions, ranging from manual systems to spreadsheets to accounting software. Increases in outsourcing key accounting functions seen from 2004 to 2008 have reversed. Accounting software and spreadsheets take up the slack. Shading indicates the max for the task for each year.

Task	No Response	N/A	Manually	Manually + Spreadsheet	Spreadsheet	Accounting Software	Outsourced
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%
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%
2008							
General Ledger	5%	3%	3%	0%	7%	72%	11%
Accounts Receivable	8%	5%	4%	0%	7%	66%	9%
Accounts Payable	7%	4%	5%	0%	7%	68%	9%
Payroll	7%	8%	3%	0%	4%	32%	45%
Budgeting	9%	4%	6%	0%	33%	44%	3%
Cash Flow	11%	5%	8%	1%	23%	46%	6%
Inventory	12%	30%	7%	1%	22%	25%	2%
2010							
General Ledger	2%	4%	4%	0%	10%	73%	7%
Accounts Receivable	4%	8%	4%	0%	11%	66%	6%
Accounts Payable	4%	6%	5%	0%	11%	68%	5%
Payroll	7%	12%	2%	0%	6%	28%	45%
Budgeting	5%	8%	6%	1%	36%	42%	2%
Cash Flow	8%	10%	4%	1%	24%	49%	4%
Inventory	9%	38%	6%	2%	20%	23%	3%

Organizations tend to use one software package across the accounting functions of general ledger, receivables, payables and cash flow. QuickBooks still dominates this market, and this year's survey sees its share rebound to 60%, near its high of 62% in 2006. In second place, we see MIP unseat Peachtree for the first time after holding essentially steady in prior surveys. BlackBaud's financial edge slipped by a percentage point, and Microsoft's Dynamics GP fell into the All Others group. Surprising diversity marks the rest of the nonprofit accounting software market with 47 different solutions used in 20% of the organizations.



Payroll remains the most likely function to be outsourced, staying at its all-timer high of 45%. Inventory remains a function that many organizations (at least 38%) don't need to perform.

Database/List Tasks

We rejoiced when databases gained in popularity for list management tasks. That momentum flags some this year, but there is still reason to rejoice. Among organizations that use databases, more are finding off-the-shelf solutions for these tasks, which leaves more time to do the work itself. Very few respondents outsource these tasks. As in prior years, a few tasks don't apply to a large number of respondents: Ticketing/Point of Sale and Quality Assurance.

More organizations indicate that they track outcomes than sell tickets or do Quality Assurance, but still less than fundraising, client management and volunteers. Among those who track outcomes, nearly a majority report using a database software for the task.

Database Tasks							
Task	No Response	N/A	Manually	Manually + Spreadsheet	Spreadsheet	Database Software	Outsourced
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%
Quality Assurance	33%	53%	6%	3%	5%	0%	0%
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%
Quality Assurance	21%	65%	2%	0%	4%	7%	0%
Outcomes Measurement	16%	39%	9%	1%	14%	20%	2%
2008							
Client Management	7%	12%	7%	1%	14%	58%	1%
Fundraising	6%	18%	11%	1%	17%	47%	0%
Volunteers	9%	26%	18%	2%	17%	28%	0%
Ticketing/Point of Sale	13%	55%	6%	1%	6%	16%	3%
Quality Assurance	21%	62%	3%	1%	5%	8%	0%
Outcomes Measurement	15%	33%	9%	2%	15%	23%	1%
2010							
Client Management	7%	17%	7%	2%	13%	53%	1%
Fundraising	5%	20%	12%	1%	15%	47%	0%
Volunteers	6%	31%	19%	2%	17%	26%	1%
Ticketing/Point of Sale	10%	59%	7%	0%	7%	16%	3%
Quality Assurance	14%	75%	2%	0%	3%	5%	0%
Outcomes Measurement	10%	36%	13%	1%	20%	18%	1%

Shaded responses in each table indicate the most frequent response.

The most common data management tasks 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. After vertical market databases (rather than custom solutions) represent the majority of the databases for the first time in 2008, they've grown more in 2010 in all four of these functions. Off-the-shelf options are improving at the same time that organizations are tiring of the custom database development process. That said, market shares remain small in most categories. There is no QuickBooks-like market leader in these functions. The majority of custom databases continue to be developed in Microsoft Access.

Database Tasks (No Response and N/A removed)					
Task	Manually	Manually + Spreadsheet	Spreadsheet	Database Software	Outsourced
2004					
Client Management	11%	4%	15%	69%	1%
Fundraising	15%	4%	23%	58%	1%
Volunteers	31%	4%	23%	41%	1%
2006					
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%
2008					
Client Management	9%	2%	17%	72%	1%
Fundraising	15%	2%	22%	61%	0%
Volunteers	28%	3%	27%	43%	0%
Outcomes Measurement	20%	3%	20%	48%	9%
2010					
Client Management	10%	2%	17%	70%	1%
Fundraising	16%	2%	20%	62%	0%
Volunteers	30%	1%	26%	41%	1%
Outcomes Measurement	22%	0%	22%	47%	9%

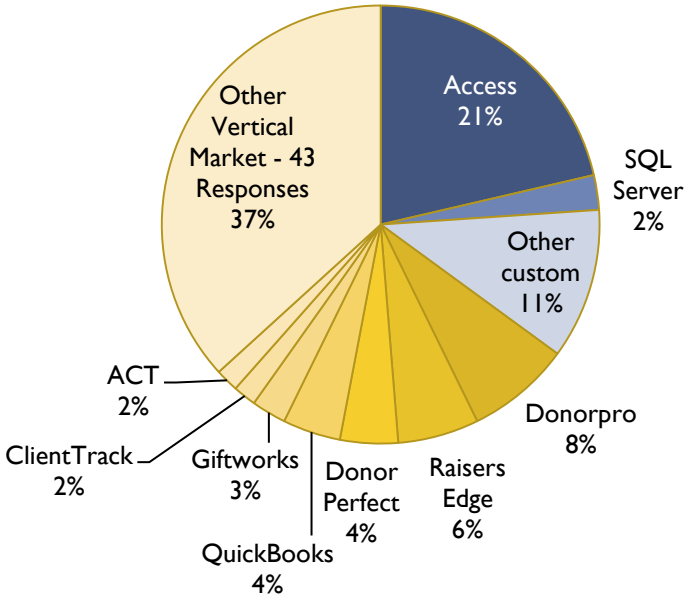
Use of database software (rather than spreadsheets or manual systems) to manage client information drops slightly from an eight-year high of 72% in 2008 to 70% in 2010.

After a steady tilt toward custom databases, the majority client management database category shifted to vertical market software (software built specifically for the task – often called an off-the-shelf solution) in 2008. The 54% off-the-

shelf solutions represented a big leap from the prior two surveys in which only 42% used vertical market software. This year, it jumps again: 65% of respondents off-the-shelf option.

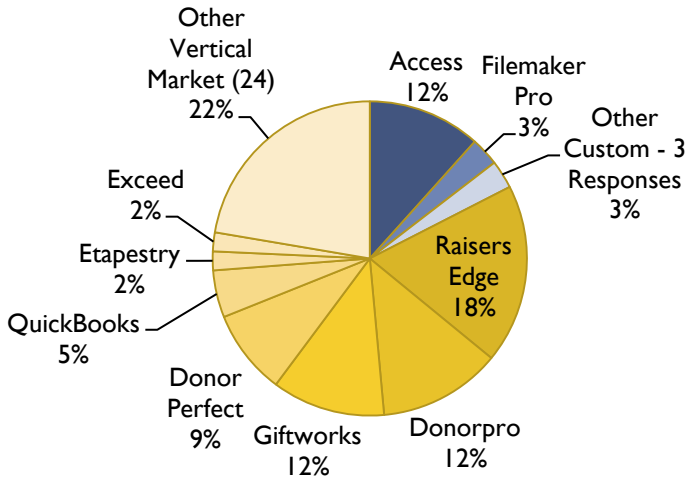
The caveat to this praiseworthy growth is that the leading off-the-shelf tools for client information management are fundraising databases. In the Bayer Center's experience, the information will find the system that works, and in many shops, the fundraising package is the best list manager available. Even QuickBooks outpaces the largest honest-to-goodness client database, ClientTrack. The 37% "other vertical market" proportion is made up largely of single organizations using a given solution.

Client Management Software Detail



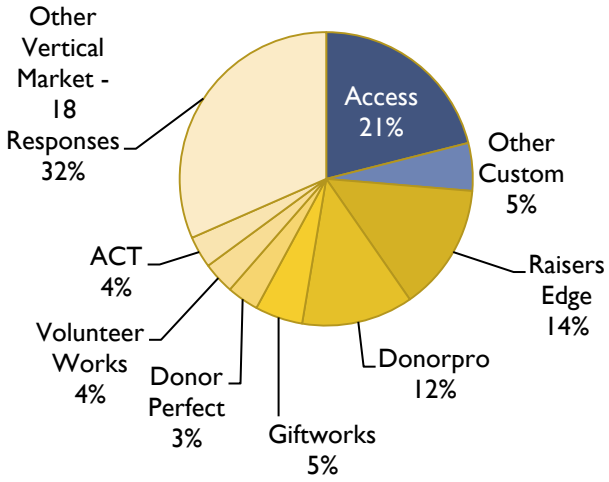
The fundraising function saw similar gains in the use of fundraising software to manage the information. Manual and spreadsheet systems remain at their 2004 levels. The off-the-shelf rate rises from 64% to 82% for fundraising, which is a more standardized business process than client/service delivery information. The market leader in this group is Blackbaud's Raiser's Edge (18 % of all orgs), but there are 21 other fundraising packages also in use. DonorPro, a local company with a national customer base, has significant market share in the region. Giftworks, an entry-level package produced by another Pennsylvania company, has grown to equal DonorPro's share.

Fundraising Software Detail



Manual systems for volunteer management remain steady at almost a third of organizations. Database solutions remain above 40% this year. After growing to 55% in 2008, vertical market software use grows again to 74%. The majority of vertical market volunteer solutions are a module of an overall fundraising package, although again 4% of all organizations use VolunteerWorks and an equal proportion use ACT, a classic customer relationship manager.

Volunteer Management Software Detail

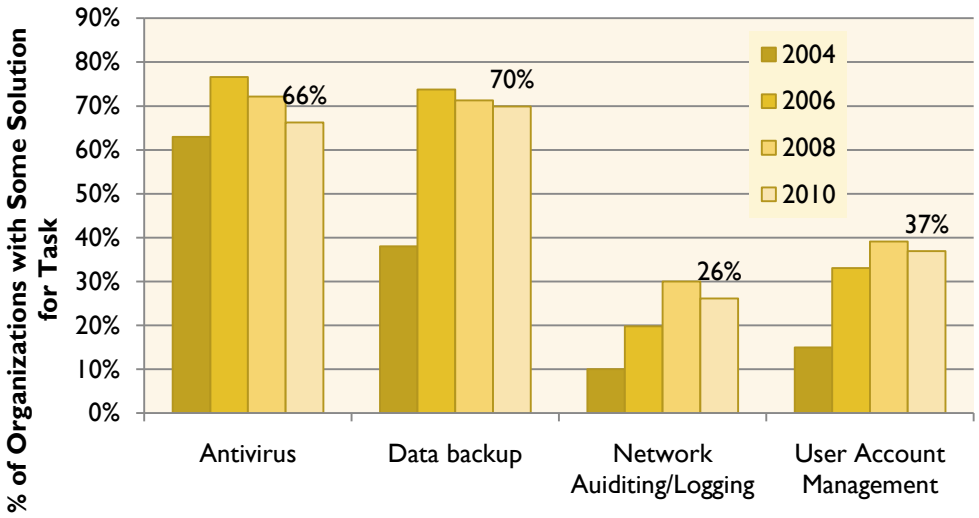


Outcomes measurement is distinguished from the other tasks by the fact that 9% of organizations outsource this function to some third-party evaluator. Nearly half (47%) of those that track outcomes in-house use a database product. On the other hand, one in five use manual systems. After finally flipping to a slight vertical market majority (55%) in 2008, the proportion jumped to 69% this year. The top three solutions are a quirky mix for the task: DonorPro, QuikBooks and Unicentric, each with 5%.

Network and Data Management Tasks

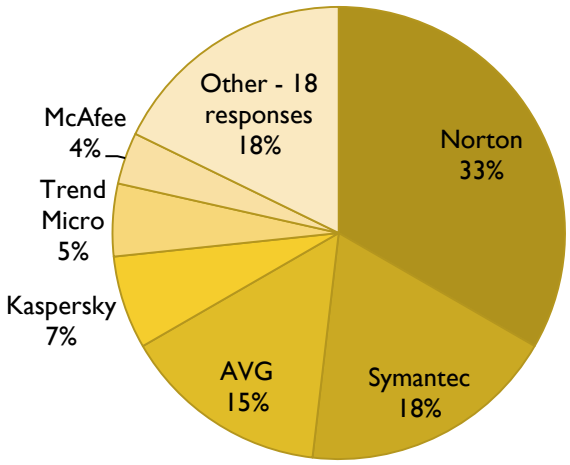
A similar catchall category of network and data management tasks include the defenses of anti-virus protection, data backup and network auditing and the management of user accounts. After surprisingly low numbers for these measures from 2004, the first year we asked about them, solutions for these tasks have plateaued across the board in the last three surveys. A large majority of organizations have anti-virus and backup solutions in place. Not all of these solutions are software solutions, per se. Some are hardware-based. Some – most predominantly in data backup – are manual, human-dependent solutions. Some come as part of a workstation or network operating system.

Network/Data Management Tasks



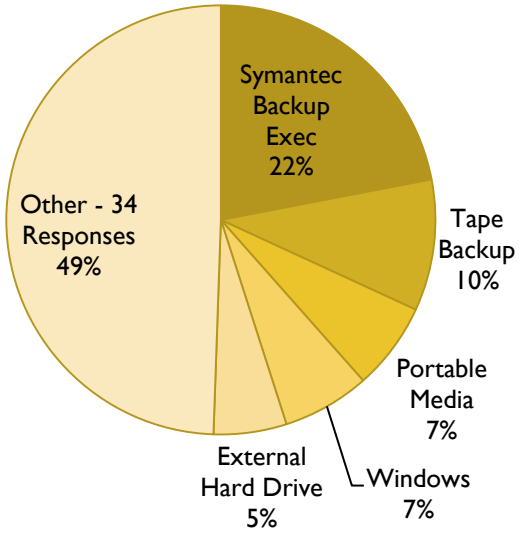
Anti-virus software remains dominated by Norton and Symantec. They may account for even more than half of the organizations represented AVG, which holds the next largest share, is a free downloadable anti-virus solution, as is Kaspersky.

Antivirus



More than 20% of organizations report a manual system for data backup. This statistic can send chills down one's spine as manual systems tend to fall off in the face of more "urgent" tasks despite the fact that data loss tends to the tragic and unexpected. If we add the Tape Backup, External Hard Drive and Removable Media responses, there may be over a third of organizations depending on a human to remember to back up mission-critical data. The Removable Media category includes USB Drives, CDs and Zip drives. Among the more formal solutions, Symantec's Backup Exec leads the way.

Data Backup



Network auditing and user account management are largely executed within the operating system (Windows, Novell) or a groupware system with Microsoft Exchange being mentioned most frequently.

The survey also asks about how frequently organizations do these tasks. The majority of organizations do each of these tasks daily with User Account Management and Network Auditing being done least frequently.

	Data backup	Antivirus	User Account Management	Network Auditing/Logging
Automatic/Constant	2%	3%	2%	3%
Daily	63%	76%	52%	56%
Weekly	26%	16%	6%	12%
Monthly or less	8%	5%	29%	29%
As Needed	1%	0%	12%	0%

IT Adoption, Impact and Needs

Once we know about the technology nonprofits use and how they manage it, we turn our attention to how they feel about technology and how it affects their work. The more qualitative questions focus on where organizations see themselves on the technology spectrum, how they estimate the impact of technology, their challenges and their IT dreams.

Challenges and Dreams

When we ask respondents open-ended questions about their challenges and dreams, they respond in ways that both that confirm intuition and surprise us. Consistently, without prompting, respondents most commonly discuss the cost of IT or difficulty funding the function, two sides of the same coin. Relevant to the earlier discussion of organizational size, one respondent said: "Cost/growing large enough to justify added technology expenditures." Often along with that, but sometimes on its own is a challenge about keeping up with the constant change in IT. Three humanware topics are training and user skill, IT staff or volunteers and getting decision-makers or users to accept technology. One wonders how the organization that cited the challenge of "Finding/Keeping a GIS Intern" treats their interns. Another group is challenged to find "knowledgeable people to help us for free." The "buy-in" category captured several responses about board members either not supporting IT in the day-to-day work or not accepting electronic board communication. The category may be best expressed in this response: "Having people accept what technology can do to help them accomplish our mission."

Biggest Challenge	Total
Funding	59
Training/User Skill	45
Staying Current	41
IT People	28
Buy-in	24
Hardware	18
Database	16
Software	15

Nonprofits may find budgets a challenge, but they dream about getting better online. The vast majority of next steps focus on redesigning web sites, gaining control to update web content in-house and making sites more interactive. An emblematic response in the database category was: "Having 'one' complete, all encompassing database". A dream related to the Training/User Skill challenge sited above: "Classes/learning and then time to utilize the technology." Time constraints were a smaller but not insignificant group of responses.

Dream or Next Step	Total
Web Site	34
Hardware	28
Database	26
Software	26
Network	24
Online Functionality	16
Tech in Service Delivery	16

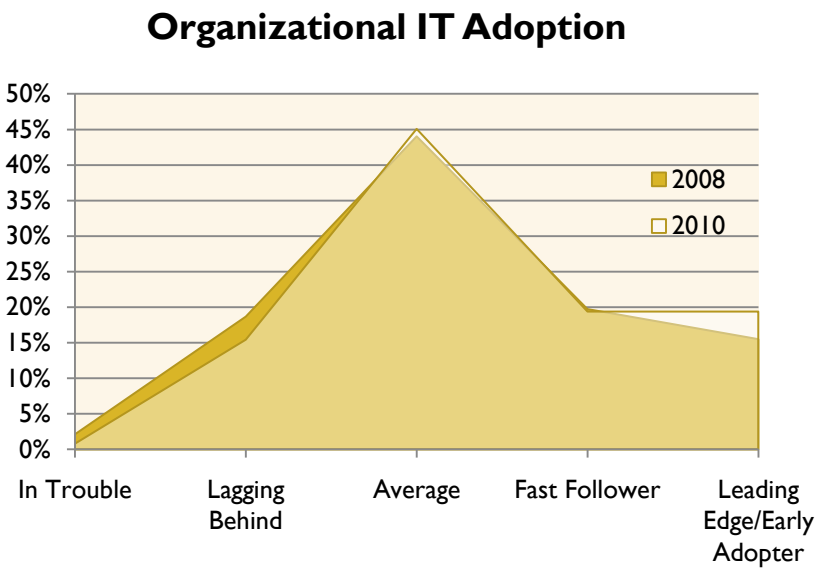
Tech Improvements

The survey asks respondents what changes they want to make in four categories of computer systems: hardware, software, training and web sites. Responses are startlingly consistent across these four in 2010. More organizations feel the need for minor changes than major, but more still do not feel the need for any changes. More than 40% of respondents did not specify desired improvements in any of these areas.

	Hardware	Software	Training	Web Site
Major	23%	23%	25%	27%
Minor	36%	35%	35%	31%

IT Adoption

A national organization of nonprofit techies, the Nonprofit Technology Network (NTEN), has conducted nation-wide research on various topics. Their staffing surveys provide a useful benchmark against our data. We've adopted a question from their survey about IT Adoption. The spectrum ranges from In Trouble to Leading Edge. The results in the Bayer Center's survey are interesting on their own merits, but they show a consistent pattern when compared with the national sample that NTEN collected most recently in 2009.[3]



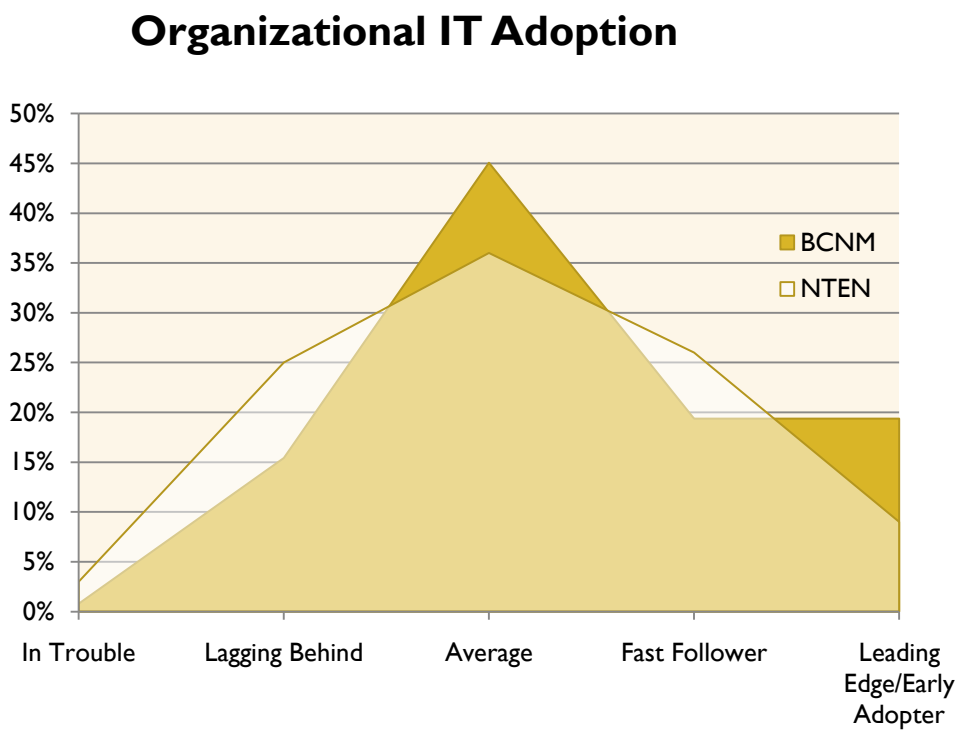
For two surveys in a row, the center of the Southwestern Pennsylvania distribution has looked like a classic bell curve, peaking at average and falling off equally to the Fast Follower and Lagging Behind groups. At the extremes, however, Southwestern PA nonprofits have a high opinion of themselves, with almost none considering themselves "In Trouble" and nearly one in 5 calling themselves "Leading Edge".

[3] "Nonprofit IT Staffing: Nonprofit IT Staffing & Spending Report". Nonprofit Technology Enterprise Network and The NonProfit Times, 2010. Download at www.nten.org.

Needless to say, this is a surprising result given the survey findings about too little funding, outdated hardware and inadequate software. We do wonder if the result would be different in a completely blind survey. Respondents identify their name and organization on the Bayer Center survey.

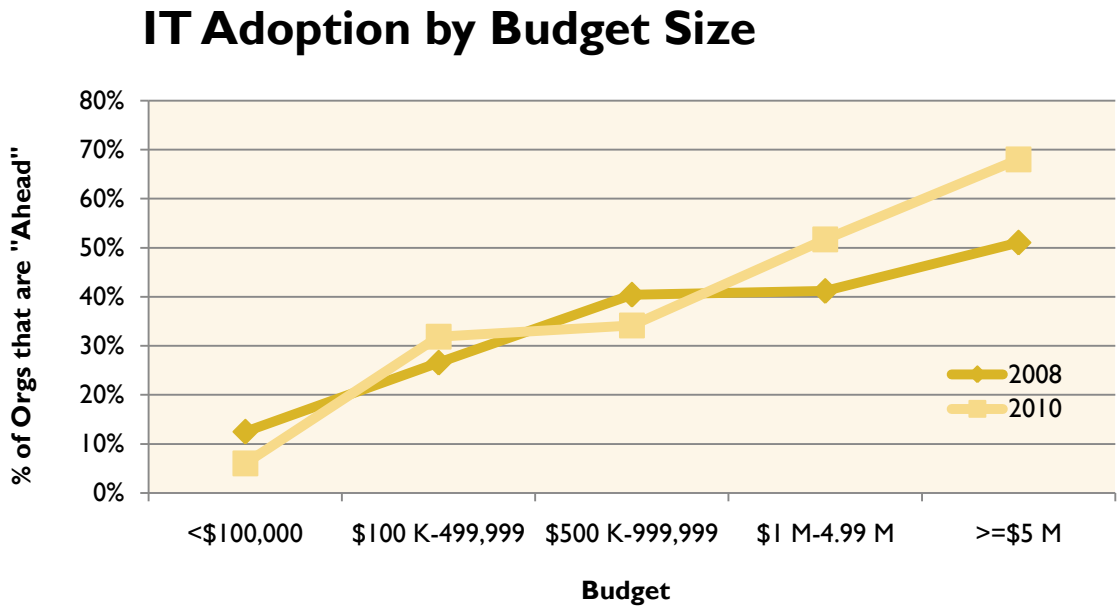
IT Adoption: Southwestern PA vs. the Nation

In the national sample – which derives from an anonymous survey – more than a quarter Lag Behind, and a mere 9% are at the Leading Edge. In addition, three times as many organizations admit they're in trouble. The national distribution aligns more closely with the Bayer Center's observations of nonprofit technology and with the harder data in the survey.

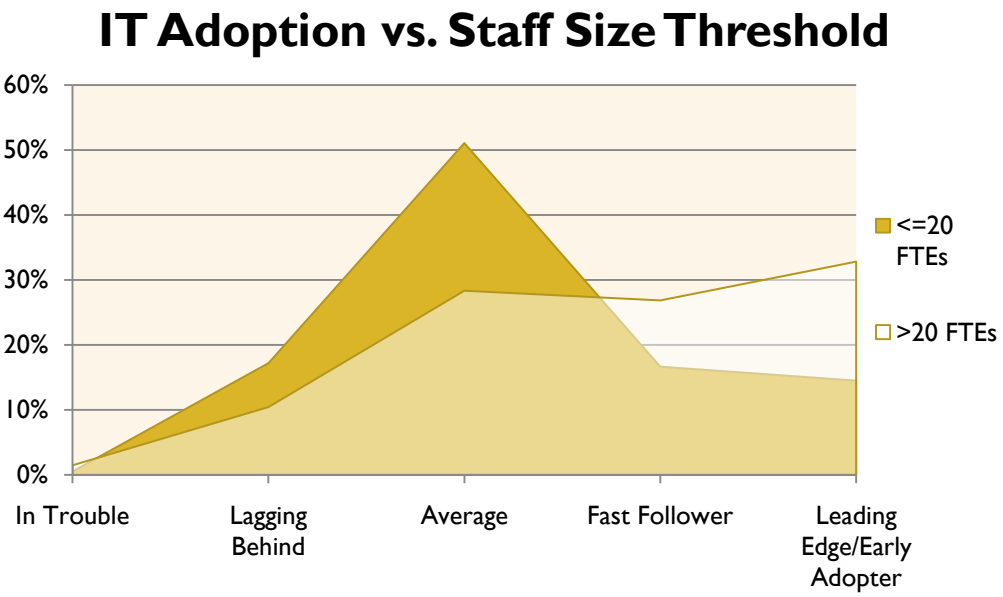


IT Adoption by Organization Size

As with other measures, the respondent pool exhibits great variety. If we distill the results to those who are ahead and those who are behind, different patterns emerge by organizational size. In both budget and staff size, the pattern continues that larger organizations are better off. If we collapse the Fast Follower and Leading Edge categories into an "Ahead" group, the relationship between budget size and IT adoption has followed an upward curve with a plateau in the middle. The plateau shifted location from 2008 to 2010, but the pattern remains.



A comparison of staff sizes by our familiar 20-FTE threshold shows that far more of the leading edge perception is in larger organizations. These organizations may be comparing themselves not to their other large peers but to the majority of regional nonprofits, which are smaller than them.



Paradoxically, the less optimistic profile in the NTEN survey represented the perceptions of larger organizations than the Bayer Center's survey pool. NTEN's sample skews much larger than the Bayer Center's.

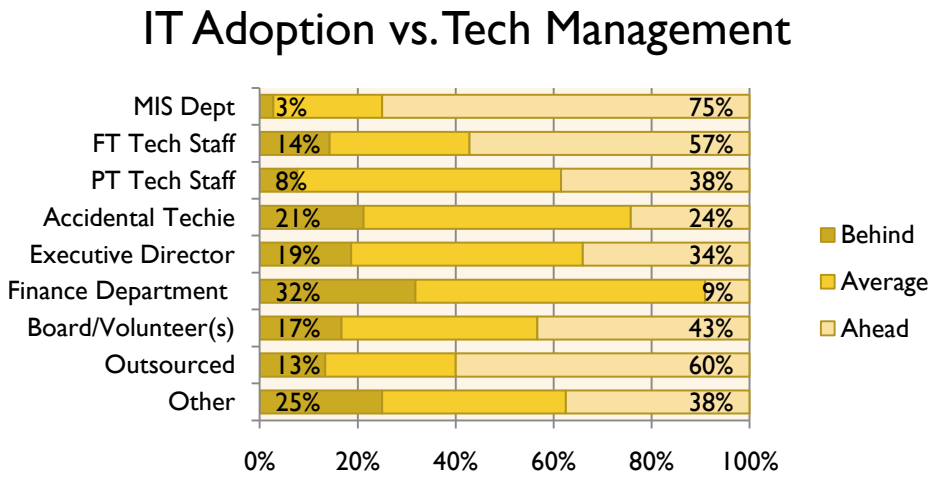
Size	Range	BCNM	NTEN
Small	<$500K	43%	15%
Medium	$500K-2.99M	34%	32%
Large	$3M-10M	12%	24%
Very Large	>$10M	11%	29%

Their recipient pool was made up of their member organizations, discussion board members and the Nonprofit Times's email newsletter subscribers. We can assume that the NTEN pool includes a higher proportion of national nonprofits and that the individuals responding are more tech-savvy. After all, they are either members of a national association of nonprofit techies or read its discussion boards or they have subscribed electronically to the content provided by a national nonprofit news outlet. The NTEN survey was distributed virtually completely via email, whereas the Bayer Center's survey mixed electronic and print solicitations for responses. The paradox lies in the fact that the more one knows about the potentials of technology, the less sanguine one may be about an organization's relative position.

IT Adoption by Technology Decision-Maker

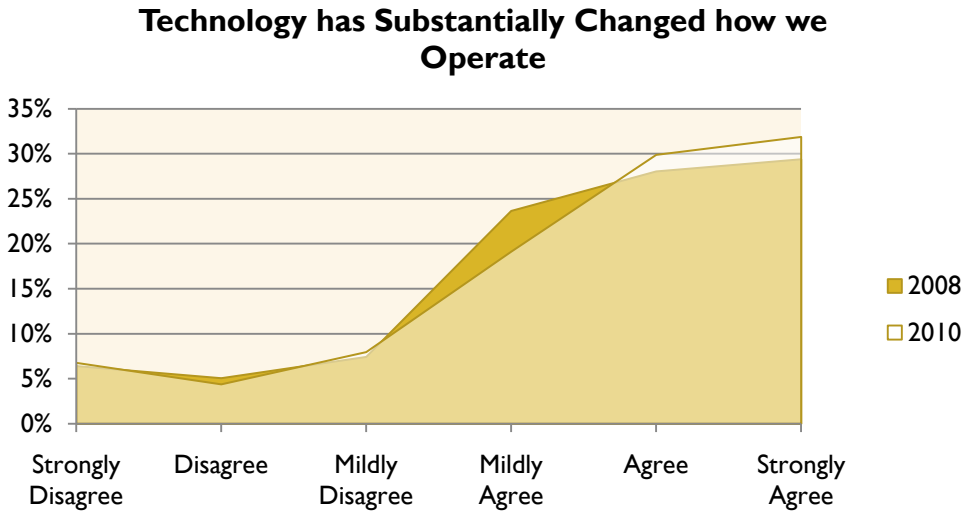
NTEN examined the perception of IT staffing levels on perception of IT adoption. Their 2007 survey found a direct connection between whether an organization felt adequately staffed and their perceived level of IT adoption. The responses ranged from 89% of organizations In Trouble feeling understaffed to only 37% of Leading Edge organizations feeling In Trouble. Interestingly, the lowest IT Staff to User ratio (1:17) was in the In Trouble organizations.

The Bayer Center's survey, without asking respondents to rate the adequacy of their IT staff, exhibits a similar pattern. Having at least a full-time tech staff person making the decisions about technology correlated with the highest rates of feeling "ahead" in IT adoption. Interestingly, outsourcing IT creates a similar perception of IT Adoption to Full-time Tech Staff. Board and Volunteer tech management correlates with better IT Adoption than a part-time tech staff person. This is a change from 2008 when Board/Volunteer tech decision-makers aligned with feeling behind. In 2010, having a Part-time techie improves the perception considerably over having an Accidental Techie. The largest group of organizations that feel behind the curve are those in which Finance Departments make tech decisions. Perhaps those with fiscal responsibility have to say no more often in the economic downturn.

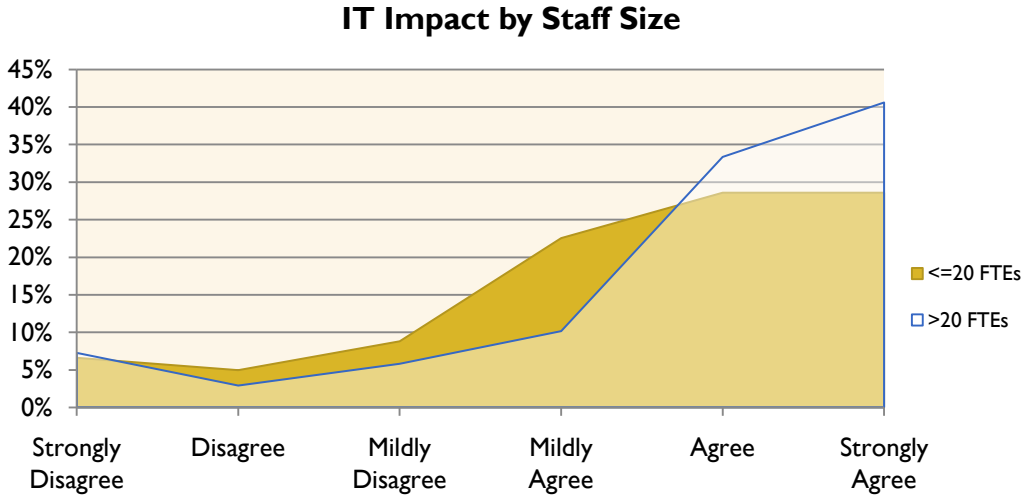


Impact

It is one thing to ask where the organization is on the IT adoption spectrum. It is another thing to ask what impact technology has had. The survey asks people whether they agree with the statement "Technology has substantially changed how we operate". This question has a six-point scale that forces respondents to come down on one side or the other.



Again in 2010, fewer than 20% will disagree at all with this statement. The vast majority agrees, and the most common response (by a larger majority than in 2008) is Strongly Agree. Agreement had eroded slightly from strong toward mild in the 2004-2008 surveys. This year, Strong agreement rebounds to 31%. Whereas in prior surveys, larger organizations clustered at both extremes more than their smaller counterparts, this year, larger organizations agree more strongly on IT's impact on how they work. More large organizations (84%) agree with the impact statement than small (80%). As the chart demonstrates, that agreement is also stronger.



A Final Word…from the Nonprofits Themselves

It seems only fitting to allow the survey respondents to have the last word. The list below of nonprofit tech dreams encapsulates the state of IT in the region's nonprofit sector.

What is your organization's Technology Dream or Next Big Step?

"Adding Interactive photo sharing to website (AKA Flikr)"

"24/7/365 organizational access to information from any internet connected device"

"Go green, thin client, firewall, satellite sites, SharePoint"

"It would be nice to be able to afford some new equipment and hire someone to help us with it part-time."

"I wish I could find a simple way to do our own website."

"Improved web site, faster Internet"

"Winning an iPad"

"All is well."

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 BIANNUAL BENCHMARKS FOR ALL VARIETIES OF AGENCY TYPE, SIZE AND OTHER FACTORS. **(PLEASE RETURN COMPLETED FORM BY SEPTEMBER 24, 2010 TO BE ENTERED IN A DRAWING TO WIN AN IPAD)**

425 SIXTH AVENUE, SUITE 2610 ● PITTSBURGH, PA 15219 ● 412-397-6000 FAX: 412-471-1366 ● 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)

☐ Arts, Culture, and Humanities
☐ Education
☐ Environment and Animals
☐ Health
☐ Human Services
☐ International, Foreign Affairs
☐ Mutual/Membership Benefit
☐ Public, Societal Benefit
☐ Religion Related
☐ Unknown, Unclassified

ROBERT MORRIS UNIVERSITY
Bayer Center for Nonprofit Management
Nonprofit Technology Survey

5) Our founding year/ 501(c)(3) ruling year is _____ .

6) How would you describe your organization's IT adoption?

☐ Leading Edge/Early Adopter
☐ Fast Follower
☐ Average
☐ Lagging Behind
☐ In Trouble

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*)

☐ Don't know/not sure
☐ MIS Dept with two or more employees
☐ Finance Department
☐ A staff person with full-time technology responsibilities
☐ A designated staff person with part-time technology responsibilities
☐ Unofficial staff interested in technology
☐ Executive Director
☐ 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/Utilization	Web Site
Minor improvement in:	☐	☐	☐	☐
Major improvement in:	☐	☐	☐	☐

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 (*please specify*) _____	_____	_____

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 2000 _____% Windows XP _____% Windows Vista

_____% Windows 7 _____% Mac OS _____% Other (specify) _____

7) Do you provide remote access for staff members?

☐ Laptop ☐ PDA ☐ Cell Phone ☐ Smart Phone – Type *(iPhone, Blackberry, Android)* _____

☐ Pager ☐ Data Access thru ASP/SaaS ☐ USB Drive ☐ Tablet Computer – Type *(. iPad, Windows)* _____

☐ Citrix ☐ Terminal Services ☐ pcAnywhere ☐ Other (specify) _____

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

☐ 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	_____	_____	_____
Fixed wireless	_____	_____	_____
Broadband (ISDN, DSL, Cable, T1, etc.)	_____	_____	_____

Do you have a firewall? _____ If yes, what kind of firewall? ☐ Hardware ☐ 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))*

☐ Yes ☐ No ☐ Don't Know/Not Sure

10) We use the following Local Area Network (LAN) Network Operating System(s) and servers: (*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.

☐ Windows NT ☐ Windows peer-to-peer

☐ Windows 2003 ☐ Windows 2003 Small Business Server

☐ Windows 2008 ☐ Macintosh Version: _____

☐ Other (Linux, Novell, etc.) specify:_____

Other Servers:

☐ Exchange Server version: _____

☐ SharePoint Server

☐ Web Server

☐ Other Server specify: _____

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.)*

☐ Voice over IP telephone system *(VoIP)*

☐ 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	☐	☐	☐	☐	Phone	☐	☐	☐	☐
Fax	☐	☐	☐	☐	Web site	☐	☐	☐	☐
Email – direct from you	☐	☐	☐	☐	Email – managed email system	☐	☐	☐	☐
Podcasting	☐	☐	☐	☐	RSS Feeds	☐	☐	☐	☐
Chat, IM	☐	☐	☐	☐	Video Conferencing	☐	☐	☐	☐
Conference Calls	☐	☐	☐	☐	Text Messaging	☐	☐	☐	☐
Voice Mail	☐	☐	☐	☐	Social Networking sites	☐	☐	☐	☐
Blog	☐	☐	☐	☐	Interactive or e-commerce oriented web page	☐	☐	☐	☐

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 (Star Office, Open Office, Google Apps)_____

For the next three questions, indicate how your organization handles accounting (14) database management (15) *and* technology management (16) *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	☐	☐	☐			
Accounts Receivable	☐	☐	☐			
Accounts Payable	☐	☐	☐			
Payroll	☐	☐	☐			
Budgeting	☐	☐	☐			
Cash flow	☐	☐	☐			
Inventory	☐	☐	☐			

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	☐	☐	☐			
Fundraising	☐	☐	☐			
Volunteers	☐	☐	☐			
Ticketing/point of sale	☐	☐	☐			
QA/RU accreditation	☐	☐	☐			
Outcomes Measurement	☐	☐	☐			

16) How does your organization handle the following **technology management** tasks and at what frequency *(e.g. daily, weekly, monthly, quarterly)*?

Tech Management Tasks			**Tools**		
	N/A	**Manually**	**Hardware/Software (specify)**	**Outsourced (specify)**	**Frequency**
Data Backup	☐	☐			
Antivirus	☐	☐			
User Account Management (*network/workstation*)	☐	☐			
Network Auditing/Logging	☐	☐			

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.

☐ 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

Thank you for your assistance.

Appendix B: Respondent Organizations

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

10,000 Friends of Pennsylvania
3 Rivers Wet Weather, Inc.
accessAbilities, Inc.
ACHIEVA
Adelphoi Village
Advantage Credit Counseling Services
African American Chamber of Commerce of W. PA.
Aliquippa Impact, Inc.
Allegheny County Housing Authority
Allegheny Health Choices, Inc.
Allegheny Mountain Rescue Group
Allegheny Regional Asset District
Allegheny Valley Association of Churches
Amachi
Anchorpoint Counseling Ministry
Anonymous
Argentine Productions
Armstrong County Community Foundation
Armstrong County Council on Alcohol and Other Drugs, Inc.
Armstrong Educational Trust
Arts Education Collaborative
Best Buddies Pennsylvania-Pittsburgh
Big Brothers Big Sisters of Grtr PGH
Big Brothers Big Sisters Of Butler County
Big Brothers, Big Sisters Of Beaver County
Blind and Vision Rehabilitation Services of Pittsburgh
Borough of Brentwood
Boy Scouts of America
Bridgeway Capital
Brighton Heights Citizens Federation
Butler Area Public Library
Butler County Chamber of Commerce
Butler County Community College
Butler County Symphony Assoc.
Calliope: The Pgh. Folk Music Society
CANDLE INC.
Carnegie Library of Pittsburgh
CASA of Allegheny County
Catholic Charities, Diocese of Pittsburgh, Inc
Center for Coalfield Justice
Center for Community Resources, Inc.
Center for Hearing & Deaf Services, Inc.
Central Northside Neighborhood Council
Children's Museum of Pittsburgh
Children's Sickle Cell Foundation
Choices Pregnancy Center
Circle C Youth & Family Services, Inc.
Citizens Coal Council
City of Duquesne
City Rescue Mission
Clearwater Conservancy
Community Action Southwest
Community Empowerment Association, Inc.
Community Foundation of Greene County, PA
Community Health Challenge
Coraopolis Church of God
Cownanshannock Creek Watershed Association
Cranberry Township
Creative Arts Renewal Effort
Crisis Center North
Crooked Creek Watershed Association
Dance Alloy
DeBence Antique Music World
Diversity Business Resource Center
Duquesne University- NLI
Duquesne University Tamburitzans
Earth Mother Enterprises
East Allegheny Community Council
Eastern Orthodox Foundation
Elder-Ado, Inc.
Evergreen Conservancy
Fair Housing Partnership Of Greater Pgh, Inc
Faith In Action Caregivers
Family Center Daycare
Family House of Pittsburgh
Family Resources
Family Services of Blair County
Family Services of Western PA - PGH
FamilyLinks
Fayette County Conservation District
FISA Foundation
Flying Mammal Wildlife Rehabilitation Center
Focus on Renewal
Freedom Area Educational Foundation
Frick Art & Historical Center
Friends of Haiti
Friends of the Pittsburgh Urban Forest
Girl Scouts Western Pennsylvania
Girls Hope of Pittsburgh, Inc.
Good Grief Center
Goodwill Industries of Southwestern Pennyslvania

GPA -Three Rivers Greyhound
Grantmakers of Western PA
Greater Canonsburg Chamber of Commerce
Greater Pittsburgh Community Food Bank
Greene County Watershed Alliance
Group Against Smog and Pollution
Grove City Education Center for Adults
GTECH Strategies
Gwen's Girls
Heritage Community Initiatives
Hilltop Alliance
Homeless Children's Education Fund
Hope Academy of Music and the Arts
Hot Metal Bridge Faith Community
Hoyt Institute of Fine Arts
Human Services Center Corporation
Independence Conservancy
Interfaith Volunteer Caregivers of Fayette, Inc.
Ireland Institute Of Pittsburgh
Jacobs Creek Watershed Assoc.
Jewish Residential Services
Jewish Women's Foundation of Greater Pittsburgh
Just Harvest
Juvenile Diabetes Research Foundation International
Kelly-Strayhorn Theater
Landau Building Company
Latin American Studies Assn.
Laughlin Children's Center
Lawrence County Tourist Promotion Agency
Lawrenceville Corporation
Leadership Pittsburgh, Inc.
Life Choices
Lifespan, Inc.
Lifesteps
Light of Life Ministries
Little Lake Theater Company
Lutheran Service Society - Allegheny
Lutheran Service Society of Western PA
Lutherlyn
Lydia's Place
Macedonia Baptist Church
Mainstay Life Services
Manchester Academic Charter School
Mario Lemieux Foundation
MCG Jazz
Mental Health America - Allegheny Co.
Mental Health Association in Butler County
Mentoring Partnership of Southwestern PA
Message Carriers of Pennsylvania, Inc.
Milestone Community Health Connections
Mon Yough Community Services Inc.
Mountain Watershed Association, Inc.
Mt. Lebanon Montessori School, Inc.
Mt. Washington Comm. Dev. Corp.
Myasthenia Gravis Association, W. PA
National Board of Public Health Examiners
National Center for Nonprofit Excellence
National Flag Foundation
National Pancreas Foundation
Nazareth Housing Services
NEED
Neighbors in the Strip
Network of Hope
New Century Careers
North Area Environmental Council
North Hills Community Outreach
Norwin Chamber of Commerce
Oakland Business Improvement District
Oakland Planning and Development Corporation
Oakland Transportation Management Association
Oncology Nursing Society
Our Own Home
Outreach Teen & Family Services
PACE - Program to Aid Citizen Enterprise
Peer Support and Advocacy Network
Penn State Cooperative Extension/Allegheny County
Pennsylvania Women Work!
Pittsburgh Action Against Rape
Pittsburgh AIDS Task Force
Pittsburgh Area Jewish Committee
Pittsburgh Ballet Theatre
Pittsburgh Cares
Pittsburgh Ceili Club
Pittsburgh Foundation
Pittsburgh Glass Center
Pittsburgh Musical Theater
Pittsburgh Toy Lending Library
Pittsburgh Urban Christian School
POISE Foundation
Polish Hill Civic Association
POWER
Present Help, Inc.
Prime Time Adult Care
Private Industry Council Wesm'd/Fayette
Problem Solvers Unlimited
Rainbow Kitchen Community Services
Rankin Christian Center
Residential Care Services
River City Brass Band
Rivers of Steel National Heritage Area
Robert Morris University
Roy A. Hunt Foundation
Saltworks Theater Company

Samaritan Counseling Center
SAMS-USA
Scott Conservancy
Senior Computer Associates
Sewickley Borough
Sharon Lifelong Learning Council
Sharp Visions, Inc.
Silver Eye Center For Photography
Sixth Mt. Zion Baptist Church
Smart Futures
South Hills Interfaith Ministries
South Side Local Development Company
Southwestern PA Human Services
Southwinds, Inc.
Spina Bifida Association of Western PA
St. David's Society of Pittsburgh, Inc.
Step-by-Step, Inc.
Stepping Stones Children's Center
The Academy System, Inc.
The Allegheny Regional Asset District
The Combustion Institute
The Early Learning Institute
The Emmaus Community of Pittsburgh, Inc.
The Grable Foundation
The Lighthouse Foundation
The Open Door Church/Garfield Community Farm
The Pittsburgh Project
The Presbyterian Church, Sewickley
The Watson Institute
Three Rivers Adoption Council
Three Rivers Connect
Three Rivers Rowing Association
Three Rivers Youth
Tides Center/Services for Older Adults
Tobacco Free Allegheny
Troy Hill Citizens Inc.
United Cerebral Palsy of Pittsburgh
United Jewish Federation of Greater Pgh.
United Way of Westmoreland County
University of Pittsburgh Office of Child Development
University of Pittsburgh-Industry Studies Assoc.
Upper St. Clair Township
Urban Impact Foundation
Urban Pathways Charter School
Valley Points Family YMCA
Venture Outdoors
Washington City Mission, Inc.
Washington County Aging Services
Washington Hospital Foundation
Watchful Shepherd USA
Western PA Coalition for Abandoned Mine Reclamation
Western Pennsylvania Conservancy
Western Pennsylvania Family Center
Western Pennsylvania Humane Society
Westmoreland Arts and Heritage Festival
Westmoreland Casemanagement and Supports, Inc.
Westmoreland Cleanways
Westmoreland Museum of American Art
Wilkinsburg Community Development
With A Golden Spirit, Inc.
Women's Law Project
Yates Fund for Cancer Hope
YMCA of Westmoreland County
YMCA University Chapter
Yoga in Schools

Appendix C: Bayer Center Advisory Board, Staff

Advisory Board

Chair
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The Bayer Foundation

Doreen E. Boyce
The Buhl Foundation

Gregory G. Dell'Omo
Robert Morris University

Carolyn D. Duronio
Reed Smith L.L.P.

Karen Farmer-White
Mesirow Financial

Robert S. Foltz
Goodwill Industries of Pittsburgh

Elizabeth Helmsen
Pittsburgh Symphony Orchestra

Scott Izzo
Richard King Mellon Foundation

Derya Jacobs
Robert Morris University

David Jamison
Robert Morris University

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Highmark Inc.

Mark S. Lewis
POISE Foundation

Peter Lucas
MAYA Design Inc

Mildred E. Morrison
Allegheny County Dept. of Human Services

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Rhoades & Wodarczyk, LLC

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McKnight Development Company

Robert J. Schuler
Blue Cross of Western PA (Retired)

Walter Smith
Family Resources

William Stein
Family Tyes

Bonnie Westbrook VanKirk
Media Networks/Time Inc. (Retired)

Michael Watson
Richard King Mellon Foundation

Laura Richeson Zinski
Mon Valley Initiative

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