



*Bayer Center for  
Nonprofit Management*

# Southwestern Pennsylvania Nonprofit Technology Survey 2008

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Presented at



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October 30, 2008



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# About the Bayer Center for Nonprofit Management at Robert Morris University

Since our establishment in 1999, the Bayer Center for Nonprofit Management at Robert Morris University has strived to provide the guidance, tools and information necessary for nonprofit organizations to effectively fulfill their missions. The Bayer Center offers consulting services and non-credit classes in areas such as:

- Board Governance
- Business Planning
- Collaborations and Mergers
- Facilities Planning
- Financial Management
- Fund Development
- Human Resources
- Legal Issues
- Organizational Effectiveness
- Strategic Planning

#### Technology Services:

- Database Development and Enhancement
- Software Application Training
- Software Selection
- RFP Assistance
- Technology Planning
- Web Site Planning and Design

In partnership with the Robert Morris University School of Business, the Bayer Center offers a master's degree in nonprofit management. We also conduct research and provide information and referral to a broad range of resources.

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

# Executive Summary

The IT landscape in area nonprofits has generally improved in the last two years. Some measures show clear plateaus as rates of progress slow to negligible.

## Technology Policy

- Technology planning holds steady at a 40% rate; large organizations are more likely to plan for technology than small organizations.
- More IT staff are technology decision-makers than in 2006. Fewer accidental techies and executive directors make “buy or pitch” decisions.
- Tech skills are in half of the region’s nonprofit job descriptions, a huge jump from prior years.
- More organization included tech costs in a foundation proposal in 2008 than in 2006.
  - Proposals with tech costs were even more successful (89%) in 2008 than in 2006.
  - All-technology proposals were the most successful.
- Larger organizations continue to adopt tech best practices at a higher rate than smaller ones.

## Computer Systems

- The aging of user workstations has halted but not reversed.
- Only 4% of computers in area nonprofits run Windows Vista.
- More than a third (38%) of all new computers are laptops.
- Wireless Internet jump from 3% in 2006 to 9% in 2008.
- The rate of Internet use by nonprofit employees for work has plateaued in the upper 50s.
- Email draws even with print and phone as a communication tool.
- About one in five nonprofits have upgraded to Office 2007.
- QuickBooks’s market share dipped from 62% to 53%.
- The majority of databases used for managing client information, fundraising, volunteer management and outcomes measurement are off-the-shelf solutions, a first in five surveys.
- Norton and Symantec make up more than half of the anti-virus software 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 consider themselves ahead of the curve (despite all evidence).
- 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

On the one hand, it's hard to believe that the Bayer Center has reached its fifth biannual technology survey. On the other hand, our local and national audience looks to us for this analysis, and we would not gladly abandon the tradition we've started. And time has flown by. The survey allows us and our peers to pause and consider in quantitative and qualitative terms what the constant march of technology looks like on the ground in nonprofit organizations. Not to give anything away, but it looks like uneven progress.

Some of the findings have a certain "duh" quality. To express that more positively and articulately, it can be useful to confirm intuition with hard data. Numerical evidence forms a more secure foundation for persuasive arguments for change within individual organizations and across the sector as a whole.

Some results are more surprising. We do our best to explain counterintuitive results by incorporating the Bayer Center's "real life" experience in training and consulting with nonprofits.

We are especially grateful to have sponsorship support from three companies that have considerable interest and presence in the local nonprofit community. TowerCare, Inc., a growing local provider of fundraising software, is our lead sponsor for the 2008 survey project. Its product, called DonorPro, has many Pittsburgh area customers and an expanding national customer base. Allied Insurance Brokers, Inc. and Fifth Third Bank's Charitable Management Services group are supporting sponsors. Both offer products and services that are tailored specifically to nonprofits. All of our sponsors take a keen interest in the success of the nonprofit community and value quantitative measures of progress.

Eight years of data allow us to evaluate trends in the use of technology by nonprofits. If observation did not show you that this is a complex subject, our four pages of questions might signal that. In that complexity, we see a lot of progress. Taken in biannual steps, advances can seem small. Over eight years, the context has morphed unbelievably. Change doesn't always move in a positive direction. Upward trends occasionally reverse themselves. If there's one pattern that marks the 2008 data, it's the plateaus. Steady growth on some measures appears to have stagnated for now. We don't believe that's the last word, and we believe that the occasional technology mistake notwithstanding, backwards steps sector-wide over time aren't really possible.

In measuring technology use, the only constant is change; we alter the survey instrument slightly each year to examine emerging technologies and issues. The new parts of this year's survey focus on emerging communication technologies (web 2.0) and tools for mobile staff members. The complete survey instrument is an appendix to the report. You may find it helpful to review the survey instrument and the response options before reading the analysis. The Bayer Center welcomes the use of the survey instrument in other regions for the sake of comparison.

Finally, we owe a debt of gratitude to those who not only make IT work in their organizations but also take the time to tell us about it in deep detail. This year's sample of 330 organizations is 15% larger than 2006 and our largest ever. We appreciate the 11 "charter" survey organizations that have responded every year, the 193 organizations that have responded more than once and the 128 who participated for the first time this year.

## Lead Sponsor



TowerCare Technologies is pleased to serve as the lead sponsor for the Bayer Center for Nonprofit Management's 2008 Southwestern Pennsylvania Nonprofit Technology Survey. We believe that technology is key in helping nonprofits maximize operational efficiencies.

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# Responding Organizations

This year's survey drew the largest sample of our five surveys; 330 organizations responded. Responses were collected in summer 2008. The conclusions drawn in this report derive from a diverse and representative sample of the nonprofits in Southwestern Pennsylvania. The majority of organizations had responded in the past. Still, over a third are first timers. Before we delve into findings, this section of the report will summarize the organization type, size, location and age of respondents.

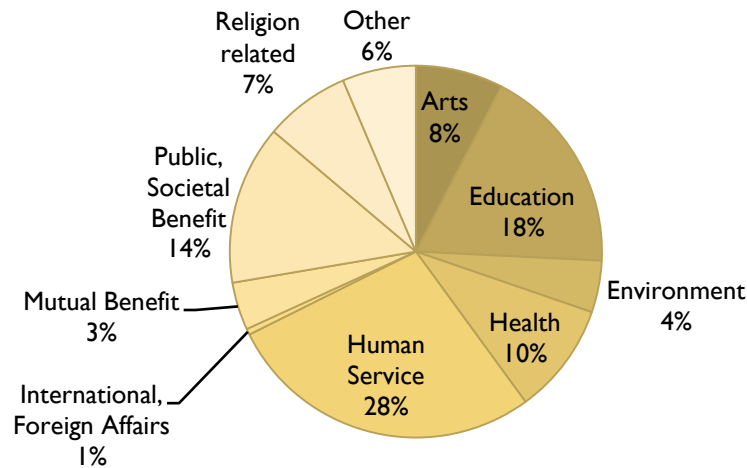
| Repeat Status    | Orgs | %   |
|------------------|------|-----|
| Five-Timers Club | 11   | 3%  |
| Four Surveys     | 47   | 14% |
| Three Surveys    | 73   | 22% |
| Two Surveys      | 71   | 22% |
| New in 2008      | 128  | 39% |

## 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.

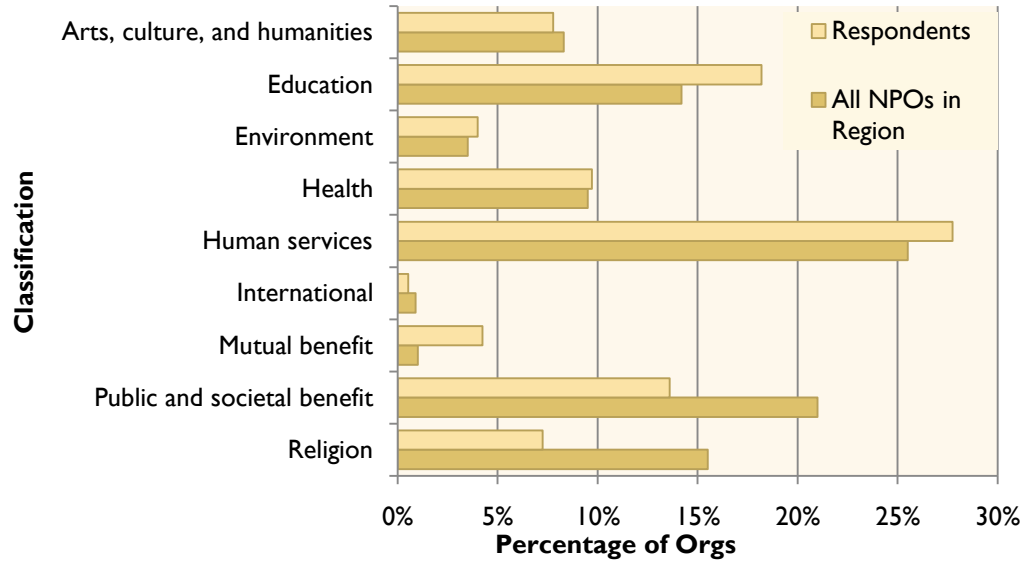
The 2008 survey pool breaks down by organization type in very similar proportions to past years. As in prior surveys, more than half of all survey respondents fall into three categories: Human Service, Education, and Public/Societal Benefit. Public/Societal Benefit – the least intuitive name among these three categories – includes advocacy, community development and philanthropy. The smallest categories include Environmental, Mutual Benefit, and International and Foreign Affairs.

**Respondents by Organization Type**



Survey respondents align closely with all of the nonprofits in the region.<sup>1</sup> The survey pool has slightly more Education and Human Services organizations and fewer Public benefit and Religion-related organizations.

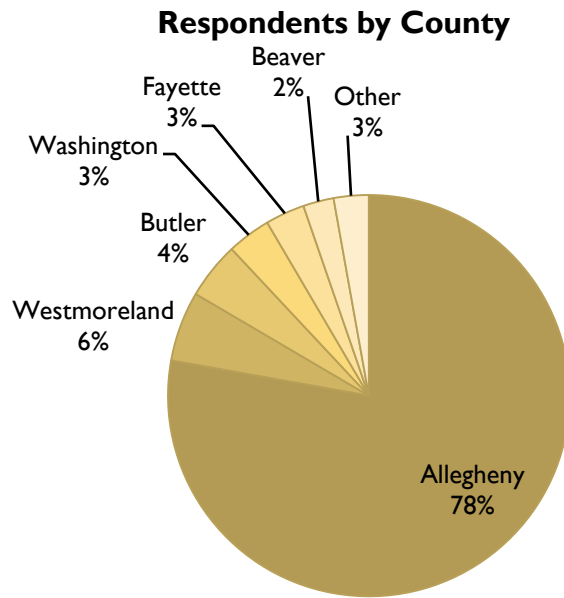
### Survey Respondents vs. Regional Organizations



<sup>1</sup> All references to the nonprofits in the region derive from the National Center for Charitable Statistics Business Master File from October 2008. The Business Master File contains all organizations all active organizations registered with the IRS. The region is defined as the following 10 counties: Allegheny, Armstrong, Beaver, Butler, Fayette, Greene, Indiana, Lawrence, Washington, and Westmoreland.

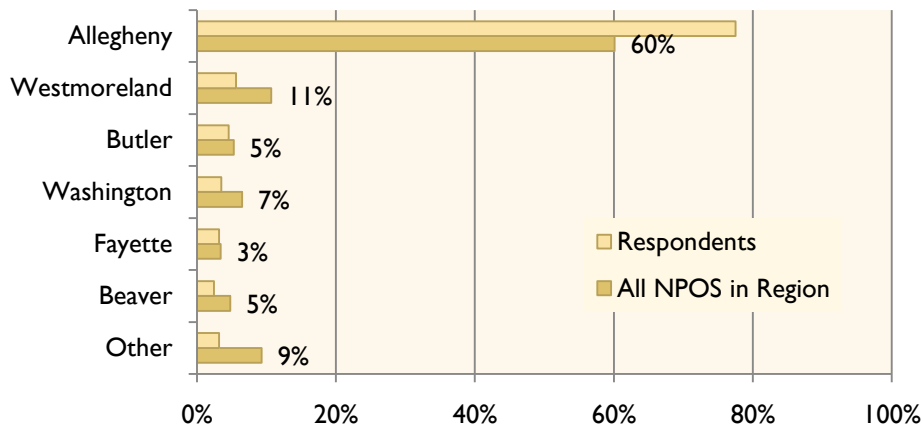
## Geography

The vast majority of 2008 respondents (78%) are located in Allegheny County, which falls within the range (69%-85%) of the Allegheny proportion in prior surveys. Of the remaining organizations, 18% are located in the adjacent counties of Beaver, Butler, Fayette, Washington and Westmoreland. The remaining three percent come from outside the immediate Pittsburgh metropolitan area.



The number of nonprofits in the Pittsburgh region is less dominated by Allegheny County than is our survey pool. Still, the central county in the region has far more nonprofits than any of the neighboring counties that make up the metropolitan area.

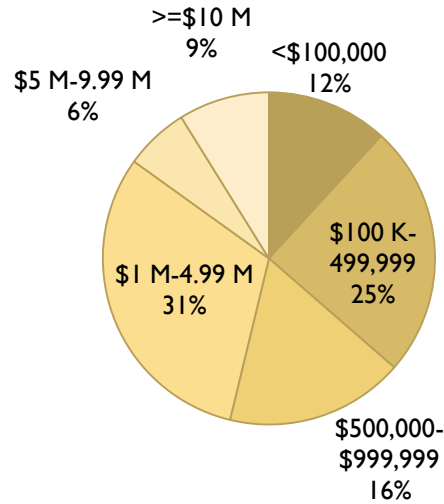
### Location: Survey Orgs vs. Regional Orgs



## Budget Size

Like nonprofits nationally, the organizations in the respondent pool tend to be small. More than half of the organizations have annual budgets of less than \$1 million, and 85% have annual budgets of less than \$5 million. The size of the organization definitely influences IT need and IT adoption. The survey pool's smallest budget (\$2000) has very different IT requirements and infrastructure from the largest (\$160,000,000).

### Survey Respondents by Budget Size



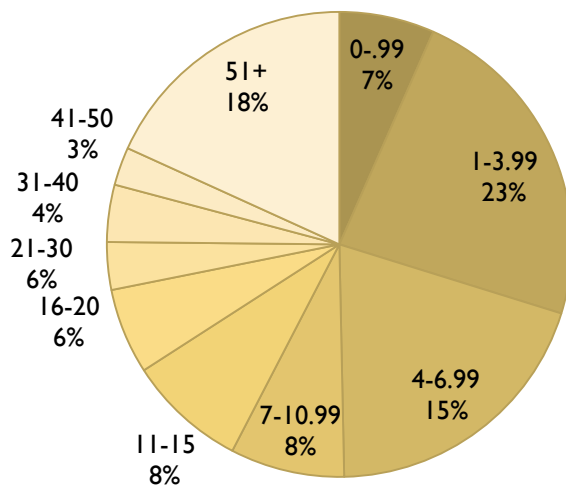
This kind of distribution fits within the pattern established in prior surveys. The 2008 median budget is the highest to date. This year's pool has more \$1-5 million budgets and more budgets over \$10 million than any previous survey. The growth in those brackets essentially offsets a decrease in the \$100,000-500,000 range. That exchange explains the median's skew upward.

| Year | Median Budget |
|------|---------------|
| 2000 | \$500,000     |
| 2002 | 700,000       |
| 2004 | 645,000       |
| 2006 | 700,000       |
| 2008 | 815,000       |

## Staff Size

Just as the nonprofits represented in the survey are small in budget, they are small in number of employees as well. The small staff – users and IT people – may be an even more important resource constraint when it comes to IT adoption. Half of the respondents employ 7 or fewer full time equivalent (FTE) employees. An additional 16% of organizations have 7-15 employees. At the margins, some organizations are run entirely by volunteers, and the largest responding organization employs 2500 FTEs.

**Survey Respondents by Staff Size (FTEs)**



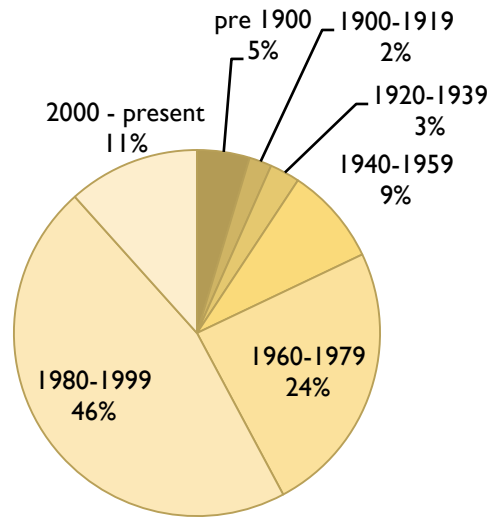
The median staff size is more in line with prior years than median budget size. The 18% proportion with staff sizes over 50 is above the norm. Only 2002 had that many organizations that large. Like in 2002, the 2008 pool has slightly fewer organizations in the three smallest brackets than is typical.

| Year | Median Staff Size |
|------|-------------------|
| 2000 | 6                 |
| 2002 | 10                |
| 2004 | 7                 |
| 2006 | 6.5               |
| 2008 | 7                 |

## Age of Organization

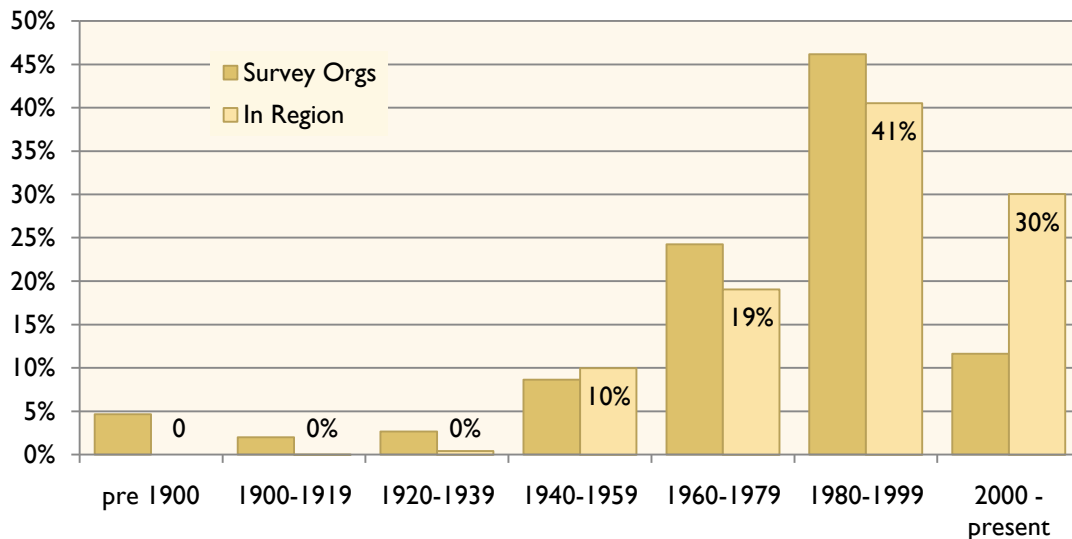
Age can cut both ways in its impact on use of technology. On the one hand, a younger organization has not existed without IT tools being available to it. Whether a new nonprofit adopts the tools is as open a question as whether an older one does, but the recently-founded organizations have developed 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 2008 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 24 years, up exactly two years from the 2006 survey.

### Respondents by Founding Year



Although the survey orgs are similar in age to the pool of all nonprofits in the region registered with the IRS, the surprising number of nonprofits founded this decade is underrepresented in the survey. The comparison data is based on the 501(c)(3) ruling year of organizations, which may be more recent than the widely accepted founding dates. This discrepancy between any given organization’s founding and 501(c)(3) ruling date partially explains the very small number of pre-1940 organizations in the regional comparison data set.

### Founding Year: Survey Orgs vs. Regional Orgs



The respondent profile is enumerated in this level of detail in order to reinforce that the snapshots produced by each survey derive from the attributes of similar organizations. More

detailed respondent profile data is available upon request. A complete list of this year's respondents appears as an appendix to this report.

# Technology Policy

The Bayer Center's technology initiative focuses, of course, on technology. We really view technology through the management lens, though. IT solutions allow nonprofits to do more with less, record their activities, make data-driven decisions and share their stories. In the words of one respondent "I want records I can use as a management tool." Before we examine "the stuff" nonprofits are using, we look at how they manage "the stuff".

## Technology Planning

People sometimes debate whether organizations need technology plans anymore. Detractors base their arguments on opportunity cost, the obsolescence of a plan document in the face of constant IT advances and the idea that the steps to take are so obvious that they don't require a planning process. Let's examine these arguments in the real-world context of today's nonprofits. That's a world in which most organizations are small (under 20 employees), lack a trained technology person, expect staff to wear many hats and run a very lean ship. In light of that, the arguments:

First, the opportunity cost is not negligible. What technology improvements could the planners make with the time and money spent on the plan? Instead of meetings and consulting fees, couldn't we have better hardware and software? Shouldn't the staff better spend that time getting trained? Possibly yes. In many organizations, however, all things being equal, the resources that might be devoted to a tech plan wouldn't necessarily be devoted to IT acquisition or training. Alternatively, if an organization does allocate money and time to tools and training, the probability of systematic improvement increases dramatically with planned and agreed-upon steps rather than a series of one-off decisions. Opportunity cost must be weighed, but for effectiveness and systematic improvement, we choose planned spending reduced by opportunity cost rather than unplanned spending.

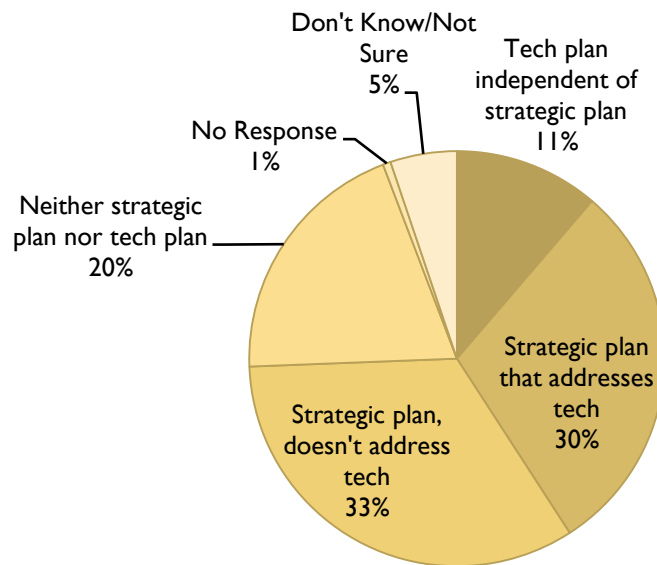
Second, IT solutions *do* evolve at a startling pace that does not tarry until the plan is written. New solutions appear all the time, especially in the age of cloud computing. By the logic that external change trumps internal planning, however, no strategic plan would ever get written. For that matter, no dinner reservations would ever get made. Constant flux, both outside and inside the organization, challenge any planning process to maintain currency while planning for a future that is difficult to pin down. We don't work ourselves out of this dilemma, however, by shelving the notion of planning. We work our way out by planning as quickly as possible and executing the plan with flexible decision points.

Third, there are times when the next step in IT growth seems obvious to a technology expert. If an organization lacks a network, they should not dump vast resources into database development yet. If an organization has just adopted a web site that serves as a service delivery tool in itself, efforts should clearly focus on public awareness, ensuring uptime and dynamic content. Too often, however, the decisions are not so clear cut. For one, multiple issues may present as "next step" barriers. Determining priorities by reading the marketing material of solution providers will make one cross-eyed. Returning to the nonprofit context, steps that may be obvious to an expert are less obvious to those who pick up the IT mantle and spend most of their IT time putting out fires. In organizations with an IT department composed of multiple people with varied expertise, project-to-project tactical planning may suffice. The

problem is that most organizations lack that resource internally and can only hope to come up with plans by composing a committee, maybe getting some outside help and working through a structured, agency-wide process.

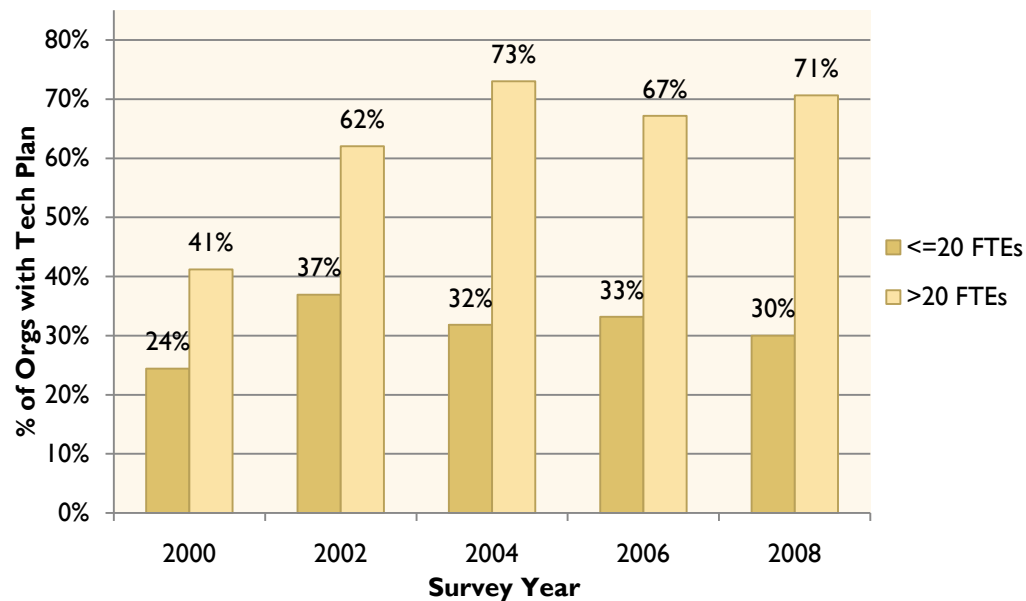
From a low in 2000 of 28%, the technology planning rate has hovered in the low 40% range from 2002-2008. The majority of technology plans are part of a broader technology planning process, which makes sense; appropriate technology solutions can only be determined when strategic direction is clear.

### Technology Planning



Among all organizations, 41% had a technology plan in 2008. 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 (71%) than smaller ones (30%). After a slight dip in the differential in 2006, the gap expands to the 2004 level this year. Organizations with a tech plan have nearly five times the median staff size (19 vs. 4.25) and seven times the average staff size (108 vs. 15) than those with no tech plan.

### Tech Plan by FTE Size

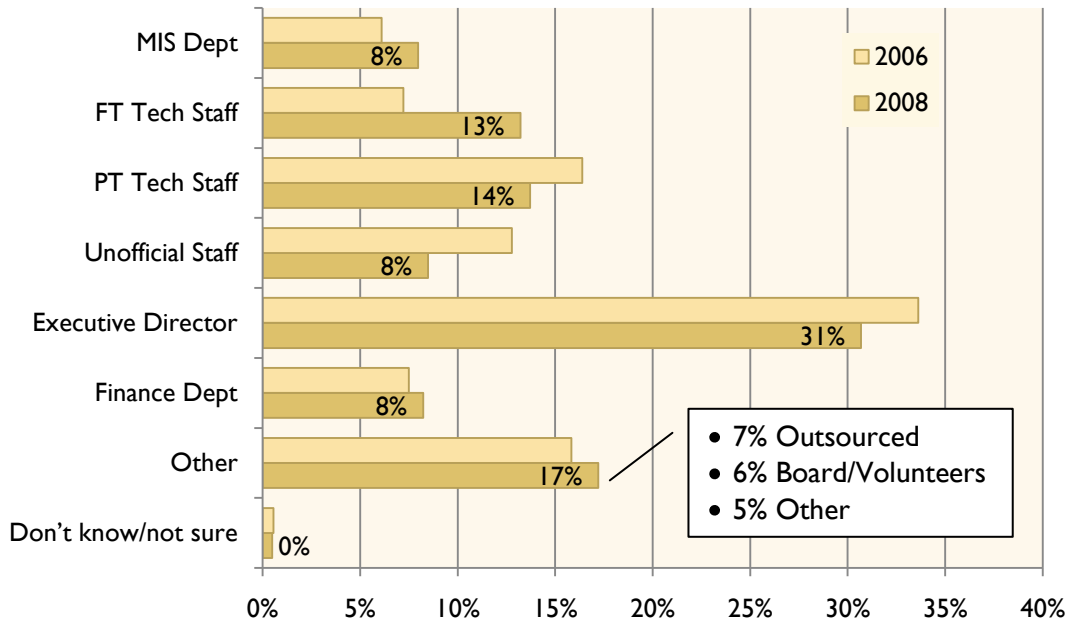


### Technology Management

There are a variety of roles and responsibilities in the techie realm. One important task 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?”

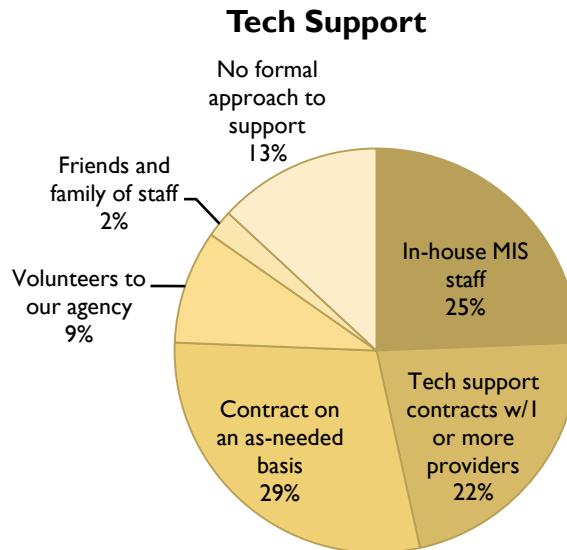
The 2006 survey indicated that tech staff were losing authority in decision-making to groups with less official responsibility. A decrease in staff decision-making was accompanied by an increase in board member and volunteer decision-making. That shift persists in 2008 but is accompanied by a shift away from accidental techies and executive directors making decisions toward IT staff making decisions. On the one hand, more board members, volunteers and consultants are making IT decisions than in earlier surveys. On the other hand, within staffs, full-time tech staff and MIS Department decision-making both increase in 2008.

## Technology Management



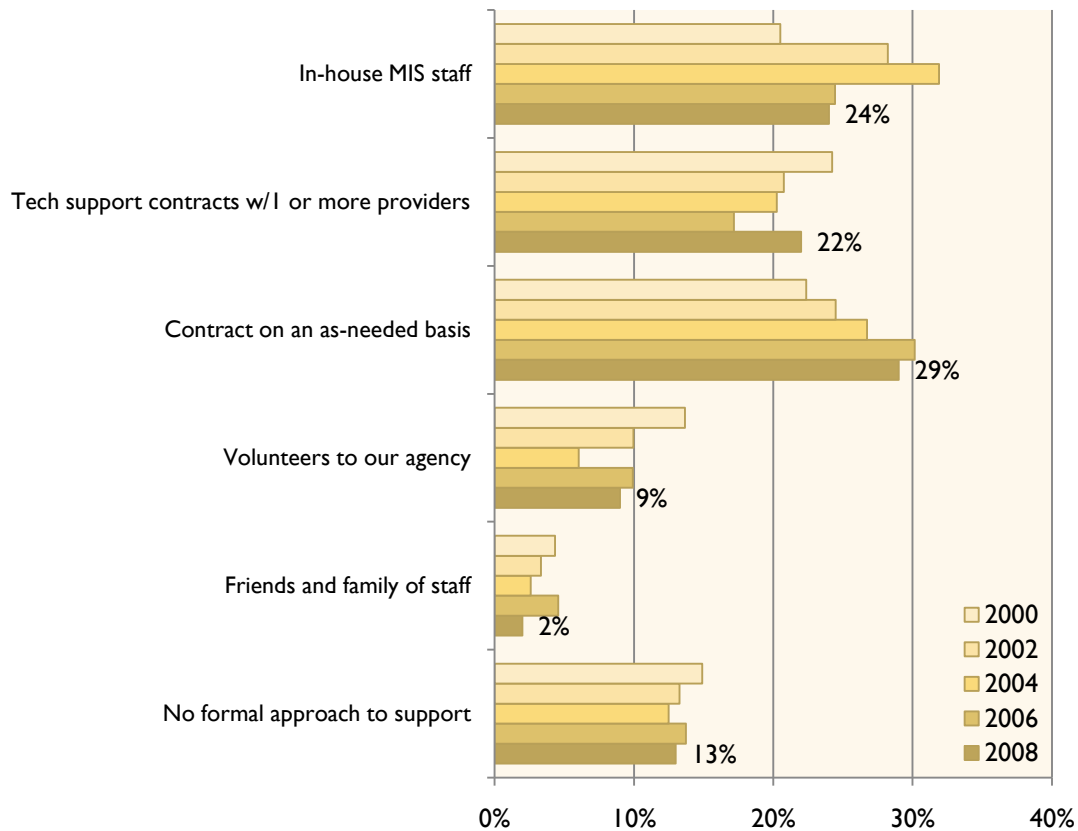
## Technology Support

Another key area of “techie” responsibility is support. In fact, the lack of support is one of the most strongly felt challenges to nonprofit IT success; more on that later. Support duties typically sort themselves into routine tasks done by staff and specialized tasks that require outside assistance. Many organizations, therefore, use more than one provider for support; for example, In-house MIS Staff supplemented by contracting for assistance in emergencies or for more technical tasks.



Support, like decision-making, has shifted increasingly to outsiders. The graph below shows the breakdown of primary providers of support<sup>2</sup> over the last eight years. The breakdown is very similar to the 2006 survey with a decrease in “friends of the nonprofit” support apparently offset by contract relationships. A return to the larger proportion of ongoing contracts vs. as-needed support suggests a more planned approach to these relationships. It may also suggest that – at least until the summer of 2008 – confidence in a brighter financial future was up enough to enter into a long-term support relationship rather than waiting for a crisis to call in help.

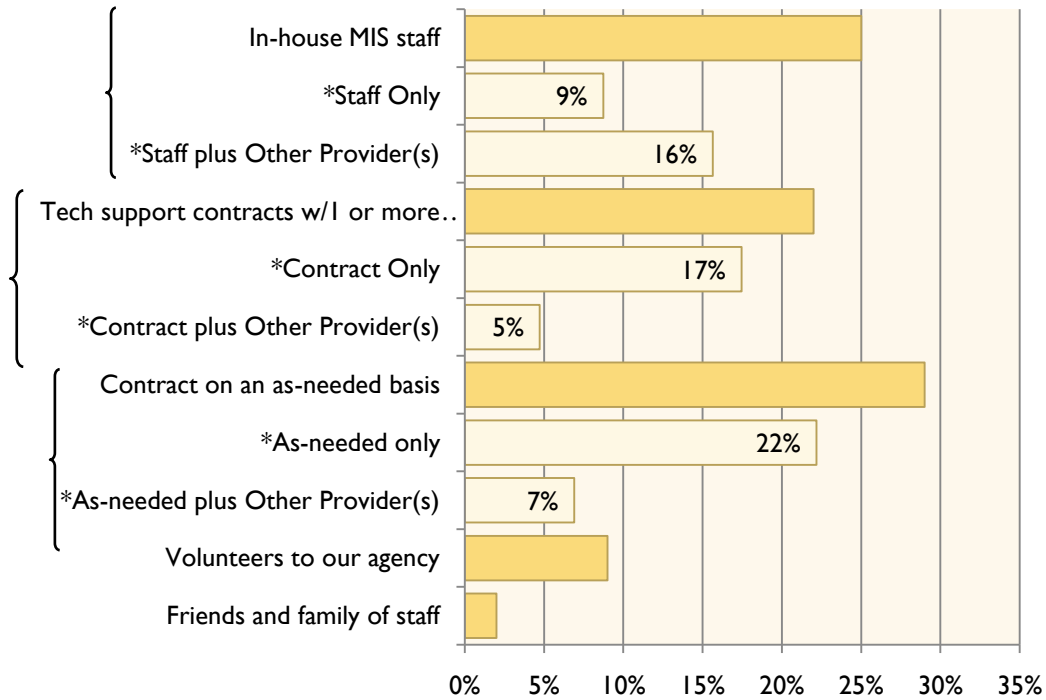
### Tech Support Provision



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

<sup>2</sup> 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.

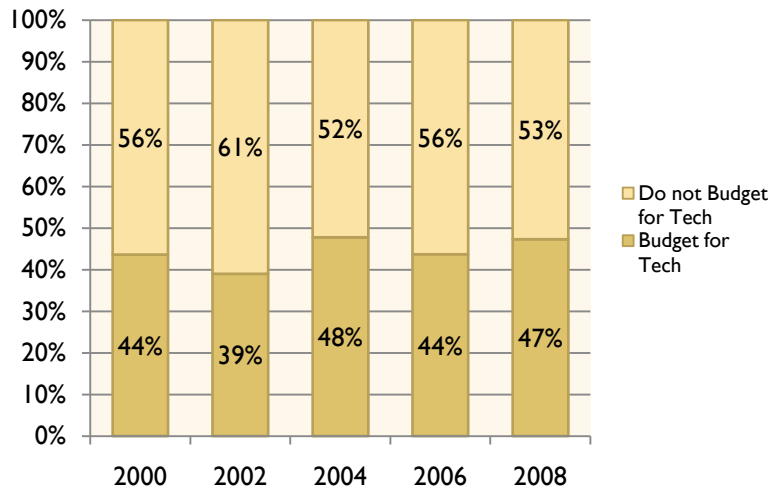
### Tech Support Provision - 2008 Detail



### Technology Spending

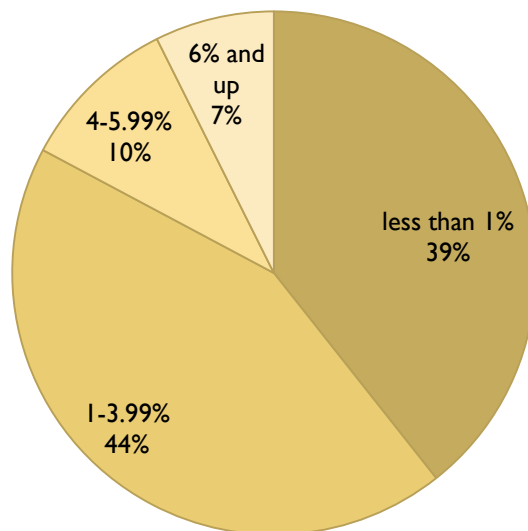
Aside from marginal changes in the rate survey to survey, the rate of tech budgeting remains near but below half. The organizations that do track and budget for technology expenses continue to be slightly larger than those that don't. Median staff size of the budget group is more than 2.5 times that of the non-budget group (13.5:5). Median budget size shows a similar gap (\$1.2M:\$500K)

### Technology Budgeting



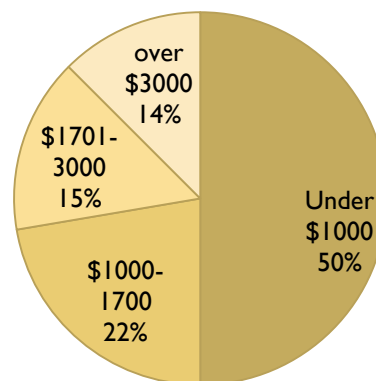
Survey respondents who budget for technology align similarly to technology spending benchmarks this year as in prior years. One benchmark is that technology spending should be 4-6% of overall annual spending. The good news is that the number of organizations in that range doubled from 2006 to 2008 to 10%. The bad news is that 83% of organizations remain below that ratio. Another guideline that ties technology to users is that the tech budget should equal 10% of payroll. Because we don't collect payroll figures in this survey, we are unable to make that comparison.

### Tech Budget as % of Total Budget



Guidelines for annual spending per machine vary, but experts say that organizations should budget \$1000 to \$1700 per year with some placing the top end of the range at \$3000 annually. The median survey organization spends just under \$1000 per computer, unchanged from 2006. The breakdown by ratio aligns pretty closely with past surveys, although it skews slightly lower than the 2004 and 2006 surveys.

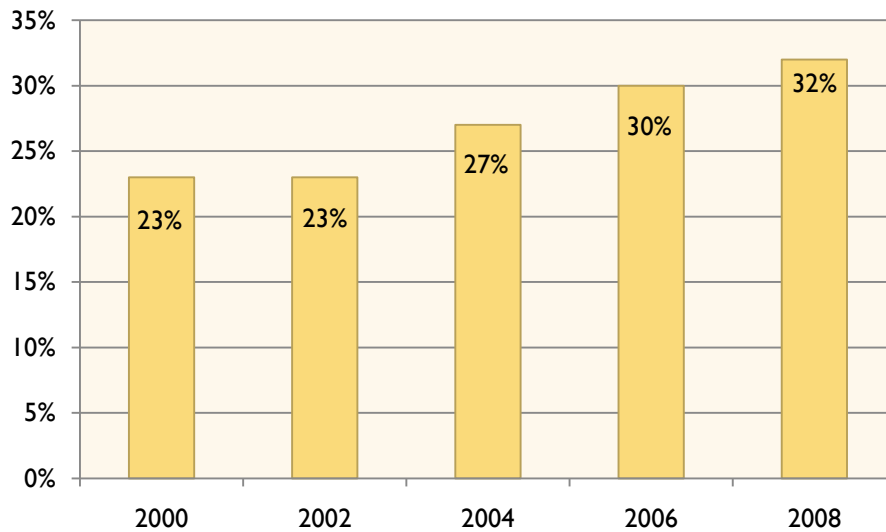
### Technology Spending per Computer



## Staff Training

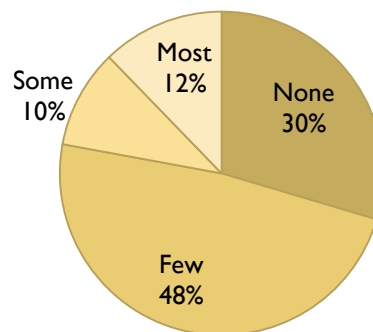
The steady increase in the overall number of nonprofit employees receiving formal technology training continues in this survey. At the organizational level, however, the trend is more ambiguous. First, the progress: a weighted average based on the employees and training rates represented in the sample estimates that 32% of employees in Pittsburgh area nonprofits received technology training in 2008. Because it's a weighted average, this overall number is heavily influenced by larger organizations sending a higher proportion of their employees to training.

**Overall Training Rate**



We arrive at this rate by asking what proportion of each organization's staff "received formal technology training" in the last year.<sup>3</sup> That breakdown for 2008 mirrors recent years pretty closely and shows a pattern of a few specialized staff members receiving technology training. Anecdotally, we have observed an increase in all-staff training with the adoption of Microsoft's latest operating system (Vista) and Office suite (2007).

**Staff Technology Training**



## Technology Skills in Job Descriptions

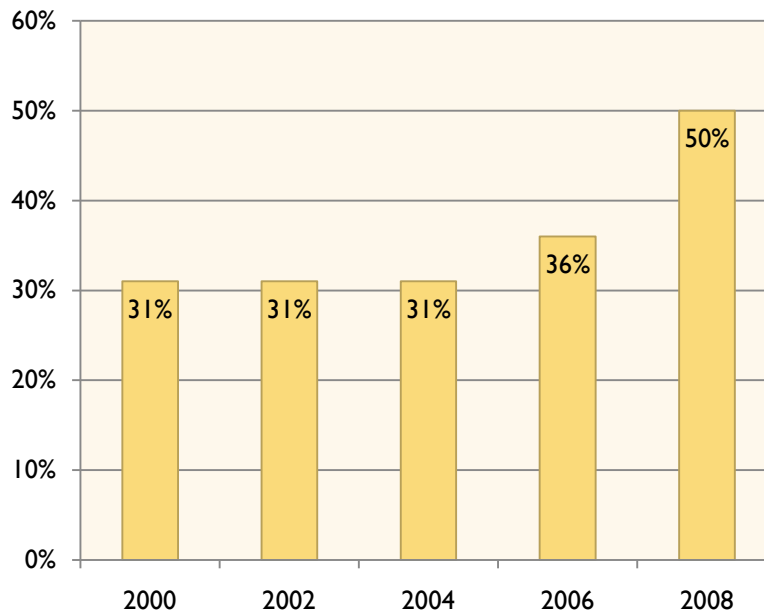
The rate of nonprofit jobs in the region that have tech skills in their job descriptions is clearly on the rise. After seeing a jump from 36% in 2006, we see a giant leap to 50% in 2008. Statistical anomalies in the sample may exaggerate the jump from 2006 to 2008, but the upward

<sup>3</sup> Options for this question were: none, 1-33% of staff, 34-66% and 67-100%

trend is unmistakable. Again, this measure derives from a weighted average of responses, and upticks in the job 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.

### Tech Skills in Job Descriptions

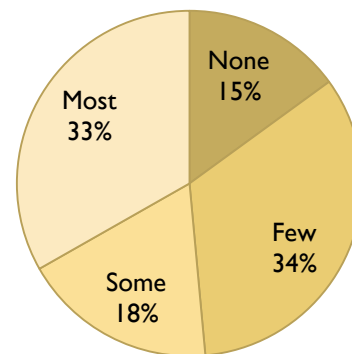
% of all NP Jobs with Tech Skills in Descriptions



Despite mixed trends in specific brackets (none, few, some, most), we can say again in 2008 that there are fewer organizations than in any prior survey with tech skills in *no* job descriptions and more organizations including them in most (67-100%) of their job descriptions.

When we drill further into the data, we see a discernible difference between the state of job descriptions based on staff size. The smallest organizations are the likelier than the larger ones to show the two extreme states. Nearly 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 descriptions.

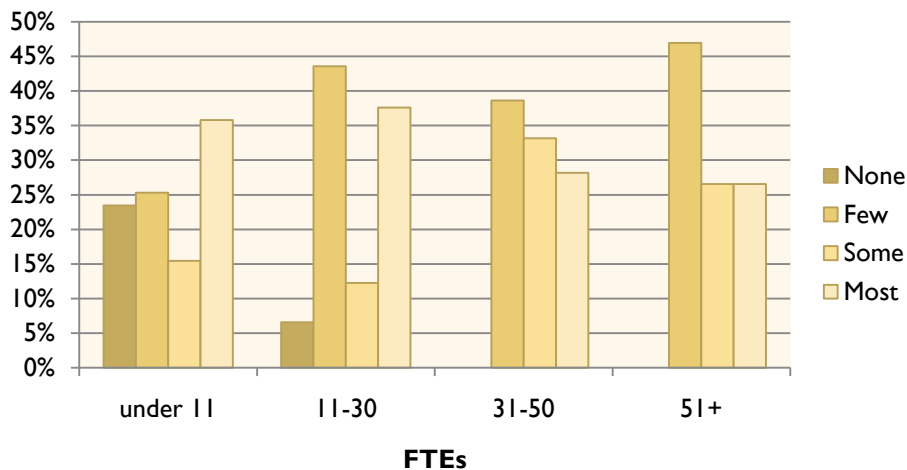
### Technology Skills in Job Descriptions



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 all of the organizations over 30 employees.

The heaviest concentration is in the 1-33% bracket, tho. 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.

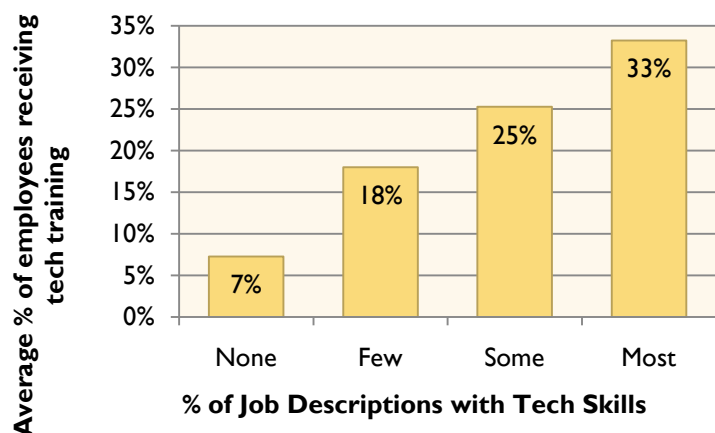
### Tech in Job Descriptions by Staff Size



### Tech Skills in Job Descriptions Related to Training Rate

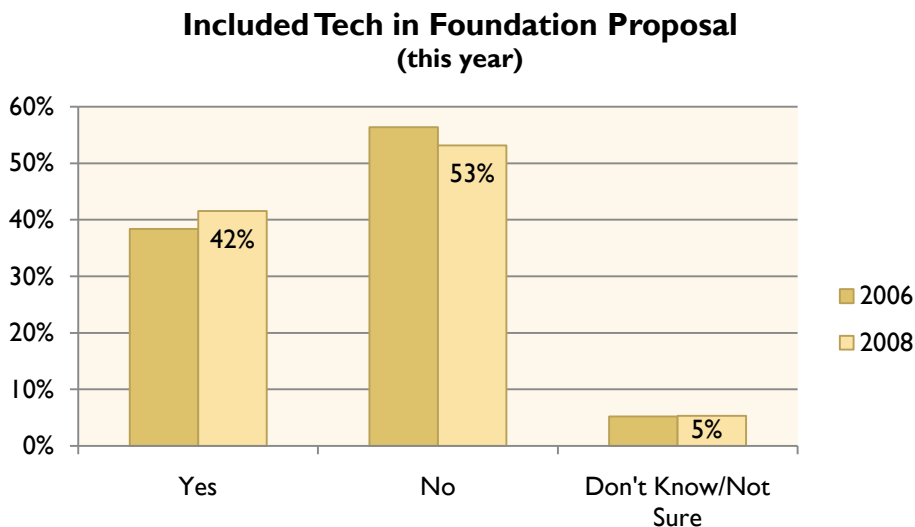
Although the majority of our findings are descriptive, some causal conclusions emerge. Again in 2008, the pattern clearly shows that organizations that list tech skills in job descriptions are more likely to send their employees to tech training. In organizations with tech skills in nobody's job description, only 7% of staff got IT training in the last year. In organizations in which most job descriptions articulate required tech skills, a third of employees got training.

### Tech Skills in Job Descriptions vs. Training



## Foundation Proposals

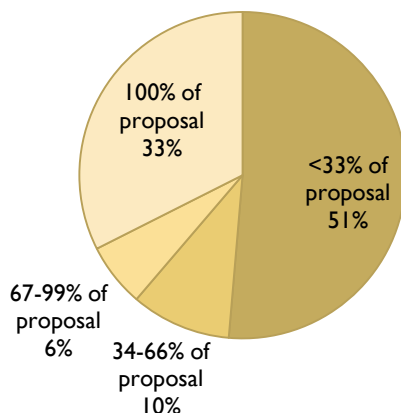
In 2006, we added questions to examine whether nonprofits include technology costs in their foundation proposals and what kind of success they have. The answers were very surprising in 2006, and 2008's answers indicate that this result did not derive from an anomalous sample.



Slightly more organizations included tech costs in foundation proposals in 2008 than 2006. This is not where the surprises lie. For one thing, this rate tracks closely with the rate of budgeting for technology. The 2008 data again confirm a hypothesis regarding the relationship between tech budgeting and tech in foundation proposals: that those that track tech spending are more likely to include tech costs in proposals. While not dramatic, the correlation between the two factors is significant: 54% of the organizations that include tech costs in foundation proposals have tech line items in their budgets vs. 43% 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. At the other extreme are the all-tech proposals (33%).

### Tech Proportion of Foundation Proposal

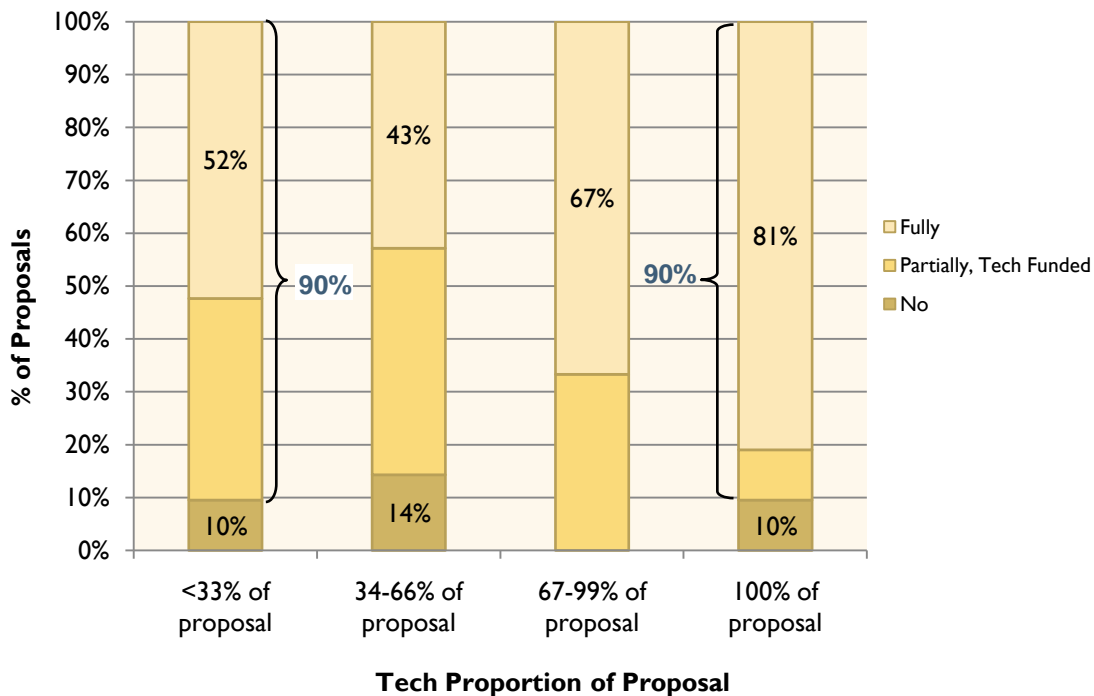


Finally, we asked about the success of these proposals. We thought 2006 was a good year for technology funding from foundations. It turns out 2008 was even better: 89% had the tech portion funded, up from 75% in 2006. The majority received the full amount requested.

| Was Proposal Funded?          | 2006 | 2008 |
|-------------------------------|------|------|
| <b>Fully</b>                  | 52%  | 60%  |
| <b>Partially, Tech Funded</b> | 23%  | 29%  |
| <b>Partially, Tech Cut</b>    | 2%   | 1%   |
| <b>No</b>                     | 23%  | 10%  |

In considering the above two questions, we again had a hypothesis: the lower the size of the tech portion of a proposal, the more likely the tech portion was to be funded. Here, finally, was the surprise. According to both our 2006 and 2008 samples, 100% technology proposals get 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. The all-tech proposals were more likely to be funded completely by a dramatic margin (81% vs. 52%). Every proposal that devoted the majority (but not all) of the budget to technology got the tech funded. Finally, the least successful (and that's relative in this highly successful company) proposals were those that were about half tech. These outcomes run counter to the anecdotally-reported practices of program officers who say they don't intend to continue funding all-technology proposals.

### Tech Proportion of Proposal vs. Was Proposal Funded?



## Tech Costs in Contracts

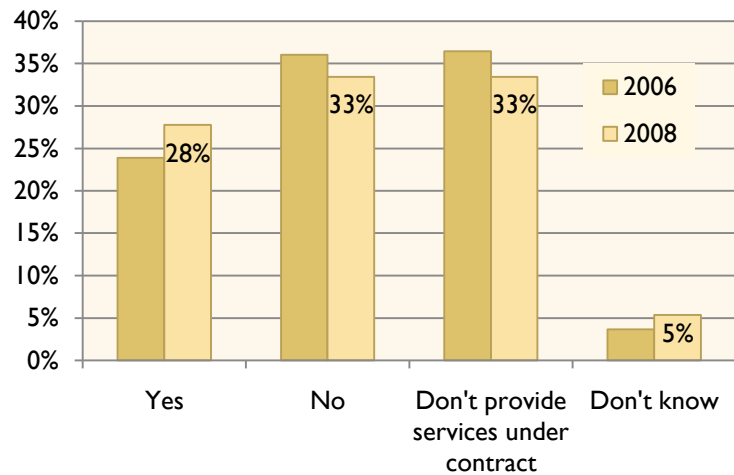
Of course, nonprofits derive revenue from sources other than grants. Many offer services under contract, for instance to government agencies. We were also interested in whether nonprofits accounted for the cost of technology in these contracts.

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

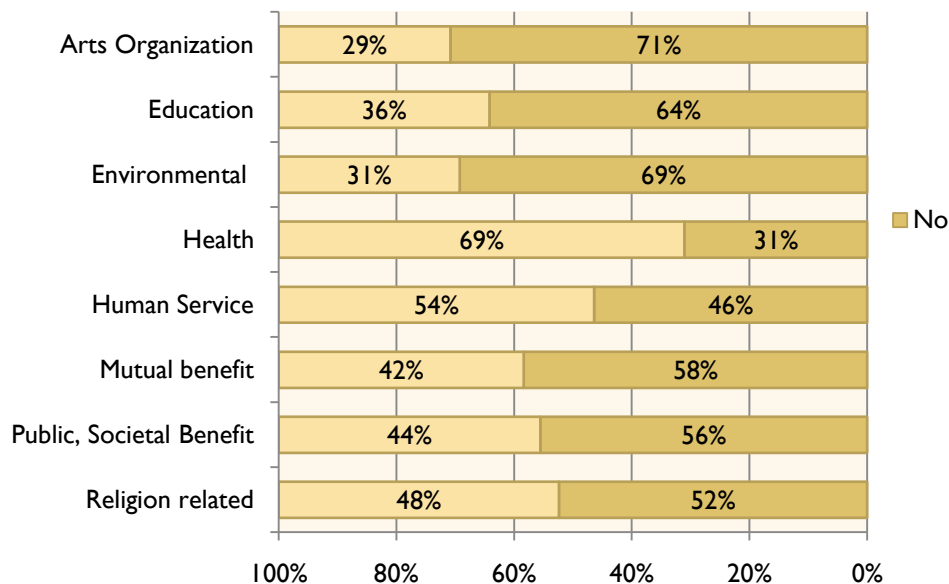
45% of service-providing organizations include tech costs in those contracts. Again, budgeting for tech correlates with working costs into contracts: 58% of nonprofits that include tech costs in contracts have a tech budget, versus 47% of those that do not include tech costs in contracts.

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 least likely to include tech costs in contracts.

**Tech Costs in Contracts**



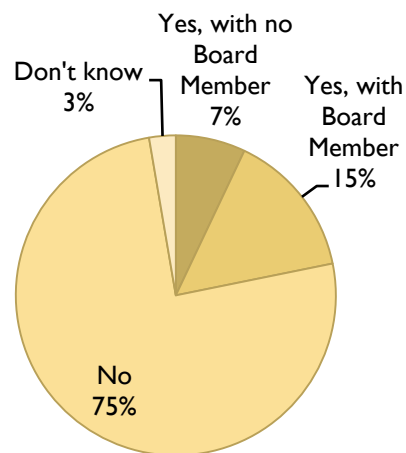
**Tech Costs in Contracts by Org Type**



## 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. Still, having a tech committee remains a distinctly minority practice. Tech committees declined slightly from an eight-year high of 24% of respondents in 2006 to 22% in 2008. The balance shifted nominally toward committees with at least one board member.

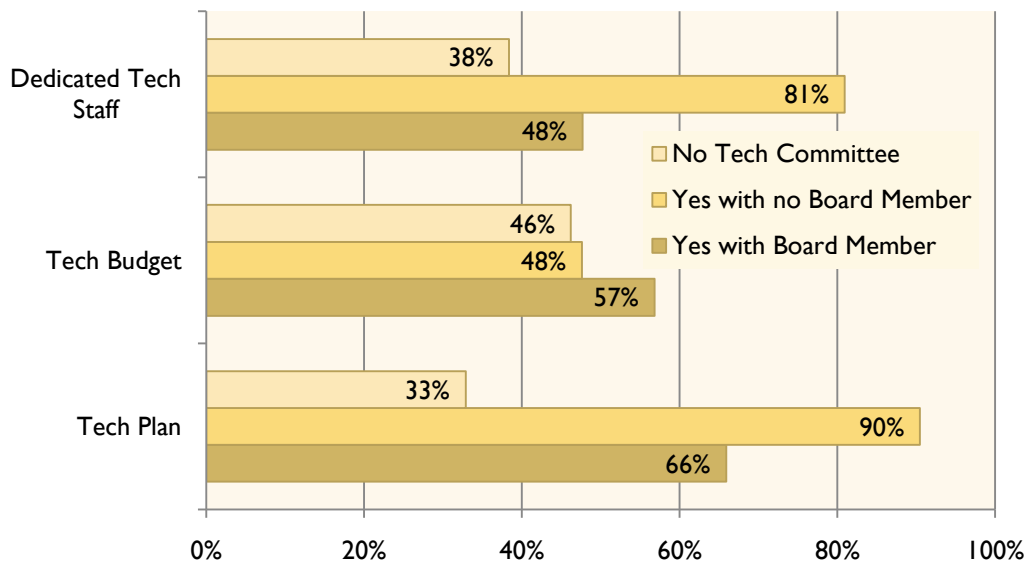
### Technology Committee



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 15 versus 6 for those that do not. In 2006, a distinct size difference emerged between those that have a board member on the committee and those that do not. The pattern continues in 2008. Board tech committees have a much lower median staff size (11.5) than staff tech committees (47). A similar ratio exists in budget (\$1.2M vs. \$4M). 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. In 2004, board committees were superior to staff committees. In 2006, staff committees looked to be the clear-cut winner. In 2008, the results are more ambiguous. Staff tech committee orgs are most likely to have dedicated tech staff and to have a written tech plan (90%). The link between staff-only tech committees and dedicated tech staff makes sense because once a staff member is officially identified, there may be less need for board input. The link to tech planning jives with a staff group wanting its marching orders codified. A third measure, budgeting for technology, is slightly superior in board tech committees. Board authority may enable budgetary authority.

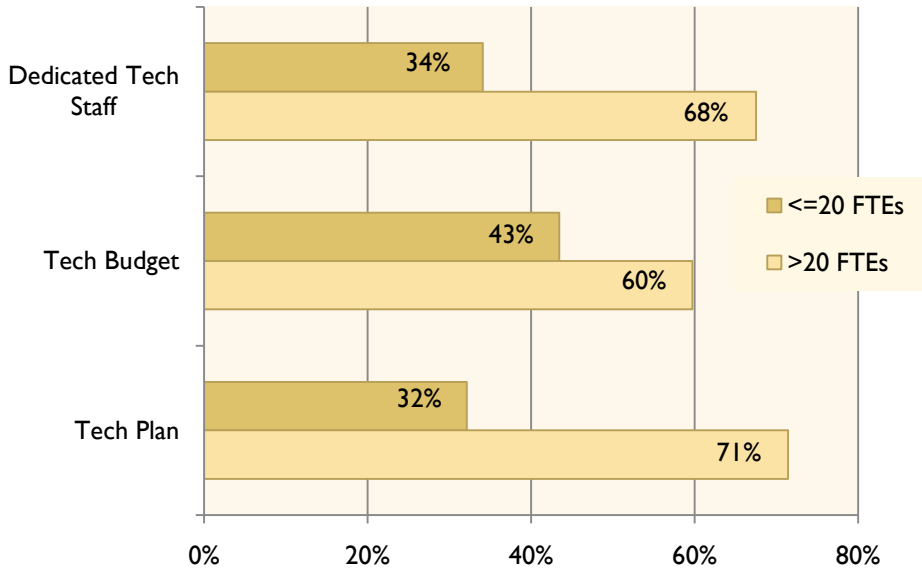
### Tech Committee vs. Best Practice



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

Because it would be difficult to analyze the micro effects of staff size along the increments laid out in the Respondent Profile section, we 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.

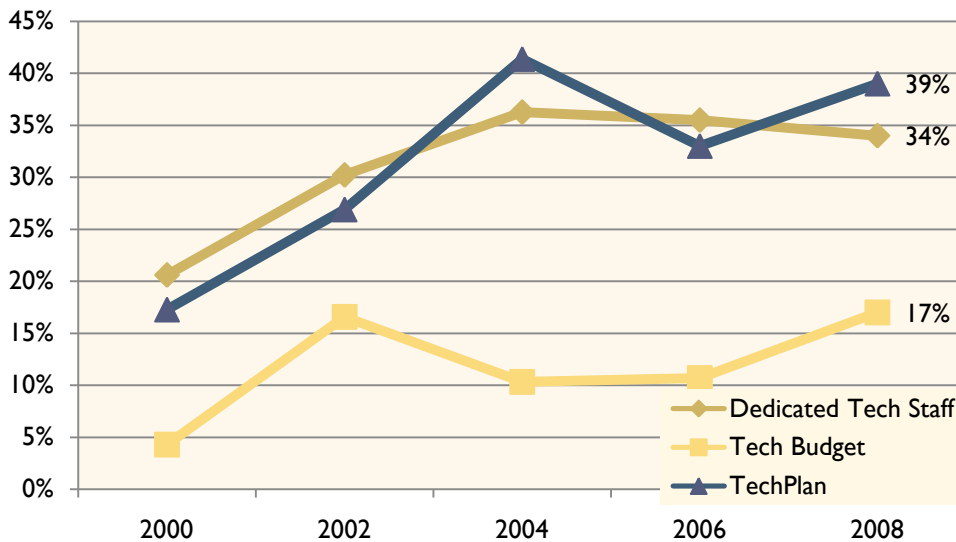
### Staff Size vs. Best Practice



Although previous surveys had analyzed best practices in relation to this threshold without such clear results, we next examined the trend in the gap between over-20 performance and under-20 performance over time. The chart below shows how the percentage point gap has widened over the years of the survey. In other words, as time passes, the best practice adoption gap between large and small organizations grows.

### Tech Best Practice vs. Staff Size Threshold

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



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, 75% of organizations do not have a tech committee.

# Computer Systems

Change in managing technology happens in a context of increasing speed and capacity of technology tools. We look with interest at whether new technologies are being deployed in area nonprofits. Nonprofits vary in the kinds of computers, software and connectivity they use. Largely, they progress from survey to survey in adopting the tools that can make them work more efficiently and effectively.

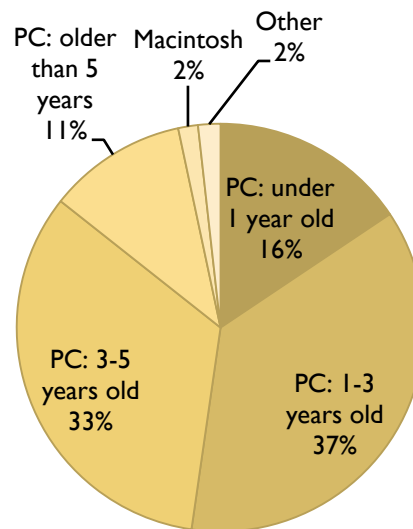
## Hardware

We sometimes use the analogy of an iceberg for technology spending. The tip of the iceberg is user hardware. There are lots of expenses like ongoing network hardware and services, software licensing, maintenance and training costs that are less obvious. Any given user, however, perceives the organization's IT resources through the keyboard at the end of her fingers.

Although it dismays some nonprofit professionals who maintain a lean ship the most efficient useful life of a workstation is about three years. The thought of replacing machines every three years can be difficult for thrifty leaders to accept. Machines do not stop running on the first day of their fourth year, of course; they do, however, start to have more and more small failures. In addition, according to Moore's law, hardware's processing capacity doubles every two years. Software keeps pace with this supply of processing power. Upgrades become impossible on maxed-out older hardware. In a workplace, we concern ourselves with more than just one machine. In a fleet of workstations, holding onto machines older than 3 years can stand in the way of standardized software across an agency.

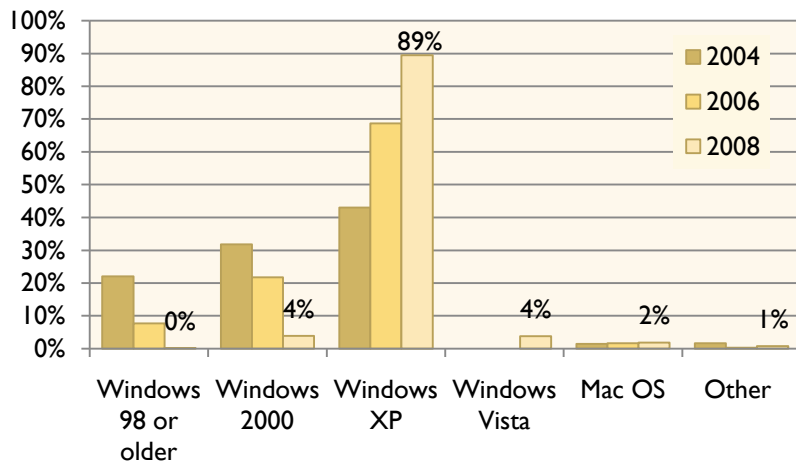
All this is to explain why we examine user hardware by its age. We could – and did in the early surveys – break workstations down by processor speed and RAM, but in the end, we only used those attributes to proxy for age. The chart shows that more than half (53%) of the PCs in area nonprofits are under three years old. A third are in that period of creeping obsolescence, 3-5 years. Just over 1 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. The “other” category is dominated by three agencies using a large number of thin client workstations.

**Computers by Type and Age**



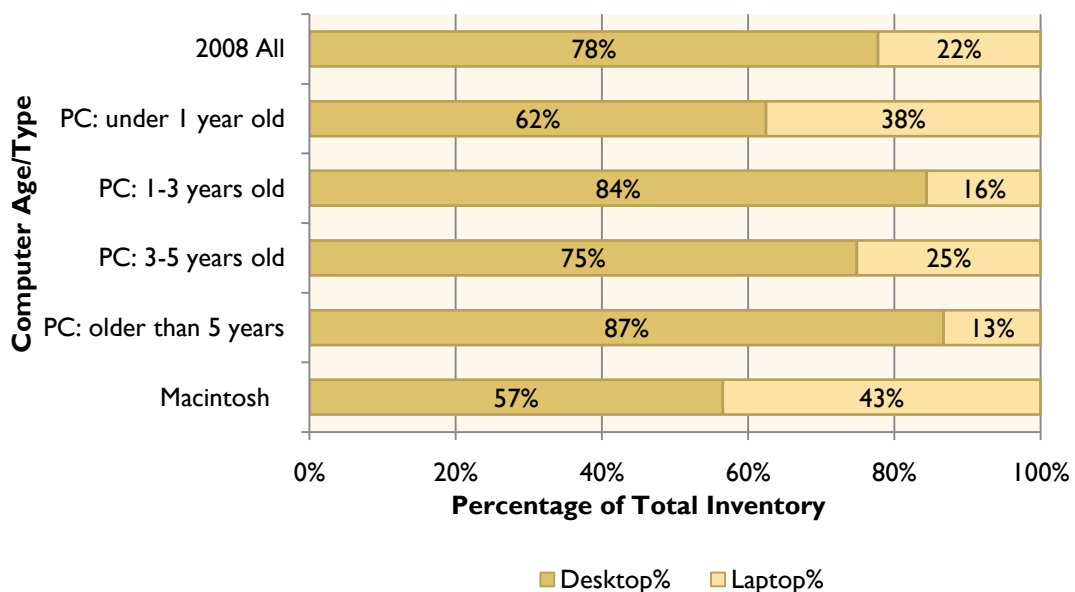
The operating systems mirror these categories of user hardware. The chart below breaks down the operating systems on all of the computers represented in the sample. Windows dominates with a few faithful Mac users. Among Windows users, versions before XP, which had some share in previous surveys, have essentially disappeared. Only 4% of the computers in nonprofits in the region have Vista loaded on them. One in five organizations has Vista loaded on at least one machine, but it's clearly a minority choice at this point.

**Total Computers by Operating System**



The breakdown of laptops versus desktops shows a noteworthy shift. Laptops make up just 22% of all the user hardware in nonprofits in 2008, up from 16% in 2006. The overall proportion has shifted because laptops make up well over a third (38%) of new workstations. In 2006, only a quarter of new machines were laptops. In addition, over 40% of Macs are laptops. Increasing numbers of laptops represent both desktop replacement and equipping mobile staff.

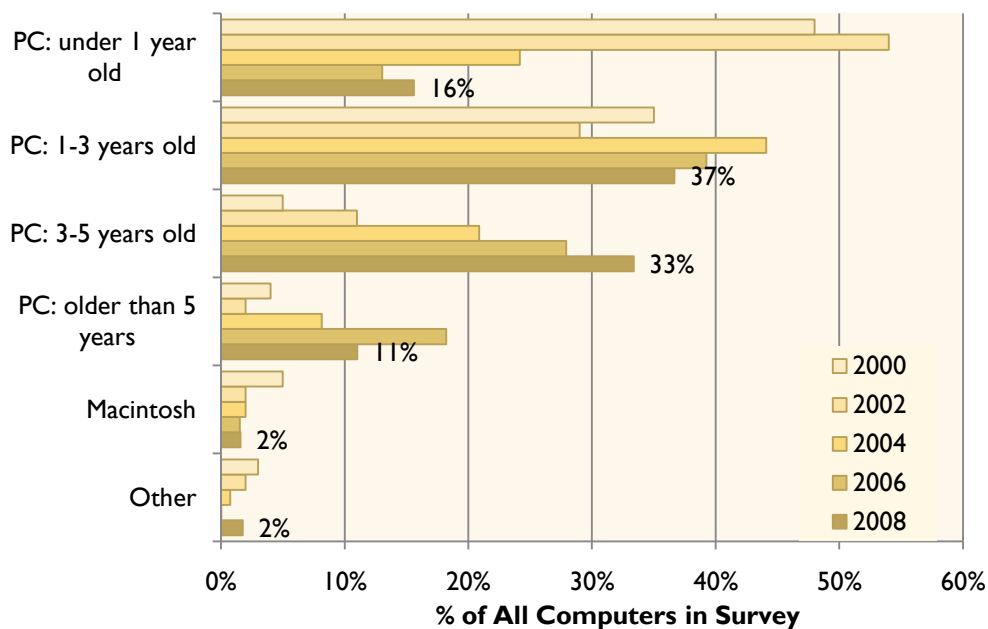
**Desktops vs. Laptops**



The 2006 results depicted a stark trend. To understand the trend, we must turn back the clock to the context of the 2000-2002 surveys. Fear of the Y2K problem motivated nonprofits to invest in their IT infrastructure just before the turn of the century. Sizable segments of workstation inventories were replaced at once. Our first tech surveys, therefore, depicted nonprofits awash in new hardware. By 2006, the pattern was clear, however: much of that user hardware was aging in place. The post-9/11 recession probably didn't help.

We feared that the trend might continue in 2008. The results are slightly ambiguous, but at the very least, we may have hit bottom in 2006. The number of PCs older than 3 years has diminished. Likely, these dinosaurs were just failing too often to keep around. A rollout of a new operating system (Vista) and Office suite (2007) since the 2006 survey may have been the death knell for these older machines. The software simply will not run without minimum specifications. That story would also account for a nominal uptick in brand new (under-1-year-old) machines. The 3-5 year range is the one bar that follows the prior trend, and that looks like organizations trying to scrape every bit of usefulness out of the machines they own.

### Computers by Age/Type

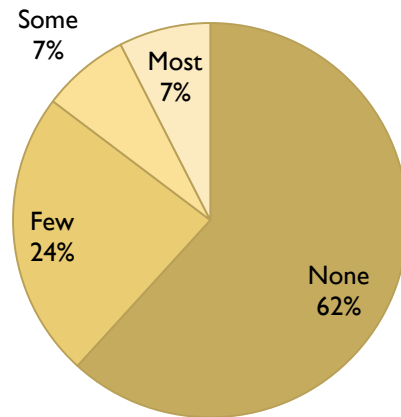


A few bellwethers predict newer or older inventories in any given organization. If an organization keeps computers for more than five years, their general IT infrastructure is more likely to be out of date. If it uses Macs, its inventory may be younger than the norm. In organizations with any 5-year-old computers, old machines account for 24% of the computers, more than twice the general rate. In Mac-using organizations, old machines account for 5%, less than half the general rate. Arts, Membership and Public/Societal Benefit organizations have slightly more Macs than other organization types.

## Donated Computers

A new computer is a highly useful donation to a nonprofit. A computer that has run its course in one's home or office represents a burden more than a boon for the recipient. Unfortunately, more of the donations we hear about tend to be in the latter category. The survey presents some good news on that score. The number of organizations with *no* donated computers is 62%, up from 58% in 2006. An additional quarter has donated computers, but they account for less than a third of their inventory. It's rare (7%) to see an organization with mostly donated computers.

**Proportion of Computers that are Donated**



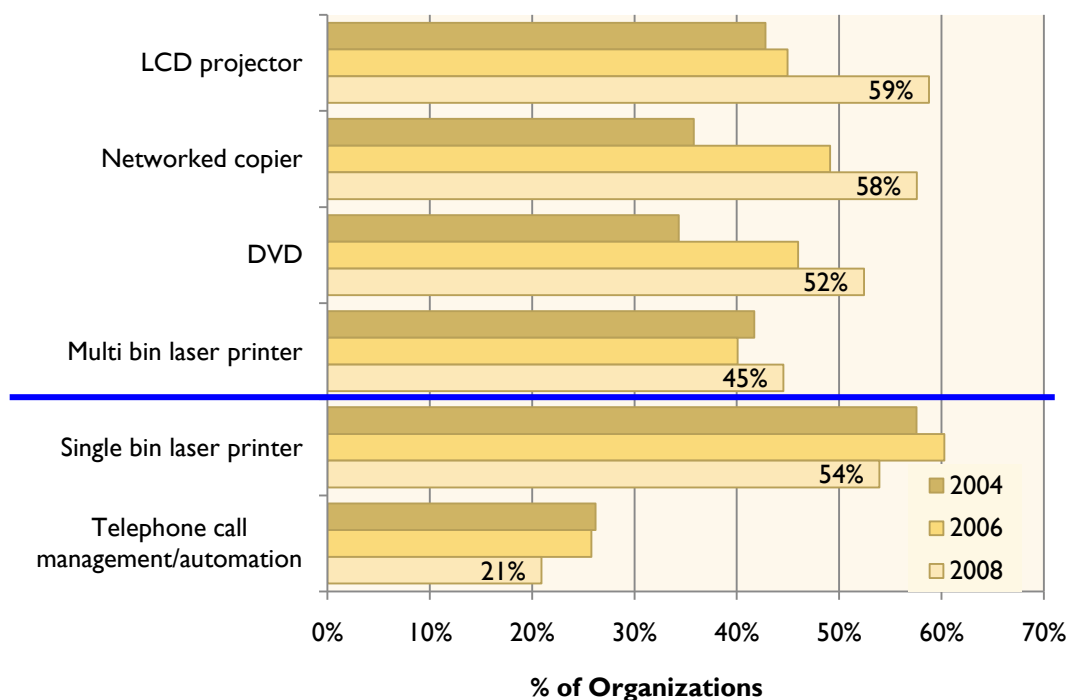
Nonprofits that use donated computers are smaller by every measure: budget, staff size and number of computers. The more donated computers they use, the smaller the organizations get.

| Proportion  | Average      |             |      |                |
|-------------|--------------|-------------|------|----------------|
|             | Budget       | Tech Budget | FTEs | # of Computers |
| <b>None</b> | \$ 4,523,065 | \$ 154,271  | 60.3 | 43             |
| <b>Few</b>  | 3,994,656    | 80,084      | 53   | 40             |
| <b>Some</b> | 2,115,958    | 9,623       | 24.5 | 25             |
| <b>Most</b> | 356,111      | 2,033       | 10.7 | 8              |

## 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. LCD projectors continued their steady march and landed in the majority at 59% for the first time in 2008. In our first survey in 2000, only 16% of nonprofits had an LCD projector. Networked copiers and DVD players also crossed into the majority, following a path of steady growth. There appears to be a shift from single bin, small-volume laser printers to multi-bin machines. After holding steady just above a quarter of all nonprofits, call management systems dropped to 21%. Stay tuned until 2010 to see if a bad news trend for lovers of robot menus continues.

## Peripheral Changes



The prevalence of other peripherals is essentially stable with a steady increase in digital cameras, scanners and CD burners.

| Other peripherals                | 2000 | 2002 | 2004 | 2006 | 2008 |
|----------------------------------|------|------|------|------|------|
| Scanner                          | 60%  | 69%  | 65%  | 73%  | 79%  |
| Digital camera                   | 28%  | 48%  | 58%  | 67%  | 70%  |
| Tape backup                      | 48%  | 50%  | 42%  | 43%  | 44%  |
| Ink jet or other color printers  | 78%  | 80%  | 66%  | 75%  | 75%  |
| Telephone system with voice mail | 68%  | 71%  | 73%  | 81%  | 80%  |
| CD ROM burner                    | 23%  | 55%  | 70%  | 75%  | 73%  |
| Fax machine                      | 93%  | 88%  | 83%  | 90%  | 86%  |

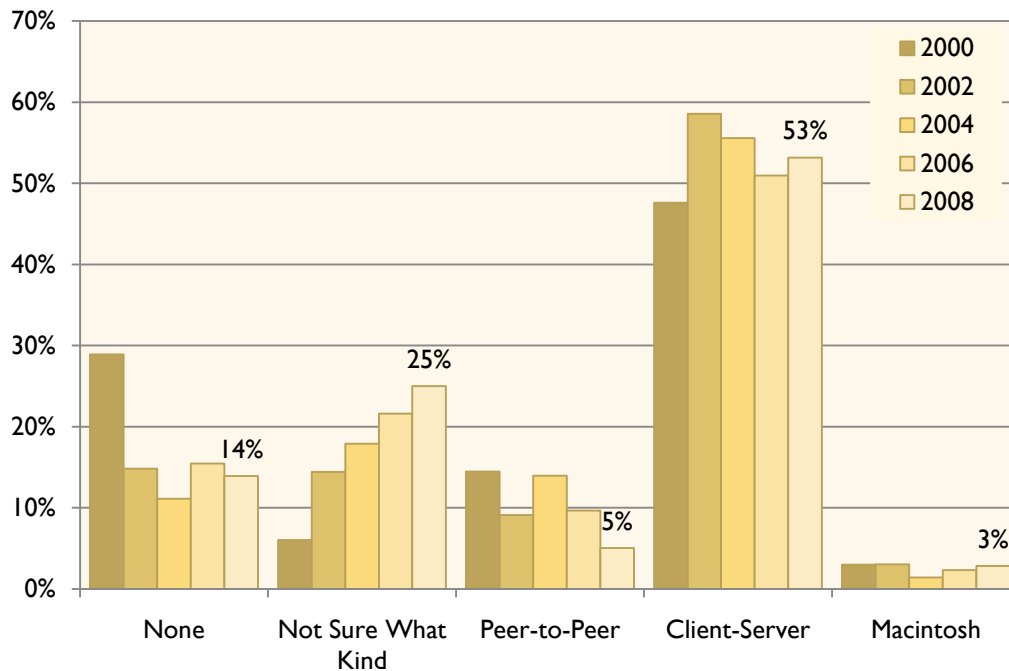
## Connectivity

### Local Area Networks

From an early low in 2000 of 72%, the proportion of nonprofits using a network of some kind has grown to 86% in 2008. 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.

### Local Area Networks



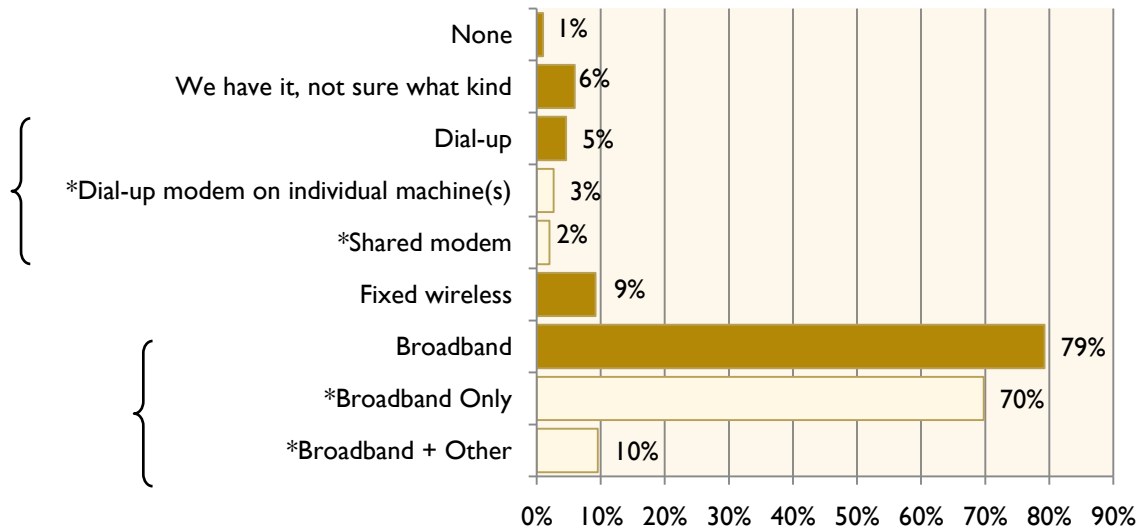
Survey Respondents use a variety of network operating systems. Most client-server networks run Windows 2003 (33%), Windows 2003 Small Business Server (27%) and Windows 2000 (19%). Windows NT networks diminished from 19% in 2006 to 11% in 2008. The migration away from Novell networks continues, dropping steadily from 34% in 2000 to 5% in 2008. A very small number of organizations use Linux (2%).

### Internet Connection

Hardware and networking has certainly changed at a high rate over the course of five surveys. These changes, though, pale in comparison to the pervasion of the Internet in all areas of personal and professional life. Fortunately, each survey has depicted enhanced Internet connections and more intensive use of the Internet by nonprofit staff.

Broadband connectivity continues to become more pervasive in area organizations. Respondents with broadband connections increased from less than a third (32%) in 2000 to a plateau of 79-80% in 2006-2008. In addition, 9% of 2008 respondents use Wireless Internet, up from 3% in 2006. The data suggests that broadband and wireless connections have all but eclipsed dial-up connections.

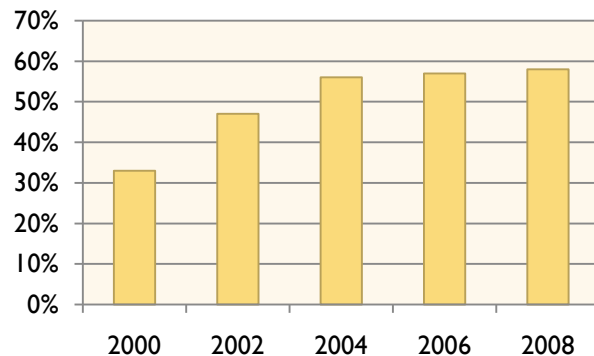
## Internet Connection



## Internet Use

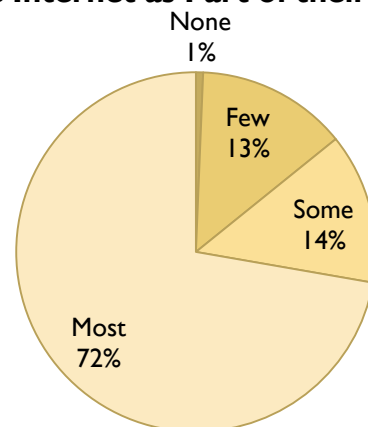
As more users have been connected via high speed connections in prior surveys, the average overall rate of Internet use among nonprofit employees has risen. The 2006 survey suggested a plateau in the overall Internet use rate, and the 2008 survey confirms it. The rate, derived using a bracket-median estimate, has risen just four percentage points from 2004-2008 and just one percentage point from 2006-2008.

### Internet Use by Nonprofit Employees



On the other hand, the number of nonprofits that report Internet use as a total minority activity among their staff has dropped steadily. 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 14% this year. Almost three quarters (72%) of nonprofits indicate that most of their employees use the Internet as part of their jobs, the highest rate in any survey.

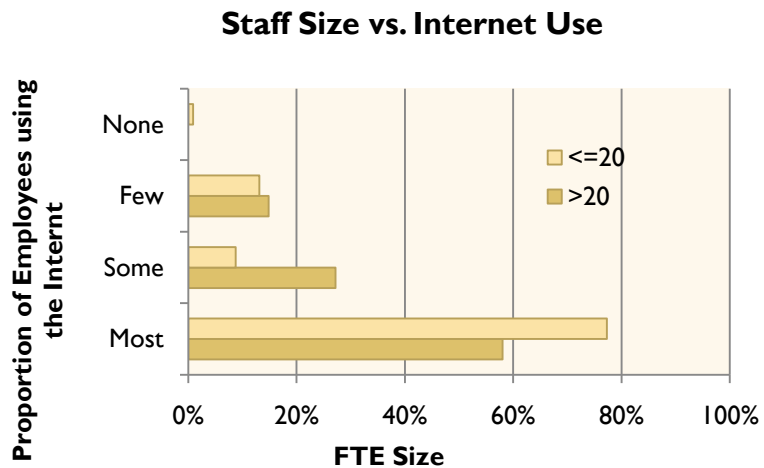
### Proportion of Employees who Use the Internet as Part of their Jobs



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

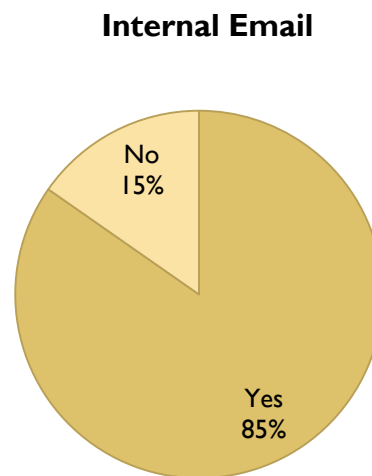
use among all nonprofit employees? A bracket median estimate is a weighted average, giving greater significance to the responses of large nonprofits. Here, we see a unique split between small and large organizations.

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 (34-66%) response. 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.



### Internal Email

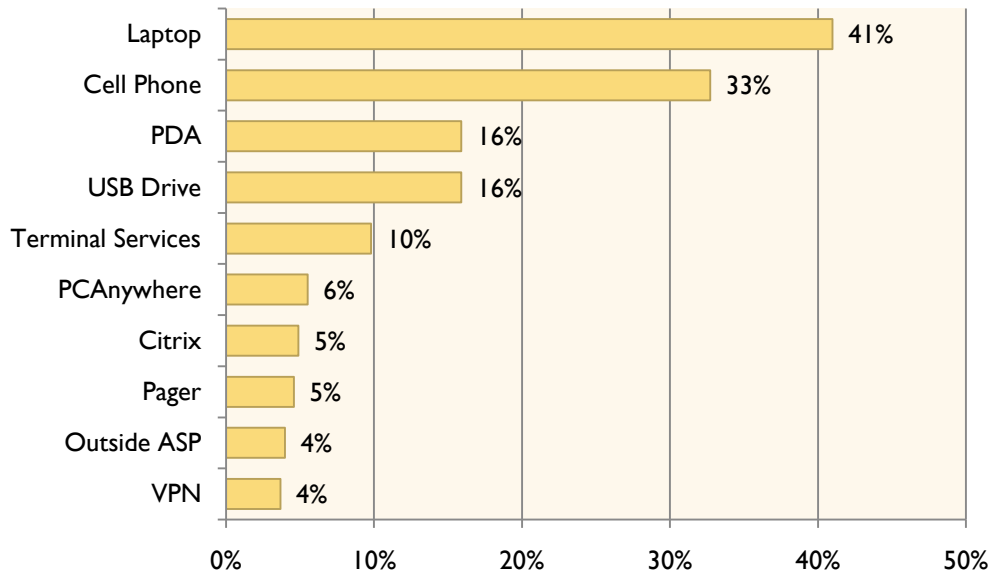
After holding steady around 78% in 2004-2006, the proportion of organizations providing internal email addresses to employees jumped to 85% in 2008. Organizations that do not provide internal email are generally smaller (median 4 FTEs) than those that do (7.5). Although it may be explained by sample variation, this gap in staff size is a good deal smaller than in 2006.



## Remote Access

The survey asks about remote access for truly mobile staff members. The 2008 results are very similar to 2006 with the biggest leap coming in PDAs (9% to 16%). Laptops and cell phones remain the most common tools provided to staff on the go. A slowly-growing minority of organizations grant their staff remote access to file servers or databases through a variety of connections: Citrix, PCAnywhere, Terminal Services and VPNs. There has not been a rise in ASP database access, as might have been expected given the Internet access and use trends described above. USB Drive was added as an option in 2008.

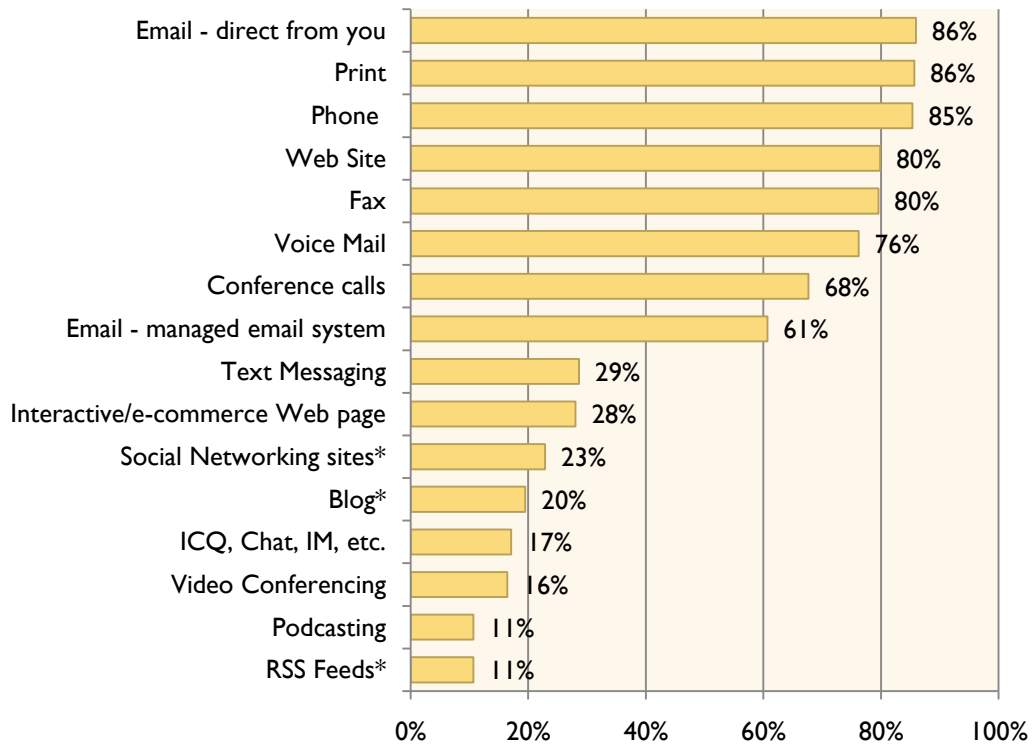
**Remote Access Tools**



## Communication Modes

Although the most common communication tools have changed little proportionally from 2006 to 2008, for the first time, email has tied print for popularity. Print had always eclipsed email slightly. Phone is in a virtual tie at the top with email and print. Managed email systems and interactive web pages have grown in popularity. Podcasting, text messaging and video conferencing have increased, although they are still firmly in the minority. The fax has dropped slightly in popularity.

### Communication Channels



\*added in 2008

| Communication Channel           | 2006 | 2008 |
|---------------------------------|------|------|
| Conference calls                | 68%  | 68%  |
| Email - direct from you         | 91%  | 86%  |
| Email - managed email system    | 52%  | 61%  |
| Fax                             | 87%  | 80%  |
| ICQ, Chat, IM, etc.             | 15%  | 17%  |
| Interactive/e-commerce Web page | 22%  | 28%  |
| Phone                           | 92%  | 85%  |
| Podcasting                      | 3%   | 11%  |
| Print                           | 91%  | 86%  |
| Text Messaging                  | 16%  | 29%  |
| Video Conferencing              | 12%  | 16%  |
| Voice Mail                      | 83%  | 76%  |
| Web page                        | 78%  | 80%  |

The survey delves beyond whether organizations use these tools and asks how frequently they do. In this analysis, the minority technologies reveal themselves to be used frequently by very few organizations. Those organizations that use social networking sites, blogs, RSS feeds and podcasting, use them rarely, not frequently. The phone's frequency held essentially steady from 2006-2008. Managed email systems grew faster in frequency than direct email. Print frequency held steady while fax frequency slipped slightly.

| Communication Channel          | Frequently | Regularly  | Rarely     |
|--------------------------------|------------|------------|------------|
| Phone                          | <b>83%</b> | 14%        | 4%         |
| Email - direct from you        | <b>74%</b> | 23%        | 3%         |
| Email - managed email system   | <b>68%</b> | 22%        | 11%        |
| Voice Mail                     | <b>57%</b> | 34%        | 10%        |
| Web Site                       | <b>54%</b> | 34%        | 12%        |
| Print                          | <b>52%</b> | 38%        | 10%        |
| Fax                            | 28%        | 30%        | <b>43%</b> |
| Interactive/eCommerce web page | 24%        | 30%        | <b>46%</b> |
| Conference calls               | 19%        | <b>40%</b> | <b>41%</b> |
| Video Conferencing             | 15%        | 11%        | <b>74%</b> |
| Text Messaging                 | 13%        | 21%        | <b>66%</b> |
| ICQ, Chat, IM, etc.            | 11%        | 18%        | <b>71%</b> |
| Social Networking sites        | 11%        | 21%        | <b>68%</b> |
| Blog                           | 9%         | 27%        | <b>64%</b> |
| RSS Feeds                      | 6%         | 20%        | <b>74%</b> |
| Podcasting                     | 0%         | 9%         | <b>91%</b> |

Bold indicates the most popular frequency response for each channel

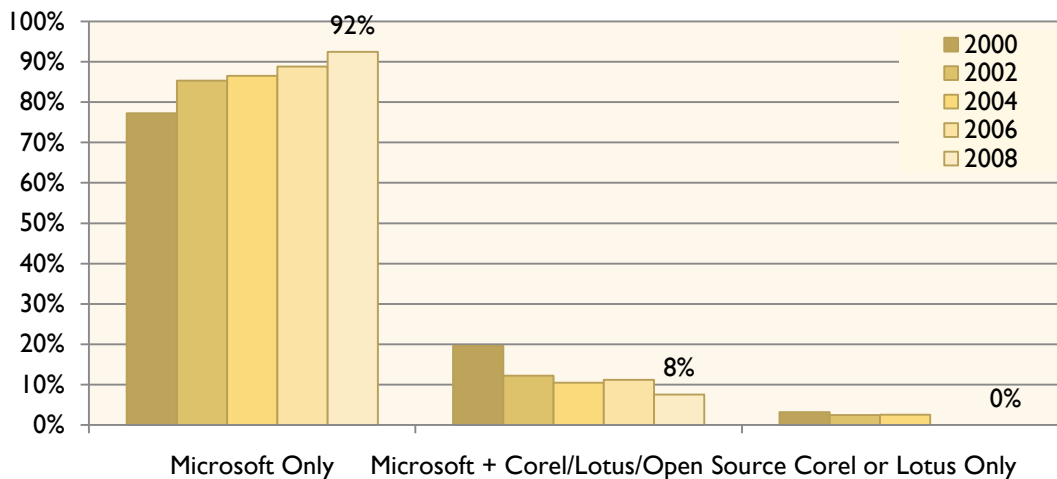
## Software

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

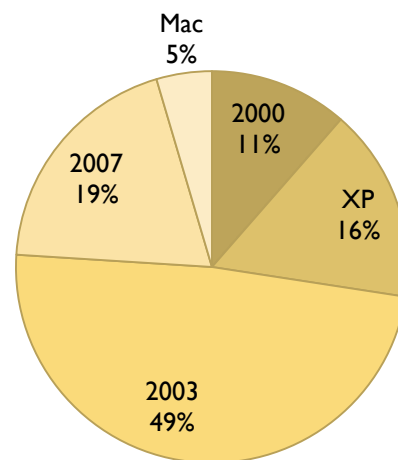
Microsoft Office continues to dominate the basic productivity market. In 2006, we saw the last non-Microsoft holdouts disappear. Among those who responded to the question, all but the barest minority of organizations use Microsoft Office (Word, Excel, PowerPoint, Access). Some Microsoft users also use Corel Office (WordPerfect, Paradox, QuattroPro, Presentations) or the Lotus Suite (Approach, 1-2-3, WordPro), although these combinations are less frequent with each survey. All organizations that use an open source package (e.g. OpenOffice) also use Microsoft Office.

**Basic Productivity Software**



Many organizations (21%) use multiple versions of the Office suite, and they use all manner of combinations. To summarize the data simply, the chart to the right captures the minimum Office package being used. Half of organizations (49%) use a minimum of Office 2003. One in five uses 2007. The most popular single arrangement is 36% organizations using only Office 2003.

**Minimum Office Suite**



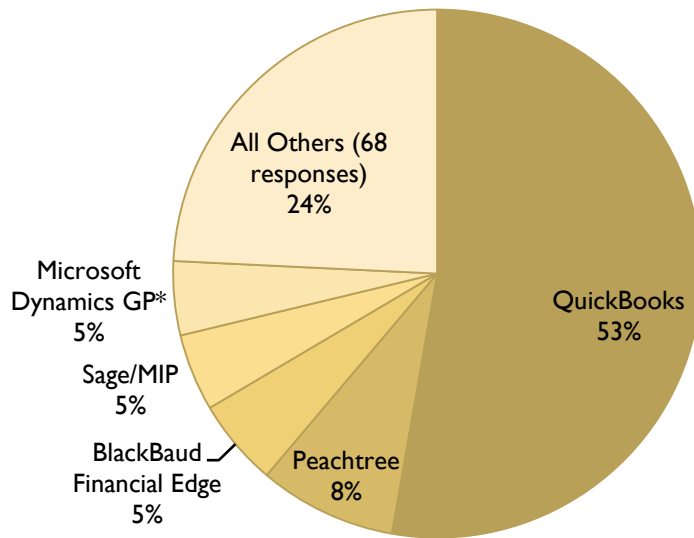
## Accounting Tasks and Software

Respondents use a variety of accounting solutions, ranging from manual systems to spreadsheets to accounting software. Increases in outsourcing key accounting functions between 2004 and 2006 persist into 2008. Other than that, the trend is toward more respondents using accounting software for accounting tasks. Shading indicates the max for the task for each year.

| Task                | No Response | N/A | Manually | Manually + Spreadsheet | Spreadsheet | Accounting Software | Outsourced |
|---------------------|-------------|-----|----------|------------------------|-------------|---------------------|------------|
| 2000                |             |     |          |                        |             |                     |            |
| General Ledger      | 12%         | 2%  | 6%       | 1%                     | 7%          | 60%                 | 12%        |
| Accounts Receivable | 17%         | 6%  | 7%       | 3%                     | 7%          | 51%                 | 10%        |
| Accounts Payable    | 16%         | 3%  | 5%       | 2%                     | 7%          | 56%                 | 11%        |
| Payroll             | 17%         | 4%  | 5%       | 1%                     | 6%          | 23%                 | 44%        |
| Budgeting           | 19%         | 1%  | 6%       | 11%                    | 25%         | 35%                 | 3%         |
| Cash Flow           | 22%         | 6%  | 5%       | 4%                     | 17%         | 37%                 | 8%         |
| Inventory           | 29%         | 26% | 12%      | 6%                     | 10%         | 16%                 | 2%         |
| 2002                |             |     |          |                        |             |                     |            |
| General Ledger      | 10%         | 2%  | 7%       | 1%                     | 6%          | 68%                 | 7%         |
| Accounts Receivable | 11%         | 7%  | 5%       | 1%                     | 10%         | 62%                 | 4%         |
| Accounts Payable    | 9%          | 4%  | 7%       | 1%                     | 7%          | 67%                 | 5%         |
| Payroll             | 12%         | 5%  | 4%       | 0%                     | 6%          | 32%                 | 41%        |
| Budgeting           | 9%          | 2%  | 6%       | 3%                     | 38%         | 40%                 | 2%         |
| Cash Flow           | 14%         | 7%  | 9%       | 1%                     | 24%         | 40%                 | 5%         |
| Inventory           | 19%         | 27% | 11%      | 1%                     | 16%         | 24%                 | 3%         |
| 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%         |

Organizations tend to use one software package across the accounting functions of general ledger, receivables, payables and cash flow. QuickBooks still dominates this market, although its share drops from a high of 62% in 2006 to 53% this year. Peachtree's 8% and Sage/MIP's 5% held essentially steady. BlackBaud's financial edge saw a nominal increase, and Microsoft's Dynamics GP (and its predecessor Great Plains) grew to 5%. Breathtaking diversity marks the rest of the nonprofit accounting software market with 68 different solutions used in a quarter of the organizations.

**Accounting Software**  
(GL, AP,AR,Budgeting, Cash Flow)



Payroll remains the most likely function to be outsourced, growing to an 8-year high of 45%. Inventory remains a function that many organizations (at least 30%) don't need to perform.

**Database/List Tasks**

A consistent survey finding that matches the Bayer Center's observations of nonprofits' IT adoption is that a surprising number of nonprofits lack a proper database solution for data management tasks. The trend toward database software thankfully continues from 2006 to 2008. 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. We've only analyzed Outcomes Measurement in the two most recent surveys. 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 |
| 2000                    |             |     |          |                        |             |                   |            |
| Client Management       | 18%         | 16% | 12%      | 2%                     | 8%          | 43%               | 2%         |
| Fundraising             | 18%         | 13% | 19%      | 2%                     | 15%         | 33%               | 1%         |
| Volunteers              | 20%         | 21% | 28%      | 2%                     | 8%          | 21%               | 0%         |
| Ticketing/Point of Sale | 33%         | 47% | 8%       | 5%                     | 1%          | 5%                | 1%         |
| Quality Assurance       | 34%         | 54% | 6%       | 1%                     | 1%          | 3%                | 0%         |
| 2002                    |             |     |          |                        |             |                   |            |
| Client Management       | 12%         | 10% | 10%      | 3%                     | 10%         | 55%               | 0%         |
| Fundraising             | 13%         | 11% | 14%      | 2%                     | 15%         | 44%               | 1%         |
| Volunteers              | 18%         | 18% | 21%      | 2%                     | 13%         | 27%               | 0%         |
| Ticketing/Point of Sale | 28%         | 47% | 6%       | 1%                     | 4%          | 13%               | 1%         |
| Quality Assurance       | 34%         | 54% | 6%       | 0%                     | 2%          | 4%                | 0%         |
| 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%         |

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. For the first time in our survey, vertical market databases (rather than custom solutions) represent the majority of the databases 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.

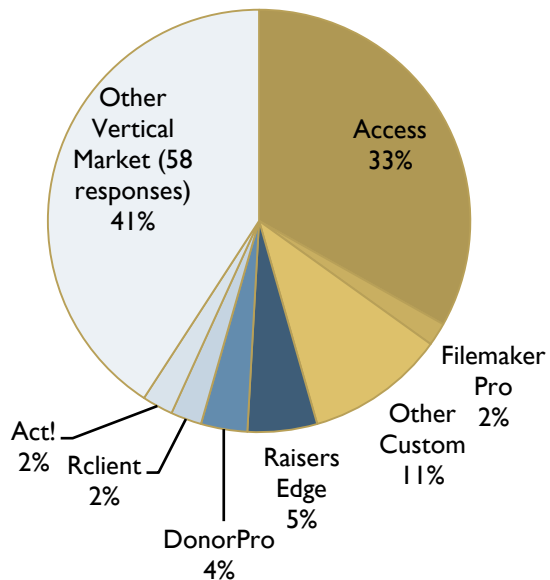
| Database Tasks (No Response and N/A removed) |            |                        |             |                   |            |
|--|------------|------------------------|-------------|-------------------|------------|
| Task   | Manually   | Manually + Spreadsheet | Spreadsheet | Database Software | Outsourced |
| 2000   |            |                        |             |                   |            |
| Client Management                            | 18%        | 3%                     | 12%         | <b>64%</b>        | 3%         |
| Fundraising                                  | 28%        | 3%                     | 21%         | <b>47%</b>        | 1%         |
| Volunteers                                   | <b>47%</b> | 3%                     | 14%         | 36%               | 0%         |
| 2002   |            |                        |             |                   |            |
| Client Management                            | 12%        | 3%                     | 13%         | <b>71%</b>        | 1%         |
| Fundraising                                  | 18%        | 2%                     | 20%         | <b>58%</b>        | 1%         |
| Volunteers                                   | 33%        | 3%                     | 21%         | <b>43%</b>        | 0%         |
| 2004   |            |                        |             |                   |            |
| Client Management                            | 11%        | 4%                     | 15%         | <b>69%</b>        | 1%         |
| Fundraising                                  | 15%        | 4%                     | 23%         | <b>58%</b>        | 1%         |
| Volunteers                                   | 31%        | 4%                     | 23%         | <b>41%</b>        | 1%         |
| 2006   |            |                        |             |                   |            |
| Client Management                            | 9%         | 2%                     | 20%         | <b>66%</b>        | 3%         |
| Fundraising                                  | 16%        | 1%                     | 26%         | <b>56%</b>        | 1%         |
| Volunteers                                   | 29%        | 2%                     | 29%         | <b>38%</b>        | 2%         |
| Outcomes Measurement                         | 27%        | 5%                     | 19%         | <b>38%</b>        | 10%        |
| 2008   |            |                        |             |                   |            |
| Client Management                            | <b>9%</b>  | 2%                     | 17%         | <b>72%</b>        | 1%         |
| Fundraising                                  | 15%        | <b>2%</b>              | 22%         | <b>61%</b>        | 0%         |
| Volunteers                                   | 28%        | <b>3%</b>              | 27%         | <b>43%</b>        | 0%         |
| Outcomes Measurement                         | 20%        | 3%                     | <b>20%</b>  | <b>48%</b>        | 9%         |

Bold indicates increase from 2006-2008. Shading indicates most popular solution for the task.

## Client Management Software Detail

Use of database software (rather than spreadsheets or manual systems) to manage client information reversed a nominal decrease in the last survey to reach an eight-year high of 72% in 2008.

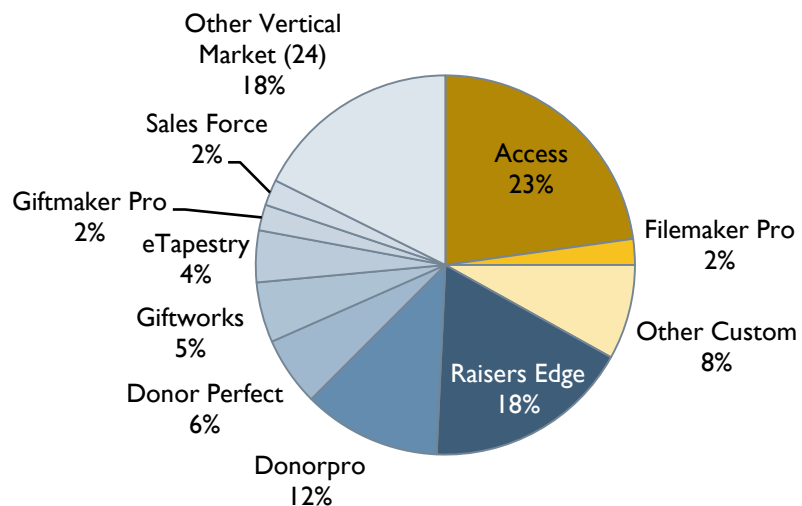
After a steady tilt toward custom databases, the majority client management database category shifted to vertical market software (software built specifically for the task – often called an off-the-shelf solution). The 54% off-the-shelf solutions represents a stark reversal from the last two surveys in which only 42% used vertical market software. Despite the overall growth in the use of off-the-shelf client management solutions, there is no market leader here. RClient has 2% overall market share, a figure eclipsed by fundraising software being used to manage client information. The 41% “other vertical market” proportion is made up largely of single organizations using a given solution.



The fundraising function saw similar gains in the use of fundraising software to manage the information. Manual and spreadsheet systems diminished to their 2004 levels. Nonprofits increasingly favor off-the-shelf solutions (64%) rather than custom solutions for fundraising, 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; 36% of vertical market users), 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. A small group of organizations still uses GiftMaker Pro despite that product being bought out by BlackBaud in early 2006.

Salesforce.com’s donation program shows up here with 2% of organizations using the ASP CRM package for fundraising tracking. In terms of trends, these results indicate a rise in vertical market fundraising packages from 51% to 58%.

## Fundraising Software Detail



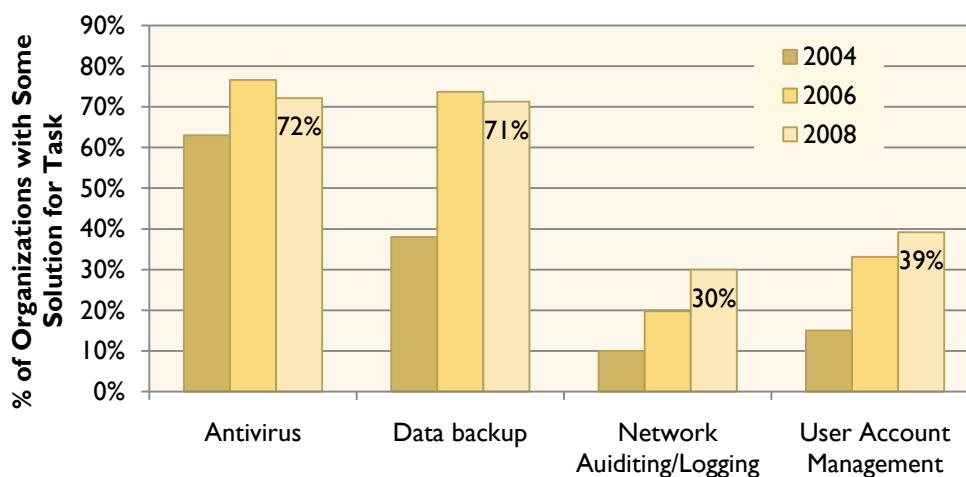
Manual systems for volunteer management remain steady at almost a third of organizations. An increase in database solutions brings the proportion back above 40% this year. The growth there appears to be replacing spreadsheet and outsourced solutions. A growth in vertical market software use (55%) puts custom volunteer management databases in a slight minority. The majority of vertical market volunteer solutions are a module of an overall fundraising package, although 4% of all organizations use VolunteerWorks.

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 (48%) of those that track outcomes in-house use a database product. On the other hand, one in five use manual systems. The last two years saw a slight majority of custom applications (53%) flip to a slight vertical market majority (55%). The only vertical market solution that has market share is Evaluation Station (3%). Fundraising databases account for 7% of all solutions.

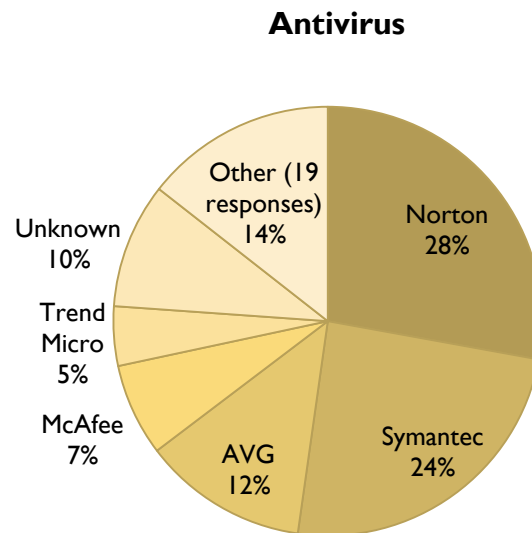
### Network and Data Management Tasks

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. The surprisingly low numbers for these measures from 2004, the first year we asked about them, have improved across the board with some hitting plateaus from 2006-2008. A large majority of organizations have anti-virus and backup solutions in place. Growing minorities systematically audit their networks and manage user accounts. 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.

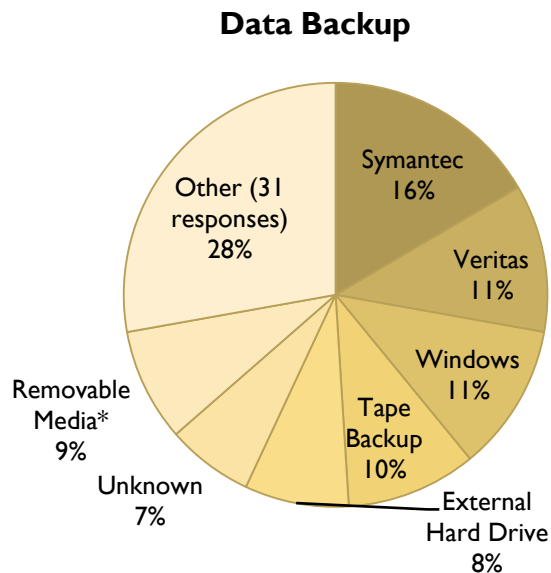
**Network/Data Management Tasks**



Anti-virus software remains dominated by Norton and Symantec. They may account for even more than half of the organizations represented due to the large number of respondents who knew they had anti-virus software but couldn't identify the name. Likely many of these respondents also use a Norton or Symantec product. AVG, which holds the next largest share, is a free downloadable anti-virus solution.



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 be 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.



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.

# IT Adoption, Impact and Needs

The survey also collects hard data about soft topics. 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

The most open-ended questions on the survey ask about the biggest challenges with technology and the respondents' IT dreams or next steps. On those few wide-open lines, respondents pour out a variety of responses, both prosaic and surprising.

The most common theme in the challenges centers on money: whether expressed as a lack of funding or the high cost of IT tools. Our choice for most eloquent statement of this challenge is “Big tastes, small budget.” A cluster of challenges forms around people. User skill levels need to be raised through training. A lack of an IT Person is a frequent barrier. Finally, buy-in is a barrier both in the form of users reluctant to change and decision-makers who are not swayed by return on investment cases. There is also a desire for more time with which to stay current with advances and to maintain partially obsolete hardware inventories.

| Biggest Challenge   | Responses |
|---------------------|-----------|
| Funding             | 75        |
| Training/User Skill | 68        |
| Staying Current     | 43        |
| Lack of IT People   | 37        |
| Buy-in              | 27        |
| Utilization         | 26        |
| Maintenance         | 23        |
| Hardware            | 21        |

If the challenges derive from lacking funds and the right people and time in the day, the web dominates dreams. The vast majority of next steps focus on redesigning web sites, gaining control to update web content in-house and making sites more interactive. Some believe specific online tools hold the secrets: “To be on social networking sites to reach a younger audience...”. A straightforward hardware dream: “A laptop on every student’s and teacher’s desk.”

Some of the dreams and next steps could be achieved with more money in budgets and more of that user buy-in decried above. A set of dreams revolving around integrating applications represents next-generation efficiency hopes. Some of these are uphill battles: “To unite 14 separate programs under one technology umbrella”. Some still yearn for Internet access or faster access. Others involve integrating offline data with interactive web tools.

| IT Dream/Next Step   | Responses |
|----------------------|-----------|
| Web Site             | 75        |
| User Hardware        | 44        |
| Database             | 38        |
| Network              | 36        |
| Software             | 36        |
| Improved Utilization | 23        |
| Online Functionality | 21        |

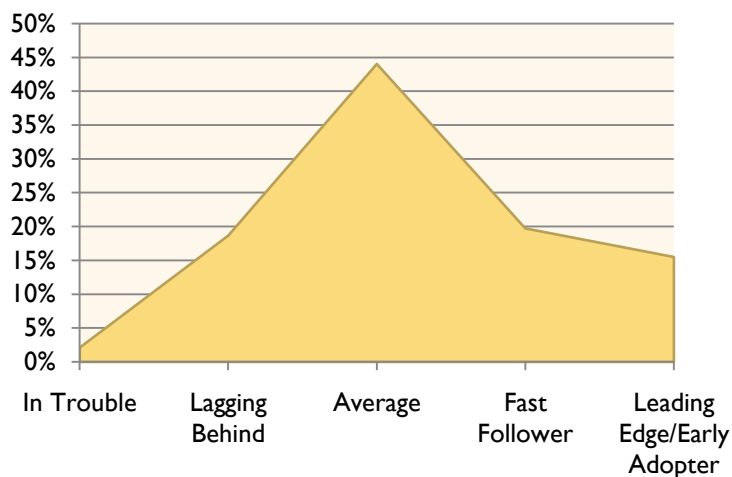
## IT Adoption

A national organization of nonprofit techies, the Nonprofit Technology Network (NTEN), has conducted nation-wide research on various topics. In recent IT staffing surveys, they've asked respondents to evaluate their 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 get more interesting when compared with a national sample that NTEN collected in 2007.<sup>4</sup>

The center of the Southwestern Pennsylvania distribution looks like a classic bell curve, peaking at average and falling off equally to the Fast Follower and Lagging Behind groups. At the extremes, however, we are Lake Wobegon.<sup>5</sup> All the children are above average.

Despite obsolete hardware, inadequate software and users who lack the willingness or skill to use IT tools to their full potential, very few people are willing to admit that they are in technology trouble. Perhaps if our survey was anonymous, we'd have different results.

**Organizational IT Adoption**



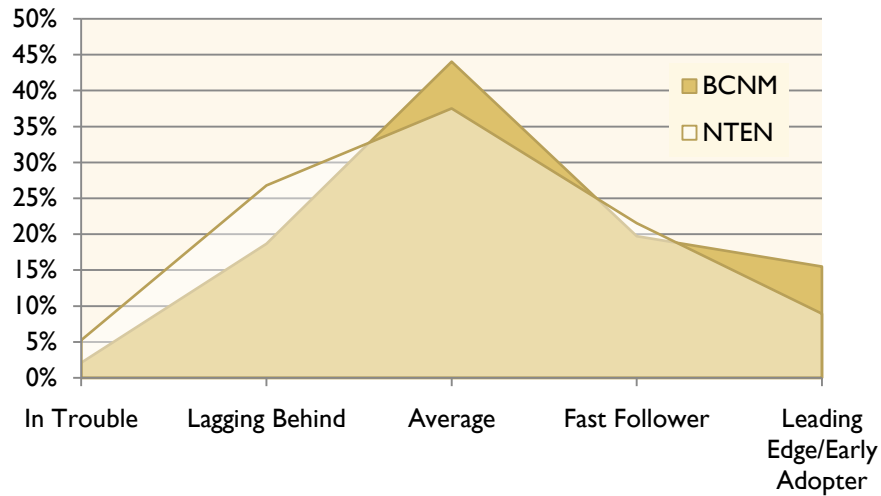
## IT Adoption: Southwestern PA vs. the Nation

Whether it's explained by anonymity or the diminished self-concept of non-Pittsburghers, the NTEN survey shows a different distribution. In the national sample, more than a quarter Lag Behind, and a mere 10% are at the Leading Edge. Also, twice 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.

<sup>4</sup> "Nonprofit IT Staffing: Staffing Levels, Recruiting, Retention and Outsourcing". Nonprofit Technology Enterprise Network and The NonProfit Times, 2008. Download at [www.nten.org](http://www.nten.org).

<sup>5</sup> Lake Wobegon is the fictional hometown of public radio personality and author Garrison Keillor. He ends his weekly stories about the goings-on there with the tagline that in Lake Wobegon, "all the women are strong, all the men are good looking, and all the children are above average."

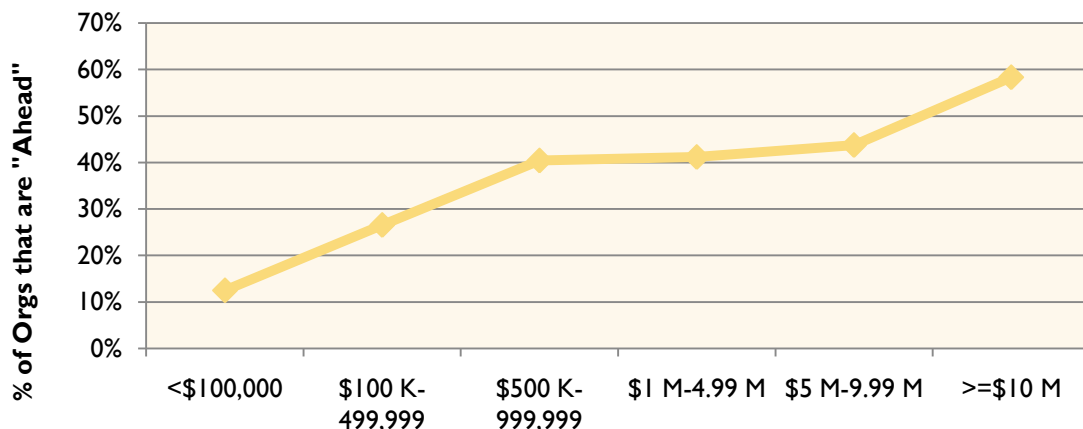
## Organizational IT Adoption



## IT Adoption by Organization Size

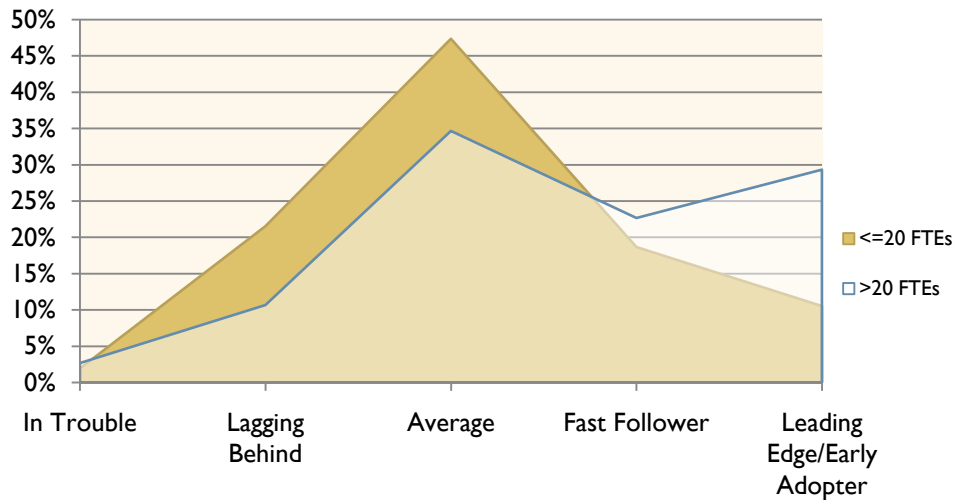
As with other measures, the respondent pool exhibits great variety. If we distill the results to those who are ahead and those who are behind, different patterns emerge by organizational size. In both budget and staff size, the pattern continues that larger organizations are better off. If we collapse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

## IT Adoption by Budget Size



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.

## IT Adoption by Staff Size



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. 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 national association of nonprofit techies or read its discussion boards or they have subscribed electronically to the electronic 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.

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|                   | Range        | BCNM | NTEN |
|-------------------|--------------|------|------|
| <b>Small</b>      | <\$500K      | 36%  | 15%  |
| <b>Medium</b>     | \$500K-2.99M | 39%  | 39%  |
| <b>Large</b>      | \$3M-10M     | 15%  | 23%  |
| <b>Very Large</b> | >\$10M       | 9%   | 23%  |

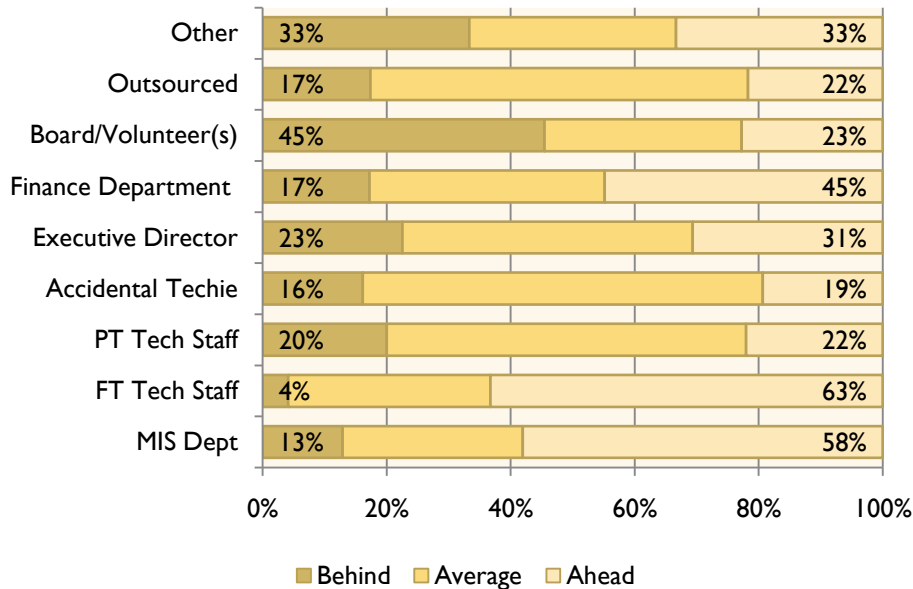
## IT Adoption by Technology Decision-Maker

NTEN examined the perception of IT staffing levels on perception of IT adoption. Their 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. Having a Part-time techie was about equivalent to having an Accidental Techie or outsourcing the function.

The largest group of organizations that feel “behind” the curve are those in which Board Members or Volunteers make tech decisions.

### IT Adoption vs. Tech Management

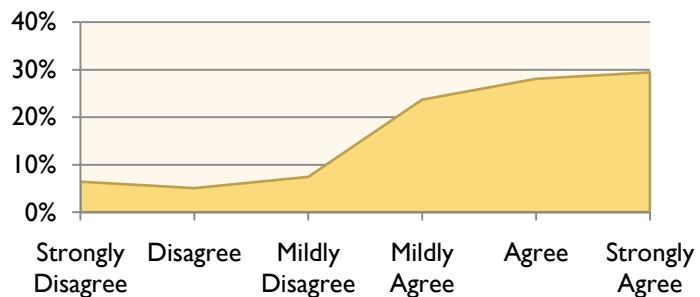


### Impact

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.

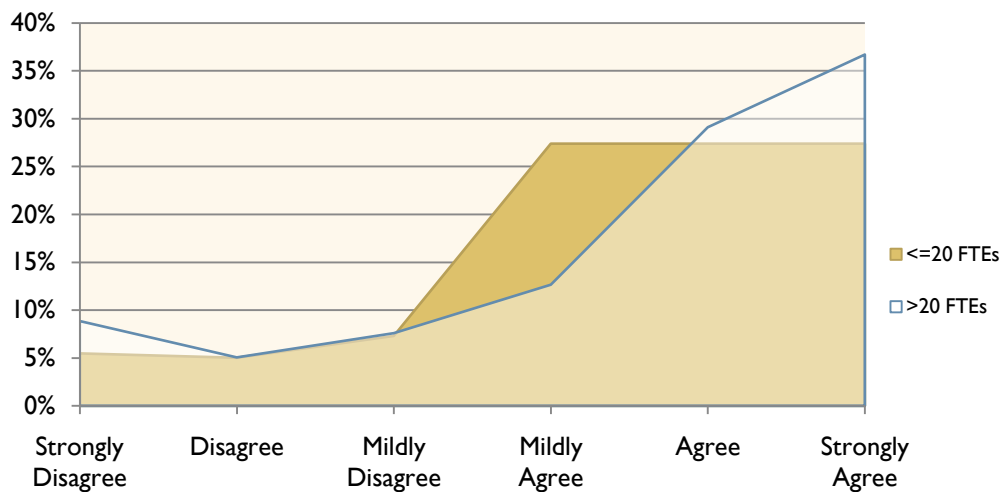
Fewer than 20% will disagree at all with this statement. The vast majority agrees, and the most common response (by a smidge) is Strongly Agree. While the percentage that disagrees has held steady from 2004-2008, the agreement has eroded slightly from strong toward mild. In 2004, for example, 34% agreed strongly versus 29% this year.

### Technology has Substantially Changed how we Operate



An interesting pattern emerges when impact is measured against size. Larger organizations cluster at both extremes more than their smaller counterparts. The Bayer Center has witnessed this on the ground. Above a certain scale of organization, two things happen: either tech becomes non-negotiable, or acquiring and maintaining adequate technology becomes such a burden that the impact seems to exhibit diminishing returns. In the former case, the culture has shifted in a way that is unlikely to reverse. In the latter, the bigger the bucket, the smaller the drop.

## IT Impact by Staff Size



### *A Final Word...from the Nonprofits Themselves*

A selection of Technology Dreams and Next Steps may be the best way to summarize uneven progress. Some are predictable. Many are ambitious. Others are surprisingly minimal for 2008. Taken together, they represent the current moment in nonprofit technology.

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

"Fully functional website with a competent web master"

"Online registration for 50,000 members"

"...to be on social networking sites to reach a younger audience..."

"A laptop on every student's and teacher's desk"

"...ability to convert documents to PDF"

"Uniform back end data store for all deployed data management systems"

"Just went through hiring an IT person...who has helped us tremendously. Currently need more computers and some software"

"More staff efficiency"

"Laptop with PowerPoint software and projector"

"WE got a printer and copier since your last survey, but still don't have Internet"

"I want records I can use as a management tool"

# Appendices



## Appendix A: Survey Instrument

# ORGANIZATIONAL TECHNOLOGY SELF ASSESSMENT

THANK YOU FOR PARTICIPATING IN THIS SURVEY, WHICH WILL HELP THE BAYER CENTER FOR NONPROFIT MANAGEMENT UPDATE ITS BIENNIAL BENCHMARKS FOR ALL VARIETIES OF AGENCY TYPE, SIZE AND OTHER FACTORS. **(PLEASE RETURN COMPLETED FORM BY AUGUST 15, 2008 TO BE ENTERED IN A DRAWING TO WIN A DIGITAL VIDEO CAMERA)**

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 \_\_\_\_\_

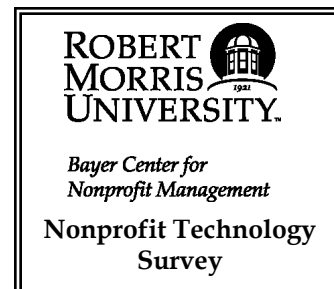
Web Site URL: \_\_\_\_\_ E-mail: \_\_\_\_\_

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
- 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
  - A designated staff person with part-time technology responsibilities
  - MIS Dept with two or more employees
  - Unofficial staff interested in technology
  - Finance Department
  - Executive Director
  - A staff person with full-time technology responsibilities
  - Other \_\_\_\_\_
- 9) We wish to make the following changes in our computer systems: (check all that apply)

|   | Hardware                 | Software                 | Training/Utilization     | Web Site                 |
|---|--------------------------|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> No changes are necessary; everything is under control. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Minor improvement in:   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Major improvement in:   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |



- 10) For what percentage of staff positions are required technology skills listed in job descriptions and included in employee evaluations? (Count positions if the required technology skills are a written part of their job description and their supervisor regularly evaluates those skills.)
- None                       1-33%                       34-66%                       67-100%
- 11) Have you included technology expenses in a foundation proposal this year?  Yes       No       Don't Know
- 12) If yes, what percentage of the proposal was for technology? \_\_\_\_\_%
- 13) If yes, was proposal funded?
- Fully       Partially, Tech included       Partially, Tech cut       No       Don't Know/Haven't heard
- 14) Do you include technology costs in your agency's contracts to provide services? (e.g. with government agencies)
- Yes                       No                       Don't provide services under contract       Don't Know
- 15) Do you have a technology evaluation and planning committee? (Choose the first Yes option if your agency has a technology committee AND at least one board member participates in any capacity.)
- Yes, and at least one board member participates       Yes, but no board member participates       No       Don't know
- 16) Technology has substantially changed how we operate: (Check only one box where 1 = strongly disagree and 6 = strongly agree.)
- Strongly Disagree    1    2    3    4    5    6   Strongly Agree
- 17) Our biggest challenge with technology is: (Describe the issues and challenges facing your organization's use of technology.)
- \_\_\_\_\_
- \_\_\_\_\_
- 18) What is your organization's technology dream or next big step?
- \_\_\_\_\_
- \_\_\_\_\_

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

- 1)  I am not comfortable answering these questions and am returning the survey at this time.
- 2) Last year, what percentage of staff received some formal technology training as part of their job? (Training can be classroom or computer based, but there needs to be a curriculum. Check only one.)
- None                       1-33%                       34-66%                       67-100%
- 3) What percentage of staff use the Internet (Web and e-mail) as part of their jobs? (What percentage of staff both require and use Internet access as part of their work for the agency? Check only one.)
- None                       1-33%                       34-66%                       67-100%
- 4) We use the following types, ages and quantities of computer(s): (Indicate the number of machines in use in any administrative or program delivery capacity – including client-oriented computer lab. Age should indicate date of manufacture, not date received.)
- | Type of Computer             | Desktops | Laptops |
|------------------------------|----------|---------|
| Macintosh                    | _____    | _____   |
| PC: older than 5 years       | _____    | _____   |
| PC: 3-5 years old            | _____    | _____   |
| PC: 1-3 years old            | _____    | _____   |
| PC: under 1 year old         | _____    | _____   |
| Other (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 ME                      \_\_\_\_\_ % Windows XP
- \_\_\_\_\_ % Windows Vista                      \_\_\_\_\_ % Mac OS                      \_\_\_\_\_ % Other (specify) \_\_\_\_\_

7) Do you provide remote access for truly mobile staff members? (Those who work the majority of their time in the field, not in a satellite office).

- Laptop                       PDA                       Cell Phone                       USB Drive  
 Citrix                       Data Access through ASP    Pager  
 Terminal Services               pcAnywhere               Other (specify) \_\_\_\_\_

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

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

Do you have a firewall? \_\_\_\_\_ If yes, what kind of firewall?  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](mailto:userid@orgname.org)))

- Yes                       No                       Don't Know/Not Sure

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

- None                       We have a LAN, but I'm not sure what kind it is.  
 Windows NT                       Windows peer-to-peer  
 Windows 2000                       Windows 2003  
 Windows 2003 Small Business Server               Macintosh Version: \_\_\_\_\_  
 Other (Linux, Novell, etc.) 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.)  
 Fax machine (At least one stand-alone fax machine – combination printer/fax machines qualify.)  
 Scanner (Any scanner for Optical Character Recognition (OCR) or imaging.)  
 CD ROM burner (Can you make your own CDs anywhere in the agency?)  
 Single bin laser printer (Any laser printer that uses only one tray at a time.)  
 Multi bin laser printer – including envelope feeders (Users can specify one of several available paper trays for their print jobs.)  
 Ink jet or other color printers (Any ink jet or bubble jet type printer)  
 Networked copier (Copier that allows printing capability from users desk)  
 LCD projector (Any projectors for computer or video)  
 Digital camera (Any still or motion picture camera producing electronic images)  
 Tape backup (The ability to back up data from one or more computers to tape)  
 DVD (Digital Video Disk burner or player)  
 Other (please specify) \_\_\_\_\_

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

|                         | Frequently               | Regularly                | Rarely                   | N/A                      |   | Frequently               | Regularly                | Rarely                   | N/A                      |
|-------------------------|--------------------------|--------------------------|--------------------------|--------------------------|---|--------------------------|--------------------------|--------------------------|--------------------------|
| Print                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Phone                                       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Fax                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Web site                                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Email – direct from you | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Email – managed email system                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Podcasting              | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Interactive or e-commerce oriented web page | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Chat, IM                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Video Conferencing                          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Conference Calls        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Text Messaging                              | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Voice Mail              | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Social Networking sites                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Blog                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | RSS Feeds                                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

- 13) What basic productivity software packages are in regular use? (Check all that apply – if you have standardized on a package, check only one.)
- Microsoft Office (Word, Excel, etc.) version: \_\_\_\_\_  Corel Office (WordPerfect, Quattro, etc.) version: \_\_\_\_\_
- Lotus Office (WordPro/AmiPro, 123, etc) version: \_\_\_\_\_  Open Source (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      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | _____                         | _____                | _____           |
| Accounts Receivable | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | _____                         | _____                | _____           |
| Accounts Payable    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | _____                         | _____                | _____           |
| Payroll             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | _____                         | _____                | _____           |
| Budgeting           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | _____                         | _____                | _____           |
| Cash flow           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | _____                         | _____                | _____           |
| Inventory           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | _____                         | _____                | _____           |

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

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

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

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

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

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

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

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

**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.

*A Second Chance, Inc.*  
*accessAbilities, Inc.*  
**ACHIEVA**  
Adult Literacy Action Penn State Beaver  
*Advantage Credit Counseling Services*  
**Affordable Comfort, Inc.**  
African American Chamber of Commerce of W. PA.  
AGEHR Area II  
Air and Waste Management Association  
Airport Corridor Transportation Association  
*Aliquippa Alliance for Unity & Development*  
*Allegheny County Bar Foundation*  
Allegheny County Literacy Council Inc.  
Allegheny County Special Olympics  
Allegheny Health Choices, Inc.  
*Allegheny Intermediate Unit*  
Allegheny Mountain Rescue Group  
*Allegheny Valley Association of Churches*  
*Allegheny Valley School*  
*Alle-Kiski Area HOPE Center, Inc.*  
*Angels' Place, Inc*  
*Armbrust Wesleyan Church*  
*Armstrong County Community Foundation*  
Armstrong County Council on Alcohol and Other Drugs, Inc.  
*Armstrong Educational Trust*  
Arsenal Family & Children's Center  
Art Commission  
Arthritis Foundation, Western PA Chapter  
*Arts Education Collaborative*  
*ASSET Inc.*  
Association of Directory Marketing  
Attack Theatre, Inc.  
*Auberle*  
August Wilson Center for African American Culture  
*Bach Choir of Pittsburgh*  
Beaver County Association for the Blind  
Beaver County Genealogy & History Center  
*Beaver County Historical Research & Land Marks Foundation*  
*Beaver County Humane Society, Inc.*  
*Beaver County Rehabilitation Center*  
*Big Brothers Big Sisters of Grtr PGH*  
*Borough Of New Stanton*  
*Borough Of Sharpsburg*  
*Boys & Girls Club of Western Pennsylvania*  
Brighton Heights Citizens Federation  
*Brownsville Area Revitalization Corp.*  
*Building New Hope*  
*Butler County Federated Library System*  
*Calliope: The Pgh. Folk Music Society*  
*Cancer Caring Center*  
CareerLink  
Center for Coalfield Justice  
Center for Community Resources, Inc.  
*Center For Creative Play*  
Center for Hearing & Deaf Services, Inc.  
*Center for Nonprofit Excellence*  
*Center for Theater Arts*  
*Charleroi Area School District*  
Chartiers MH/MR Center  
Chatham Baroque  
*Children's Museum of Pittsburgh*  
*City of Duquesne*  
*Coalition for Christian Outreach*  
*Communities in Schools*  
*Community Child Development Ctr.*  
*Community Design Center of Pittsburgh*  
*Community Development Corporation of Butler County*  
*Community Foundation of Westmoreland County*  
Community Health Challenge  
*Community Human Services Corporation*  
*Community Technical Assistance Center*  
*Conemaugh Health Foundations*  
Connellsville Cultural Trust  
Construction Junction  
*Consumer Health Coalition*  
*Contact Beaver Valley*  
CONTACT Pittsburgh  
*Cranberry Township*  
*Crisis Center North*  
Crohn's & Colitis Fnd. of America W. PA  
Delta Gamma Pi Multicultural Sorority, Inc.  
Diversity Business Resource Center  
*Dollar Energy Fund, Inc.*  
Dress for Success Pittsburgh  
Duquesne University Tamburitzans  
Earth Force  
*Earth Mother Enterprises*  
*East Allegheny Community Council*  
Eden Hall Foundation  
Elder Care Services  
*EMMCO East, Inc.*  
Fair Housing Partnership Of Greater Pgh, Inc  
*Faith Based Network*  
*Faith Christian School*  
Fame  
Family House of Pittsburgh

Family Services of Blair County  
*Family Services of Western PA - PGH*  
*FamilyLinks*  
*Fayette County Conservation District*  
*Findlay Township*  
 First Tee of Pittsburgh  
**FISA Foundation**  
**Flying Mammal Wildlife Rehabilitation Center**  
*Focus on Renewal*  
 Freedom Unlimited, Inc.  
*Frick Art & Historical Center*  
 Friends of the Pittsburgh Urban Forest  
 Friends Of The Riverfront  
*Gateway Rehabilitation Center*  
**Gateway to the Arts**  
*George Junior Republic*  
 Gerri Holden Ministries, International  
*Gilda's Club of Western Pennsylvania*  
 Girl Scouts Western Pennsylvania  
*Girls Hope of Pittsburgh, Inc.*  
*Glenshaw Public Library*  
*Good Grief Center*  
*Grantmakers of Western PA*  
 Grapevine Center  
*Greater Pittsburgh Arts Council*  
*Greater Pittsburgh Community Food Bank*  
 Green Building Alliance  
*Greene County Watershed Alliance*  
*Group Against Smog and Pollution*  
 Heinz History Center  
 Heritage Health Foundation, Inc  
*Holy Family Institute*  
*Homeless Children's Education Fund*  
 Hosanna Industries  
*Hoyt Institute of Fine Arts*  
 Independence Conservancy  
*Institute for Entrepreneurial Excellence*  
 Interfaith Hospitality Network of the South Hills  
*Interfaith Volunteer Caregivers of Fayette, Inc.*  
*Jewish Family & Children's Service of Pittsburgh*  
*Jewish Residential Services*  
 Junior Achievement  
*Just Harvest*  
 L.I.V.I.N.G Ministry  
*Lark Enterprises, Inc.*  
 Laughlin Children's Center  
*Lawrenceville Corporation*  
 Lawrenceville United  
*League of Women Voters of Greater Pittsburgh*  
*Lemington Community Services*  
*Lifespan, Inc.*  
*Light of Life Ministries*  
 Lincoln Highway Heritage Corridor, Inc.  
*Little Sisters Of The Poor*  
*Local Government Academy*  
*Long Run Children's Learning Center*

Longe Dominica  
*Lydia's Place*  
*Macedonia Family & Cmnnity Enrich.Center*  
 Magee-Womens Foundation  
 Marian Manor Corporation  
 Mario Lemieux Foundation  
*Mars Home for Youth*  
*Ma's Pantry Food Bank*  
 Massey Center for Business Innovation & Development  
 McKees Rocks Community Development Corporation  
**Mental Health America - Allegheny Co.**  
*Mental Health Association In Beaver County*  
*Mental Health Association in Butler County*  
*Mental Health Association of Washington County, Inc.*  
**Mentoring Partnership of Southwestern PA**  
*Meridian U.P. Church Day Care*  
 Metamorphosis Foster Homes  
*Metro Family Practice, Inc.*  
*Miryam's*  
**Mon Valley Initiative**  
 Mon Yough Community Services, Inc.  
*Monessen Business Center*  
*Mountain Watershed Association, Inc.*  
*Mt. Lebanon Christian Church*  
*Mt. Lebanon Montessori School, Inc.*  
 Myasthenia Gravis Association, W. PA  
*Nazareth Housing Services*  
**NEED**  
*Neighbors in the Strip*  
*Neurofibromatosis Clinics Assoc.*  
*North Hills Community Outreach*  
*North Hills Youth Ministry Counseling Center*  
 North Side Christian Health Center  
**OASIS**  
 Ohio Valley General Hospital  
 Old Economy Village  
*Onala Club, Inc.*  
 Operation Better Block, Inc.  
*Outreach Teen & Family Services*  
*Pace School*  
*Parental Stress Center*  
*Partners in Progress*  
 Peer Support and Advocacy Network  
 Pennsylvania Association for Sustainable Agriculture  
 Pennsylvania Cancer Control Consortium  
*Pennsylvania Legal Aid Network*  
*Pennsylvania Trolley Museum*  
*Pennsylvania West Soccer Association*  
 Pentecostal Temple Development Corporation  
 PERSAD Center, Inc.  
 PHDA Inc.  
**Pittsburgh Action Against Rape**

*Pittsburgh AIDS Task Force*  
*Pittsburgh Ceili Club*  
 Pittsburgh Community Reinvestment Group  
 Pittsburgh Downtown Partnership  
*Pittsburgh Film Office*  
 Pittsburgh Harlequins Rugby Football Association  
*Pittsburgh Musical Theater*  
*Pittsburgh Partnership for Neighborhood Development*  
 Pittsburgh Pastoral Institute  
 Pittsburgh Planned Giving Council  
 Pittsburgh Presbytery  
 Pittsburgh Regional Minority Purchasing Council  
 Pittsburgh Social Venture Partners  
 Pittsburgh Symphony Orchestra  
 Pittsburgh Zoo and PPG Aquarium  
*POISE Foundation*  
 Polish Hill Civic Association  
*POWER*  
 PowerLink  
 Present Help, Inc.  
*Prime Time Adult Care*  
 Private Industry Council Wesm'd/Fayette  
*Providence Connections, Inc.*  
*Radio Information Service*  
 Rainbow Christian Missions  
*Rainbow Kitchen Community Services*  
 Rankin Christian Center  
 Rebuilding Together - Pittsburgh  
*Redeemer Lutheran School*  
 Redevelopment Authority of Fayette County  
*Renewal, Inc.*  
*Residential Care Services*  
 Richard King Mellon Foundation  
*River City Brass Band*  
 Rock The World Youth Mission Alliance  
 Safety Kids Inc.  
 Salvation Army/East Liberty  
*Sarah Heinz House*  
*Schenley Heights Community Development*  
 Senior Computer Associates  
*Seton-La Salle High School*  
 Sewickley Valley Historical Society  
*Shady Lane*  
*Shakespeare in the Schools*  
 Sharp Visions, Inc.  
 Shepherd's Heart Fellowship  
*Sisters Place, Inc.*  
 Slippery Rock Pregnancy Center  
 Small Seeds Development, Inc.  
*Smart Futures*  
*SMC Business Councils*  
*Society for American Music*  
*Society for Contemporary Craft*  
 South East Asia Prayer Center

South Hills Chamber of Commerce  
**Southwestern PA Human Services**  
*Southwinds, Inc.*  
*St. Agnes School*  
*Staunton Farm Foundation*  
 Steel City Biofuels  
*Stepping Stones Children's Center*  
*Sustainable Pittsburgh*  
 Sweetwater Center for the Arts  
 The Aircast Foundation  
**The Allegheny Regional Asset District**  
 The Children's Aid Home Programs  
*The Children's Home of Pittsburgh & Lemieux Family Center*  
*The Early Learning Institute*  
**The Emmaus Community of Pittsburgh, Inc.**  
*The Grable Foundation*  
*The Hispanic Center of Pittsburgh*  
*The Lighthouse Foundation*  
*The LOGOS Ministry*  
 The Minerals, Metals & Materials Society, Inc.  
*The Pittsburgh Experiment*  
*The Pittsburgh Project*  
*The Presbyterian Church, Sewickley*  
*Three Rivers Adoption Council*  
*Three Rivers Center for Independent Living*  
*Three Rivers Community Foundation*  
*Three Rivers Connect*  
*Three Rivers Youth*  
*Time-Out Ministries, Inc.*  
 Tobacco Free Allegheny  
 ToonSeum  
*Transitional Employment Consultants*  
*Transitional Services, Inc.*  
 Treasure House Fashions  
*Tri-City Life Center, Inc.*  
*Turtle Creek Watershed Association, Inc.*  
*Union Project*  
*United Cerebral Palsy of Pittsburgh*  
*United Jewish Federation of Greater Pgh.*  
*United Way of Butler County*  
*United Way of Lawrence County*  
*United Way of Westmoreland County*  
*University of Pittsburgh Office of Child Development*  
 Urban Farming Initiative  
*Urban Impact Foundation*  
*Urban League of Pittsburgh*  
*Urban Youth Action, Inc.*  
*Venture Outdoors*  
*Villa St. Joseph Nursing Care Facility*  
*Vintage, Inc.*  
 Visiting Nurses Association of Butler County  
*VOICE- Victim Outreach Intervention Center*  
 Voluntary Action Center of Beaver County, Inc.  
*Volunteers of America PA/Working Order*

*Ward Home, Inc*  
*Washington City Mission, Inc.*  
*Watchful Shepherd USA*  
*Western Penn Hills Community Action, Inc.*  
*Western Pennsylvania Humane Society*  
*Westmoreland Bar Assoc/Fdn*  
*Westmoreland Casemanagement and Support*  
*Westmoreland Fayette County BSA*  
*Westmoreland Museum of American Art*  
*WestPACS*  
*Whitehall Public Library*  
*With A Golden Spirit, Inc.*  
*Womansplace*  
*Women's Center Of Beaver County*  
*YMCA of McKeesport*  
*YMCA Sewickley Valley*  
*YouthWorks, Inc.*

## Appendix C: Bayer Center Advisory Board, Staff

### Advisory Board

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The Buhl Foundation

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Pittsburgh

Elizabeth Helmsen  
Pittsburgh Symphony  
Orchestra

Ronald R. Hoffman  
Alcoa (Retired)

Scott Izzo  
Richard King Mellon  
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Derya Jacobs  
Robert Morris University

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Mark S. Lewis  
POISE Foundation

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MAYA Design  
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Cindy Leonard  
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Peggy Morrison Outon  
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Carrie Richards  
Marketing Manger

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Office Coodinator