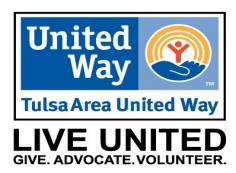
TCF / TAUW Technology Needs Survey Prepared August, 2010





THE CONCEPT

the NTech Collaborative

A Non-profit Technology Services Organization

■ MISSION: To extend the social impact and improve the "social bottom line" of Tulsa's non-profit organizations
 ■ STRATEGY: To improve operational effectiveness through improved access to technology and technology expertise
 ■ TACTIC: To create a donor-funded non-profit technology services organization to meet the needs of Tulsa's non-profit organizations
 ■ Concept pioneered by Tulsa Area United Way via

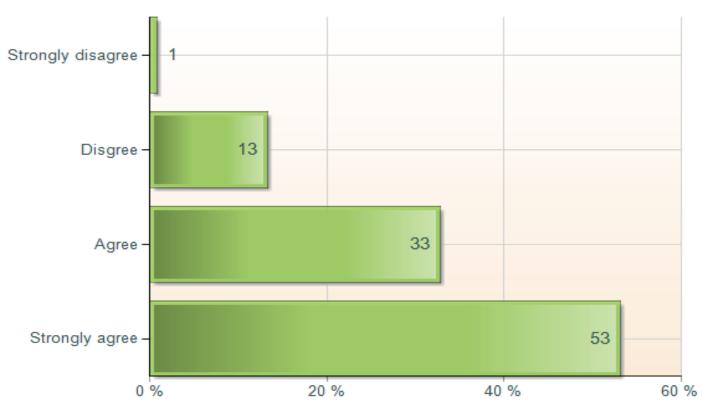
SURVEY & ANALYSYS TIMELINE

Technology Needs Assessment Survey

- ☐ Initiated with announcement July 2nd
- ☐ On-line survey opened July 16th and closed August 4th
- □ 128 agencies responded (~ 60% response rate)
- ☐ Internal review underway
- ☐ Focus group sessions being scheduled

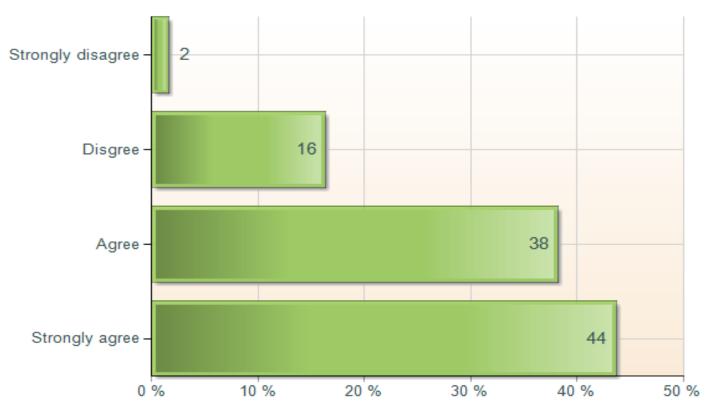
Respondent's View of Technology

Please indicate your agreement / disagreement with the following statement: "The overall effectiveness and efficiency of our organization could be significantly improved through better access to technology and technology expertise."



Respondent's View of Technology

Please indicate your agreement / disagreement with the following statement: "The overall effectiveness and efficiency of our fundraising efforts could be significantly improved through better access to technology and technology expertise."



Perception of Most Valued Services? (Q46)

SMALL AGENCIES (staff < 21)

- 1. General technology consulting
- 2. Software consulting (evaluation / selection / implementation)
- 3. PC Support
- 4. Discounts on products & services
- 5. Help desk

MEDIUM AGENCIES (staff 21 – 100)

- 1. General technology consulting
- 2. Discounts on products & services
- 3. PC Support
- 4. Help Desk
- 5. Server support

LARGE AGENCIES (staff > 100)

1. Discounts on products & services

PRELIMINARY OBSERVATIONS

The Technology Divide

- ☐ Agencies with staffs of more than 100 FTE's are largely self-reliant with internal IT personnel and adequate funding for technology (3 5% of operating budget)
- ☐ Small and medium agencies largely rely on a host of third party service providers and struggle to maintain their technology landscape (less than 1% of operating budget, 22% of respondents do not budget for IT separately)
- ☐ Small and medium agencies stand to benefit more significantly from the concept as they rely almost solely on for-profit third parties and volunteers for expertise, and likely pay higher rates for products and services than larger agencies

PRELIMINARY OBSERVATIONS

Hardware Volume Purchasing Cooperative

- □ Responding agencies represent 5,000 PC's and 275 servers with a replacement value of ~ \$10M
- □ Responding agencies in all three categories expressed a strong interest access to discounted products and services. By aggregating purchasing volume a reduction of 10% is achievable and would conservatively represent an annual savings of ~ \$170K
- ☐ The development of a volume purchasing cooperative for hardware represents an immediate opportunity with clearly defined quantitative benefits

PRELIMINARY OBSERVATIONS

Potential for Infrastructure Simplification

- □ 94% of medium and 65% of small agencies operate an on-premise server; 36% of respondents would like to upgrade their servers over the next 18 months
- ☐ 65% of respondents use their servers to host Microsoft Exchange mail services; 62% of respondents use their servers to host core application software
- ☐ 73% of small and 70% of medium agencies rely on a 3rd party for network / server support
- ☐ Small and medium agencies can reduce server related costs by migrating from Exchange to Google Apps and by consuming core applications (such as e-Tapestry and QuickBooks) as web services rather than licensed products

PRELIMINARY OBSERVATIONS

Need for Donor Management Consulting

☐ 36% of respondents do not use a donor management specific software solution
☐ 40% of respondents would like to implement or replace their donor management solution
☐ Cost is not a barrier in this case as TechSoup offers full functioning web based versions of e-Tapestry and Donor Perfect for \$60 per year.
☐ Small and medium agencies would benefit from access to expertise in the area of donor management software evaluation, selection, implementation and ongoing refresher training

SURVEY RESULTS RESPONDENT OVERVIEW

Respondent Overview (128 responses, 39 TAUW)

	%	Responses
Small agencies (staff size 1 - 20 FTE's)	66%	85
Medium agencies (staff size 21 – 100 FTE's)	26%	33
Large agencies (staff size > 100 FTE's)	8%	10

Overall response rate of ~ 60%

Respondent Overview (128 responses)

	Low	High	Average
Operating Budget (Q8)	\$30,000	\$46,000,000	\$3,174,000
IT Budget* (Q9)	\$50	\$910,000	\$45,100
Staff (in FTEs) (Q10)	1	600	39
PCs (Q26, Q27)	1	400	42
PCs > 4yrs Old (Q28)	0%	100%	43%

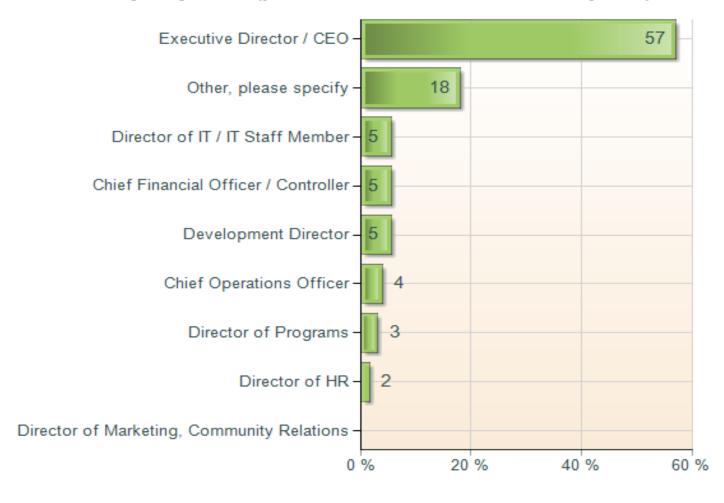
NOTE: Nine of the responding agencies either do not or can not budget for IT separately or do not have funding for IT expenditures. These agencies are excluded from the average IT budget calculation.

Respondent Overview (128 responses)

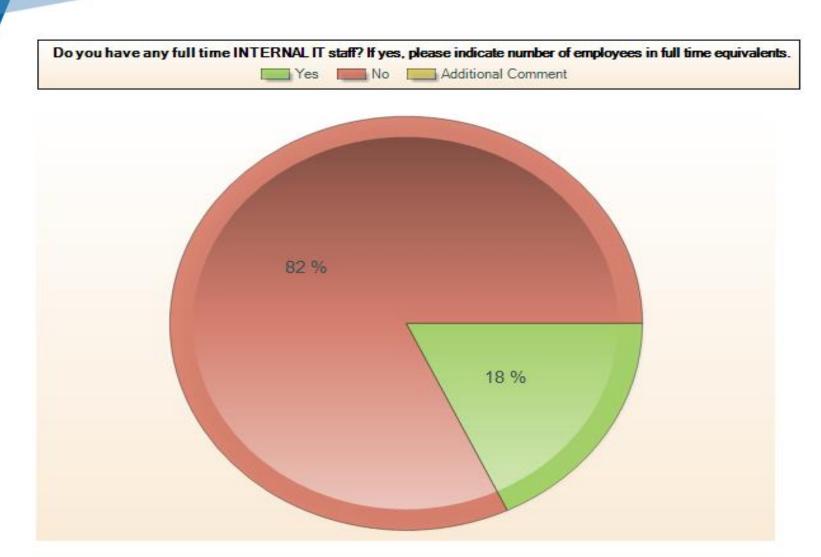
□ 21% of responding agencies either have *no IT budget* or do not budget for it separately
 □ While large agencies spend 3 – 5% of their operating budgets on IT related expenditures, small & medium agencies spend less than 1% of their operating budgets on IT related expenditures
 □ What % of agencies spend less than 1% of operating budget on technology?

Respondent Overview

What is your job title (please choose the one closest to yours)?

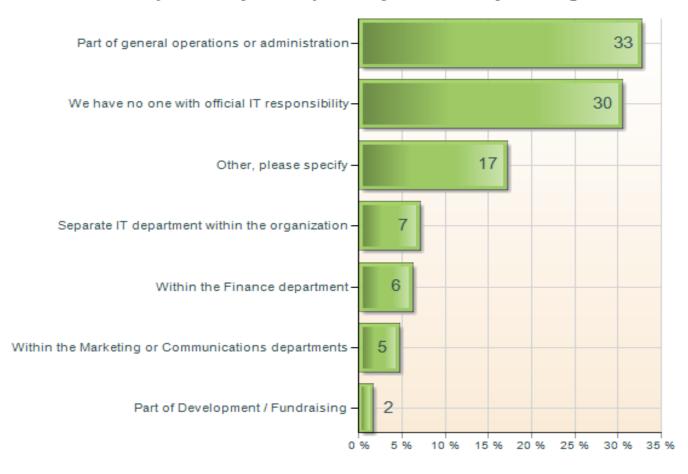


Respondent Overview



Respondent Overview

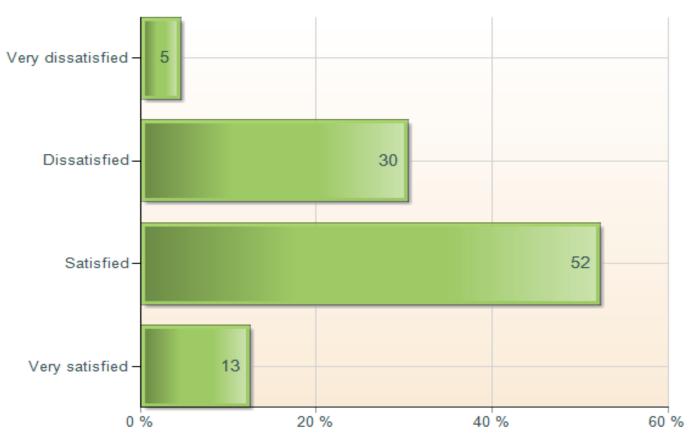
Where is the responsibility for IT primarily located in your organization?



RESPONDENT'S VIEW OF TECHNOLOGY

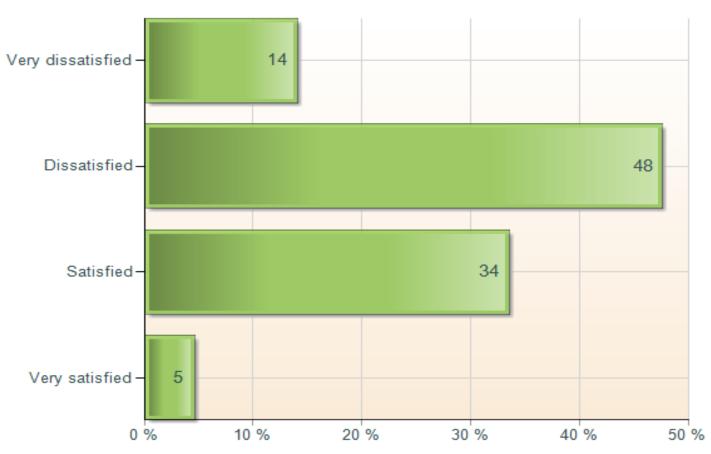
Respondent's View of Technology

How satisfied are you with the quality of the hardware & software used by your organization?



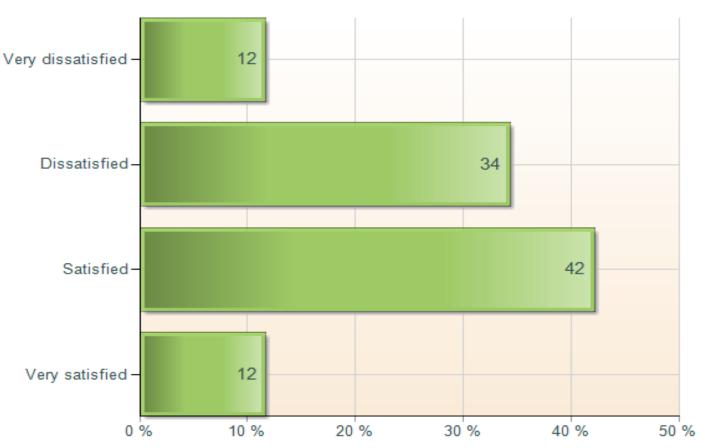
Respondent's View of Technology

How satisfied are you with the amount of your organization's budget that is allocated for technology?



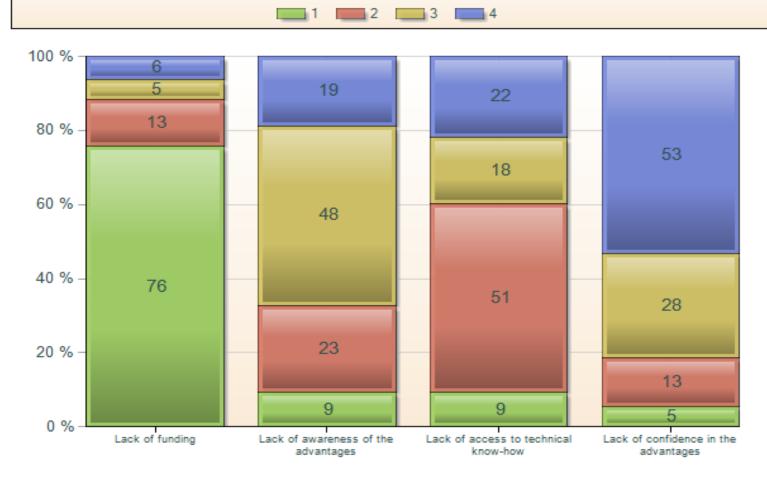
Respondent's View of Technology

How satisfied are you with the availability of IT support resources (internal or external) to respond to your staff needs?



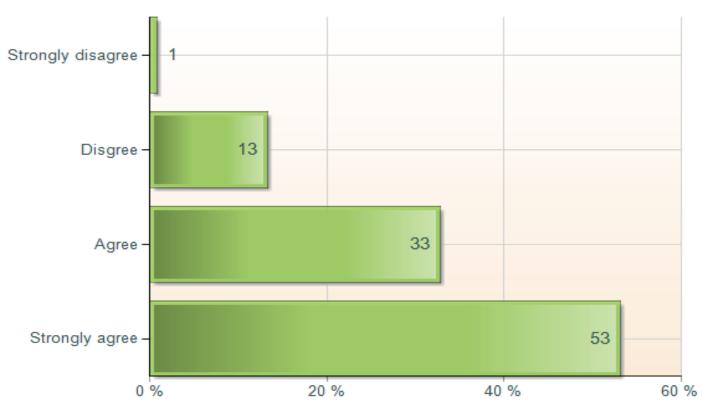
Respondent's View of Technology

Please rank the following barriers to the adoption of new technologies or expansion of existing technologies with 1 being the most problematic and 4 being the least problematic barrier for your organization?



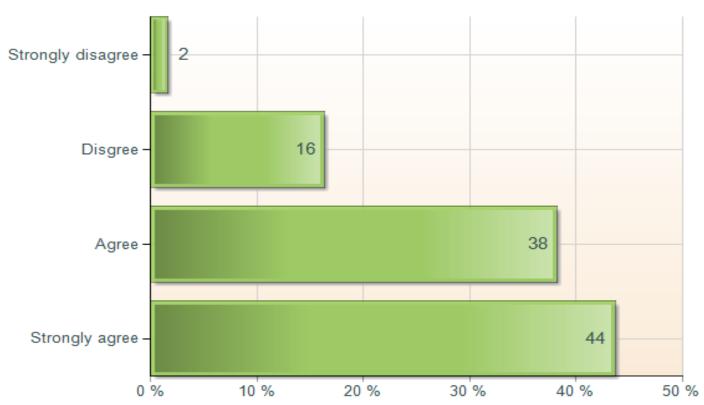
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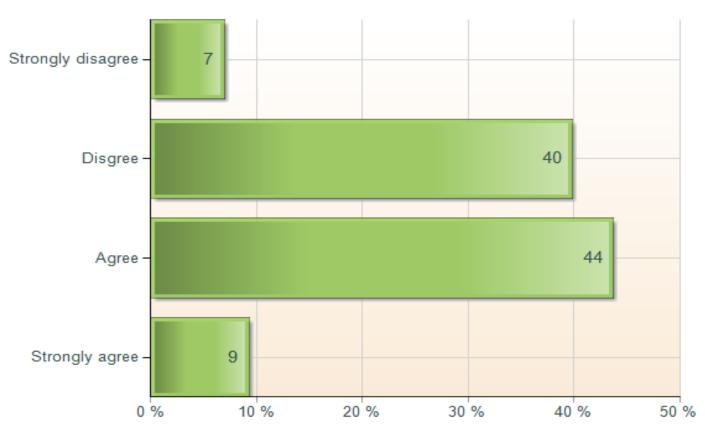
Respondent's View of Technology

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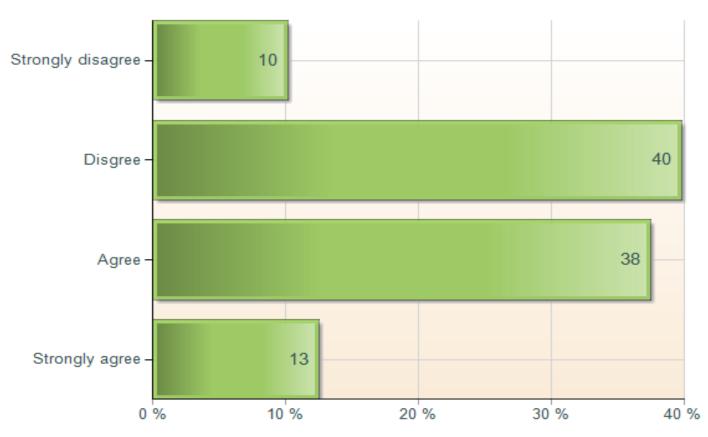
Respondent's View of Technology

Please indicate your agreement / disagreement with the following statement: "Our organization has access to the technology it needs to be successful."



Respondent's View of Technology

Please indicate your agreement / disagreement with the following statement: "Our organization has access to the technology expertise it needs to be successful."



HOW ARE RESPONDENT'S TECHNOLOGY NEEDS MET TODAY?

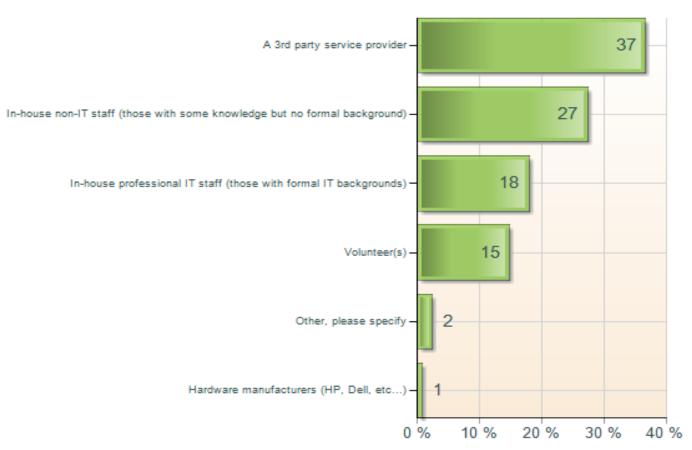
How are technology needs met?

% of Responding Agencies Using A Third Party for...

Web hosting	80%
Telephony support	69%
Web design	63%
E-mail hosting	62%
Web development	60%
Hardware installation	53%
Hardware maintenance	52%
Network administration	52%

How are respondent's technology needs met today?

Who has primary accountability for maintenance of your hardware (PC's & on-premise servers)?



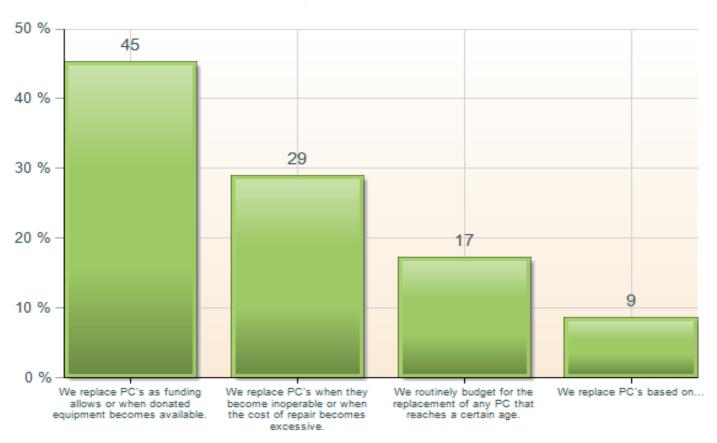
RESPONDENT'S HARDWARE & NETWORK ENVIRONMENT

Respondent Overview (128 responses)

□ Responding agencies represented 4,965 PC's, 2,112 or 43% of which were older than 48 months (Q26 - Q28)
□ Large agencies, only 28% of PCs are older than 48 months
□ Medium agencies, 69% of PCs are older than 48 months
□ Small agencies, 60% of PCs are older than 48 months
□ Responding agencies represented 275 "servers" (Q31)
□ 94% of medium agencies operate an on-premise server
□ 65% of small agencies operate an on-premise server

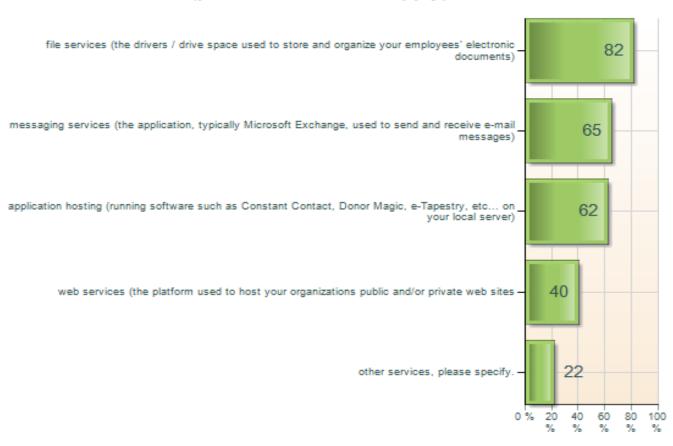
Respondent's Hardware & Network Environment

Which statement most accurately describes your organizations approach to the replacement of PC's?



Respondent's Hardware & Network Environment

What services are hosted on the servers operating on your premises (please check all that apply)?



RESPONDENT'S SOFTWARE ENVIRONMENT

The software environment (Q35, Q37)

Donor Management

Raiser's Edge (17 agencies)

QuickBooks (14 agencies)

e-Tapestry (10 agencies)

Donor Perfect (5 agencies)

Giftworks (6 agencies)

Other 3rd party or custom solutions (30 agencies)

36% of responding agencies do not use a donor management solution (combinations of MS Excel, MS Access, MS Outlook)

Finance & Accounting

Quickbooks (10 agencies)

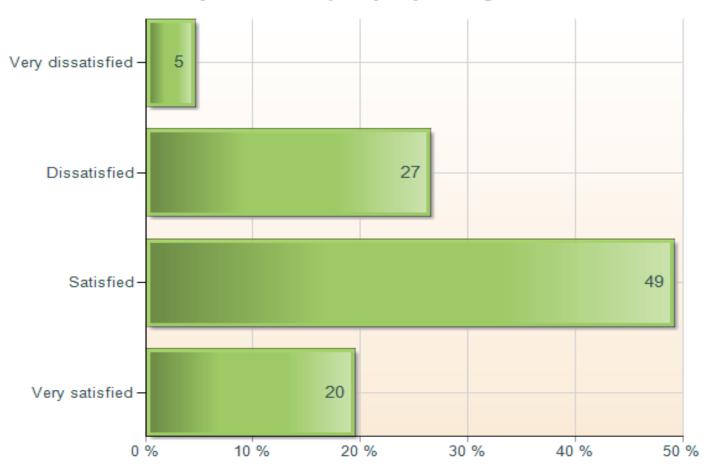
MIP (4 agencies)

Peachtree (3 agencies)

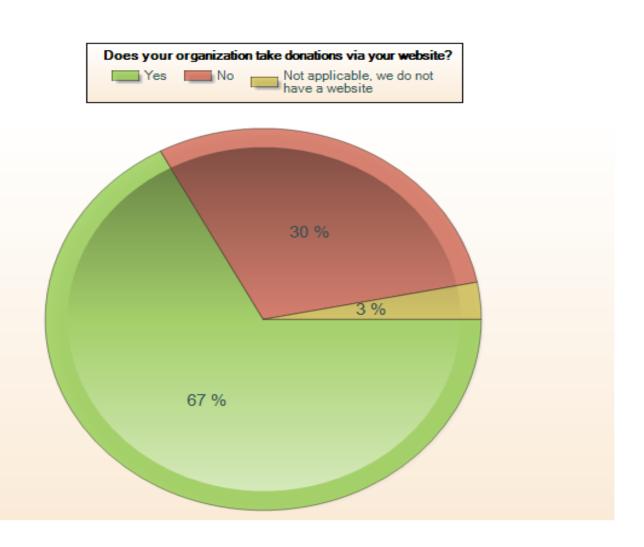
RESPONDENT'S WEB PRESENCE

Respondent's Web Presence

How satisfied are you with the quality of your organization's website?

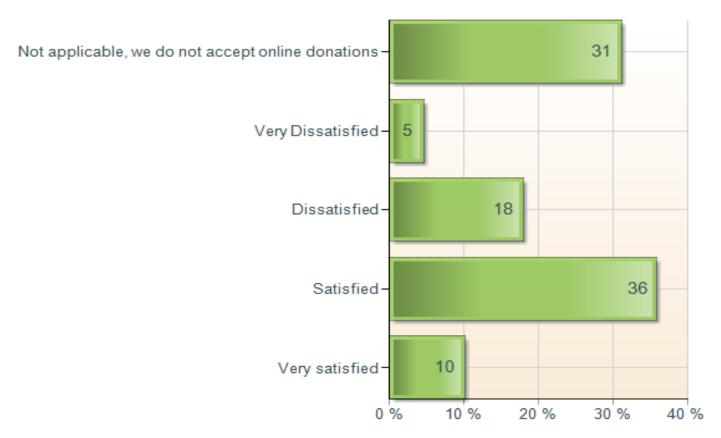


Respondent's Web Presence



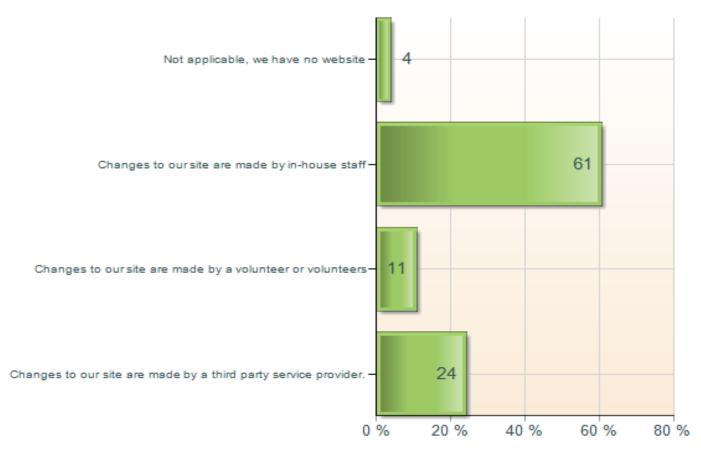
Respondent's Web Presence

If your organization DOES accept donations via your website, how satisfied is your organization with the visibility and simplicity of making online donations?



Respondent's Web Presence

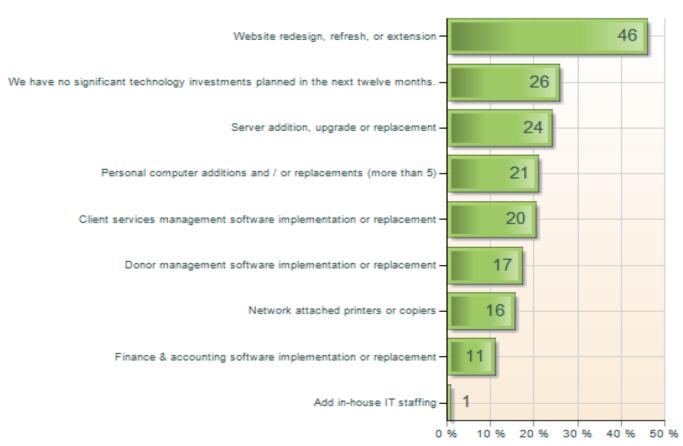
Who in your organization is primarily responsible for making content changes to its web site?



RESPONDENT'S TECHNOLOGY PLANS AND NEEDS

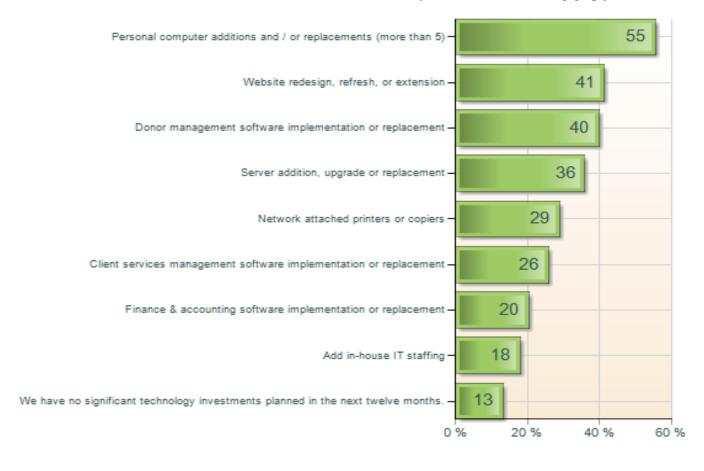
Respondent's Technology Plans & Needs

What significant technology investments will your organization make over the next twelve months (check all that apply)?



Respondent's Technology Plans & Needs

What significant technology investments would your your organization like to make over the next twelve months (check all that apply)?



Most valued services? (Q46)

SMALL AGENCIES

- 1. General technology consulting
- 2. Software consulting (evaluation / selection / implementation)
- 3. PC Support
- 4. Discounts on products & services
- 5. Help desk

MEDIUM AGENCIES

- 1. General technology consulting
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- 4. Help Desk
- 5. Server support

LARGE AGENCIES

1. Discounts on products & services