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MAKING CONNECTIONS

2015 Digital Adoption Report

An NTEN Report

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Introduction

Did you know that more than 60 million Americans do not have Internet access in their homes? That statistic is alarming, and is precisely what drove NTEN and Mobile Citizen to launch the first Digital Adoption Survey. We wanted to explore digital adoption from the basic nonprofit operations level, but also understand the impacts the digital divide has on delivering of services in the community. Equally as important was our shared desire to help nonprofits understand and help address this staggering statistic moving forward.

This survey explores how organizations keep staff connected, from offices to virtual teams, as well as how the Internet factors into program or service delivery. Beyond the organization's staff, this survey also looks to better understand how the community that is served influences digital decisions by staff and board. We hope this research provides an initial benchmark that we can all learn from and build on together.

Throughout this survey, we define the digital divide as any barrier that prevents people from being able to access the Internet.

Our goal in this initial report is to provide benchmarks and qualitative data about online technology and digital inclusion efforts among nonprofits and the communities that nonprofits serve.

Digital adoption, whether for organization or individuals, includes three requirements:

1. Access to the Internet where and when we want or need to go online;
2. Affordable equipment to use; and,
3. Training, or digital literacy skills enabling us and our constituents to use the Internet to support our work and lives.

In this report, respondents note obstacles around access, training, and devices used by their staff and community members. Recognizing where barriers exist is critical for creating the most successful solutions.

We hope that after reading this report, you are ready to learn more about the impact of digital adoption decisions and strategies for your organization and for your community. To help you and your colleagues explore best practices, learn from other organizations, and identify next steps, we will publish additional resources, provide a number of case studies, and present educational programs including webinars. All of these materials will be available on the NTEN website.

About NTEN

NTEN aspires to a world where all nonprofit organizations use technology skillfully and confidently to meet community needs and fulfill their missions.

We believe that technology allows nonprofits to work with greater social impact. We enable our members to strategically use technology to make the world a better, just, and equitable place.

NTEN facilitates the exchange of knowledge and information within our community. We connect our members to each other, provide professional development opportunities, educate our constituency on issues of technology use in nonprofits, and spearhead groundbreaking research, advocacy, and education on technology issues affecting our entire community.

Learn more at NTEN.org

About Mobile Citizen

Mobile Citizen, a Voqal initiative, works with nonprofits, social welfare agencies and schools to advance social equity through access.

We aim to help bridge the digital divide by reducing the costs associated with Internet access for nonprofits, social welfare agencies, schools and the people they serve.

Mobile Citizen was created via a unique, 30-year partnership with CLEAR — now a part of Sprint.

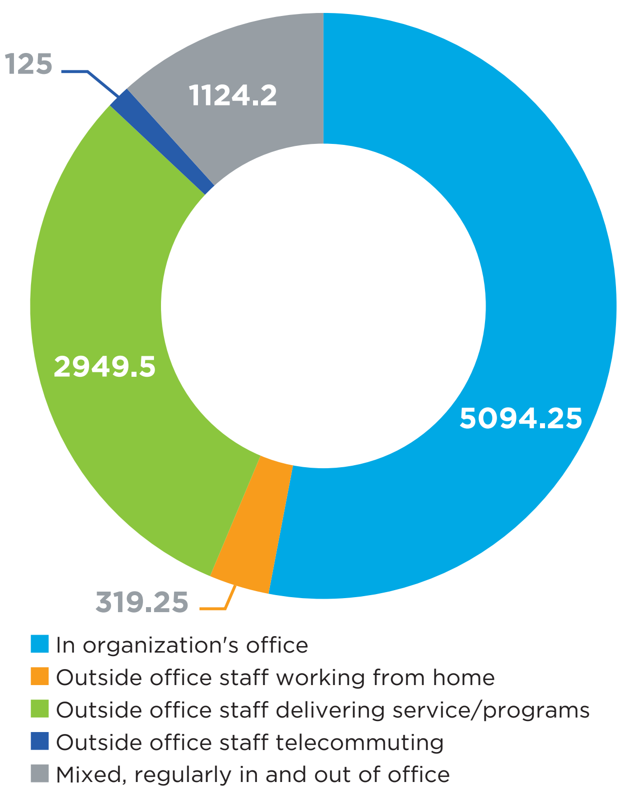
Learn more at mobilecitizen.org

Internet Access and Devices

Q In which of the following settings do your staff work? Indicate the number using Full Time Equivalent (FTE) staff working from each of the following locations in the boxes below.

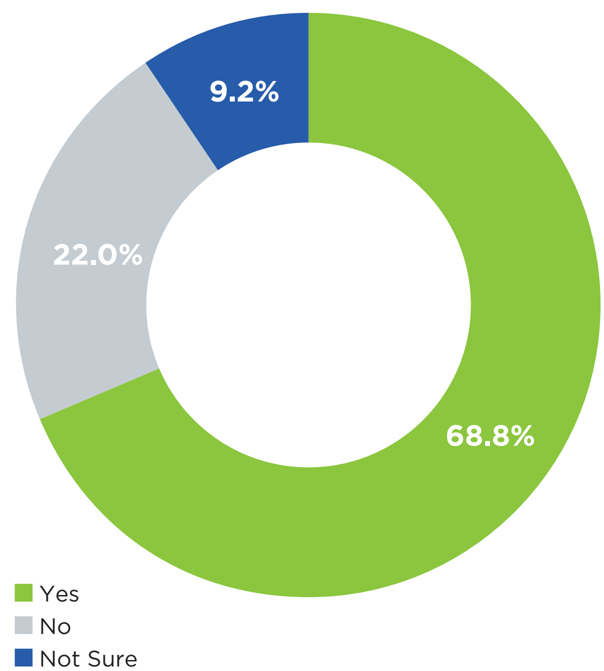
How flexible has the modern nonprofit workplace become? We asked respondents to tell us where their staff performed their work. Most organizations have a significant percentage of staff working at a central location, however many have staff that spend at least part of their time working outside the office, typically from home or delivering services. These responses do not vary significantly based on the size or primary focus of the organization.

FTE by Primary Workplace



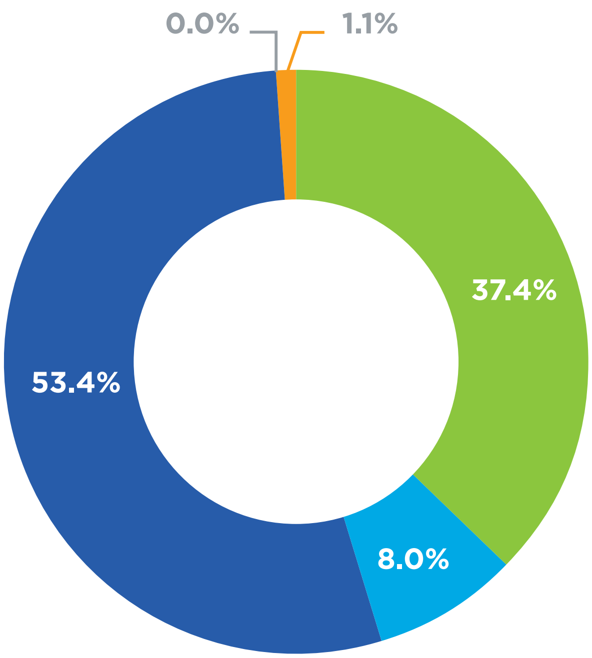
Q Does your organization include technology in your organizational strategic plan?

Identifying technology needs is an important part of the planning process. We asked respondents whether or not they included technology in their strategic plans. While over 2/3 say "yes," many indicate that technology is bundled into strategic areas rather than having a discrete component within the plan. Several "no" respondents indicate that they are planning to include technology or are undergoing a new – or first – strategic planning process.



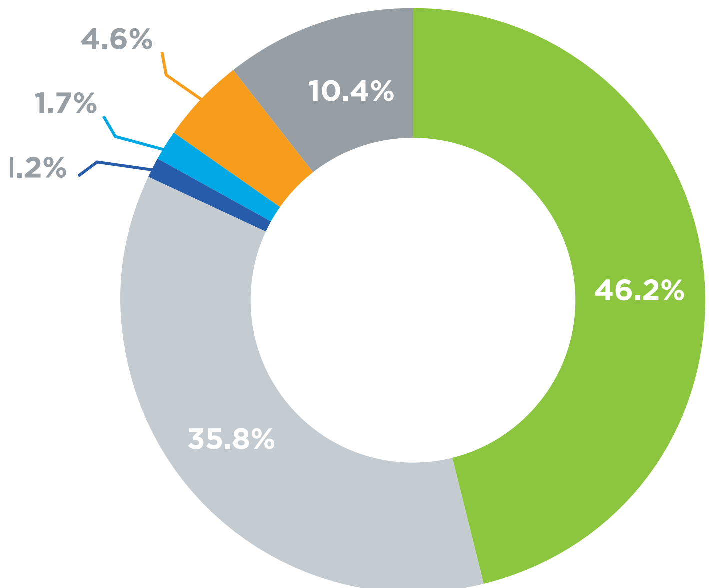
Internet Access for our Work

Q Which of the following best describes your organization relative to its Internet access scenario?



- We have a mixture of fixed and mobile Internet
- We have fixed Internet
- We have mobile Internet
- We do not have Internet access
- Other

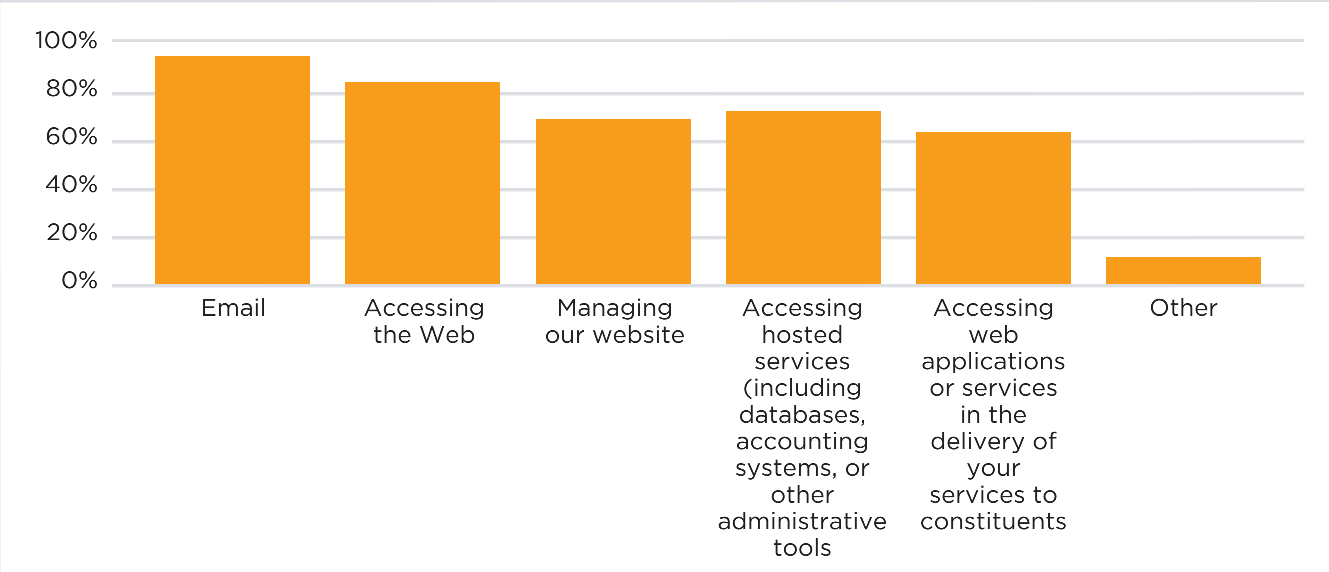
Q Which of the following best describes your organization's devices for accessing the Internet?



- Our staff primarily use desktop computers
- Our staff primarily use laptops
- We have a "bring your own device" (BYOD) policy, so device types vary
- Our staff primarily use smart phones
- Our staff primarily use tablets
- Other

Internet Access for our Work

Q What are the biggest reasons for needing Internet access for your organization? Please select all options that apply.



How Do We Use the Internet for Our Work?

Not surprisingly, all respondents identify the Internet as a critical business tool and indicate some form of access. Over a third rely on fixed Internet, while over half use a mix of fixed and mobile. A small, but significant, group rely entirely on mobile Internet access.

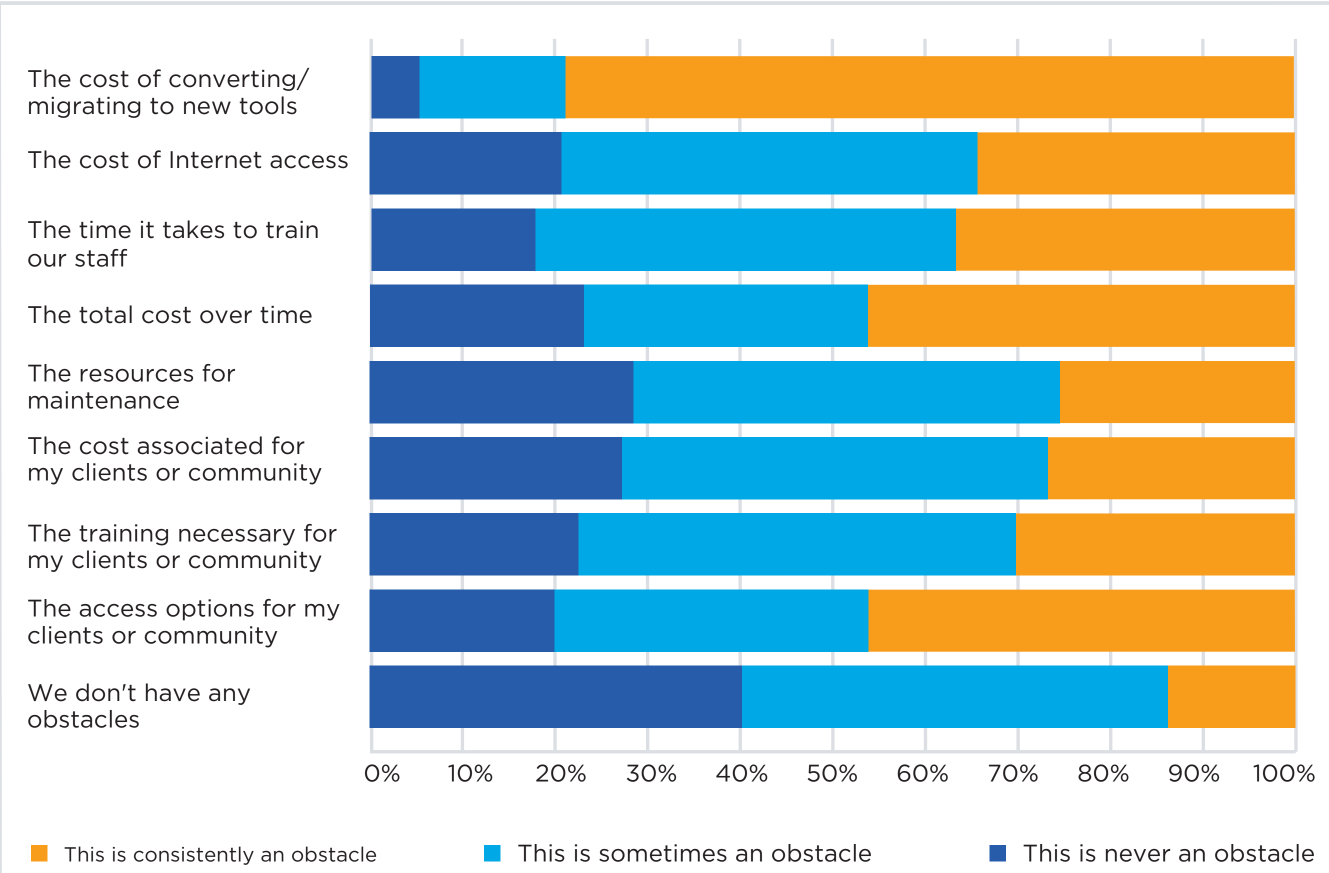
Further demonstrating the importance of Internet access, a majority indicate that they rely on it for all five of the reasons provided. Email is a near universal need, with access to websites a strong second. Respondents who provided their own business needs frequently cited meetings/conferences, and social media.

The importance of Internet access for multiple business functions is consistent across organizations regardless of size or primary focus, although larger organizations indicate a greater number of critical reasons for needing access. Here we start to see the need for access in order to access web applications or services in the delivery of services, an area we will explore further in the next section of this report.

When respondents indicate a primary computing resource for staff, nearly half specify desktop computers, and a third specify laptops. Mobile devices account for a very small percentage of "primary" resources.

Internet Access for our Work

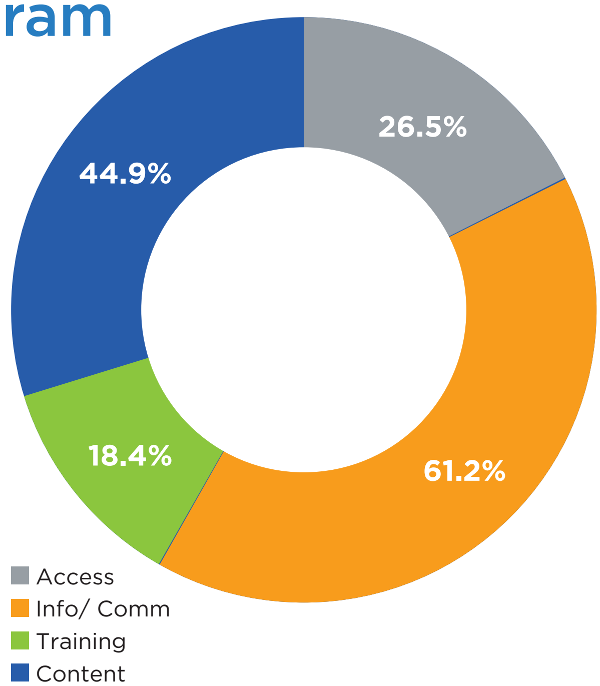
Q What obstacles, if any, prevent your organization from having its ideal Internet access scenario or delivering programs/services online?



Fortunately, over half of respondents indicate that they face no obstacles in maintaining what they consider ideal Internet access. When obstacles are mentioned, the most significant by far is cost. The expense of upgrading and migration is the biggest concern, with maintenance and training costs also noted. The availability of reasonable Internet access is another strong theme, both in terms of local/regional options and limitations based on the physical facility.

These findings reinforce what we know to be true relative to digital adoption – either for nonprofits or their client; that Internet access, affordable service and equipment and training are barriers that must be overcome for true digital inclusion.

Internet Access for Program & Service Delivery



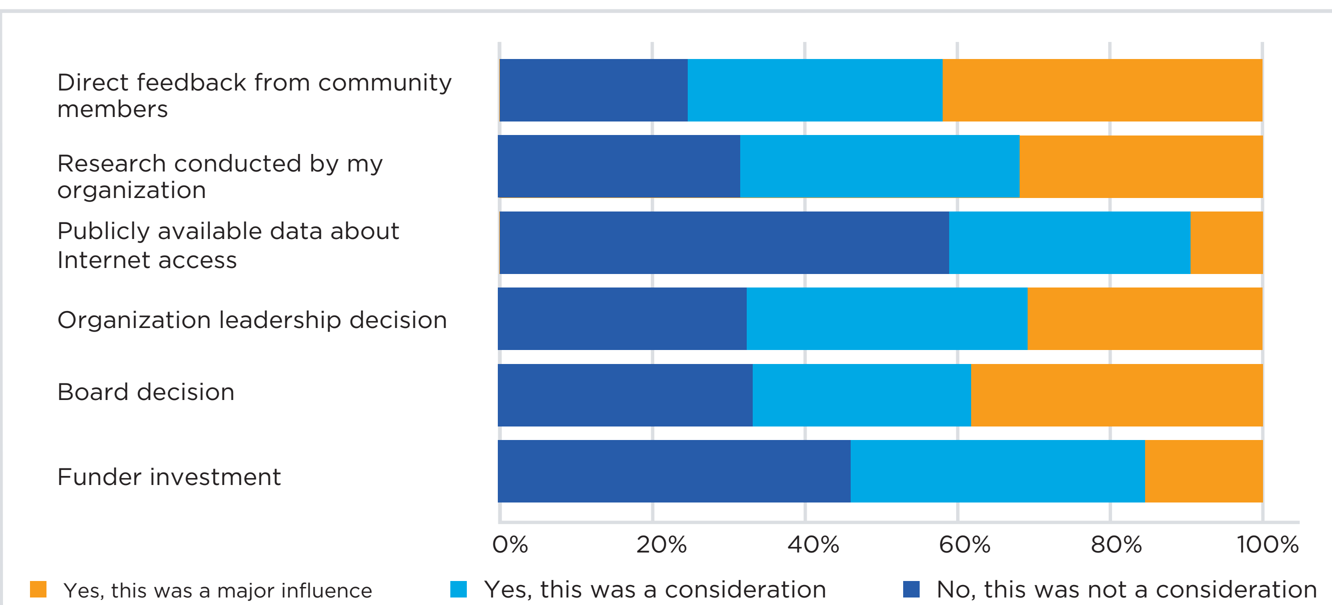
Q Do your constituents need Internet access to benefit or participate in your organization's services or programs?

Nearly 60% of respondents indicate that constituents need Internet access to participate in their services. They highlight four main service areas in which this is true:

- Communication and Information: Including completion of forms and applications, identified by 61% of respondents who indicated service areas;
- Access to content, mostly unique to the organization but including some links to additional resources (45%);
- Fundamental access issues, including delivery of basic services (27%); and
- Training, including delivery and registration (18%).

Organizations are informed by both internal and external factors when deciding to provide online services. The most significant factor is decision-making by organizational leadership; direct feedback from community members comes in a strong second. Information gathering – both through formal surveys and through research – is important for many respondents but not as likely to be a major influence. A number of respondents indicated standards and community expectations as additional factors.

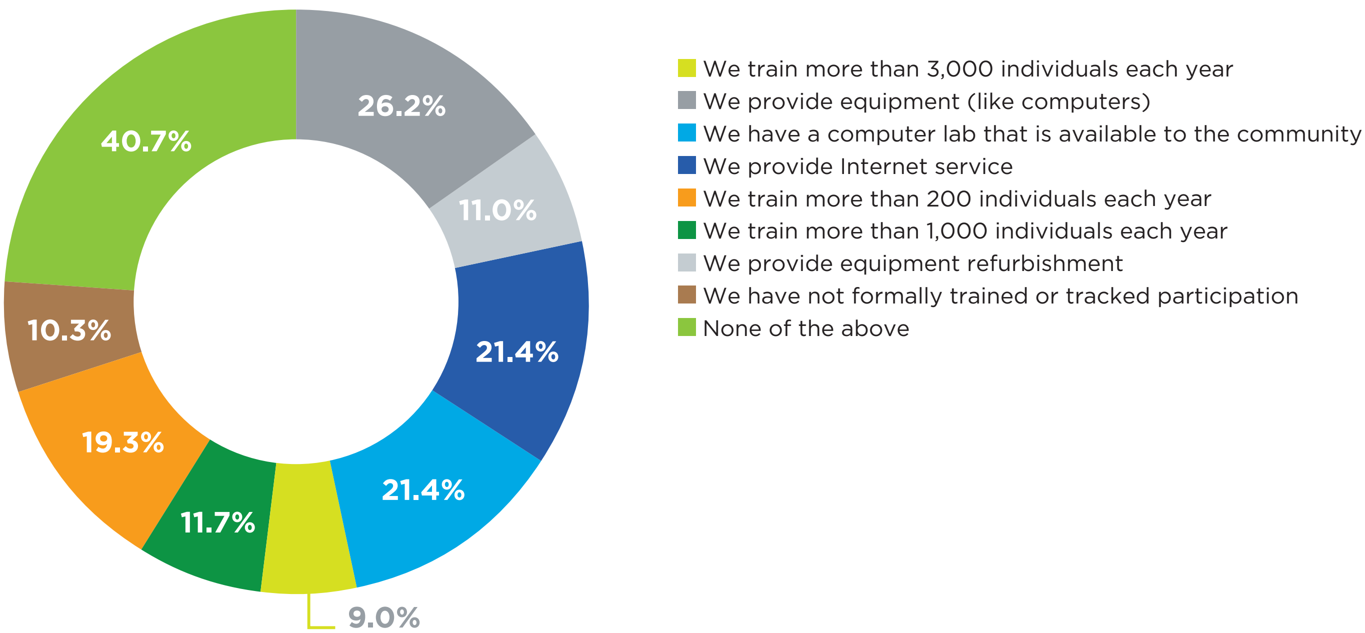
Q What factors influenced your decision to implement online services for your community?



Internet Access for Program & Service Delivery

Q As a part of delivering your program/services, which of the following do you offer: Please select all that apply.

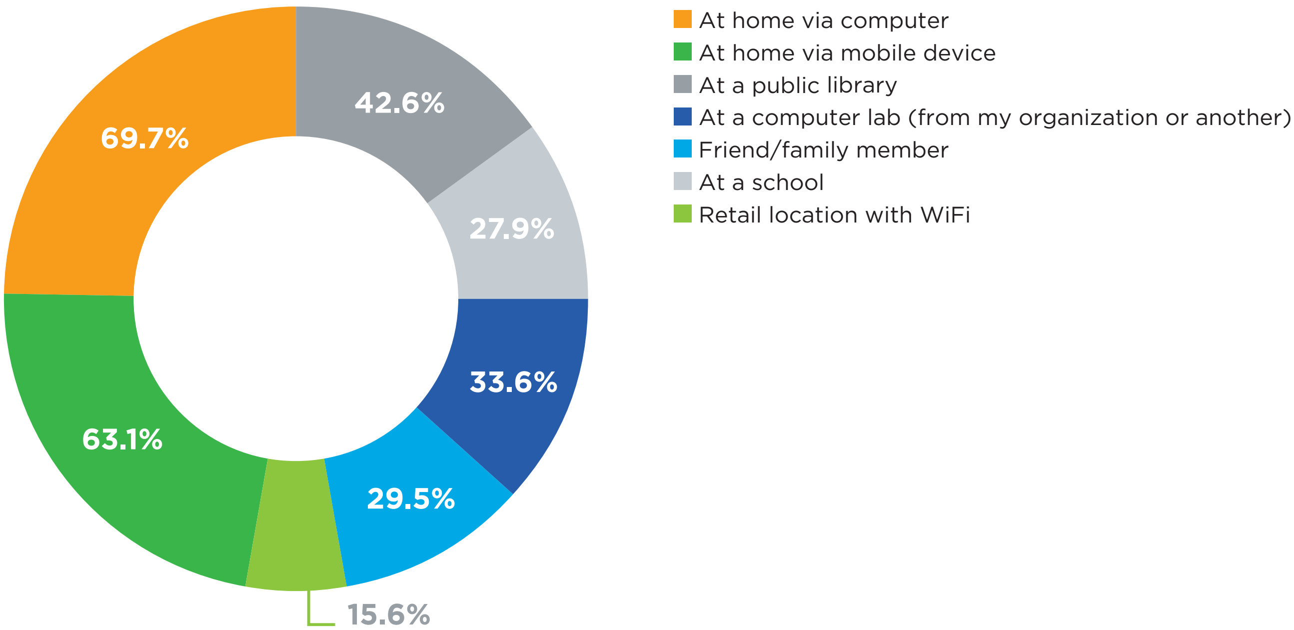
About 20% of respondents provide one or more of these services. Training is the most-frequently offered service. Services that increase access for constituents cluster below that.



Community Internet Access

Q How do your constituents most often access the Internet currently?

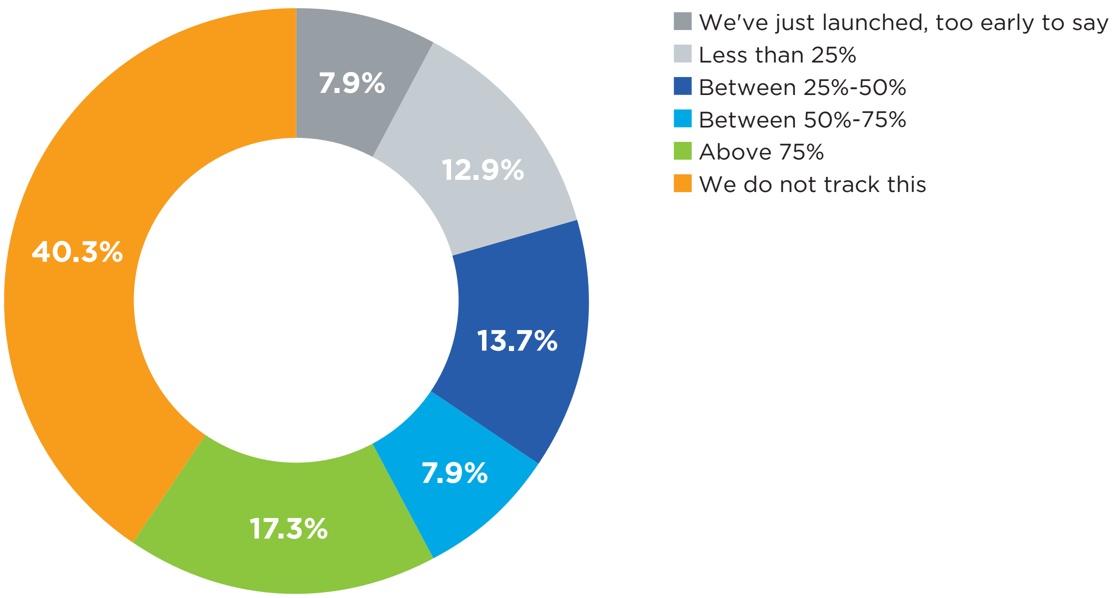
When respondents knew how their constituents access the Internet, over two-thirds indicated personal access through home computing or mobile devices. Shared access facilities are also significant, especially libraries and labs. Constituents generally must provide their own access or find a public/shared space.



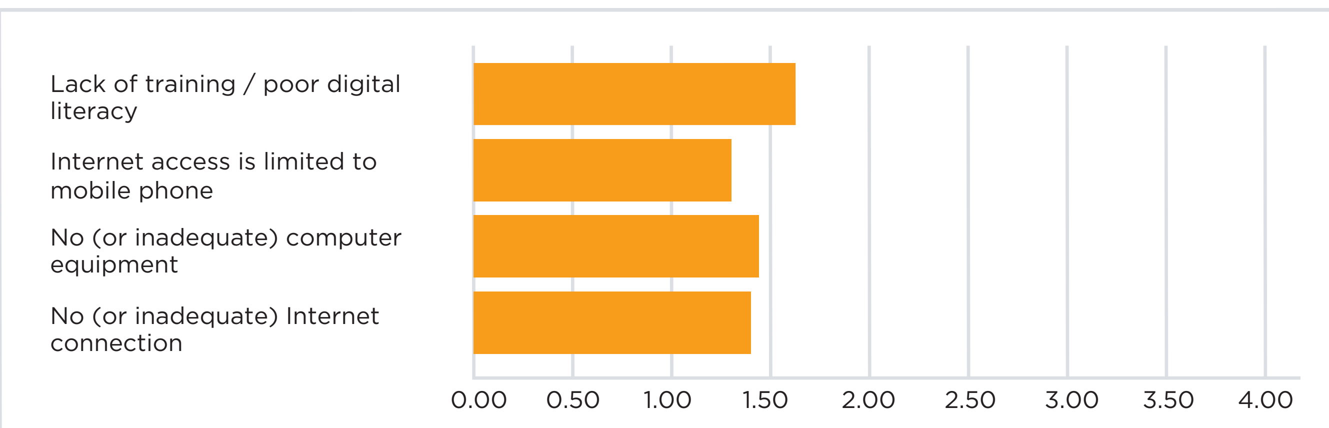
Community Internet Access

Q Of the programs or services you deliver online, what is the adoption rate or level of use by your community?

Respondents generally do not have information about adoption rates; 60% indicate that they do not track it, haven't had time to measure adoption for new services, or provide no answer. For those who have information, adoption rates are fairly evenly divided, with substantial adoption (75% or more) having a slight edge.



Q Which of these are barriers preventing your constituents from accessing your online services? Please rank the following issues with 4 being high or common barrier, and 1 being the lowest or least.

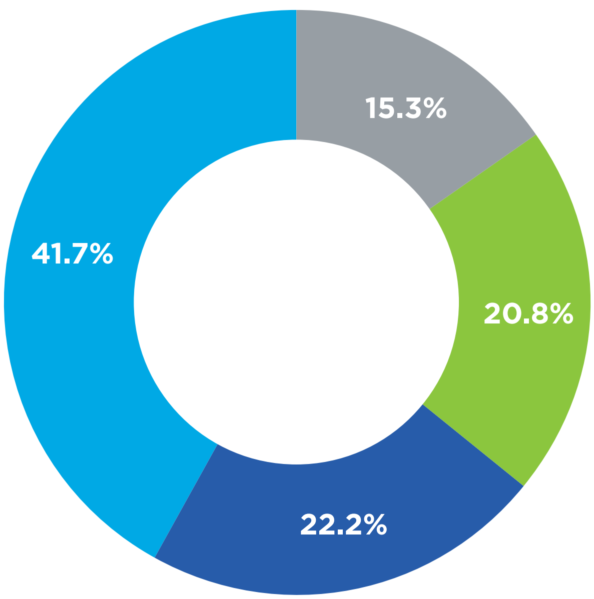


When respondents have information about their constituents' barriers, none of the suggested answers are rated as a significant barrier. Lack of training and digital literacy rate highest. A number of respondents add age and generational challenges to the list.

Digital Inclusion Efforts

Q Which of the following descriptions most closely reflects your organization's current overall position and participation in digital inclusion efforts?

A majority of respondents indicate that they do not include digital inclusion or access training in their efforts. Those who do so are fairly evenly divided about the effort they put into these issues, diminishing slightly as the effort increases. Responses vary evenly across all organizations regardless of focus.



- We do not include digital inclusion or access training in our current efforts
- We recognize the benefit of digital access and training in our community and have programs each year
- We are a local thought leader with regular programs
- We are a national thought leader; we support other organizations doing this work and provide frequent programs

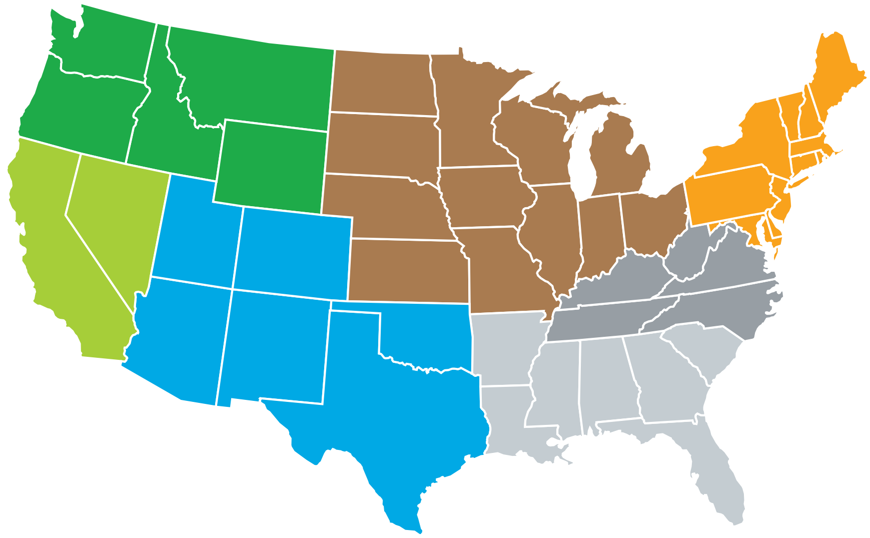
Q Based on the challenges you and/or your constituents may face in getting access to online-based services, is there anything more the industry can do to support you in closing the digital divide?

Just over a quarter of respondents answered this question, providing their own insights. They focused heavily on provision of low-cost access for everyone. Most of the answers specifically mention the cost of Internet access; many also mention finding solutions that reach all communities and depend less on commercial providers. Other suggestions included assistance with training, finding ways to provide low- or no-cost equipment, and increasing capacity.

Respondent Demographics

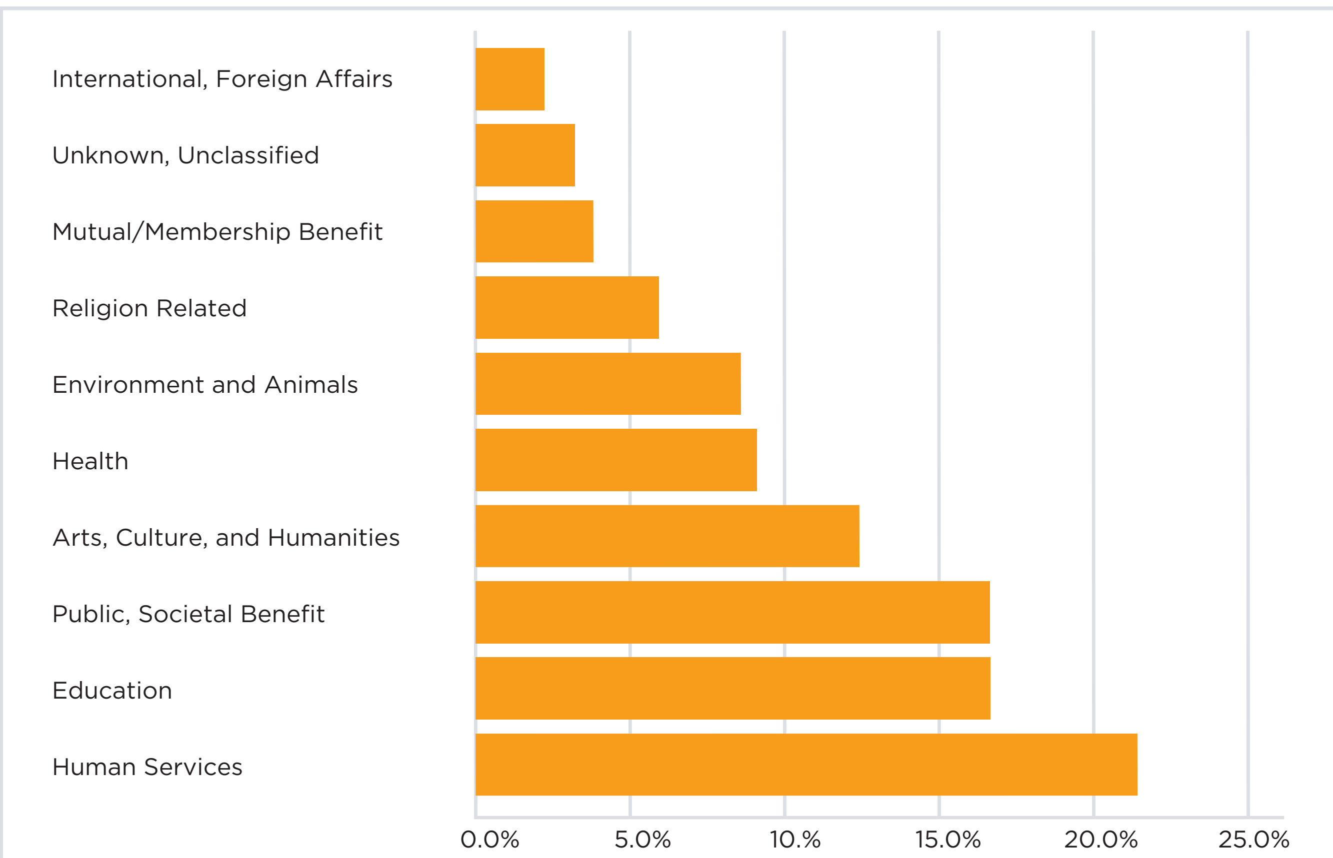
Q Where is your organization located? If more than one location, select your headquarters' location.

- Mid-Atlantic 13%
- Midwestern 28%
- Northeastern 24%
- Northwestern 6%
- Southern 5%
- Southwestern 4%
- Western 14%



Q What is the PRIMARY issue area of your organization? Please select the category closest to your primary focus. Note, these are the NTEE categories of nonprofits designated by IRS.

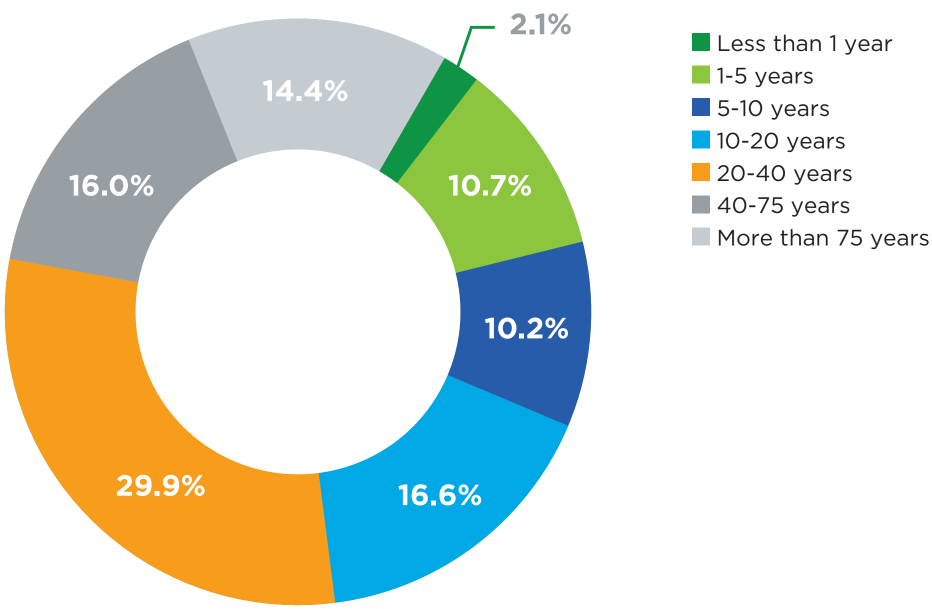
The majority of the respondents work in the areas of human and public services, with four categories accounting for nearly two-thirds of the total respondents. Other significant areas were Arts & Culture (12%), and Environment (9%).



Respondent Demographics

For how long has your organization operated?

The majority of respondents represented well-established organizations; 60% have operated 20 years or longer. Approximately 13% were relatively new (five years or fewer), with the remaining organizations fairly evenly distributed.



What is your organization's TOTAL annual OPERATING budget?

BUDGET SIZE	CRITERION	%	AVERAGE STAFF
Very Large	>$10 million	17.71%	242.42
Large	$5 - $10 million	6.29%	59.27
Medium	$1 - $5 million	26.86%	21.88
Small	<$1 million	49.14%	9.46

About how many staff does your organization have?

CATEGORY	OVERALL %
Leadership	7.62%
Program / Direct Service	67.14%
Communications / Marketing	4.00%
Fundraising / Development	6.34%
IT / Technology	2.85%