NTEN

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a voqal initiative

Digital Adoption in 2018

Advancements and Challenges to Digital Engagement at Nonprofits

An NTEN Report

May 2018

www.nten.org/reports

Introduction

The internet is truly a required service for any organization to be successful in 2018. From voice-over-IP telephone service to email, and file sharing to websites, your organization is inevitably using the internet every day to operate internally and to communicate with your community.

But what if your programs are meant to serve people who are among the 60 million Americans who don't have internet access at home? They aren't accessing your website, reading your emails or registering for your events. They are not benefitting from important work, particularly in the areas of education, workforce development, and accessing social services.

At NTEN, we believe that the internet is a powerful tool to help nonprofits work more effectively and efficiently so they can better meet their missions. We also believe that nonprofits are trusted partners in the communities they serve. As such, they are in a unique and important position to help their community members who are not online find the relevancy, tools, and skills to access the services, benefits, and social connections that await online.

The Digital Adoption survey seeks to understand how organizations are making decisions and addressing the challenges of internet access and use by both staff and the communities they serve. Nearly 60 percent of organizations surveyed said they do not provide any digital inclusion programming, and the biggest barrier to doing so is resource and capacity—not surprisingly, the top two indicators that organizations would provide digital literacy programs and other services were new or increased funding and training for staff.

The good news is digital adoption is increasing, but there are still gaps or needs among specific communities that digital inclusion programs have the opportunity to address.

Wherever your organization may be today with regards to digital inclusion, we hope this report helps you understand some of the challenges, opportunities, and considerations for incorporating digital equity into your organization's mission.

Contents

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

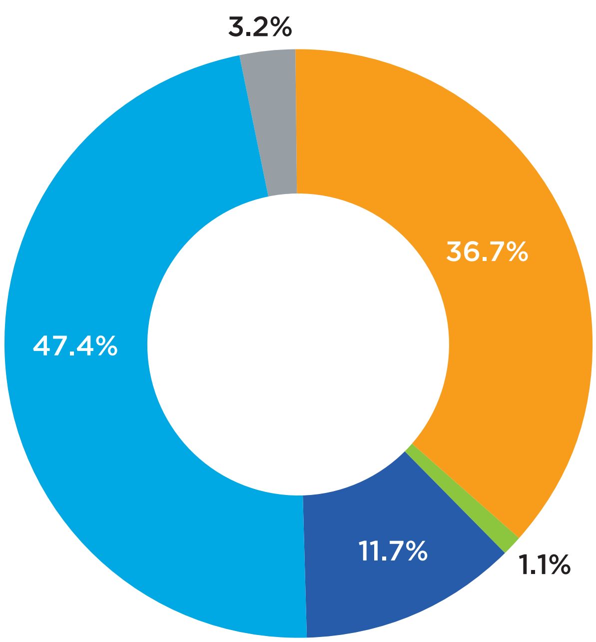
Mobile Citizen, a Voqal initiative, actively advances social equity through access by providing low-cost wireless 4G internet exclusively to nonprofit organizations, educational entities and social welfare agencies. Championed by a national collaboration of EBS (Educational Broadband Service) licensees, Mobile Citizen's internet service is available nationwide. We believe that making the internet available at an affordable price contributes to an engaged public and ultimately a more equitable democracy.

For more information, call 877-216-9603 or visit mobilecitizen.org.

Operations — Internet Access and Planning

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.

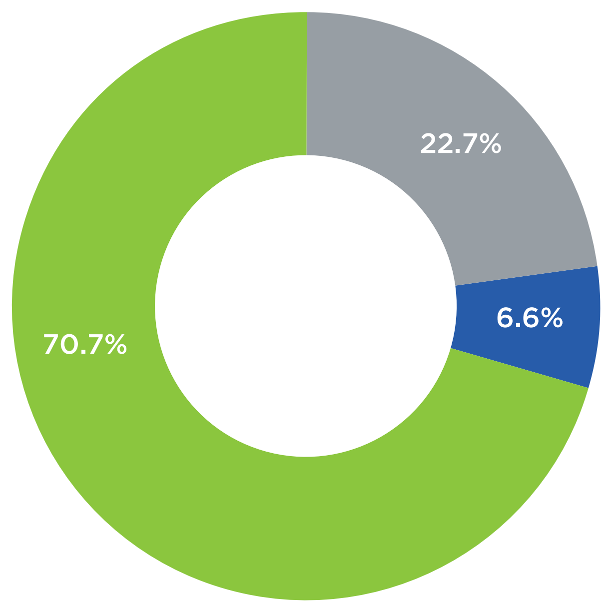
How flexible has the modern nonprofit workplace become? We asked respondents to tell us where their staff performed their work. Most organizations have a significant percentage of staff working at a central location. Many have staff that spend at least part of their time working outside the office, typically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



- In organization's office
- Outside office staff working from home
- Outside office staff delivering service/programs
- Outside office staff telecommuting
- Mixed, regularly in and out of office

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

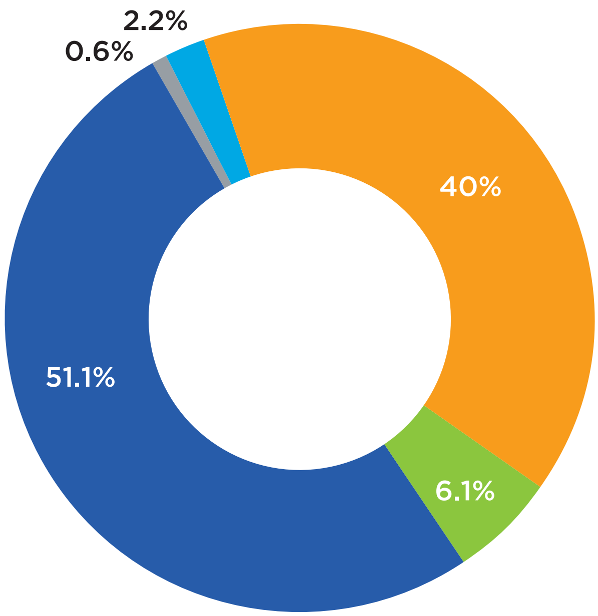
Identifying technology needs is an important part of the planning process. We asked respondents whether or not they included technology in their strategic plans. While over two-thirds say "yes," many indicate that technology is bundled into strategic areas rather than having a discrete component within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



- Yes
- No
- Not sure

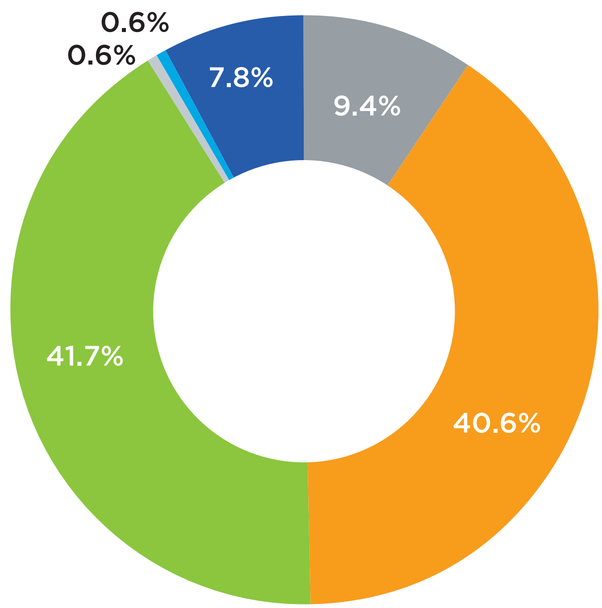
Internet Access for Our Work

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

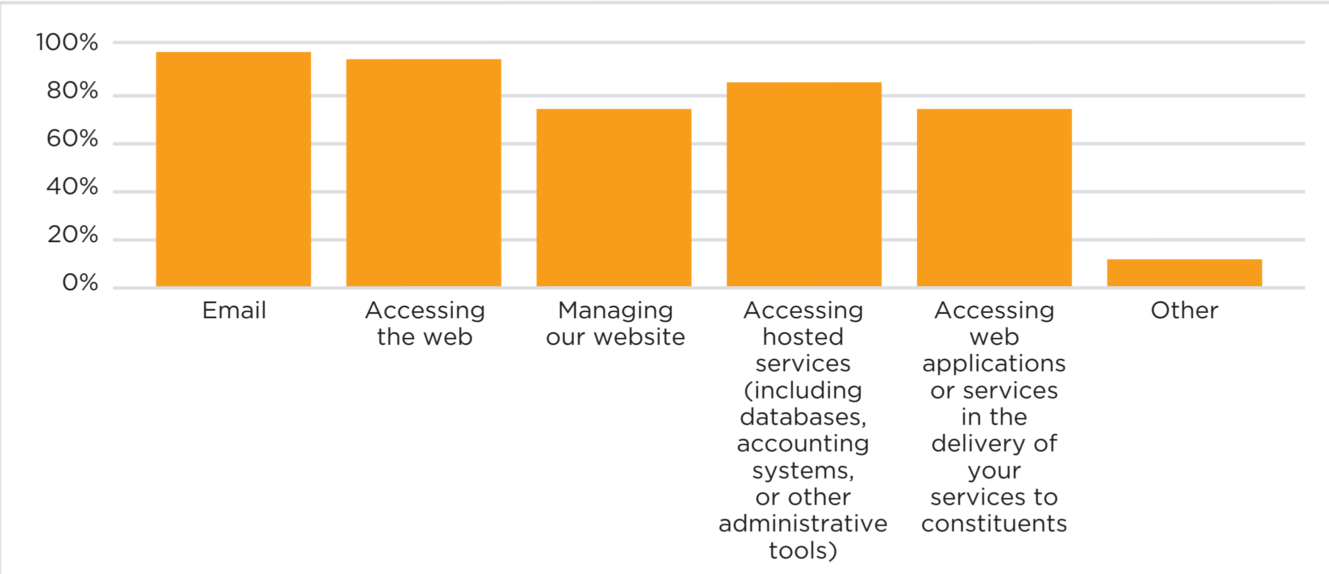
Q Which of the following best describes your organization's devices for accessing the internet?



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

Internet Access for Our Work

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



Not surprisingly, nearly 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 web access a strong second. Respondents who provided their own business needs frequently cited meetings, conferences, and social media.

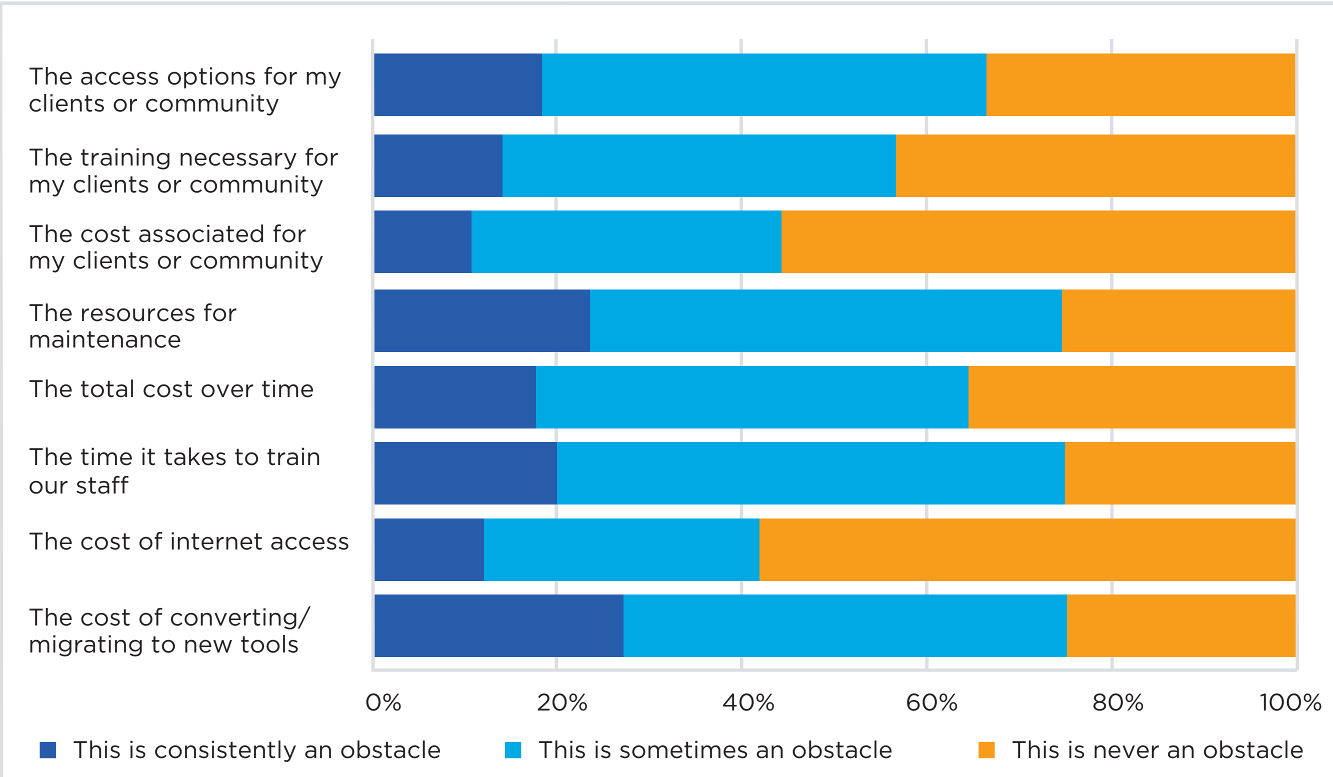
The importance of internet access for multiple business functions is distributed across organizations regardless of size or primary focus, although larger organizations indicate a greater number of critical reasons for needing access.

When respondents indicate a primary computing resource for staff, about 80% specify desktop computers or laptops with a fairly even split. Mobile devices account for a small percentage of “primary” resources.

Nearly 10% indicate a mix of resources; these answers are split between “it depends on the job/person” and “people supplement office technology with their own devices.”

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?**

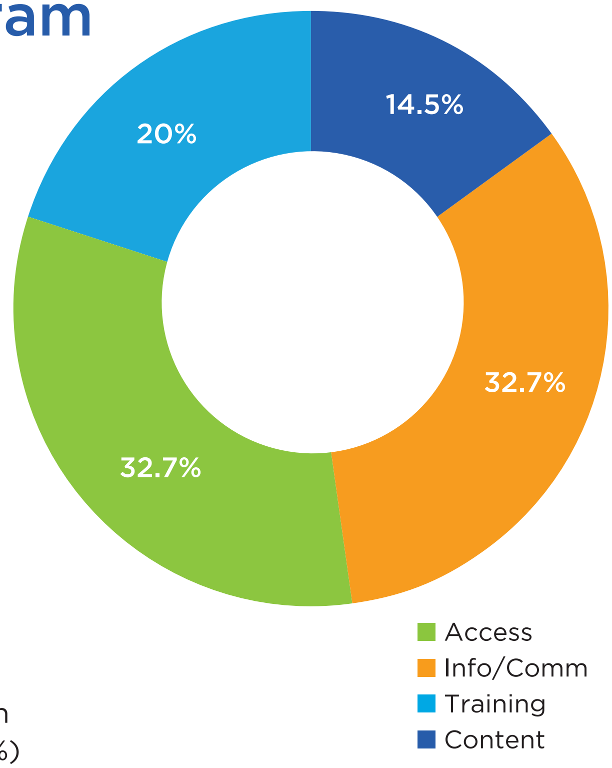


Despite the importance and omnipresence of internet access, most respondents indicated some barriers to providing optimal internet access.

When obstacles are mentioned, the most significant by far is cost of some sort, with training and the variety of options (or lack thereof) factoring in notably.

Respondents shared these concerns equally for both their staff and their clients.

Internet Access for Program & Service Delivery

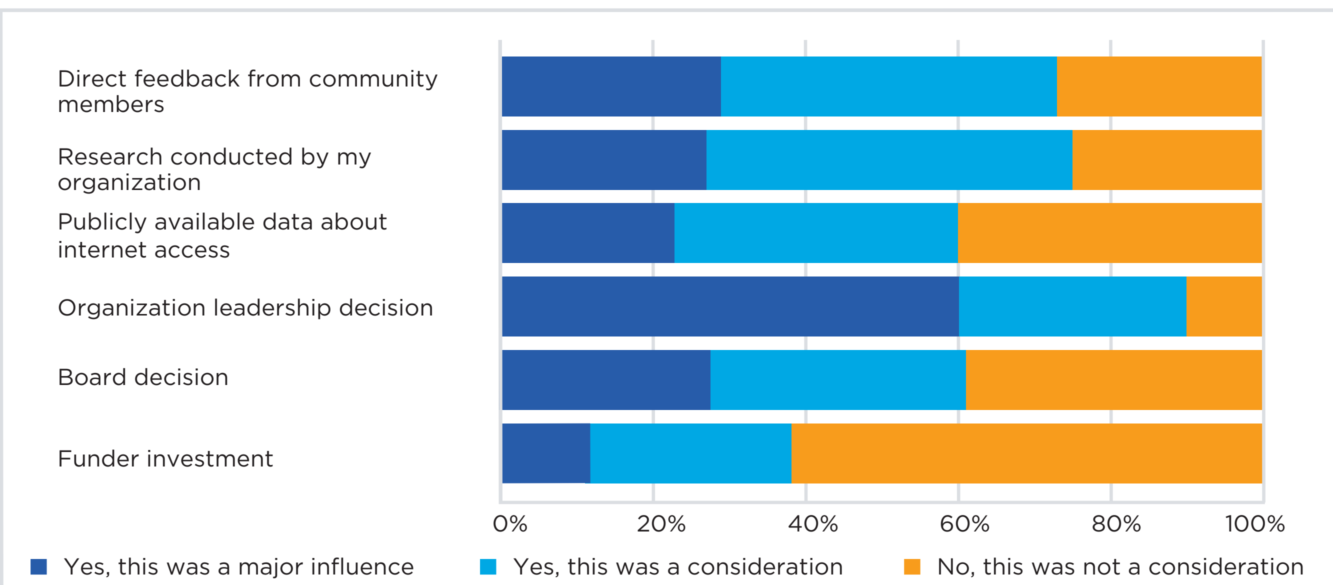


Q Do your constituents need internet access to benefit or participate in your organization's services or programs?

Over 50% 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 33% of respondents who indicated service areas
- Fundamental access issues, including delivery of basic services (33%)
- Training, including delivery and registration (20%)
- Access to content, mostly unique to the organization but including some links to additional resources (15%)

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

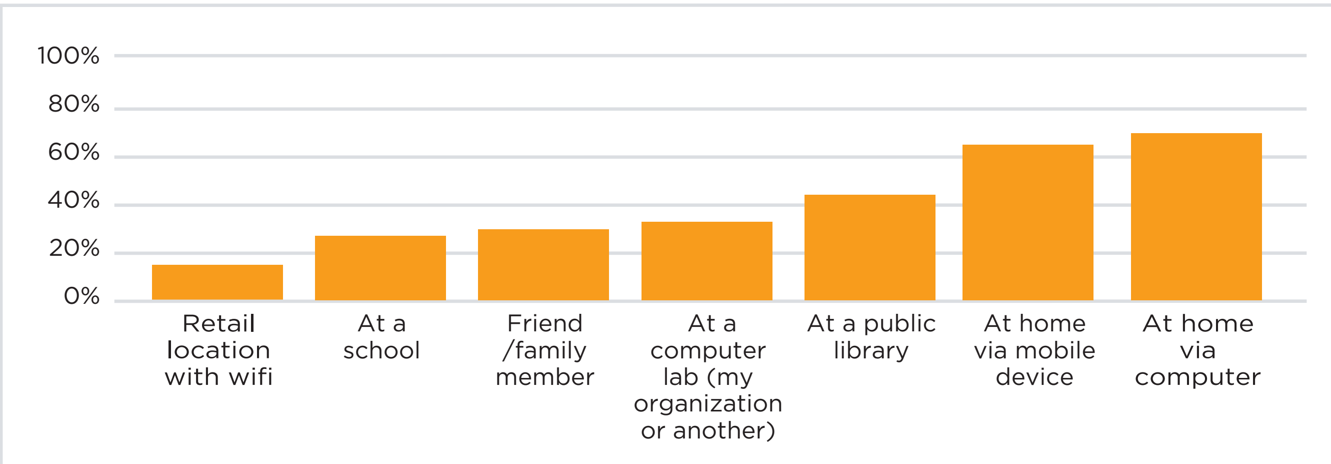


Organizations are informed by both internal and external factors when deciding to provide online services. The most significant factor is decision-making by organizational leadership; direct feedback from community members and direct research come in as the next strongest factors with very similar response rates. Investment is the least mentioned reason, but still factors into nearly 40% of decisions.

Community Internet Access

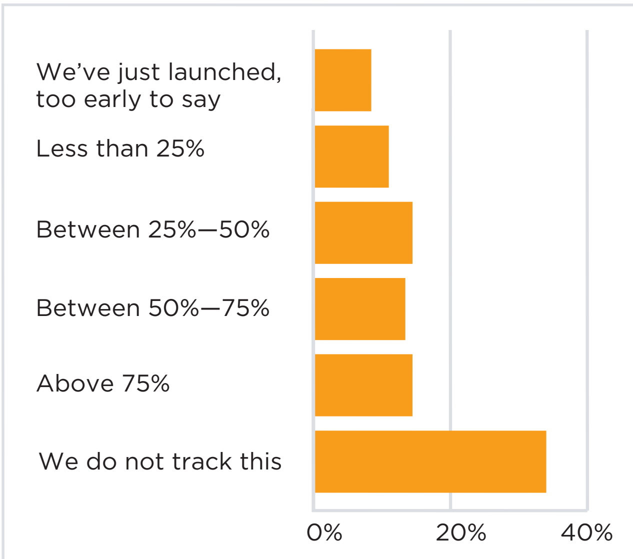
Q **How do your constituents most often access the internet currently?**

About two-thirds of respondents had information about how their constituents accessed the internet. The majority had some form of home access, with public services like libraries, schools, and labs also representing notable sections of the audience.

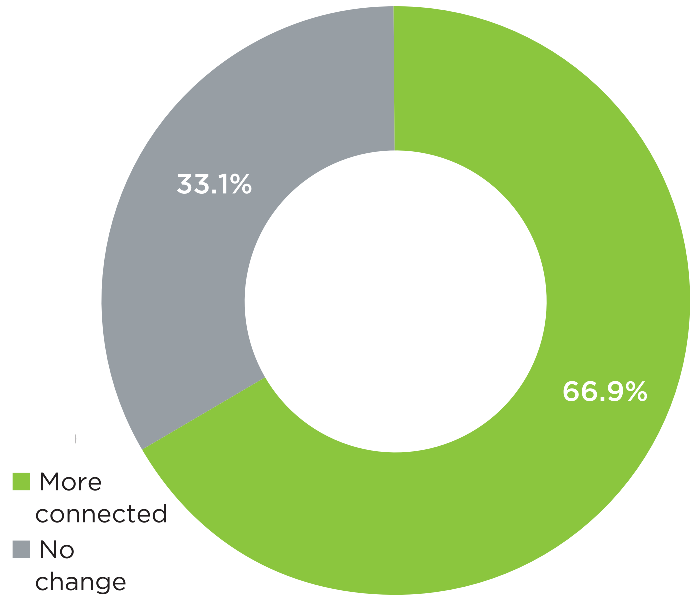


Community Internet Access

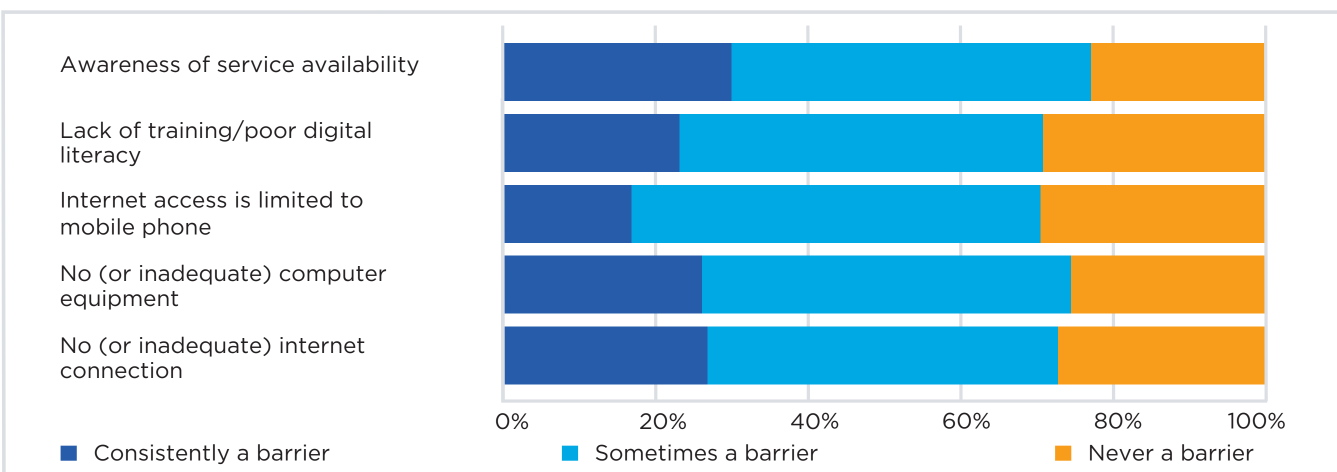
Of the programs or services you deliver online, what is the adoption rate or level of use by your community?



How has your community's overall level of adoption changed for the last year?



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.



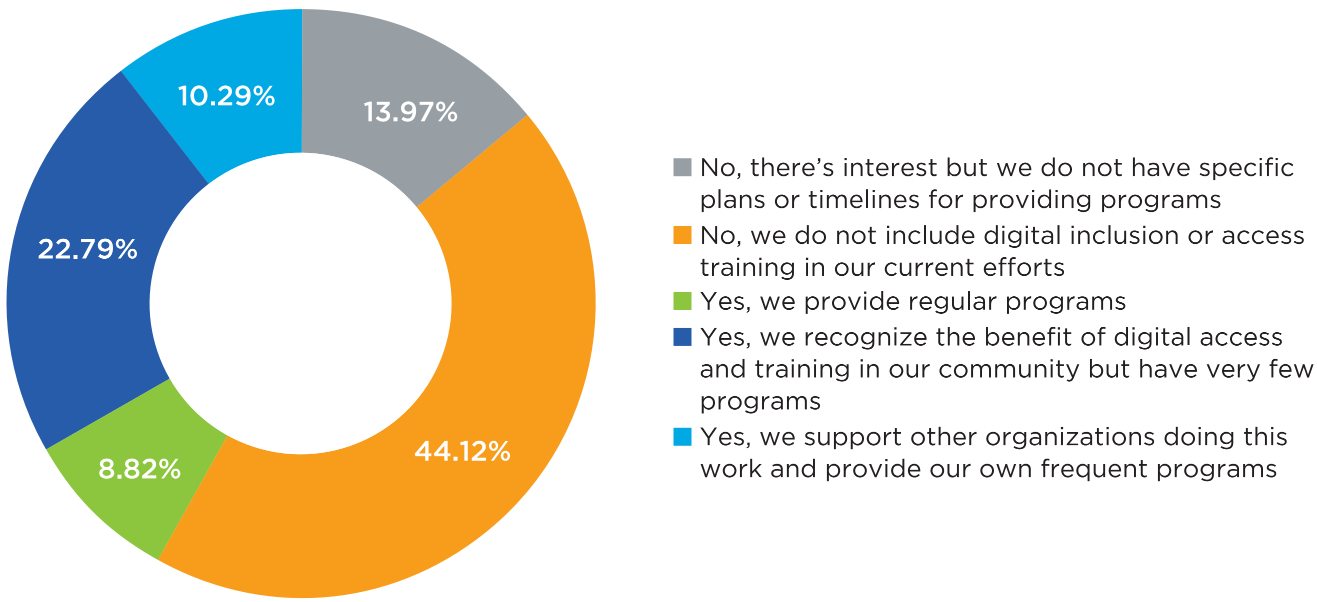
Approximately two-thirds of respondents had some information regarding adoption rates and barriers to adoption and access for online services. Adoption rates vary significantly, with the highest rate barely receiving the largest number of responses. Fortunately, nearly 70% of respondents indicated that constituents were more connected and no respondents indicated that constituents were less connected than during the previous year.

Respondents indicated that their constituents face all five suggested barriers to some extent nearly 60% of the time or more.

Digital Inclusion Efforts

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

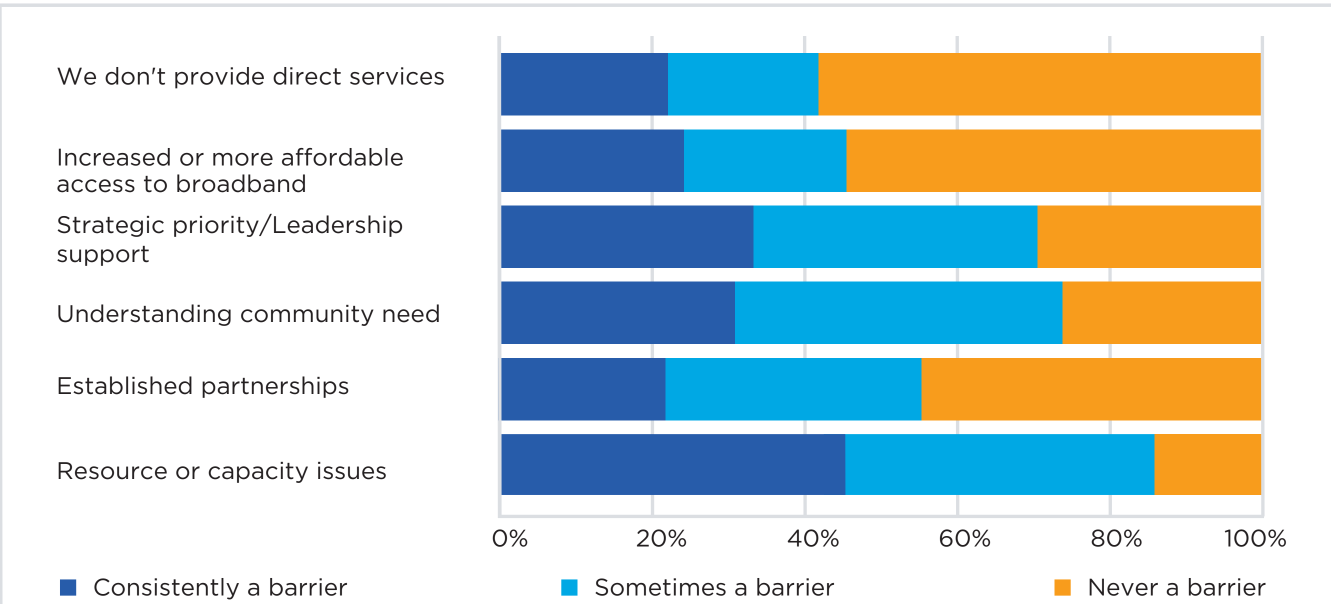
Just over 40% of respondents currently deliver digital inclusion programs and services.



Organizations That Do Not Provide Digital Inclusion Services

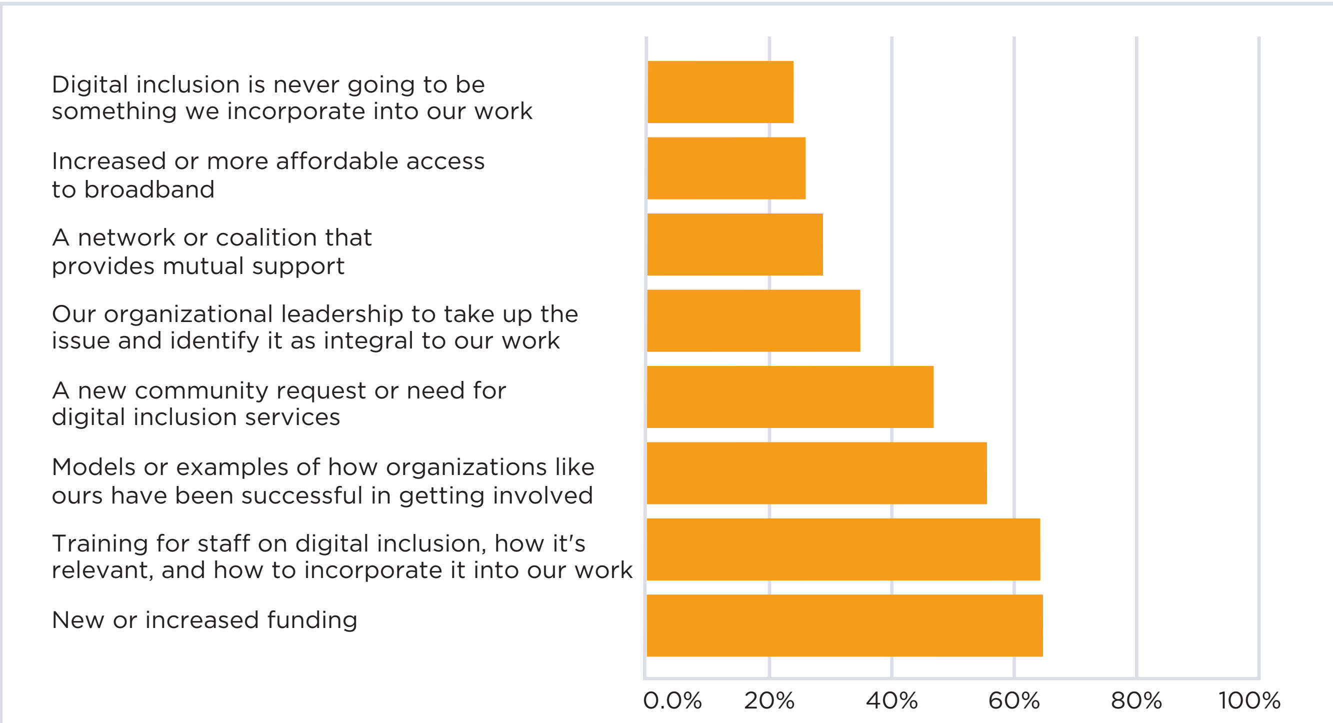
Unsurprisingly the barriers that respondents indicated to providing digital inclusion services align closely with the factors that might allow for service provision. Resources, training, and understanding of community needs are the most significant issues. Organizations choose to be cautious and responsible in expending resources and engaging in new ventures. Approximately 20% simply don't have interest in or relevant programs for such services.

Which of these are barriers preventing your constituents from accessing your online services?



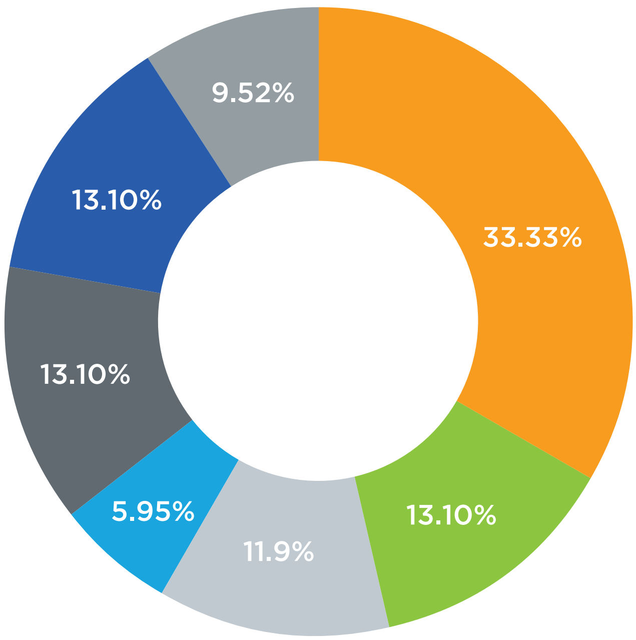
Organizations That Do Not Provide Digital Inclusion Services

What factors might move you towards taking up digital inclusion initiatives? Please select all that apply.



Organizations That Do Not Provide Digital Inclusion Services

What is your vision for your organization's digital inclusion programming?



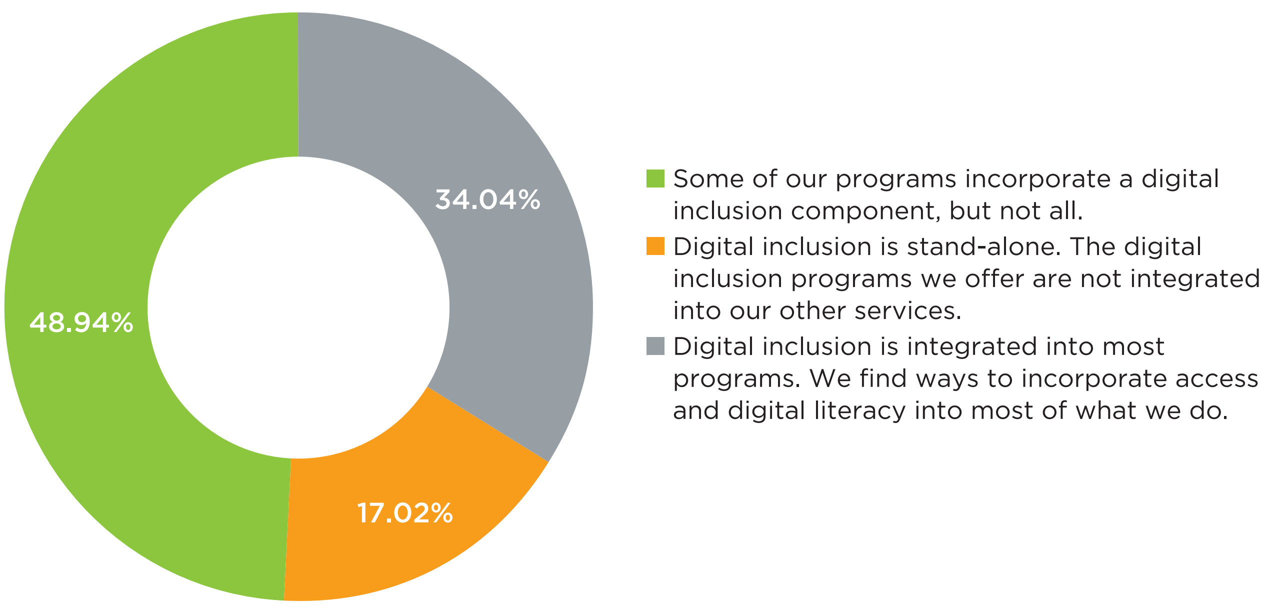
- To be an informed and engaged representative for our community when digital inclusion decisions or policy are being made
- To champion and support key digital inclusion issue but not otherwise engage in offering service or participating in decision making
- To engage a referral network so that we can refer clients to service providers
- To offer occasional programs or services that support skill development and digital adoption
- To offer regular programs or services that support skill development and digital adoption
- It's just not an issue we're ever going to engage with
- Other

Digital Inclusion Services Provided

Approximately 25% of organizations surveyed stated that they did provide digital inclusion programs, and filled out the following questions in regards to their programming.

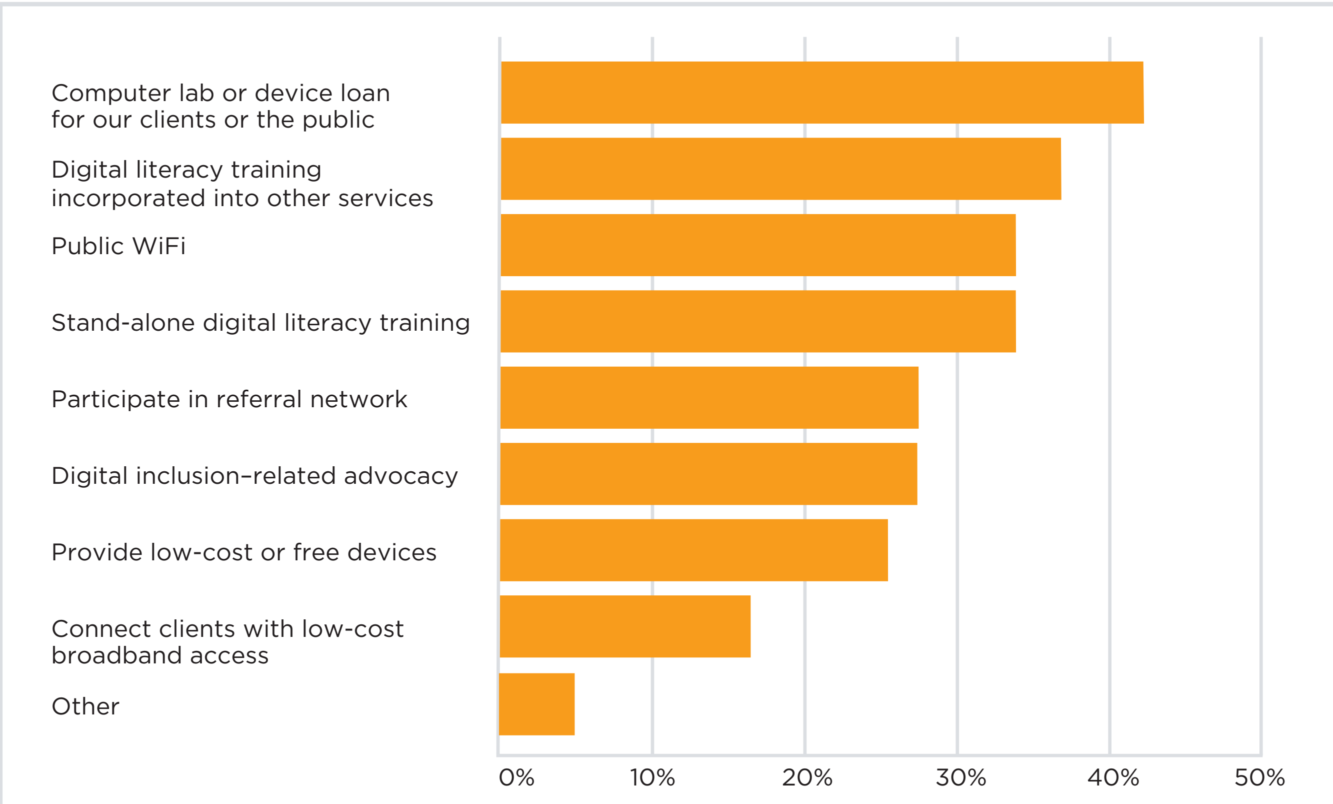
Q **Is digital inclusion integrated across your organization? For example, do English language classes include an online component? Do program staff routinely connect clients with digital inclusion–related services?**

For organizations that provide digital inclusion programs, those services are part of the strategic plan just over 50% of the time (19% of respondents were not sure). Nearly half of these respondents have partial integration of digital inclusion components. Over one-third feel that their programs are fully integrated. Taken together, responses to these questions suggest a gradual integration of digital inclusion programs into organization culture and services.



Digital Inclusion Programs Provided

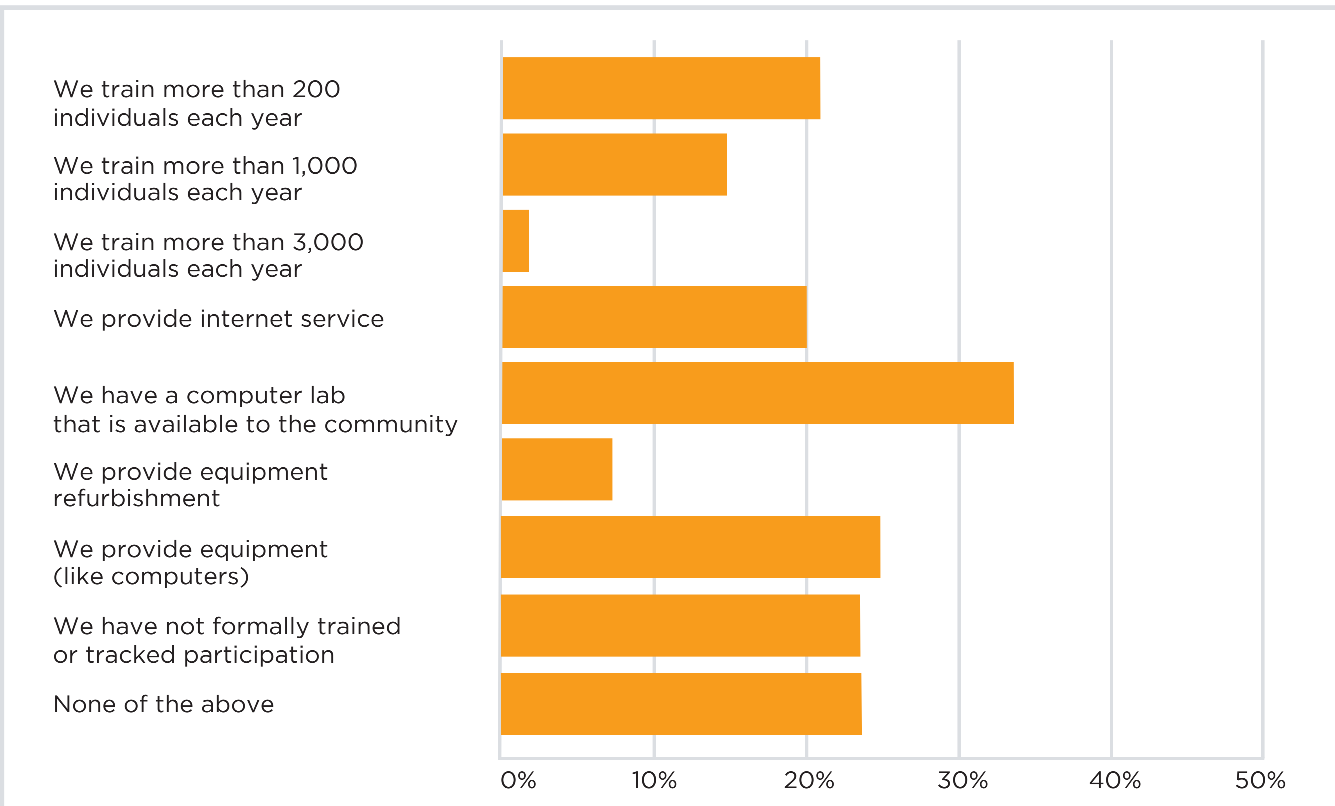
Q What digital inclusion programs do you offer? Please select all that apply.



Digital Inclusion Programs Provided

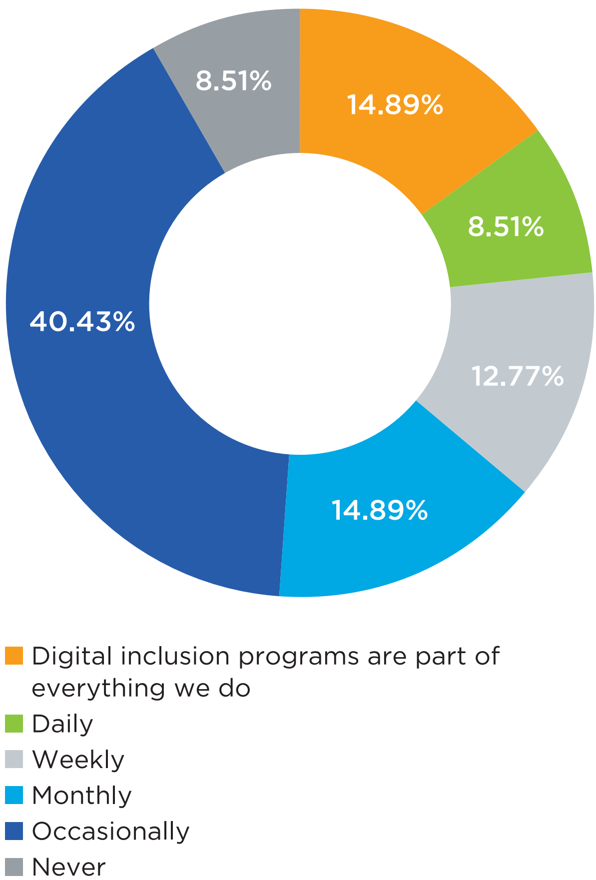
As a part of delivering your program/services, which of the following do you offer? Please select all that apply.

Most respondents offer a mix of services. Computer labs and training programs are by far the most common, the only two offered by more than one-third of organizations. Over one-fourth of respondents offer some kind of physical equipment to constituents. Access services—such as broadband, WiFi, and internet—are also frequently offered.

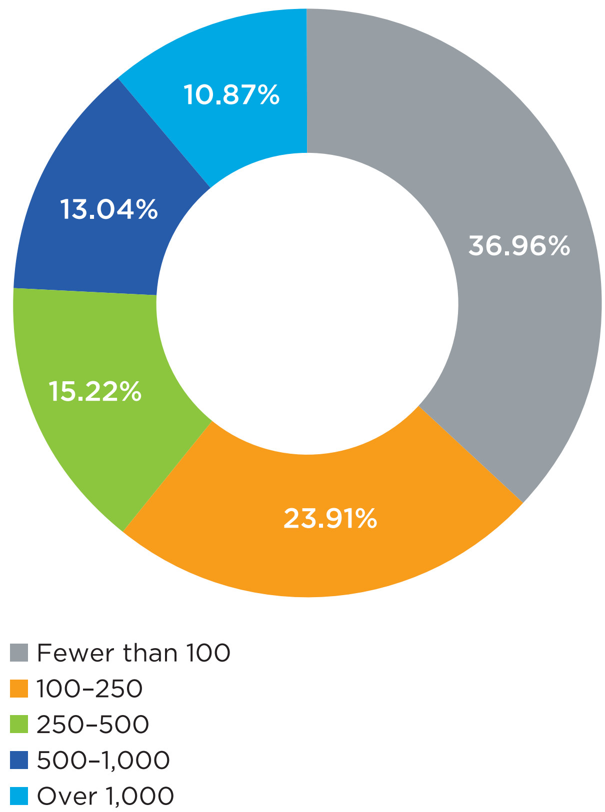


Digital Inclusion Programs Provided

Q How often do you offer digital inclusion-related programs, like workshops, classes or outreach initiatives?



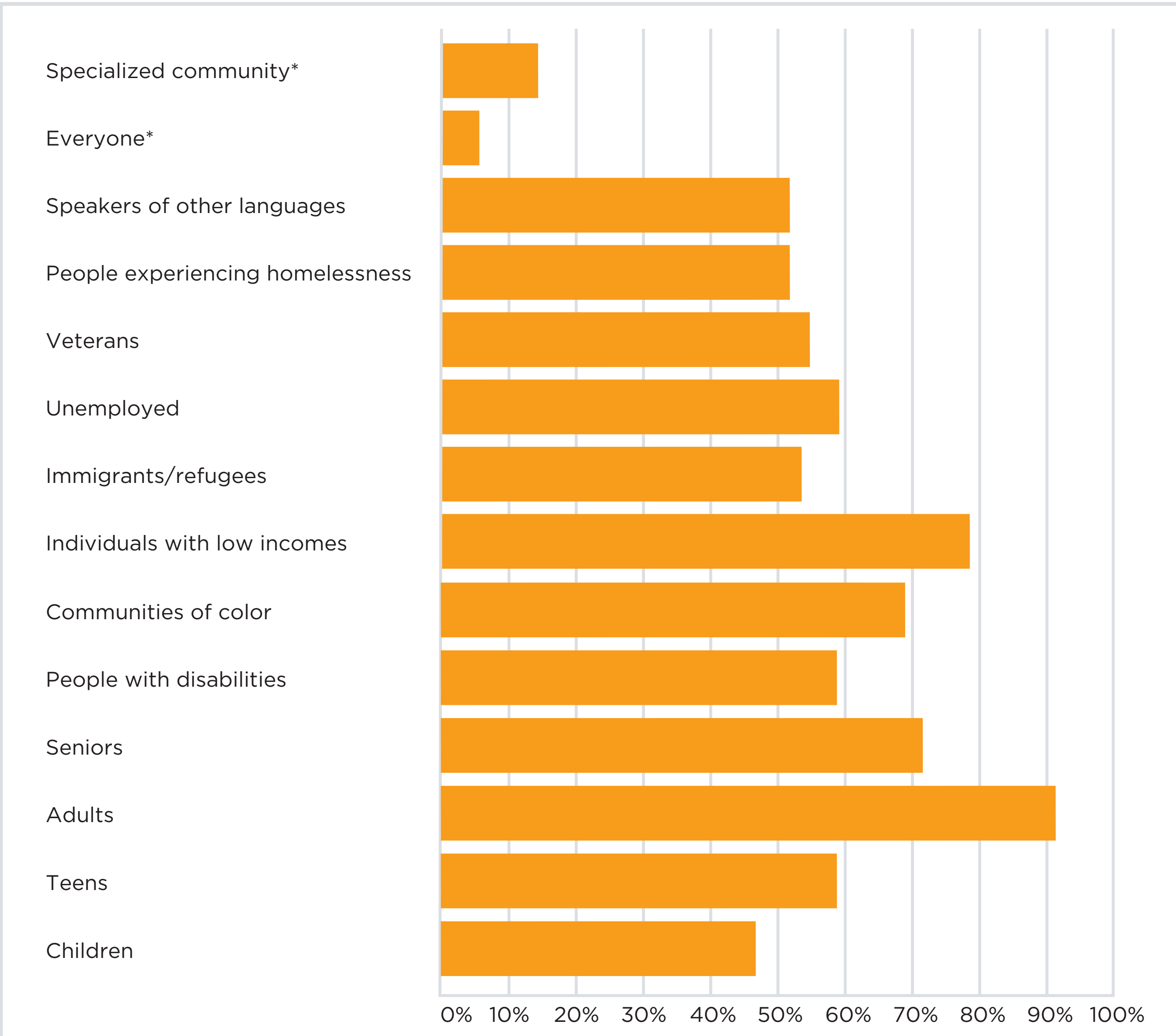
Q How many people do you serve through your digital inclusion programming in one year?



About 15% of respondents offer fully integrated, robust programs. Outside of this group, levels vary significantly, with about 40% offering occasional services to relatively small numbers of constituents. Not surprisingly, larger organizations are more likely to be fully integrated and to serve larger audiences.

Digital Inclusion Programs Provided

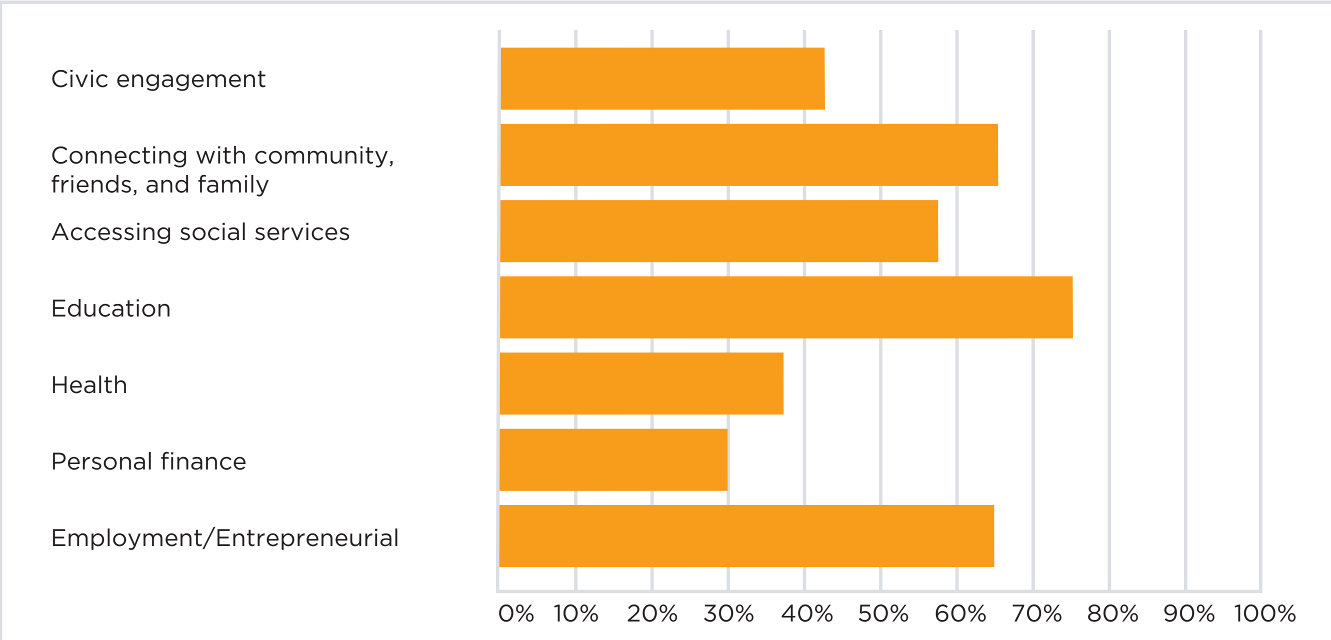
Q **Which communities do you serve? Please select all that apply.**



*Taken from "please describe"

Digital Inclusion Programs Provided

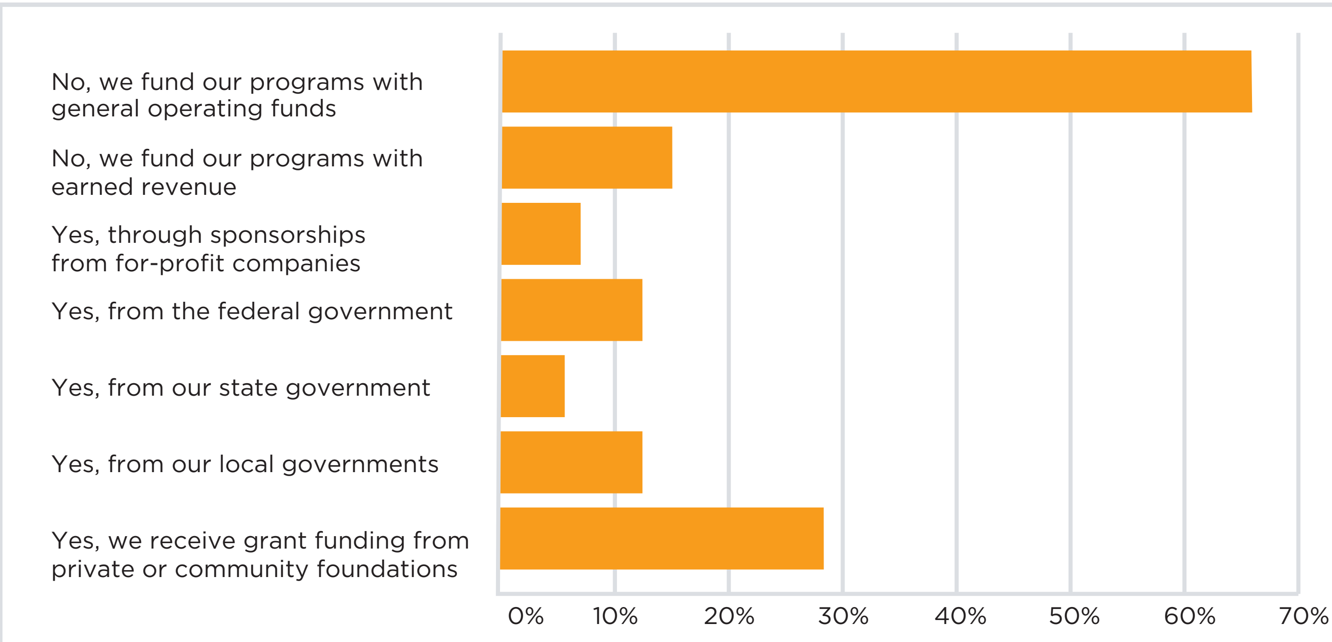
Q **What are the most critical areas in which access to technology and the skills to use it affects your clients? Please select all that apply.**



The majority of respondents indicated a mix of communities served and issues faced by those communities. Every constituent group listed is served by 40% or more of the respondents. The largest specific communities served are individuals with low incomes, communities of color, and seniors. Critical areas for technology skills and access are more widely distributed, with education being the clear leader.

Digital Inclusion Programs Provided

Q **Do you currently receive funding for your digital inclusion work?**
The vast majority of respondents (nearly 70%) fund their own digital inclusion programs and services. Those who have external funding receive it from a mix of sources, with foundation grants being the largest provider nearly two-to-one over the other options.



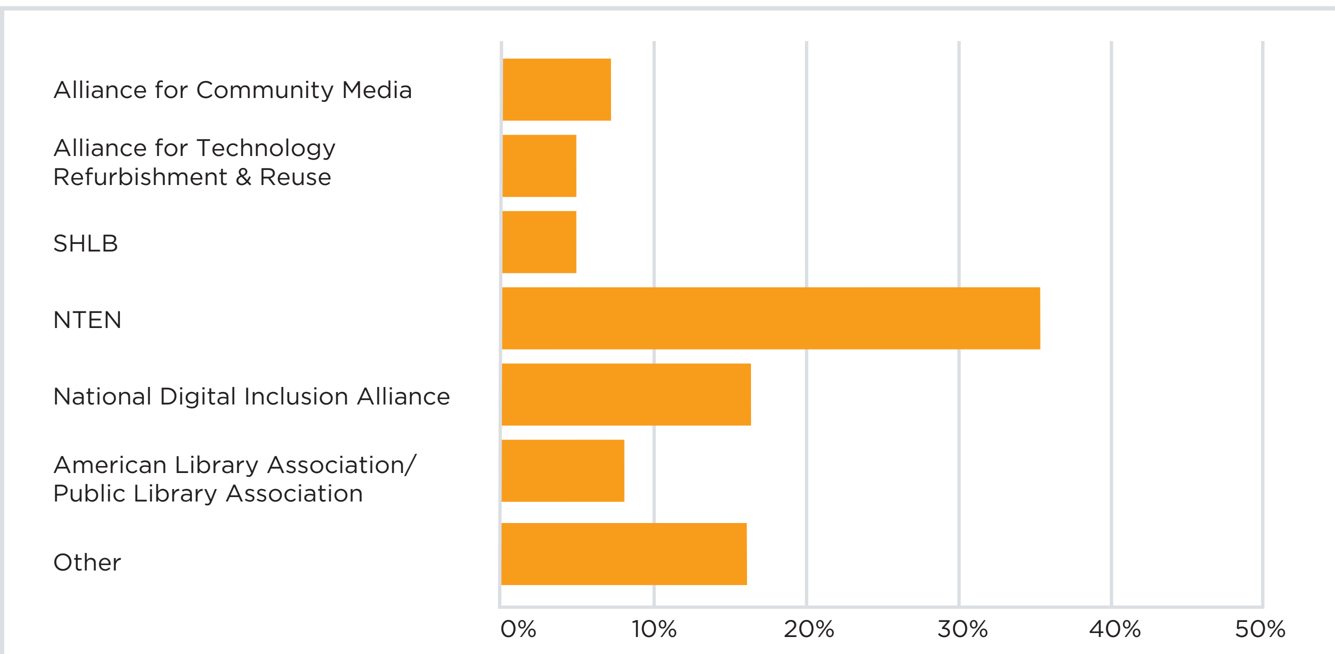
Digital Inclusion Programs Provided

How do you evaluate your digital inclusion work? What specific indicators and metrics do you evaluate?

Only about half of the organizations that indicated they offer digital inclusion programs and services answered these questions, and nearly half of those organizations had no specific evaluation criteria or were in the process of developing criteria. Of those who have evaluation strategies in place, a few methods and metrics are the most common:

- Pre- and post-testing scores
- Surveys indicating how well the service allowed constituents to meet its intended goal
- Raw numbers (attendance, clients, gate counts, etc.)
- Specific standards established by business partners or funding bodies

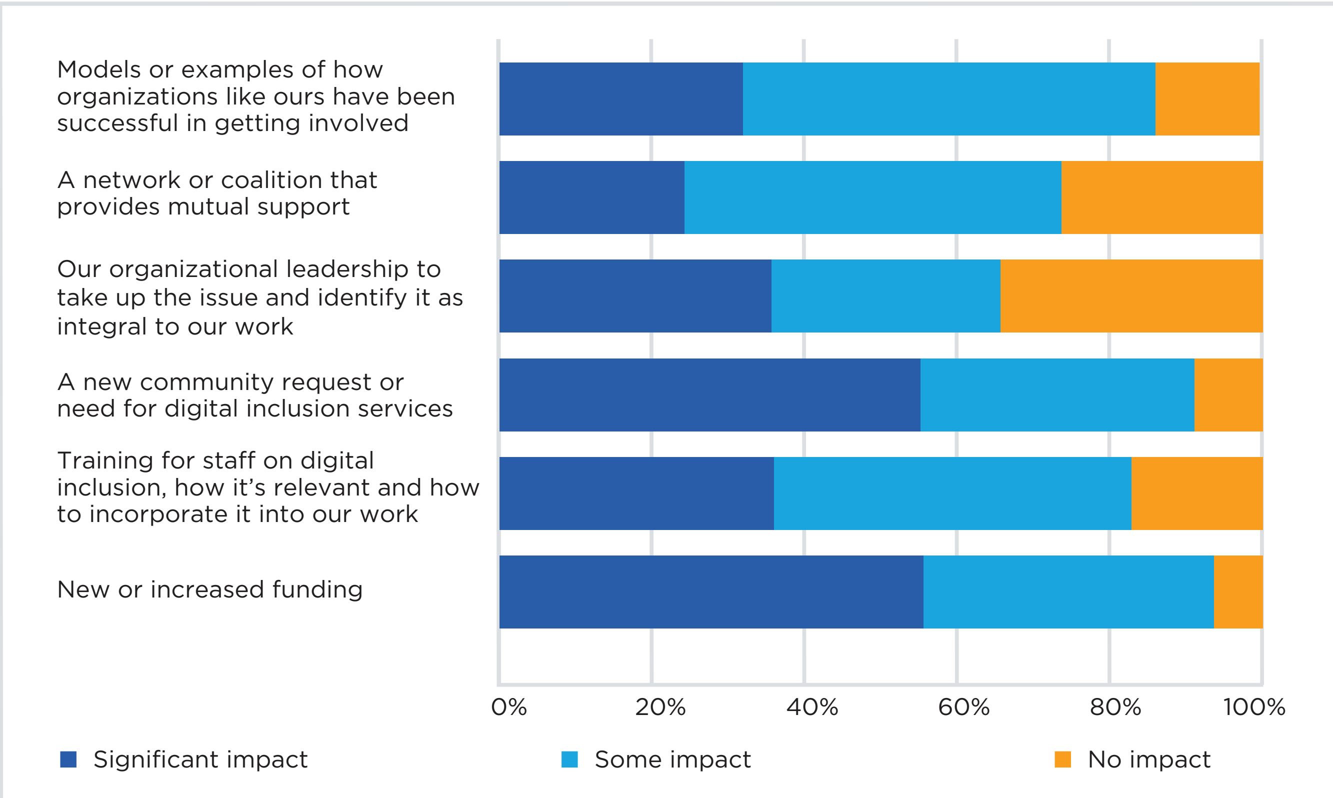
Which digital inclusion networks are you part of?



Most respondents belong to at least one network. Those who indicated “Other” generally belong to a service- or region-specific network.

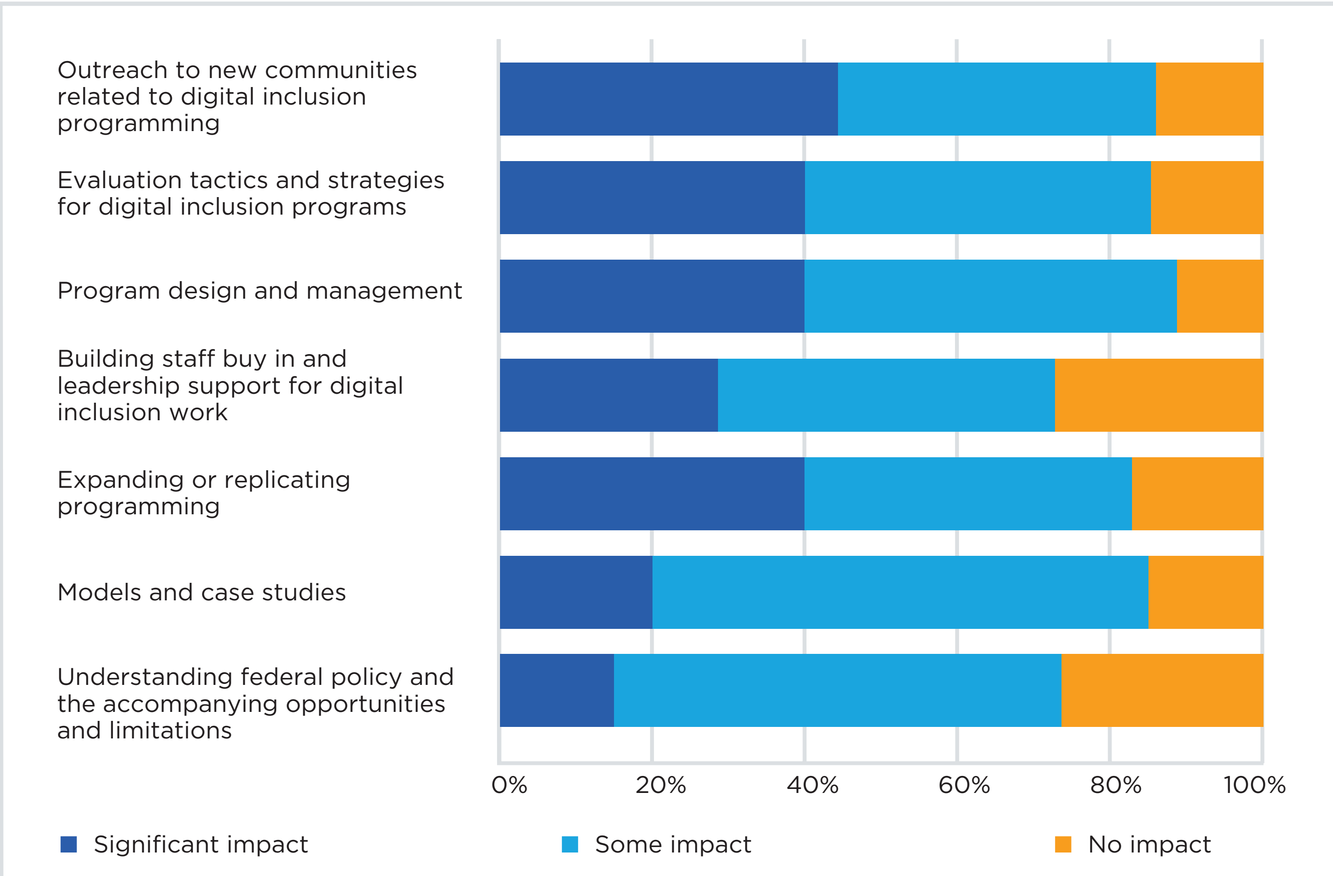
Digital Inclusion Programs Provided

What factors would support your organization expanding or taking up new digital inclusion initiatives?



Digital Inclusion Programs Provided

Q What types of training would your staff most benefit from in support of improving, expanding, or starting digital inclusion initiatives?

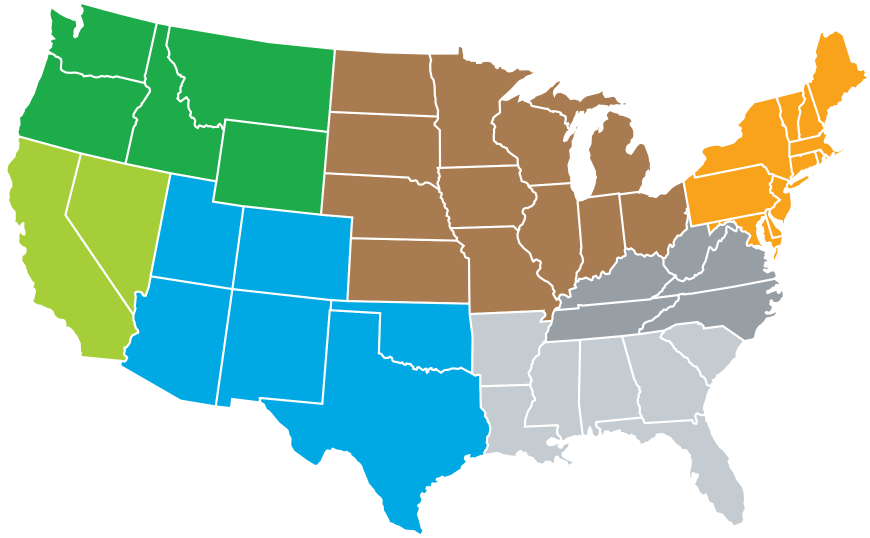


When presented with factors that might support new initiatives, organizations that currently have digital inclusion programs responded enthusiastically to all the options. Funding, training, best practices, and community needs were the most significant. Training had the lowest "significant impact" of the four.

Training possibilities were more evenly divided, with a similar focus on models and best practices and community needs.

Demographics

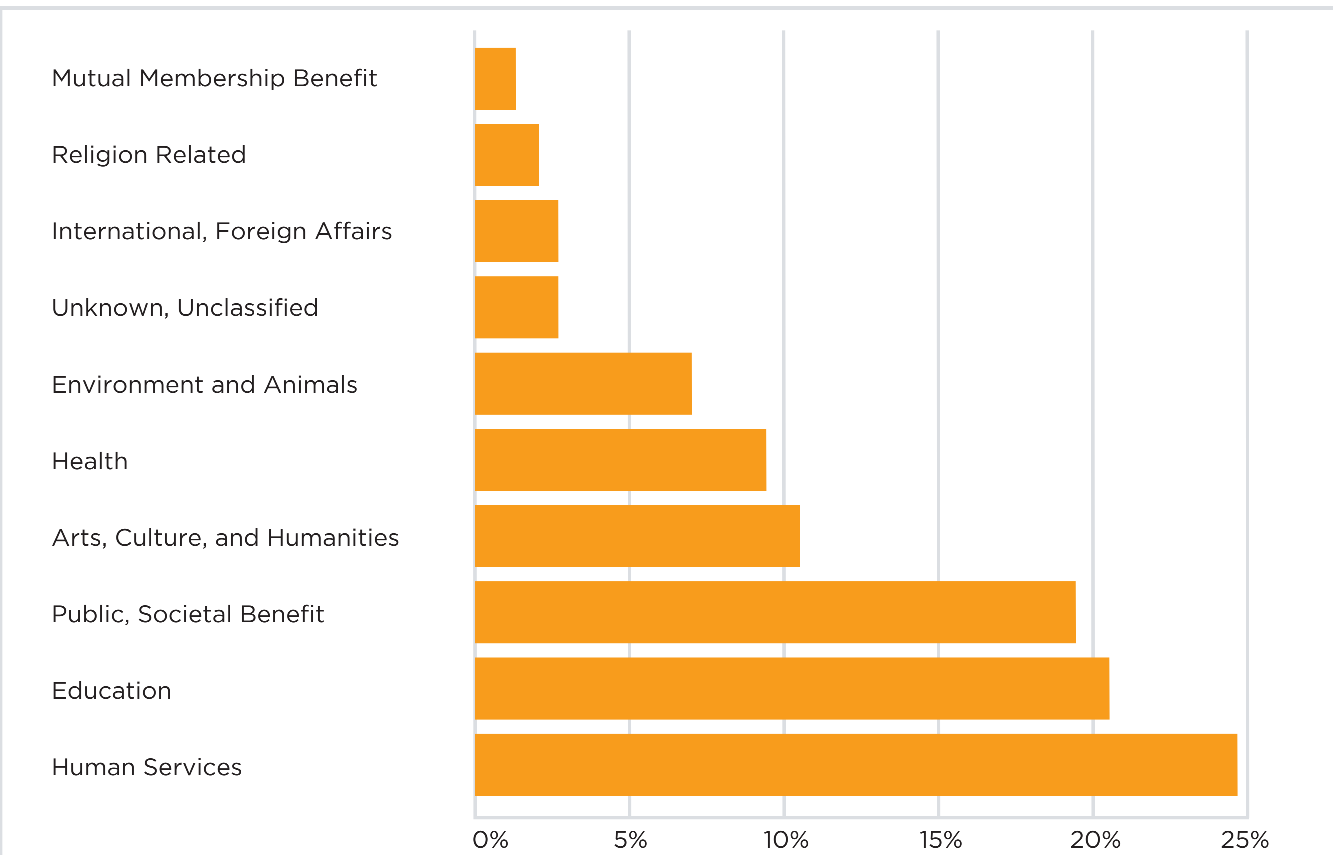
Where is your organization located? If more than one location, select your headquarters' location.



- Mid-Atlantic 11%
- Midwestern 23%
- Northeastern 17%
- Northwestern 12%
- Southern 4%
- Southwestern 9%
- Western 15%
- International 8%

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.

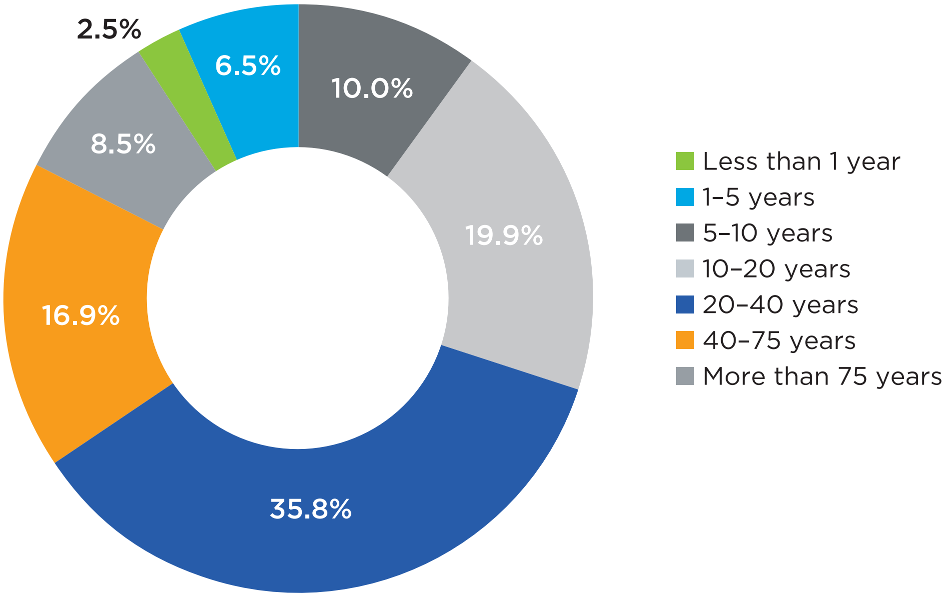
The majority of the respondents work in the areas of human and public services, with three categories accounting for nearly two-thirds of the total respondents. Other significant areas were Arts & Culture and Health at about 10% each.



Respondent Demographics

Q For how long has your organization operated?

The majority of respondents represented well-established organizations; 60% have operated 20 years or longer. Approximately 9% were relatively new (five years or fewer), with the remaining organizations fairly evenly distributed.



Q What is your organization's total annual operating budget?

BUDGET SIZE	CRITERIA	%	AVERAGE STAFF
Very Large	>$10 million	22.29%	348.10
Large	$5–$10 million	12.00%	61.68
Medium	$1–$5 million	33.71%	17.26
Small	<$1 million	45.71%	6.89

Q About how many staff does your organization have?

CATEGORY	OVERALL %
Leadership	6.12%
Program/Direct Service	72.04%
Communications/Marketing	3.52%
Fundraising/Development	4.30%
IT/Technology	3.35%
Admin/Other	10.67%