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INDUSTRY RESEARCH

Nonprofit Trends Report

Insights from over 450 nonprofit leaders into the trends shaping the social sector

INTRODUCTION

The World Needs Nonprofits More Than Ever — How Are They Answering the Call?

Nonprofits are at the heart of changes taking place around the world – from inequality discussions to international relations to natural disasters. For better or worse, this has put nonprofits in the spotlight.

As in every sector, technology disruption has taken its toll on large, established NGOs, and given rise to scrappy startup orgs that can launch new movements overnight. Underpinning all of this are seismic shifts in technology: cloud, social, mobile, big data, artificial intelligence (AI), and the Internet of Things (IoT).

This study, conducted by Salesforce Research and Salesforce.org, explores how these shifts impact nonprofits' capacity for and approach to program resourcing, delivery, engagement, and impact measurement.

Data in this report is based on a survey of 461 decision-makers at nonprofit organizations in the United States, the United Kingdom, Canada, and Australia/New Zealand.

Browse our research reports at salesforce.com/research and learn more about Salesforce.org by visiting www.salesforce.org/nonprofit.

Sincerely,
Rob Acker
CEO, Salesforce.org

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01 | Nonprofits Struggle to Bridge the Gap Between Demands and Resources

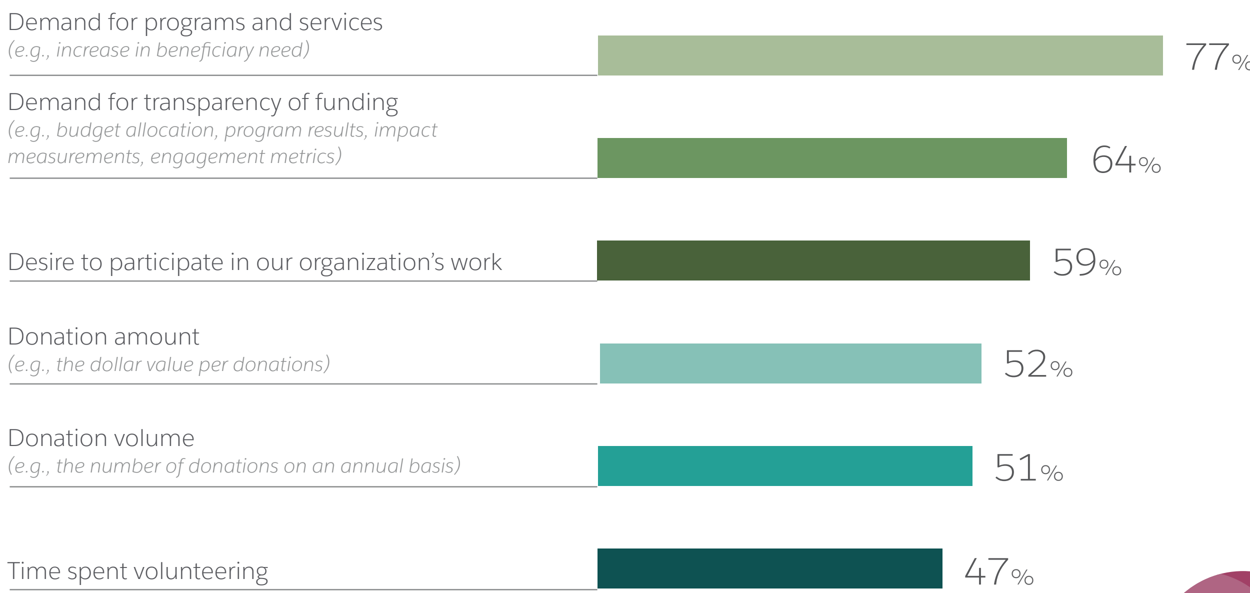
Seventy-seven percent of nonprofits have seen increased demand for their programs and services from beneficiaries over the past year. At the same time, however, 64% have experienced increased demand for transparency of funds from benefactors. In other words, nonprofits are now tasked with catering to increasing needs of two very different – but very important – stakeholder groups.

While donations are also trending upward, they are doing so at a slower pace. Meanwhile, fewer than half of nonprofits have seen increased volunteerism. The result is an industry being pushed to do more without necessarily having the resources to do so.

64% of nonprofits have seen increased demand for transparency of funding over the past five years.

Increased Nonprofit Demands Outpace Resources

Percentage of Nonprofit Leaders Who Say the Following Have Increased Over the Past Five Years



01 | Nonprofits Struggle to Bridge the Gap Between Demands and Resources

Growing demand leads a long list of challenges that nonprofits say they are facing in their day-to-day operations. While meeting growing demand, in and of itself, is their top challenge, nonprofits cite plenty of other pain points in their day-to-day operations.

Rounding out the top three organizational challenges, for example, is creating awareness of their mission. Nonprofits, therefore, face a catch 22: how to promote their work and its importance to new audiences while addressing the needs of those already in their orbit.

Wrangling and applying the data that are so critical to the full breadth of nonprofit operations is a stumbling block, as evidenced by the share of organizations that struggle to capture and manage constituent data. In fact, 73% of nonprofits grapple with tracking the impact of their efforts, and two-thirds have the same predicament when it comes time to demonstrate that impact.

78% of nonprofits are challenged to keep up with growing demand for programs/services.

Nonprofits Grapple with an Overload of Challenges

*Percentage of Nonprofit Leaders Who Cite the Following as an Operational Challenge**

* answers of extreme, substantial, or moderate challenge

02 | Constituent Engagement Enters the Connected Era

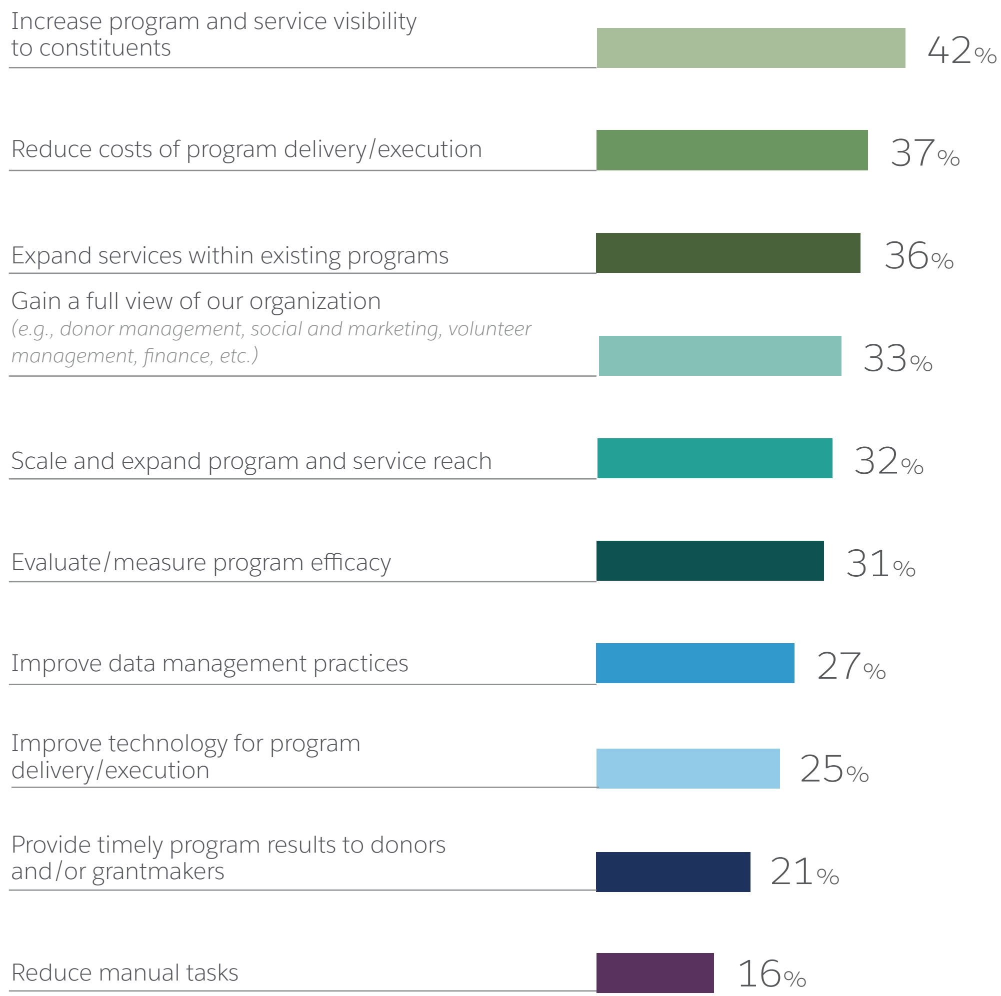
Aside from reducing costs, nonprofits' top priorities underscore their dual mandates of meeting increased demand for services while increasing visibility to constituents. Gaining a full view of their organization – including donor management, marketing, volunteer management, and finance data, among others – rounds out the top four priorities.

While overall program improvement is top of mind, that's not the case for tactics that could make it a reality. Only 27% of nonprofit leaders prioritize data management improvement, and only 25% prioritize program delivery/execution technology improvement. Reducing manual tasks that can slow progress against nonprofits' myriad objectives ranks as the lowest priority for program delivery and execution.

Only 25% of nonprofits prioritize improving technology for program delivery/execution.

Nonprofits Have Lofty Objectives, but Sideline Program Optimization

Percentage of Nonprofit Leaders Who Include the Following in Their Top Three Priorities for Program Delivery/Execution



02 | Constituent Engagement Enters the Connected Era

Events are seen as the most fruitful fundraising strategy, with 76% of nonprofit leaders citing them as successful. Sixty percent are also satisfied with their ability to seek major donors, and 59% say the same for their work in cultivating corporate partnerships.

However, today's donors are a channel-agnostic bunch that expect personalized, on-demand engagement. In fact, the average individual uses 10 channels to communicate with organizations.* In many cases, they're more likely to take the easy step of clicking on a relevant social post than commit to an event.

However, only 44% of nonprofit leaders consider themselves successful at sending prospects and constituents through engagement journeys that tailor interactions to their unique behaviors and preferences and even fewer say the same for soliciting donations across various channels.

Only 39% of nonprofits say they're successful at omni-channel fundraising.

Fundraising Strategies Fall Behind the Times

Percentage of Nonprofit Leaders Who Are Very or Somewhat Successful at the Following Fundraising Strategies

* "State of the Connected Customer," Salesforce Research, June 2018.

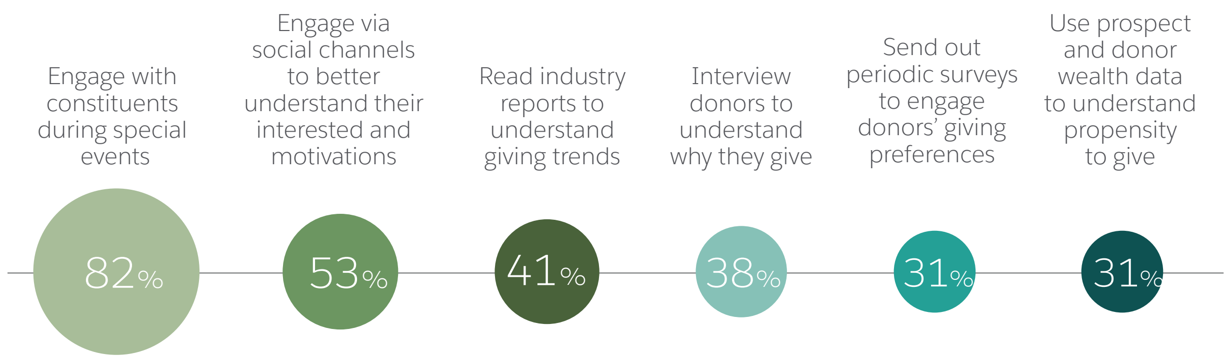
Today's donors want to feel understood and known as individuals, particularly if their time and money are on the line. In fact, 76% of individuals expect organizations to understand their needs and preferences.*

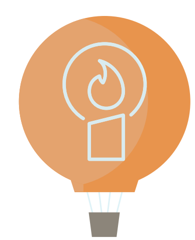
But today's nonprofits largely overlook several tactics for developing an understanding of constituents' unique motivations for giving. A mere 31% of nonprofits survey donors on their giving preferences, for example, and the same portion analyze donor wealth data to gauge their propensity to give.

The majority of nonprofits have embraced one particular digital engagement tactic: **53% use social media to understand constituents' interests and motivations.**

Relationship Building Remains Largely Analog

Percentage of Nonprofit Leaders Who Use the Following Tactics to Understand Constituents' Motivations for Giving





* "State of the Connected Customer," Salesforce Research, June 2018.

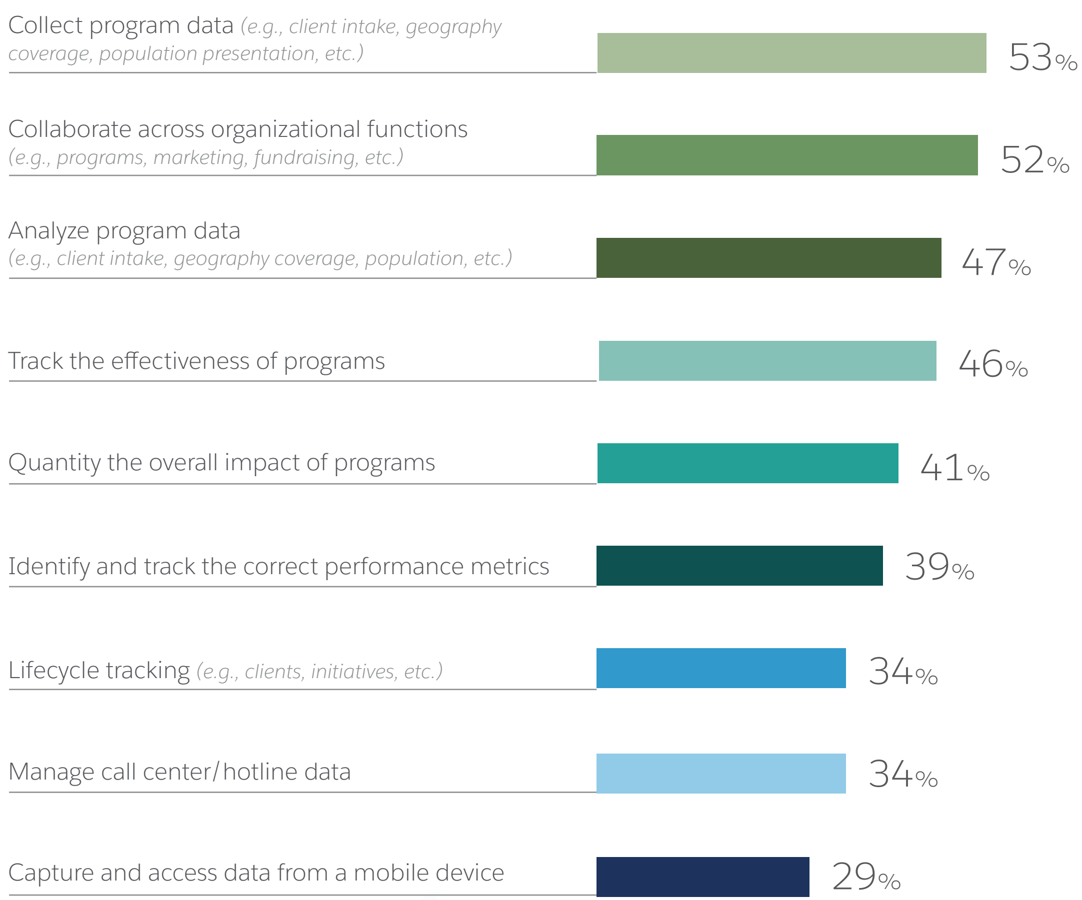
03 | Data Woes and Manual Processes Hinder Progress

Fundraising challenges are the tip of the iceberg of nonprofits' struggle with data.

More than half (53%) of nonprofits find it easy to collect program data. But putting that data into action is a less straightforward endeavor. **Fewer than half (47%) say it's easy to analyze that data**, leading to a myriad of struggles when it comes to tracking and quantifying things like impact and performance.

Collecting Data Is Easy, but Analyzing it Is a More Challenging Endeavor

Percentage of Nonprofit Leaders Who Find the Following to be Easy



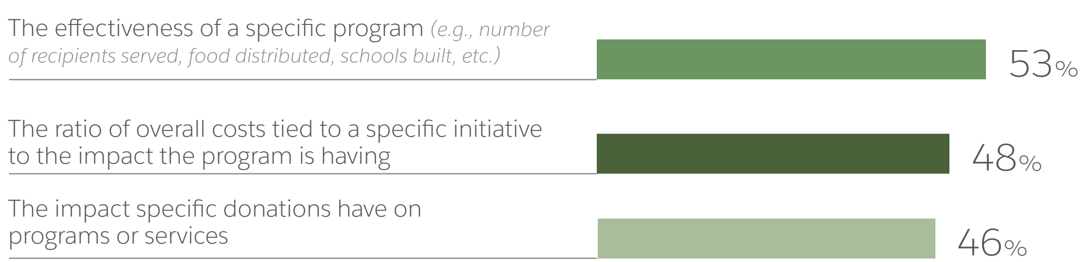
03 | Data Woes and Manual Processes Hinder Progress

The implications of nonprofits' data woes extend beyond day-to-day operations. Only about half of nonprofits say it's easy for them to measure and report donations' impacts, program effectiveness, and cost/impact ratio.

This shortcoming can be partially attributed to the fact that measurement and reporting remains a largely manual process for nonprofits. A mere 8% of nonprofits have completely automated their donation impact measurement and reporting. Meanwhile, more than five times as many nonprofits (42%) have a completely manual process for measuring and reporting such information.

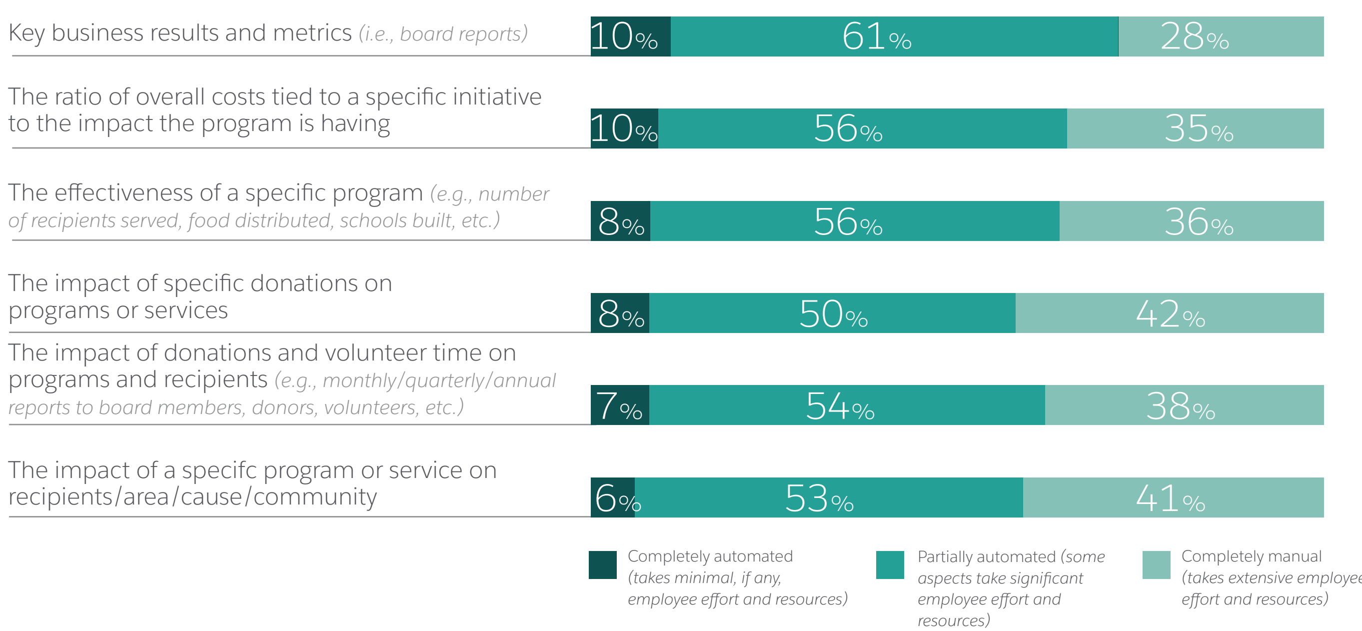
Impact Measurement and Reporting Isn't Easy for Roughly Half of Nonprofits

Percentage of Nonprofit Leaders Who Say It's Easy to Measure and Report on the Following



Nonprofits Are Burdened by Manual Measurement and Reporting

Percentage of Nonprofit Leaders Who Say Measurement and Reporting Processes Are Automated



04 | Budgets Derail Technology Roadmaps

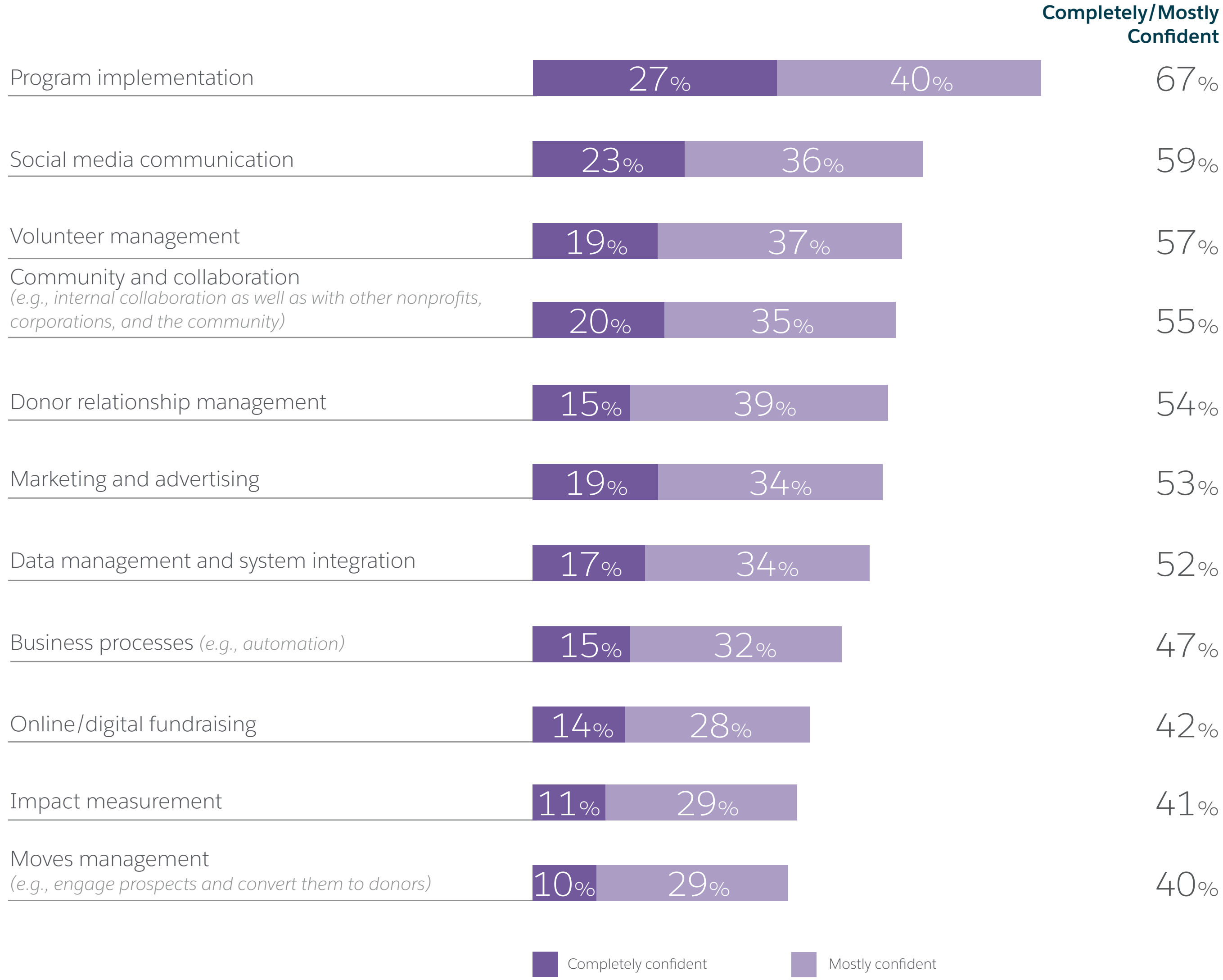
In assessing their overall technology stacks, nonprofit leaders' double down on their concerns about measurement and reporting. While two-thirds are mostly or completely confident in their technological ability to implement programs, only 41% share this sentiment regarding their capabilities to measure impact.

But nonprofits' technology shortcomings don't end with measurement. Only 42% of leaders are mostly confident in their digital fundraising capabilities and 40% are confident in their capabilities around moves management.

Across all areas, levels of *complete* confidence are alarmingly low. Given the interdependencies of fundraising, program management, and measurement and reporting, it's particularly notable that only 17% of nonprofit leaders have complete confidence in their data management and system integration capabilities.

Nonprofit Leadership Lacks Complete Confidence in Their Technology

Percentage of Nonprofit Leaders Who Are Confident They Have the Adequate Technology in Place to Scale/Grow in the Following Areas



04 | Budgets Derail Technology Roadmaps

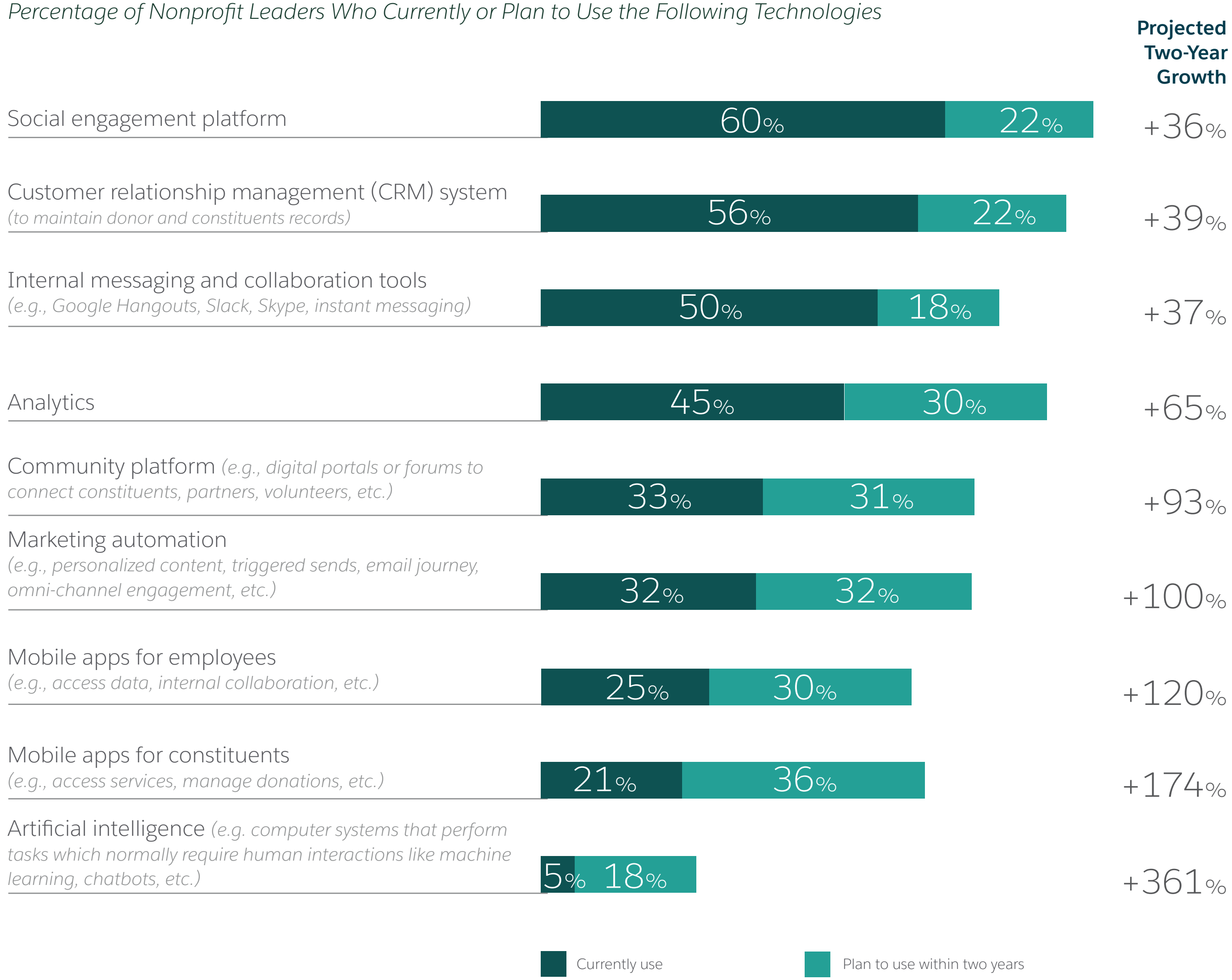
Nonprofit leaders' relatively low confidence in their technological capabilities coincides with relatively low adoption of digital tools and platforms. On the positive side, 60% of nonprofits have embraced social engagement platforms that can be leveraged for fundraising and constituent engagement alike. Fifty-six percent have invested in customer relationship management systems to maintain donor and constituent records.

However, less than half of nonprofits use analytics to dissect data housed in such systems. Only one-third use community platforms to connect stakeholders and marketing automation systems to foster personalized journeys.

Yet, planned adoption rates for many technologies are notably high. For instance, **while only 5% of nonprofits have AI capabilities, that figure is forecasted to skyrocket by 361% over the next two years**. The prevalence of constituent-facing mobile apps is poised to rise by 174% within the same time period, and the use of marketing automation is set to double.

AI, Mobile, and Marketing Automation Lead Nonprofit Technology Growth

Percentage of Nonprofit Leaders Who Currently or Plan to Use the Following Technologies



04 | Budgets Derail Technology Roadmaps

While nonprofits have lofty plans to expand and modernize their technology stacks, they face several roadblocks in doing so. Not surprisingly, budget constraints present the most formidable challenge.

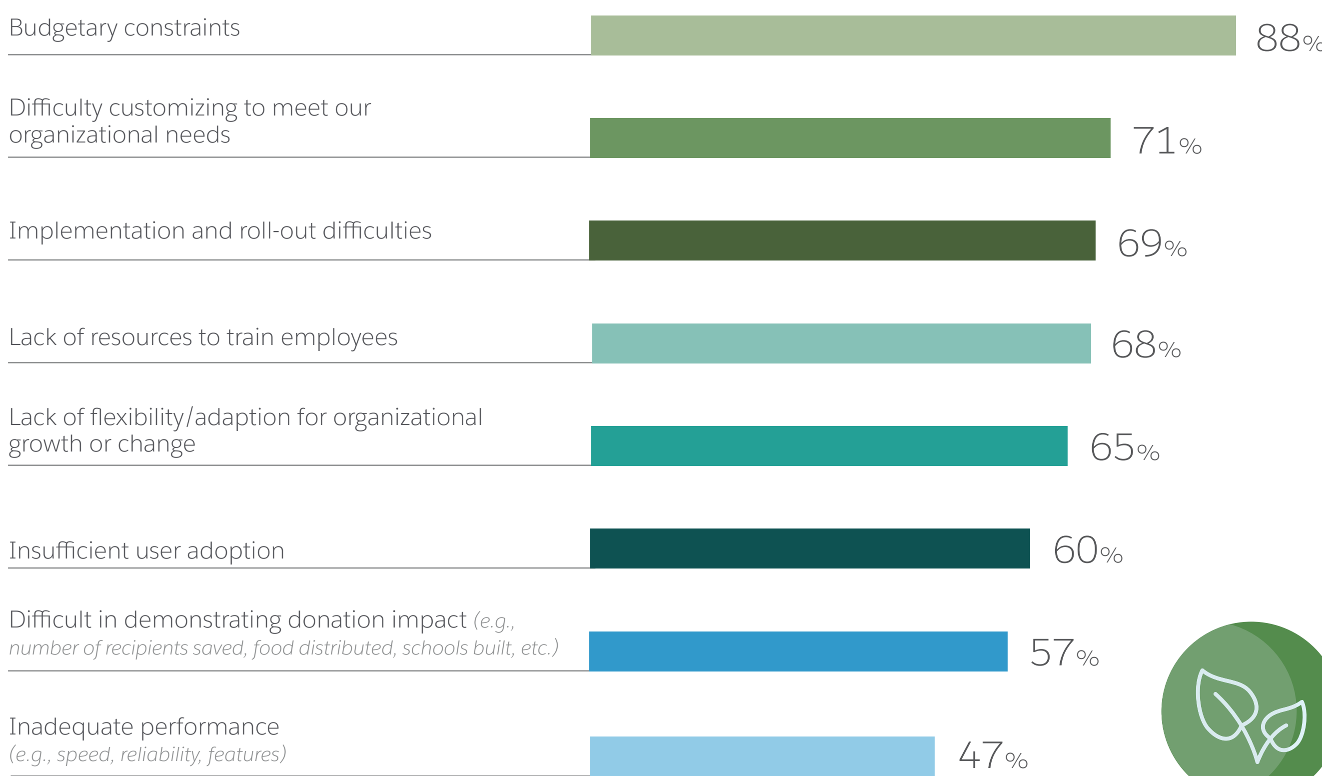
71% of nonprofit leaders are challenged to customize technology to their organizations' unique needs.

Additionally, 69% have doubts about their ability to implement and roll out these technologies.

Anticipating changing needs, 65% of nonprofit leaders say a lack of flexibility or adaptability hinders their tech adoption. And since tools are only as good as how they're used, 60% report that insufficient user adoption also is a blocker. Fifty-seven percent worry about their ability to demonstrate the impact of each donation made to their cause.

People, Process, Budget, and Customization Slow Modernization

Percentage of Nonprofit Leaders Who Cite the Following as at Least a Moderate Challenge to 'Technology Adoption



04 | Budgets Derail Technology Roadmaps

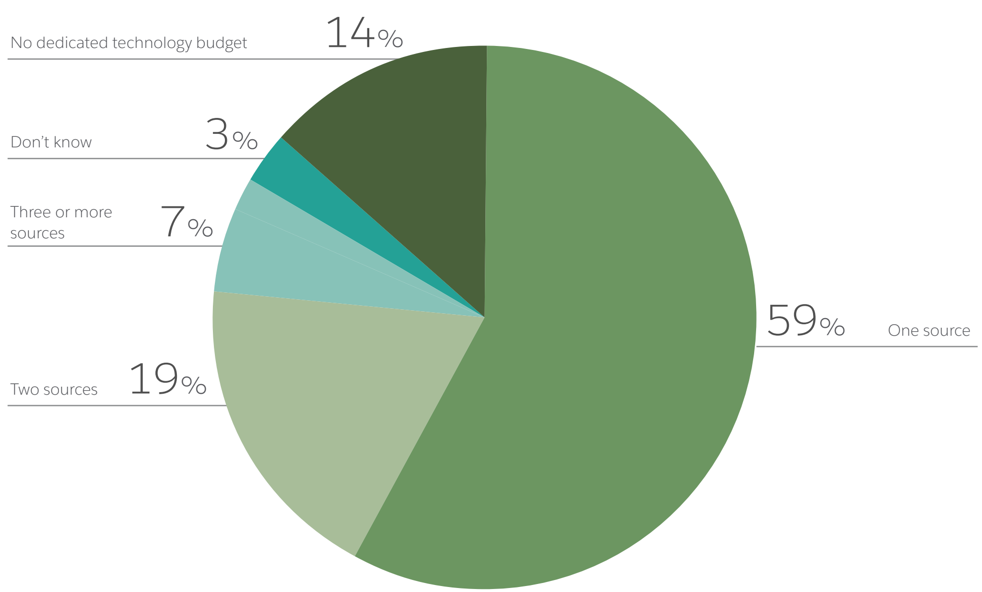
Funding for technology projects is scarce in the nonprofit sector, with 59% of organizations relying on just one funding source to cover IT costs and 14% with no tech budget whatsoever.

For most nonprofits, the operations budget bears the brunt of the technology costs. Roughly a quarter have a separate technology budget, and only 16% have access to coveted, unrestricted funding for IT.

14% of nonprofits have no dedicated technology budget.

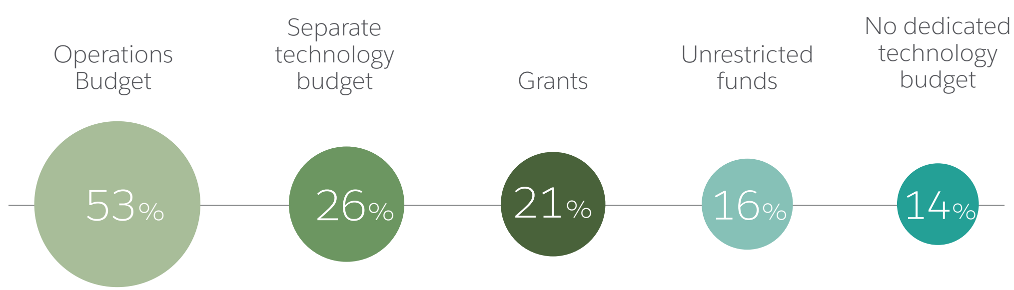
Most Nonprofits Have Very Limited Sources for Tech Funding

Number of Funding Sources for Technology



Few Nonprofits Have Access to Unrestricted Funds For Technology

Funding Sources for Technology



Key Takeaways

01 | BALANCE THE DEMANDS OF ALL CONSTITUENTS

In an era of unprecedented demand for services – and unprecedented desire to help – nonprofits stand at a crossroads. With antiquated engagement strategies and capabilities, they risk not only underserving their causes, but alienating the donors and volunteers they depend on to help make the world a better place.

02 | WRANGLE YOUR DATA

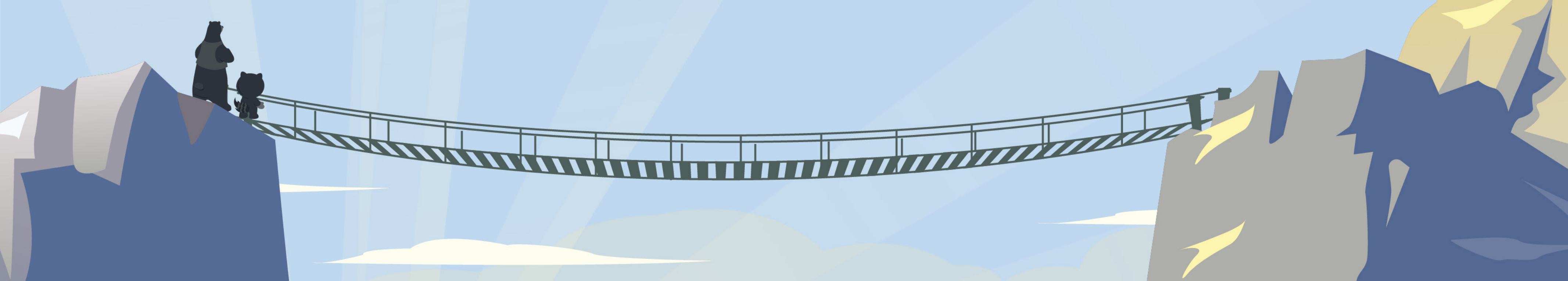
Nonprofits have an opportunity to organize, analyze, and unite information on benefactors, programs, and beneficiaries that can drive new levels of transparency and impact. By understanding what drives donor's to give, providing transparency, and adjusting programs based on data-driven insights, nonprofits can drive new levels of engagement and – most importantly – impact.

03 | GO OMNI-CHANNEL

The for-profit world has groomed its customers to expect seamless two-way communication across any channel they choose – as well as continuity and contextualization across those channels. This new dynamic can be a challenge for under-resourced nonprofits, but also provides an opportunity to engage with the right constituent, at the right time, on the right medium.

04 | TRANSFORM THE ROLE OF TECHNOLOGY IN YOUR ORGANIZATION

Technology should never be seen as overhead. With scare resources, nonprofits must ensure that their stacks are truly advancing their causes. Examine not only what your technology does for your organization now, but how it will advance your mission moving forward. Remember that in order for technology to have maximum impact, it must be ingrained in processes, and viewed as indispensable by staff, donors, volunteers, and beneficiaries alike.



COUNTRY PROFILES

Country Profiles

Percentage of Nonprofit Leaders Who Say the Following Have Increased Over the Past Five Years by Country

	United States	Australia/ New Zealand	Canada	United Kingdom
Demand for programs and services *(e.g., increase in beneficiary need)*	72%	85%	83%	77%
Desire to participate in our organization's work	57%	60%	63%	61%
Donation amount *(e.g., the dollar value per donations)*	56%	49%	55%	42%
Donation volume *(e.g., the number of donations made on an annual basis)*	55%	52%	51%	43%
Demand for transparency of funding *(e.g., budget allocation, program results, impact measurements, engagement metrics)*	52%	76%	65%	79%
Time spent volunteering	43%	40%	55%	53%

Country Profiles

Top Three Operational Challenges by Country*

	United States	Australia/New Zealand	Canada	United Kingdom
#1	Staffing resources (76%)	Keeping up with growing demand for our programs/services (85%)	Keeping up with growing demand for our programs/services (81%)	Keeping up with growing demand for our programs/services (82%)
#2	Effectively managing change (74%)	Staffing resources (83%)	Competing with other nonprofits for support (78%)	Competing with other nonprofits for support (82%)
#3	Keeping up with growing demand for our programs/services (73%)	Capturing and managing accurate data on our constituents (81%)	Staffing resources (76%)	Capturing and managing accurate data on our constituents (82%)

Top Three Priorities/Initiatives for Program Delivery and Execution by Country

	United States	Australia/New Zealand	Canada	United Kingdom
#1	Increase program and service visibility to constituents (48%)	Reduce costs of program delivery/ execution (40%)	Increase program and service visibility to constituents (47%)	Reduce costs of program delivery/ execution (43%)
#2	Expand services within existing programs (35%)	Gain a full view of our organization (38%)	Reduce costs of program delivery/ execution (42%)	Expand services within existing programs (35%)
#3	Scale and expand program and service reach (35%)	Scale and expand program and service reach (35%)	Expand services within existing programs (40%)	Evaluate/measure program efficacy AND Improve technology for program delivery/execution (33%)

* answers of extreme, substantial, or moderate challenge

Country Profiles

Percentage of Nonprofit Leaders Who Are Very or Somewhat Successful at the Following Fundraising Strategies by Country

	United States	Australia/ New Zealand	Canada	United Kingdom
Host fundraising events *(e.g., galas, auctions, runs, etc.)*	81%	72%	74%	71%
Seek major donors / major gift-givers	59%	61%	59%	61%
Cultivate corporate partnerships	55%	61%	60%	62%
Execute grassroots fundraising campaigns	51%	57%	52%	51%
Offer corporate sponsorships	51%	52%	52%	48%
Moves management *(e.g., engaging prospects and converting them to donors)*	48%	52%	65%	54%
Send prospects and constituents through an engagement journey *(e.g., behavior-based personalized interactions across channels/touchpoints)*	37%	36%	58%	53%
Create omni-channel fundraising strategies *(i.e., consistent/connected campaigns across online, direct mail, SMS text, peer-to-peer, other channels)*	32%	51%	47%	39%

Country Profiles

Percentage of Nonprofit Leaders Who Use the Following Tactics to Understand Constituents' Motivations for Giving by Country

	United States	Australia/ New Zealand	Canada	United Kingdom
Engage with constituents during special events	86%	76%	85%	77%
Engage via social channels to better understand their interests and motivations	47%	56%	60%	57%
Read industry reports to understand giving trends	38%	45%	38%	45%
Interview donors to understand why they give	35%	31%	42%	44%
Use prospect and donor wealth data to understand propensity to give	30%	25%	40%	32%
Send out periodic surveys to gauge donors giving preferences	22%	39%	34%	39%

Country Profiles

Percentage of Nonprofit Leaders Who Say It's Easy to Measure and Report on the Following by Country

	United States	Australia/ New Zealand	Canada	United Kingdom
The impact specific donations have on programs or services	54%	48%	53%	46%
The effectiveness of a specific program based on metrics *(e.g., number of recipients served, food distributed, schools built, etc.)*	49%	55%	57%	57%
The ratio of overall operating costs tied to a specific initiative to the impact the program is having	47%	43%	53%	46%

Country Profiles

Percentage of Nonprofit Leaders Who Are Confident They Have the Adequate Technology in Place to Scale/Grow in the Following Areas by Country

	United States	Australia/ New Zealand	Canada	United Kingdom
Data management and system integration	48%	47%	61%	54%
Business processes *(e.g., automation)*	41%	47%	58%	49%
Community and collaboration *(e.g., internal collaboration as well as with other nonprofits, corporations, and the community)*	50%	65%	62%	52%
Program implementation	65%	66%	80%	60%
Volunteer management	51%	54%	64%	66%
Impact measurement	31%	42%	58%	45%
Donor relationship management	49%	59%	62%	55%
Online/digital fundraising	37%	46%	52%	40%
Moves management *(i.e., engage prospects and convert them to donors)*	36%	44%	43%	40%
Social media communication	55%	64%	61%	61%
Marketing and advertising *(e.g., for email campaigns, display ads, text/SMS campaigns, etc.)*	49%	58%	63%	50%

Country Profiles

Percentage of Nonprofit Leaders Who Currently Use the Following Technologies by Country

	United States	Australia/ New Zealand	Canada	United Kingdom
Social engagement platform	60%	53%	63%	64%
Customer relationship management (CRM) system (to maintain donor and constituents records)	53%	69%	70%	79%
Internal messaging and collaboration tools *(e.g., Google Hangouts, Slack, Skype, instant messaging)*	45%	53%	52%	56%
Analytics	42%	49%	41%	53%
Community platform *(e.g., digital portals or forums to connect constituents, partners, volunteers, etc.)*	28%	37%	38%	37%
Marketing automation *(e.g., personalized content, triggered sends, email journey, omni-channel engagement, etc.)*	46%	46%	51%	52%
Mobile apps for employees *(e.g., access data, internal collaboration, etc.)*	23%	32%	20%	25%
Mobile apps for constituents *(e.g., access services, manage donations, etc.)*	19%	24%	22%	20%
Artificial intelligence *(e.g., computer systems that perform tasks which normally require human interactions like machine learning, chatbots, etc.)*	4%	8%	3%	5%

Country Profiles

Percentage of Nonprofit Leaders Who Cite the Following as at Least a Moderate Challenge to Technology Adoption by Country

	United States	Australia/ New Zealand	Canada	United Kingdom
Budgetary constraints	89%	85%	91%	86%
Difficulty customizing to meet our organizational needs	68%	73%	74%	71%
Implementation and roll-out difficulties	67%	80%	70%	64%
Lack of resources to train employees	66%	75%	72%	62%
Lack of flexibility/adaptation for organizational growth or change	65%	68%	65%	65%
Insufficient user adoption	59%	61%	63%	60%
Difficulty in demonstrating donation impact *(e.g., number of recipients served, food distributed, schools built, etc.)*	50%	63%	59%	63%
Inadequate performance *(e.g., speed, reliability, features)*	43%	61%	58%	46%

Country Profiles

Funding Sources for Technology by Country

	United States	Australia/ New Zealand	Canada	United Kingdom
Operations budget	57%	53%	60%	39%
Separate technology budget	17%	29%	27%	39%
Grants	19%	15%	31%	23%
Unrestricted funds	22%	3%	11%	19%
No dedicated technology budget	15%	13%	9%	15%

CAUSE PROFILES

Cause Profiles

Percentage of Nonprofit Leaders Who Say the Following Have Increased Over the Past Five Years by Primary Cause

	Arts, culture, and humanities	Education and youth development	Environment and animals	Religion related	Health	Human services	Public and societal benefit
Demand for programs and services *(e.g., increase in beneficiary need)*	73%	83%	70%	52%	83%	87%	80%
Desire to participate in our organization's work	63%	55%	77%	55%	60%	58%	59%
Donation amount *(e.g., the dollar value per donations)*	55%	49%	80%	62%	41%	48%	47%
Donation volume *(e.g., the number of donations made on an annual basis)*	55%	48%	77%	62%	44%	49%	45%
Demand for transparency of funding *(e.g., budget allocation, program results, impact measurements, engagement metrics)*	55%	73%	60%	33%	76%	67%	65%
Time spent volunteering	38%	39%	70%	40%	53%	47%	55%

Cause Profiles

Top Three Operational Challenges By Primary Cause*

	#1 Challenge	#2 Challenge	#3 Challenge
Arts, culture, and humanities	Effectively managing change (90%)	Capturing and managing accurate data on our constituents (85%)	Staffing resources (80%)
Education and youth development	Keeping up with growing demand for our programs/services (81%)	Staffing resources (80%)	Tracking the impact a specific program or service has on the community/area/cause/service recipients (80%)
Environment and animals	Creating awareness of mission (83%)	Staffing resources AND Keeping up with growing demand for our programs/services AND Capturing and managing accurate data on our constituents (77%)	
Religion related	Effectively managing change (69%)	Creating awareness of mission (67%)	Keeping up with growing demand for our programs/services (64%)
Health	Staffing resources (82%)	Keeping up with growing demand for our programs/services (82%)	Creating awareness of mission (75%)
Human services	Keeping up with growing demand for our programs/services (81%)	Staffing resources (78%)	Creating awareness of mission (71%)
Public and societal benefit	Staffing resources (88%)	Competing with other nonprofits for support (86%)	Effectively managing change and keeping up with growing demand for our programs/services (80%)

* answers of extreme, substantial, or moderate challenge

Cause Profiles

Top Three Priorities/Initiatives For Program Delivery and Execution by Primary Cause

	#1 Priority/Initiative	#2 Priority/Initiative	#3 Priority/Initiative
Arts, culture, and humanities	Increase program and service visibility to constituents (43%)	Reduce costs of program delivery/execution (40%)	Improve data management practices AND Scale and expand program and service reach (35%)
Education and youth development	Reduce costs of program delivery/execution (40%)	Increase program and service visibility to constituents AND Improve technology for program delivery/execution AND Expand services within existing programs (33%)	
Environment and animals	Increase program and service visibility to constituents (50%)	Gain a full view of our organization *(e.g., donor management, social and marketing, volunteer management, finance, etc.) (47%)*	Provide timely program results to donors and/or grantmakers (40%)
Religion related	Gain a full view of our organization (53%)	Increase program and service visibility to constituents (52%)	Expand services within existing programs (36%)
Health	Reduce costs of program delivery/execution (45%)	Increase program and service visibility to constituents (37%)	Evaluate/measure program efficacy (36%)
Human services	Increase program and service visibility to constituents (46%)	Expand services within existing programs (41%)	Reduce costs of program delivery/execution (35%)
Public and societal benefit	Increase program and service visibility to constituents (49%)	Scale and expand program and service reach (41%)	Expand services within existing programs (37%)

Cause Profiles

Percentage of Nonprofit Leaders Who Are Very or Somewhat Successful at the Following Fundraising Strategies by Primary Cause

	Arts, culture, and humanities	Education and youth development	Environment and animals	Religion related	Health	Human services	Public and societal benefit
Host fundraising events *(e.g., galas, auctions, runs, etc.)*	75%	77%	77%	69%	80%	78%	78%
Actively engaging recurring donors	73%	73%	73%	79%	74%	73%	67%
Convert one-time donors into recurring donors	65%	64%	87%	62%	61%	65%	59%
Seek major donors/major gift-givers	55%	55%	77%	48%	64%	61%	65%
Cultivate corporate partnerships	65%	56%	63%	26%	68%	65%	65%
Deliver donor recognition and stewardship programs *(e.g., exclusive events or access, annual report listing, etc.)*	55%	61%	77%	43%	57%	61%	51%
Execute grassroots fundraising campaigns	50%	50%	63%	48%	48%	55%	57%
Offer corporate sponsorships	68%	44%	53%	17%	57%	58%	59%
Moves management *(e.g., engaging prospects and converting them to donors)*	48%	50%	67%	45%	59%	48%	51%
Send prospects and constituents through an engagement journey *(e.g., behavior-based personalized interactions across channels/touchpoints)*	35%	47%	67%	31%	39%	46%	49%
Create omni-channel fundraising strategies *(i.e., consistent/connected campaigns across online, direct mail, SMS text, peer-to-peer, other channels)*	30%	38%	47%	26%	40%	45%	45%

Cause Profiles

Percentage of Nonprofit Leaders Who Use the Following Tactics to Understand Constituents' Motivations for Giving by Primary Cause

	Arts, culture, and humanities	Education and youth development	Environment and animals	Religion related	Health	Human services	Public and societal benefit
Engage with constituents during special events	85%	83%	80%	79%	83%	86%	82%
Interview donors to understand why they give	43%	39%	43%	40%	33%	39%	29%
Read industry reports to understand giving trends	40%	38%	40%	28%	48%	37%	55%
Engage via social channels to better understand their interests and motivations	38%	53%	60%	41%	54%	58%	57%
Use prospect and donor wealth data to understand propensity to give	33%	36%	43%	22%	33%	28%	24%
Send out periodic surveys to gauge donors giving preferences	30%	34%	33%	19%	37%	27%	35%

Cause Profiles

Percentage of Nonprofit Leaders Who Say It's Easy to Measure and Report on the Following by Primary Cause

	Arts, culture,and humanities	Education and youth development	Environment and animals	Religion related	Health	Human services	Public and societal benefit
The impact specific donations have on programs or services	56%	57%	57%	50%	45%	54%	49%
The effectiveness of a specific program based on metrics	42%	54%	39%	48%	56%	58%	60%
The ratio of overall operating costs tied to a specific initiative to the impact the program is having	47%	47%	54%	34%	56%	49%	49%

Cause Profiles

Percentage of Nonprofit Leaders Who Are Confident They Have the Adequate Technology in Place to Scale/Grow in the Following Areas by Primary Cause

	Arts, culture, and humanities	Education and youth development	Environment and animals	Religion related	Health	Human services	Public and societal benefit
Data management and system integration	28%	59%	55%	49%	50%	54%	49%
Business processes *(e.g., automation)*	22%	48%	39%	53%	49%	49%	50%
Community and collaboration *(e.g., internal collaboration as well as with other nonprofits, corporations, and the community)*	60%	56%	48%	51%	59%	56%	52%
Program implementation	70%	68%	62%	60%	64%	68%	73%
Volunteer management	45%	56%	48%	56%	59%	57%	71%
Impact measurement	28%	47%	43%	29%	43%	48%	33%
Donor relationship management	25%	54%	45%	59%	58%	68%	53%
Online/digital fundraising	28%	45%	34%	38%	39%	52%	38%
Moves management *(e.g., internal collaboration as well as with other nonprofits, corporations, and the community)*	33%	40%	43%	35%	46%	42%	35%
Social media communication	69%	65%	57%	60%	52%	61%	53%
Marketing and advertising *(e.g., for email campaigns, display ads, text/SMS campaigns, etc.)*	64%	57%	50%	49%	47%	50%	58%

Cause Profiles

Percentage of Nonprofit Leaders Who Say They Use the Following Technologies by Primary Cause

	Arts, culture, and humanities	Education and youth development	Environment and animals	Religion related	Health	Human services	Public and societal benefit
Social engagement platform	56%	64%	75%	66%	54%	62%	60%
Customer relationship management (CRM) system *(to maintain donor and constituents records)*	53%	49%	64%	53%	64%	57%	62%
Internal messaging and collaboration tools *(e.g., Google Hangouts, Slack, Skype, instant messaging)*	44%	53%	57%	48%	47%	47%	53%
Analytics	36%	49%	50%	38%	49%	43%	47%
Community platform *(e.g., digital portals or forums to connect constituents, partners, volunteers, etc.)*	22%	35%	32%	22%	38%	46%	27%
Marketing automation *(e.g., personalized content, triggered sends, email journey, omni-channel engagement, etc.)*	33%	40%	46%	19%	31%	28%	31%
Mobile apps for employees *(e.g., access data, internal collaboration, etc.)*	14%	28%	32%	16%	21%	26%	27%
Mobile apps for constituents *(e.g., access services, manage donations, etc.)*	11%	22%	32%	22%	24%	16%	20%
Artificial intelligence *(e.g., computer systems that perform tasks which normally require human interactions like machine learning, chatbots, etc.)*	3%	9%	14%	0%	4%	0%	11%

Cause Profiles

Percentage of Nonprofit Leaders Who Cite the Following as at Least a Moderate Challenge to Technology Adoption by Primary Cause

	Arts, culture, and humanities	Education and youth development	Environment and animals	Religion related	Health	Human services	Public and societal benefit
Budgetary constraints	97%	85%	93%	79%	89%	95%	91%
Difficulty customizing to meet our organizational needs	81%	69%	61%	60%	69%	76%	84%
Implementation and roll-out difficulties	72%	67%	68%	69%	65%	70%	76%
Lack of resources to train employees	86%	67%	64%	52%	68%	72%	71%
Lack of flexibility/adaptation for organizational growth or change	58%	66%	61%	62%	71%	62%	76%
Insufficient user adoption	56%	65%	68%	62%	55%	59%	58%
Difficulty in demonstrating donation impact *(e.g., number of recipients served, food distributed, schools built, etc.)*	69%	55%	50%	50%	55%	55%	64%
Inadequate performance *(e.g., speed, reliability, features)*	61%	48%	46%	38%	55%	53%	40%

Cause Profiles

Percentage of Nonprofit Leaders Who Use the Following Funds for Technology by Country

	Arts, culture, and humanities	Education and youth development	Environment and animals	Religion related	Health	Human services	Public and societal benefit
Operations budget	42%	55%	43%	59%	58%	50%	60%
Separate technology budget	19%	34%	32%	12%	25%	27%	31%
Grants	14%	24%	43%	9%	21%	24%	24%
Unrestricted funds	25%	10%	25%	12%	12%	26%	18%
No dedicated technology budget	14%	11%	11%	21%	12%	9%	18%

DEMOGRAPHICS

Demographics

Organization Size	Base	Percent
1 to 25 employees	130	28%
26 to 59 employees	54	12%
60 to 100 employees	24	5%
101 to 250 employees	65	14%
251 to 500 employees	53	12%
501 to 3,500 employees	88	19%
3,501 to 10,000 employees	26	6%
More than 10,000 employees	21	5%
Small and medium business *(1–100 employees)*	208	45%
Mid-market *(101–3,500 employees)*	206	45%
Enterprise *(3,501+ employees)*	47	10%

Primary Cause	Base	Percent
Arts, culture, and humanities	40	9%
Education and youth development	96	21%
Environment and animals	30	7%
Religion related	58	13%
Foundations	4	1%
Health	87	19%
Human services *(e.g., legal services, crime prevention, employment, hunger/nutrition, housing/homelessness)*	83	18%
International development	14	3%
Public and societal benefit *(e.g., civil rights/social action, community/economic development, science/tech, social science, veterans)*	49	11%

Role Size	Base	Percent
Owner or equivalent	16	3%
Board of Directors, Chairman, or equity owner	12	3%
President or CEO	57	12%
Other executive management *(CMO, CTO, CIO, CFO, etc.)*	82	18%
Vice president or equivalent	21	5%
Director or equivalent	125	27%
Manager or equivalent	148	32%

Country	Base	Percent
Australia/New Zealand	75	16%
Canada	88	19%
United Kingdom	97	21%
United States	201	44%

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