

3rd Annual
Nonprofit
Social Network
Benchmark
Report

2011



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www.commonknow.com



www.blackbaud.org

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Introduction	1
Executive Summary	2
Detailed Reporting Par 1: Topline Results	6
COMMERCIAL SOCIAL NETWORKS	6
Nonprofit Presence	6
Budget, Staffing and Resources.....	7
Promotion.....	8
Return on Investment	10
Why Nonprofits Are Not On CSN's	10
HOUSE SOCIAL NETWORKS	11
Nonprofit Presence	11
Budget, Staffing and Resources.....	11
Role	13
Return on Investment	14
Why Nonprofits Are Not Building HSNs.....	15
COMMERCIAL SOCIAL NETWORKS VS. HOUSE SOCIAL NETWORKS	16
Detailed Reporting Part 2: Crosstabs	18
Nonprofits by Mission Type on Commercial Social Networks.....	18
Nonprofits by Mission Type on House Social Networks.....	19
Nonprofits by Organization Size on Commercial Social Networks	21
Nonprofits by Organization Size on House Social Networks	22
Nonprofits Measuring "Hard" ROI	24
Master Social Fundraisers	25
Detailed Reporting Part 3: Trends.....	27
Commercial Social Networking Trends.....	27
House Social Networking Trends.....	30
About	
NTEN	32
Common Knowledge.....	32
Blackbaud.....	32

Introduction

NTEN, Common Knowledge, and Blackbaud are pleased to present the third annual **2011 Nonprofit Social Networking Benchmark Report**. The report provides insights for nonprofits, foundations, media and nonprofit-focused businesses about the most important behavior and trends surrounding social networking as part of nonprofits' marketing, communications, fundraising, program and IT services.

Between January 24, 2011 and February 10, 2011, nonprofit professionals responded to a survey about their organizations' use of online social networks.

Two groups of questions were posed to survey participants:

1. Tells us about your use of *commercial social networks* such as Facebook, Twitter, LinkedIn, and others.
2. Tell us about your work building and using social networks on your own websites, called *house social networks*.

Who Participated

Respondents included 11,196 nonprofit professionals representing small, medium, and large organizations and all nonprofit segments including: Arts & Culture, Education (Higher and K-12), Environment & Animal Welfare, Health & Healthcare, Human Services, Internal, Professional Associations, Public Benefit, and others.

Commercial Social Network

An online community operated on a commercial social networking platform such as Facebook, Twitter or LinkedIn.

House Social Network

Social networking community built on a nonprofit's own website. Term derived from direct mail house lists.

Executive Summary

The 2011 nonprofit social networking survey served up surprising results along with a few “I saw that coming” moments. **Below are the top ten results from this third annual survey of nonprofits of all sizes and all major sectors.**

From the commercial social networking world (i.e. Facebook, Twitter, LinkedIn, YouTube)

1. Facebook is King and Extending Its Lead - Slowly

Facebook, the consumer-focused social networking platform, is the most popular commercial social network for nonprofits and continues to grow, albeit slowly.

Nine out of 10 nonprofits (89%) report having a presence on Facebook in 2011. In the last three years Facebook usage has grown from 74% to 89%, with the largest chunk of this adoption occurring between 2009 and 2010 – a 16% jump from 2009 to 2010, and just 3% from 2010 to 2011.

By comparison, Twitter, the professional micro-blogging community, looks to have leveled off among nonprofits with usage levels reported at 57% in 2011, down slightly from 2010 (60%).

LinkedIn, the online professional social networking community is used by 1 in 3 nonprofits (30%) in 2011, representing a steady-state - no real change from the 33% usage levels reported in both 2010 and 2009.

MySpace, variably claimed as the future of social music distribution and consumer-based social networking more generally, is dying on the vine with an all-time low in 2011 of just 7% of nonprofits indicating they maintain a presence here, a -50% drop from 2010 (14% of nonprofits were on MySpace) and a veritable plunge from 2009 when 6% reported a presence on MySpace.

2. Commercial Social Networks Keep Getting Bigger

Apparently nonprofit efforts to attract more supporters on social networks are working. The Facebook average member community size is up 161% in 2011 to 6,376 members compared to 2,440 and 5,391 respectively in 2010 and 2009. The average Twitter follower base is up just 2% in 2011 to 1,822 followers (from 2010's 1,792 followers) and up a massive 535% from 2009 levels (287 followers). LinkedIn, while not as large overall compared to Facebook managed to quietly creep up to near Twitter levels with an average of 1,196 members in 2011 compared to past years - just 450 in 2010 and 291 members in 2009.

3. Low-Level Fundraising on Facebook Increased

Fundraising on Facebook is growing but it's still a minority effort. The number of groups successfully generating a small fundraising revenue

stream (\$1 to \$10K annually) has risen each year from 38% in 2009 to 46% in 2011. The number of organizations raising \$100,000 or more per year on social networks doubled this year from 0.2% to 0.4%, but obviously this still represents a critically thin slice of the sector.

4. Nonprofits Still Agree – CSNs are Valuable

Nonprofit industry sentiment toward social networks remains very positive with 4 out of 5 (82%) nonprofits indicating that they find their commercial social networking (CSN) efforts *valuable* (i.e. the combination of respondents who answered with “very valuable” or “somewhat valuable” when asked about the value of their CSNs). The same question in 2009 and 2010 saw 79% and 81% of nonprofits respectively found their CSNs valuable. It looks like nonprofits got hooked early and are still enamored with the idea of doing business on commercial social networks.

5. A Few Newcomers Hit the Scene

The newbie, place-based social networking platform **FourSquare** appeared in our survey results in a substantive way for the first time in 2011 with 4% of nonprofits saying they have a presence here.

Newcomer **Jumo** (founded in February 2010 by Chris Hughes, co-founder of Facebook) claims a thin slice of less than 1% of charities, along with other narrowly adopted (and not so new) outlets such as **Vimeo** (video sharing), **Yelp** (local search and review), **Picassa** (photo sharing), **Ning** (build your own community) and **Delicious** (social bookmarking) all of which individually accounted for less than 1% of responses each.

First-time mentions this year also include the donor-empowered peer-to-peer giving sites **CrowdRise**, **FirstGiving**, **Razoo** and **Causes**. All were reported as being used by nonprofits but by less 1% of respondents each.

Facebook made efforts to supplant all of these companies with the release of new product features in 2010 and 2011. It will be interesting to see if these smaller players are able to carve out a firm hold in the market despite Facebook’s best efforts.

6. Surprise Result: Master Social Fundraisers Come in all Sizes

It turns out that nonprofits of all sizes are able to scale their fundraising efforts on commercial social networks.

We identified a subset (27 organizations) of “Master Social Fundraisers” from amongst the survey respondents. Master Social Fundraisers are nonprofits that raised more than \$100,000 on Facebook over the last year.

Fascinatingly, the first characteristic that jumped out reversed many of our conclusions regarding **organization size**: 30% of the Master Fundraisers were Small organizations (\$1 to \$5MM annual budget) and 8% were Medium-sized (\$6MM to \$50MM).

Table 1.1: Master Fundraisers – the size of organizations raising more than \$100K on Facebook

ORGANIZATION ANNUAL BUDGET	ORGANIZATIONS WHO RAISED >\$100K
\$1 to \$5MM	30%
\$6 to \$50MM	8%
\$51 to \$250MM	37%
>\$250MM	35%

The average Facebook following of a Master Social Fundraiser is nearly 100,000 (99,911) members—more than fifteen times the general average. This number demonstrates that a prerequisite for raising big dollars via social networks is a big community. Viral or word-of-mouth-marketing within online social networks may reduce the cost of building a community, but nonprofits still need a large base of supporters to bring in substantial fundraising revenue.

Staffing is important as well – 30% of Master Fundraisers dedicate 2+ staff to managing and fundraising on their social networking presence, compared to just 2% for the industry.

The conclusion is that resourcing matters a lot to get the job done if you want to fundraise successfully on social networks like Facebook, and it doesn't matter how large or small your nonprofit. If you manage to dedicate the budget and staff to the task even a small charity can raise \$100,000 or more on Facebook.

7. Environmental/Animal Welfare and International Services Groups Outperform the Sector

We sliced the survey results along nonprofit verticals and identified the top performers. Environmental/Animal Welfare groups recorded the highest average community size on Facebook with 8,490 members compared to the overall industry average of 6,376 members. International Service organizations reported the highest use of Facebook with 97% of these groups reporting a presence here, and nearly double the number of Twitter base with 7,360 followers compared to second place Environmental/Animal Welfare group average of 4,182 followers and an industry average of 1,822 followers. Public and Societal Benefit charities report the highest average LinkedIn base with 5,544 members, more than three times greater than the nearest peer sector – Higher Education with 1,591 LinkedIn members.

Moving on to the house social networking world, we round out our Top Ten results from the 2011 nonprofit social networking survey.

8. Average Community Size is Up (Again) for HSNs

Just like commercial social networks, the community size of nonprofit house social networks (HSNs) is on the rise with an average of 5,967 members in 2011 compared to 3,520 in 2010, a 70% increase year-over-year. Organization size looks to have a direct bearing on community size for house networks with Small (\$0 to \$5MM annual budget) organizations claiming an average base of 4,473 members, while Large (\$51MM to \$250MM) and Very Large (\$250MM+) report average community sizes of 15,717 and 18,528 members respectively.

9. Program & Service Delivery Creeps into #1 Spot

Over half (55%) of nonprofits who have a house social network report that the role of their community is for Program and Service delivery, eclipsing Marketing (49%) for the first time as the primary purpose for charity house networks. This mirrors our anecdotal experience over the last year as we talked with increasing numbers of nonprofits looking to use their house networks for delivery of health (e.g. stop smoking), education (e.g. electronic delivery of business education curricula), advocacy (e.g. stop climate change) or best practice innovation (e.g. animal welfare shelter improvements). Layering on or weaving mission into socially-enabled online communities helps to differentiate them from Facebook; finally answering the question, "Why would my supporters register and use my house network if they are already on Facebook?"

10. Business-focused Departments Still Running the Social Networking Show

Unlike many of the recent technology waves (e.g. web sites, email, mobile) social networking projects (and communities) are typically managed by the business-oriented departments instead of IT. Even the more technologically intensive house social networks are owned by Communications (17%), Marketing (13%), Fundraising (13%), Programs (12%), Executive Management (10%) and cross-departmental (owned by multiple departments equally) (11%). IT owns house social networking projects for 9% of organizations. It seems that the department that most directly benefits from the social networking program owns the effort, and IT mostly assists.

Detailed Reporting Part 1: Topline Results

Commercial Social Networks

Nonprofit Presence on Commercial Social Networks

Heading in to 2011 **most nonprofits (92%)**, regardless of organization size **are using at least one commercial social network (CSN)** like Facebook, Twitter or LinkedIn.

The industry giant, with 89% adoption among nonprofits is **Facebook**.

Twitter is the second most popular, used by 57% of organizations, while **LinkedIn** claims usage by 1 in 3 nonprofits (30%).

YouTube is still popular with nearly half (47%) of charities indicating they have a presence on this social video-sharing site.

Usage of **Flickr's** social photo sharing community fell off from 2010 levels (25%) to 2011's lower 19% adoption rate among nonprofits. Facebook's most popular application is photo sharing among members and presumably Facebook's continued ascent is cutting into Flickr usage.

The newbie place-based social networking platform **FourSquare** is used by just 4% of nonprofits.

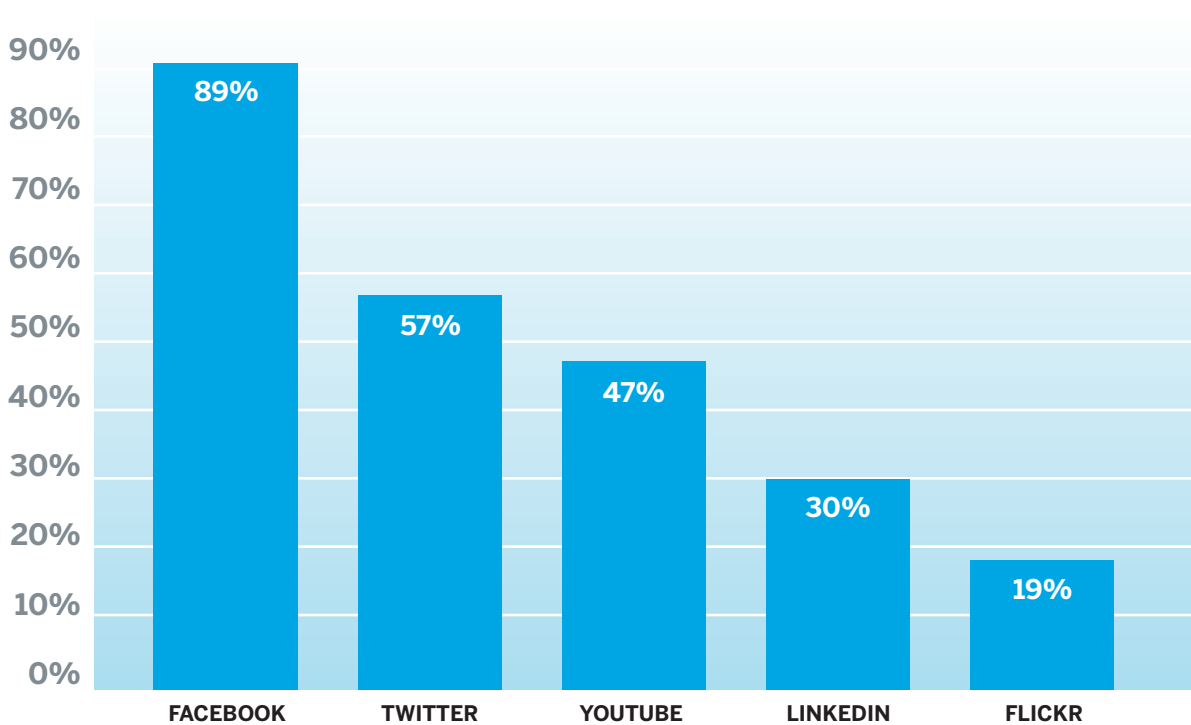
Newcomer **Jumo** (founded in February 2010 by Chris Hughes co-founder of Facebook) claims a thin slice of less than 1% of charities, along with other narrowly adopted outlets such as **Vimeo** (video sharing), **Yelp** (local search and review), **Picassa** (photo sharing), **Ning** build your own community) and **Delicious** (social bookmarking). All accounted for less than 1% each of nonprofit commercial social networking efforts.

First mentions this year (first time appearing on respondent's lists) also include the donor empowered giving sites **CrowdRise**, **FirstGiving**, **Razoo** and **Causes**.

Predictably, **MySpace** usage tailed off over the last year, with MySpace losing half of its remaining nonprofit base - now used by just 7% of organizations.

Overall, communities are getting larger with the average community size on Facebook *growing by 161% since last year to 6,376 in 2011*, LinkedIn *average size grew by 165% to 2011's 1,196*, and YouTube *blasted up by 504% to 2,702*. Twitter posted an anemic 2% growth from a 2010 average community size of 1,794 to 2011's average of 1,822, and Flickr accounts remain small at 307.

Top 5 Commercial Social Networks Used by Nonprofits

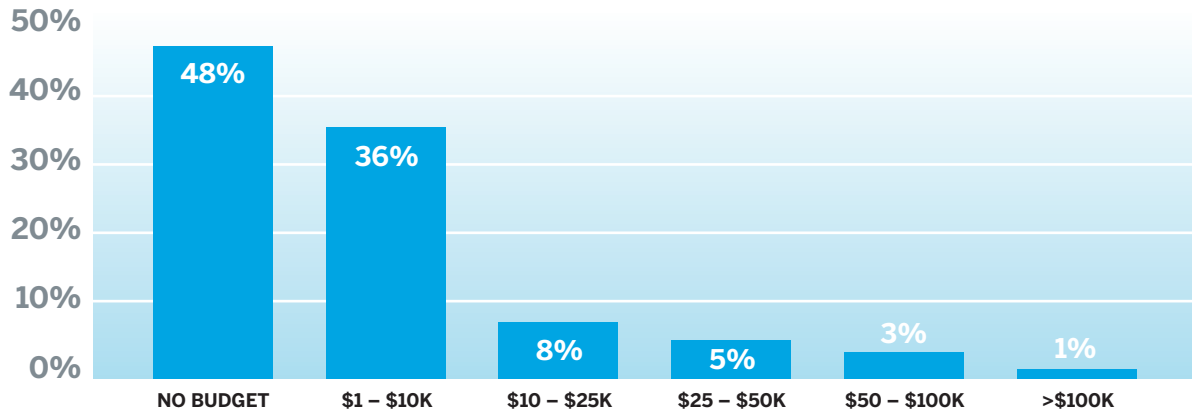


Budget, Staffing and Resources

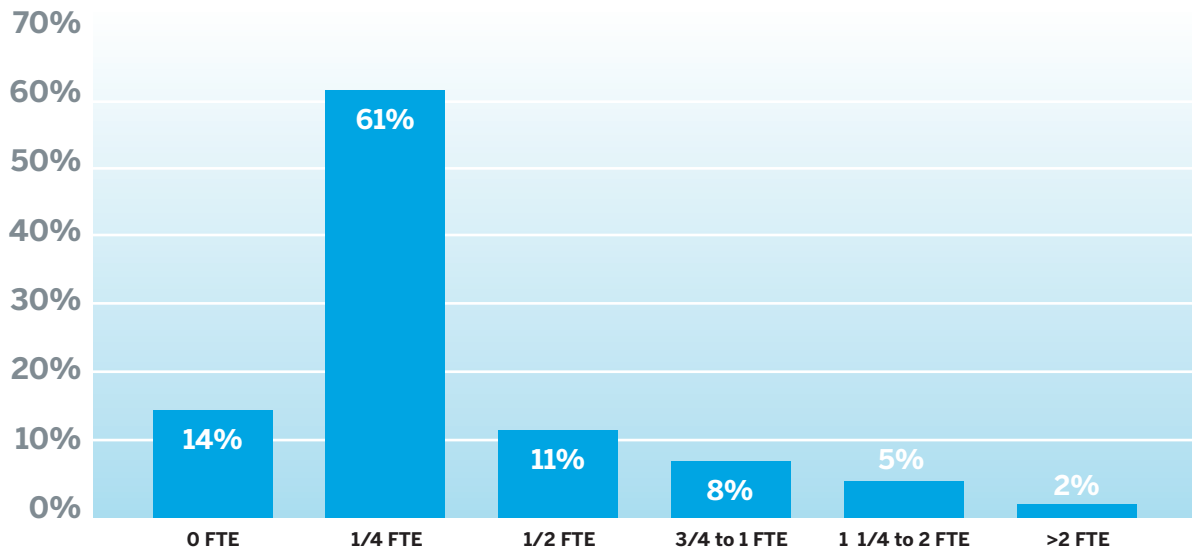
More than half (52%) of nonprofits have no formal budgets for commercial social networks with just 4% allocating more than \$50,000 annually. On the staffing side, 86% commit some employee time to commercial social networks, with the majority (61%) allocating a quarter (1/4) of a full-time employee equivalent (FTE), and nearly 15% dedicating three-quarters or more (3/4 +) of an FTE. Practically all (97%) of organizations say they will keep their commercial social networking staffing allocations the same or increase them over the next twelve months.

The owning department – the department with primary responsibility for commercial social networking – remains heavily skewed toward the business teams, largely leaving IT in a supporting role. Nonprofits give primary responsibility for CSNs to their Communications, Marketing, and Development departments in roughly even numbers. 1 in 10 (9%) are calling this responsibility “cross departmental”, and more executive management departments are taking on commercial social networking for their organizations than ever before (13%; up 8% from 2010)—demonstrating that more than one intern or volunteer has lost their social networking responsibilities to the boss.

Graph 2.2: Budget for Commercial Social Networks



Graph 2.3: Staffing for Commercial Social Networks



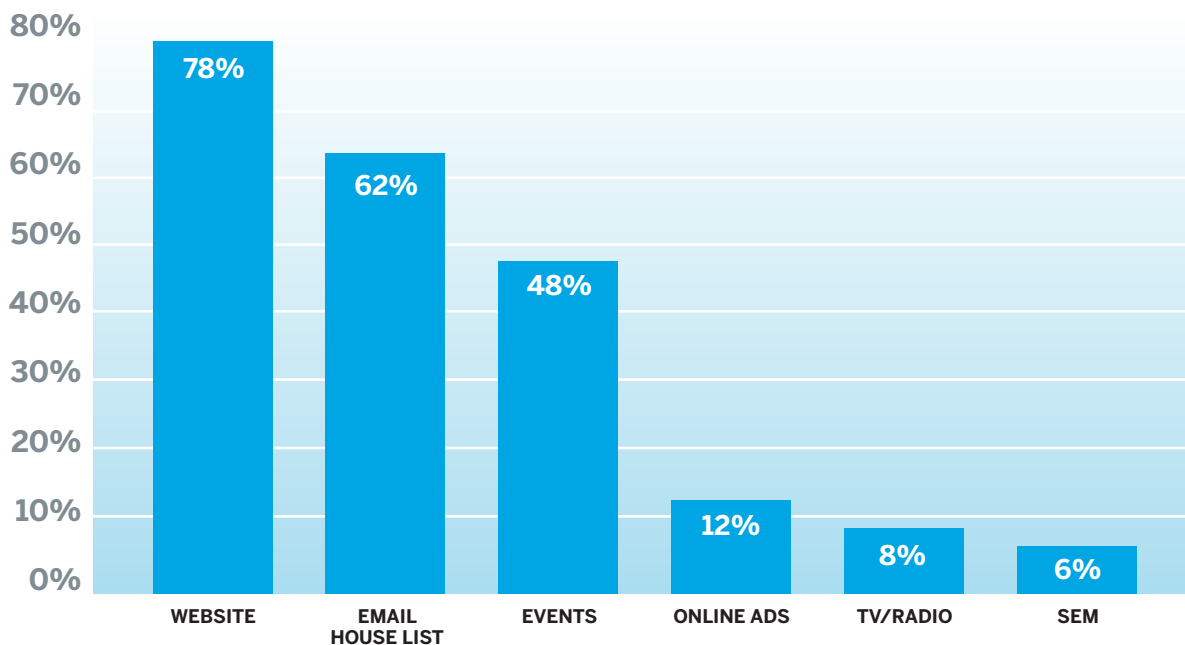
Promotion of Commercial Social Networks

Marketing (i.e. promoting the organization brand, programs, events or services) is the primary role for commercial social networks within nonprofits with 9% assigning Facebook that role. In a related question, 75% and 73% of organizations report that the goal for their commercial social networks includes a marketing focus - to “engage supporters” or “grow membership”- respectively.

Fundraising is a large but secondary role; 65% use CSNs to raise money, and 56% state fundraising as a goal for their CSNs over the next year. This continues the trend of nonprofits’ growing emphasis on CSNs for fundraising.

Contrary to often articulated best practice (i.e. promote social networks socially), 2011 was once again all about traditional marketing outlets. The most popular channel for nonprofits to promote their commercial social network communities is the charity’s own website(s) (78%), with 62% using emails to their e-subscriber house lists and 48% marketing CSNs at organizational and face-to-face events. Paid media promotion like online advertisements and search engine marketing (SEM) are less popular, used by just 12% and 6% of groups respectively.

Graph 2.4: Promotion Strategies for CSNs



Return on Investment of Commercial Social Networks

58% of nonprofits report measuring at least the soft benefits (e.g. increased awareness, education, non-financial supporter participation) of their commercial social networks, with just 9% measuring hard return on investment (ROI)—revenue received from donors, sponsors, advertisers, etc.

In a related question, 3 out of 4 (73%) nonprofits report prioritizing the measurement of site visitor volume, which is also the most popular metric for evaluating the success of their CSN, followed by the number of registered members (57%). More than half (52%) monitor customer feedback.

In a qualitative measure of CSN importance, a hearty 4 out of 5 (82%) of nonprofits rate their CSNs as somewhat or very valuable.

Lastly, returning to hard ROI, Facebook is the most popular CSN for fundraising, with one-half (48%) of nonprofits using Facebook to raise money from individual donors. It is important to note that 35% have raised less than \$1,000, and a very thin slice of less than 1% of all nonprofits have raised more than \$100,000 via Facebook in the last 12 months.

Table 2.5: Individual Fundraising on Commercial Social Networks

	NOT FUNDRAISING	\$0 – \$1K	\$1K – \$10K	\$10 – \$100K	MORE THAN \$100K
Facebook	52%	35%	11%	2%	0.4%
Twitter	80%	17%	2%	1%	0.1%
YouTube	91%	8%	1%	0.4%	0.1%
LinkedIn	94%	5%	1%	0.1%	0.1%
Flickr	98%	2%	0.2%	0.1%	0%

Why Nonprofits are not on Commercial Social Networks

Focusing the looking glass on our late adopters who have yet to establish a presence on commercial social networks (10% of nonprofits), they indicate that a lack of a strategy is the biggest reason they stay off—true for 60% of these organizations. A lack of staff or budget is a contributing factor for 57%, and 36% cite a lack of expertise. Concerns about privacy and control are also issues for 24% and 21% respectively.

House Social Networks

Nonprofit Presence on House Social Networks

House Social Networks (HSN)—social networking communities created on a nonprofit’s own website (sometimes called private social networks)—are operated by 13% of nonprofit organizations. Of those that operate house social networks, 79% manage just one community, while the most committed organizations (4% of HSN owners) manage five or more communities.

The average nonprofit house social networking community has **5,967 members**. 4 out of 10 (42%) nonprofits’ oldest house social networks are less than a year old.

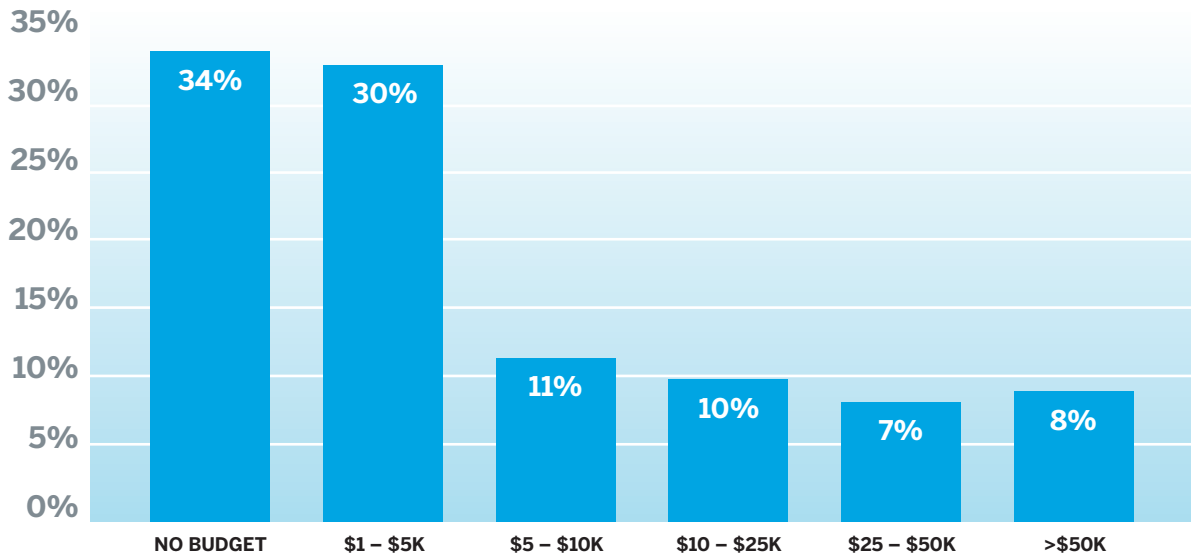
Table 3.1: Duration of House Social Networking Presence

	1 – 6 MONTHS	7 – 12 MONTHS	13 – 23 MONTHS	2 – 3 YEARS	LONGER THAN 3 YEARS
House Network	22%	20%	24%	16%	18%

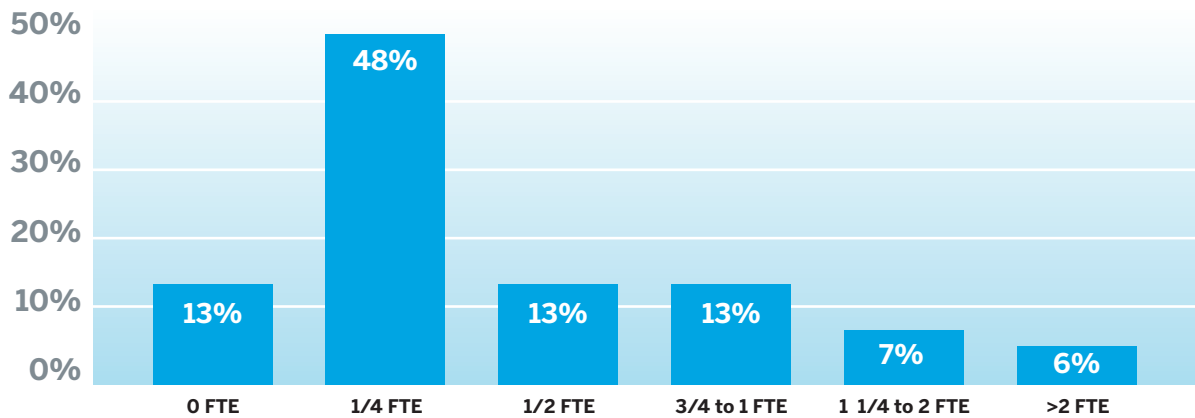
Budget, Staffing and Resources

Two-thirds (66%) of nonprofits with house social networks (HSNs) have official budgets for them; though 41% allocate less than \$10,000, and by contrast 8% allocate more than \$50,000. 9 out of 10 (87%) allocate staff resources to their HSNs. 61% allocate a one-quarter to a one-half of a full-time employee equivalent (FTE), and 13% have more than one full-time staff member. Here again, nearly all (94%) of organizations report that they will keep their staffing allocations the same or increase them over the next twelve months.

Graph 3.2: Budget for House Social Networks



Graph 3.3: Staffing for House Social Networks



Departmental ownership once again veers toward the business teams, even for this more technologically intensive “build-your-own” HSN context.

Communications (17%), Marketing (13%) and Development (13%) lead as owners of the HSNs, closely followed by Programs (12%) and executive management (10%). IT steps in at 9%. Unlike many previous technology waves (e.g. donor database, websites) house social networks are not centralized within IT, and in fact, it looks like ownership is falling down along role lines – ex. if the HSN is used to deliver health programs then the program group owns it.

6 in 10 (61%) nonprofits with house social networks have a budget item for social networking software. One-third (37%) budgeted more than \$1,000. One in five (21%) are using commercial software to build their HSNs, while 22% and 26% are building custom platforms or using open source software respectively.

The white label social networking software (i.e. software for building HSNs) marketplace remains highly fragmented, where the most popular commercial social networking platform is Ning—used by 11% of organizations—while Blackbaud products take the second and third place slots with their Blackbaud NetCommunity software (9%) and Blackbaud Social (formerly ThePort) with 3% adoption, respectively.

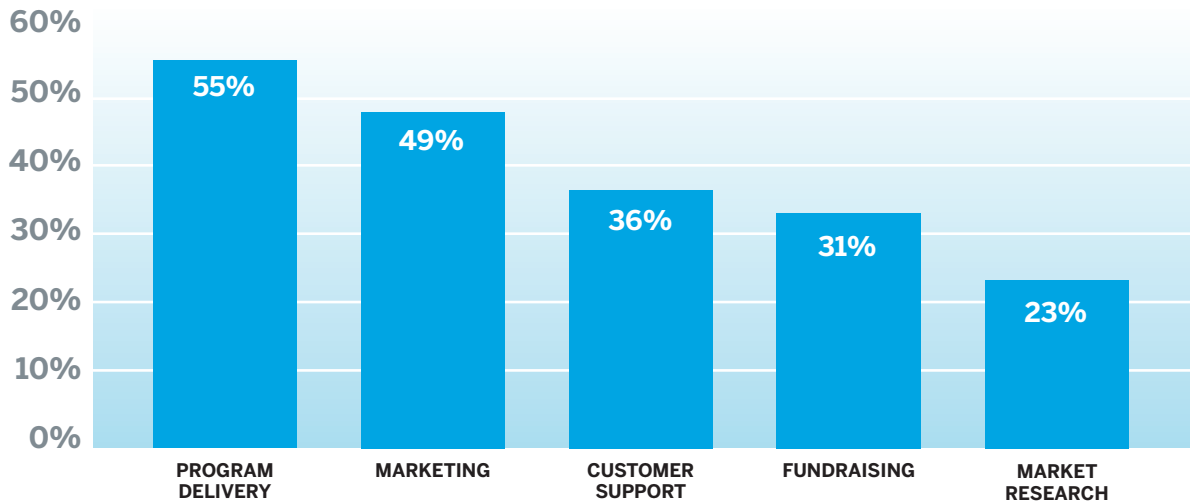
Role of House Social Networks

Service and program delivery takes over as the leading role for House Social Networks in 2011 with 55% of nonprofits with an HSN indicating this as the primary role of their community, compared with 37% of nonprofits who use their Commercial Social Networks for this purpose. The marketing role (49%) falls to second place, with fundraising coming in at 31% of HSN-owning nonprofits. This confirms our anecdotal experience over the last year of seeing more nonprofits engaging their supporters with service and program-focused portals (HSNs) that are socially-enabled rather than building social communities that offer arriving supporters very little value.

“Engaging members”, “growing membership” and “expanding community site features” are nonprofits’ biggest goals for their house social networks over the next twelve months.

About one-third of nonprofits say their HSNs play a fundraising role, and a similar number (32%) say that raising money on their house social network(s) is a goal in the next year. Compare that to the 65% and 56% respectively who say the same things about their work on commercial social networks.

Graph 3.4: Top Roles of House Social Networks



Looking at the promotion of HSNs as compared to CSNs we note that the organizational website is the leading marketing channel for both, but HSNs are promoted by 59% of nonprofits using this outlet versus 78% using their website to promote their CSN. This is odd given that most HSNs are often integrated with or connected to the organization's website so therefore the website would seem like a natural marketing outlet.

Return on Investment for House Social Networks

57% of nonprofits report measuring at least the soft benefits (e.g. increased awareness, education, non-financial supporter participation) of their House Social Network, with just 12% measuring hard return on investment (ROI) - revenue received from donors, sponsors, advertisers, etc.

Organizations use similar metrics for evaluating HSNs as for commercial networks: site traffic, number of registered members, and customer feedback are the most popular measures of house social networks, with 59%, 56% and 49% percent of groups saying they gauge success in these ways respectively. Nearly 8 out of 10 (77%) of nonprofits rate their house social network as somewhat or very valuable.

One-third (34%) of nonprofits with HSNs have used them to fundraise, and 10% have used them to raise more than \$10,000 over the last twelve months. While 16% of nonprofits are advertising on their HSN, only 4% have brought in more than \$10,000 in revenue from advertising in the past year.

Table 3.5: Individual Fundraising on House Social Networks

NOT FUNDRAISING	\$0 – \$1K	\$1.1K – \$10K	\$10 – \$100K	MORE THAN \$100K
66%	12%	12%	7%	3%

Table 3.6: Ad Revenue on House Social Networks

NOT FUNDRAISING	\$0 – \$1K	\$1.1K – \$10K	\$10 – \$100K	MORE THAN \$100K
84%	7%	5%	3%	1%

Why Nonprofits are Not Building House Social Networks

The gross majority of nonprofits (77%), those without a house social network, state they do not have the staff or budget (64% of HSN non-owners), don't have the expertise (47%) or don't have a social networking strategy (44%) as the top three reasons they don't have an HSN. Interestingly these are the top three reasons given by just 10% of nonprofits who don't yet have a presence on Commercial Social Networks.

In evaluating this question further – why more nonprofits have not built their own HSN – we offer the following hypotheses:

- 1. Cost: House networks are more expensive to build.** A Facebook Page, Twitter account or LinkedIn Group is free. The simplest HSN is built using a tool like Ning, which now costs a minimum of \$50-\$100 per month, and more sophisticated white label social networking software costs \$500 to \$5,000+ per month. The one-time costs of designing, building and deploying an HSN vary from minimal to \$100,000+.
- 2. Complexity: A house network is more complex.** Deploying a house social network requires (at a minimum) a good understanding of software tools like Ning and more typically technologically-intensive skills like programming in HTML/CSS or server-side software languages like PHP or Java and database setup and deployment.
- 3. Time:** A simple Facebook Page takes as little as 5 minutes to set up and publish. A simple house network takes 30 minutes to 3 hours. Larger, more sophisticated HSNs require weeks or months to develop and deploy.

- 4. Audience Access:** Correctly or not, many nonprofits believe that Facebook, Twitter and LinkedIn more readily offer access to a larger base of prospect supporters, where with a House Network one is required to build a base. In truth, to build a large community both channels – CSNs and HSNs – require a formalized, well-funded acquisition program, and both benefit equally from online word of mouth marketing
- 5. Education Gap:** There is a widely held perception in the nonprofit industry that social networking is a channel for awareness building and light engagement, and that heavy stewardship and conversion occurs in other channels – email, direct mail, telemarketing and face-to-face. Facebook, Twitter and LinkedIn fit this Marketing-Lite model given the ease of deployment and the seemingly easy access to hundreds of millions of potential supporters. While marketing is a great use for social networking technology, program and service delivery is equally as valuable, albeit more complex to deploy, and especially well suited for house social networks. Other issues such as platform flexibility, ownership of supporter data, ease of integration with existing systems, and brand exclusivity (nonprofit brand vs. Facebook, for example) are all core to the HSN value proposition, but are not well understood in the nonprofit marketplace today.

Combining these hypotheses we see that a rapid analysis of cost, complexity, and elapsed time to deployment orients many nonprofits to the Commercial Social Networks. And, in fact, some nonprofits are quite successful in these channels – witness the most successful groups assembling 200K, 500K or more Facebook fans, Twitter followers or LinkedIn members. That said, as the value of socially-enabled, program-focused communities becomes more mainstream, the value of HSNs will be more obvious and therefore more prevalent. In addition, software technology will continue to evolve making it easier for nonprofits to deploy more sophisticated HSNs more quickly and cost-effectively.

Commercial Social Networks v. House Social Networks

How do nonprofits' use of commercial social networks (CSNs) and house social networks (HSNs) compare?

Nearly all nonprofits have a presence on CSNs (especially Facebook) while just 13% have a house network. Allocation of staff time, average community size, budgets, fundraising revenue and average age (time since site creation) are quite similar between the two channels.

Advertising (controlled by and revenue-generating for the nonprofit) is more prevalent on HSNs – obviously Facebook, Twitter and LinkedIn have their own advertising networks which largely rule out advertising opportunities for nonprofits (especially associations). Where on house networks, nonprofits are free to leverage advertising, sponsorship and underwriting at will.

An emerging and significant difference between commercial and house networks centers on the role of the community. While both channels are used for various purposes (marketing, customer service, fundraising, market research), marketing still leads as the chief role of commercial social networks, while Program and Service Delivery has taken over as the top role for house networks. Nonprofits have quickly figured out that Facebook is massive – providing both a robust platform and a huge base (600 million active members and growing) and is the default choice for American consumers for peer-to-peer socializing online. As a result, savvy organizations are moving to overlay the delivery of their programs and services on house networks, thereby providing supporters a socially enabled experience steeped in the core organizational experience – the mission.

Table 4: Comparison of Commercial Social Networks and House Social Networks

QUESTION	COMMERCIAL SOCIAL NETWORK	HOUSE SOCIAL NETWORK
Does your organization have one?	92%	13%
What is the primary purpose of the community?	Marketing	Program Delivery
How much staff time did you allocate to the community over the last year?	1/4 to 1/2 FTE (72%)	1/4 to 1/2 FTE (61%)
Average number of community members?	6,376 (Facebook)	5,967
How long have you had your community?	13-23 months <i>on Facebook</i> (40%)	13-23 months (24%)
How much fundraising revenue have you raised over the last year?	Not Fundraising (52%) \$0-\$10K (46%)	Not Fundraising (66%) \$0-\$10K (24%)
How much revenue from advertising, sponsorship or underwriting over the last year?	Not Advertising (98%) \$0-\$10K (2%)	Not Advertising (84%) \$0-\$10K (12%)
For those nonprofits without a community of this type, what is the primary reason?	No strategy (60%) No staff or budget (57%)	No staff or budget (64%) No expertise (47%) No strategy (44%)

Detailed Reporting Part 2: Crosstabs

Organizational Mission

Nonprofits by Mission Type on Commercial Social Networks

Most nonprofit sectors have adopted Facebook at a high rate with the International Services vertical leading (97%) and the Health sector trailing (83%). International Service groups have historically been early and strong adopters of technology including the Internet and social networks, so their leadership position is no surprise. Health groups are likely trailing in their adoption of public social networks due to sensitivities around supporter privacy issues (e.g. nonprofits' respect for an individual's right to determine how and to whom sensitive health information is disseminated or HIPAA concerns).

Environmental and Animal Welfare organizations deliver the largest bases of Facebook Fans, with 8,490 fans on average. Environment and Animal Welfare groups have consistently demonstrated a knack for using technology effectively over the years. K-12 Education sector nonprofits have the smallest Facebook communities at an average of 948 – not surprising given the inherently small ecosystem centered around a typical elementary or high school.

Arts & Culture sector groups are the least likely to measure hard ROI (e.g. fundraising revenue and other financial data), but they express the most enthusiasm for their communities' performances. 26% say their CSNs are *very* valuable compared to 12% from the least enthusiastic sector—Professional Associations.

Higher Education organizations are among the most likely to allocate significant budget and staff to commercial social networking, but only 6% of them raised more than \$1,000 on Facebook in the last year. International Service groups, by contrast, are more likely than their peers to have raised more than \$1,000 last year—likely due to their penchant for deploying the resource (budget and staff) to make it happen combined with a history of smart and effective use of the Internet.

Table 5.1: Nonprofit Verticals and Commercial Social Networking

	ARTS AND CULTURE	ASSOC. PROF.	ENVIRO. / ANIMAL	HEALTH	HIGHER EDU.	K-12 EDU.	HUMAN SERVICE	INTL.	PUBLIC BENEFIT
Facebook	94%	87%	92%	83%	89%	89%	87%	97%	88%
Average # Members on Facebook	2,089	2,318	8,490	6,037	2,710	948	2,318	4,780	5,002
Measuring Hard ROI	6%	9%	10%	10%	7%	9%	9%	12%	9%
Community is Very Valuable	26%	12%	26%	21%	19%	17%	15%	21%	22%
Budget (>\$10K)	13%	18%	14%	17%	21%	13%	11%	19%	17%
Staffing (>1/4 FTE)	23%	23%	26%	27%	30%	20%	19%	29%	26%
Fundraising on Facebook (>\$1K)	9%	8%	19%	18%	6%	11%	11%	23%	12%
Primary Role	Marketing								

Nonprofits by Mission Type on House Social Networks

The Professional Association sector leads all other groups on house social networking with one in four (25%) of Professional Associations offering an HSN to their members. House social networking is a natural use of the Internet for these member-focused groups that emphasize professional networking, service delivery and a protective “firewall” approach to community management.

The Professional Associations rate 4th, however, in community size with an average of **6,082 members**. The Public Benefits sector claims the largest average house community size at **13,847 members**, followed closely by Health sector organizations’ average house community size of 10,580. Public Benefit sector nonprofits are also more likely to report getting higher value from their HSN, perhaps in part because of the large member bases they have attracted on average.

We call the Higher Education sector organizations the ‘early adopters’; three in four higher education groups with house social networks started their first community more than one year ago.

Organizations in the highest adopting sectors—Professional Associations, Health, and Higher Education—plus K-12 Education sector nonprofits are the least likely to be measuring hard ROI statistics like financial data and fundraising revenue. This finding is surprising given these groups’ relative sophistication with all forms of revenue-generating activities: sponsorship, individual giving, advertising, etc. Perhaps the answer lies in their strong focus on program and service delivery. Bringing in revenue is not the objective of a health-based community built, for example, to help diabetics manage their diet and exercise in a peer-supported online portal.

Table 5.2: Nonprofit Verticals and House Social Networking

	ARTS AND CULTURE	ASSOC PROF	ENVIRO/ ANIMAL	HEALTH	HIGHER EDU	K-12 EDU	HUMAN SERVICE	INTL	PUBLIC BENEFIT
1+ House Networks	9%	25%	9%	14%	23%	15%	7%	14%	14%
Average # Members	1,250	6,082	5,024	10,580	6,270	1,558	1,130	2,241	13,847
Started 1st in the Last Year	43%	43%	36%	46%	25%	47%	47%	43%	43%
Measuring Hard ROI	16%	9%	14%	9%	7%	9%	13%	10%	13%
Community is Very Valuable	25%	25%	27%	26%	21%	24%	24%	27%	34%
Budget (>\$10K)	11%	38%	28%	31%	30%	18%	18%	19%	25%
Budget for Software (>\$10K)	6%	23%	29%	20%	28%	12%	10%	7%	18%
Staffing (>1/4 FTE)	29%	49%	42%	40%	39%	36%	34%	45%	42%
Fundraising (>\$5K)	17%	9%	25%	11%	19%	16%	17%	17%	7%

Organization Size

Nonprofits by Organization Size on Commercial Social Networks

Overall, organizations of all sizes are embracing Facebook, with 9 out of 10 (89%) of organizations – Small, Medium, Large and Very Large - indicating that they have a presence on Facebook (*Note: Organization size based on annual budget*). That said, organization size does make a difference when it comes to community size – presumably bigger budgets, more resources and access to deeper expertise at larger organizations, on average, do make for a bigger fan base on Facebook. Small organizations (\$0 to \$5MM annual budget) average just 3,227 fans, while Very Large organizations (more than \$250MM annually) average 24,811 fans on Facebook or 7.7 times greater than Small nonprofits.

Twitter lags Facebook overall in its adoption by nonprofits, and a nonprofit's likelihood to have a Twitter account and its average number of followers grows with the size of the organization. Very Large charities have a 40% greater likelihood than Small nonprofits (74% vs. 53%) to have a Twitter account and 16x greater follower base (16,686 followers vs. 1,025 for Very Large and Small organizations respectively).

Large and Very Large organizations are 2 to 3 times more likely to be measuring the financial viability of their commercial social networks with Large (17%) and Very Large (21%) groups measuring hard ROI more frequently than Small (8%) and Medium (9%) charities.

While determining cause and effect is tricky, Large and Very Large nonprofits indicate much higher levels of internal resourcing and budgets for their commercial social networking efforts. Very Large (56%) and Large (53%) groups are committing one-quarter FTE or more to their commercial social networking efforts at higher rates than their smaller peers – just 21% for Small and 34% for Large groups.

When it comes to annual budgets, the story is the same. A greater percentage of Large and Very Large groups are spending \$10,000 or more on commercial social networking. Smaller groups are not able (or willing) to commit as many hard dollars; 11% of Small and 27% of Medium charities spend \$10,000 or more annually.

To complete the ROI picture, larger organizations are raising more money via fundraising on commercial social networks. 18% of Very Large charities report raising at least \$10,000 in individual donations on commercial social networks, while just 1% of Small organizations report having raised at least \$10,000 in the last year.

Table 6.1: Organization Size and Commercial Social Networking

	SMALL (\$0 – \$5MM)	MEDIUM (\$6MM – \$50MM)	LARGE (\$51MM – \$250MM)	VERY LARGE (>\$250MM)
Facebook				
a. % of orgs	a. 88%	a. 88%	a. 88%	a. 89%
b. Average of fans	b. 3,227	b. 7,539	b. 20,430	b. 24,811
Twitter				
a. % of orgs	a. 53%	a. 64%	a. 70%	a. 74%
b. Average of fans	b. 1,025	b. 3,379	b. 9,266	b. 16,686
LinkedIn				
a. % of orgs	a. 28%	a. 35%	a. 40%	a. 45%
b. Average of fans	b. 1,356	b. 315	b. 1,071	b. 4,784
Measuring ROI	8%	9%	17%	21%
Internal Staffing (More than 1/4 FTE)	21%	34%	53%	56%
Total Budget (More than \$10,000)	11%	27%	42%	52%
Started on Facebook in the last year	37%	30%	21%	26%
Fundraising on Facebook >\$10,000	1%	3%	12%	18%

Note: Organization size is measured based on total annual budget. Ex. A Small Organization has between \$0 and \$5 million in annual budget, while a Medium Organization has between \$6 million and \$50 million in annual budget.

Nonprofits by Organization Size on House Social Networks

The picture is similar with house networking. Organization size is the best predictor of whether an organization will have a house network or whether they will allocate staffing, budget overall or budget for white label social networking software (software to build a house network). Basically, the bigger the organization the more likely they will have a house network and the larger their staffing, budgets, etc.

The two exceptions to the rule of size are: how long since the organization built its first house network and the role of the house community. About half of Small (42%), Medium (44%) and Very Large (50%) organizations indicate they built their first house network in the last 12 months, meaning that 1 out of every 2 existing house networks were built in the last year. The exception is among Large groups, where one-quarter (28%) indicated starting their first house network in the last

year. In general then, there's a good chance that you jumped into the deep end (to build a house network) pretty recently, and you are much more likely to have a presence on, for example, Facebook than to have built your own house network regardless of the size of your organization.

As for the purpose or role of the house network, size mostly doesn't matter until you get to the organizations with annual budgets more than \$250MM. A little over half of Small (57%), Medium (52%) and Large (54%) organizations specify that Program and Service Delivery is the focus for their house networks, while Very Large charities place a lower priority on program delivery (37%) and focus more on Marketing (53%) and Fundraising (32%).

Table 6.2: Organization Size and House Social Networking

	SMALL (\$0 – \$5MM)	MEDIUM (\$6MM – \$50MM)	LARGE (\$51MM – \$250MM)	VERY LARGE (>\$250MM)
1+ House Networks	11%	18%	23%	21%
# Members	4,473	4,024	15,717	18,528
Measuring ROI	12%	11%	14%	18%
Internal Staffing (More than 1/4 FTE)	36%	45%	57%	45%
Total Budget (More than \$10,000)	19%	33%	56%	47%
Started 1st House in the last year	42%	44%	28%	50%
Fundraising >\$10,000	9%	11%	12%	13%
Annual Budget for Social Networking Software (More than \$10,000)	12%	23%	46%	56%
Purpose of House Network: Program Delivery	57%	52%	54%	37%

Nonprofits Measuring “Hard” ROI

With an eye to profiling a cost-effective social network-using charity (charities that construct a self-funding or money-making social networking program) we looked at nonprofits that measure hard ROI metrics (e.g. fundraising revenue). We searched for areas of distinction between measurers and non-measurers (admittedly “measuring” ROI is just the first step in actually being cost-effective).

In our sample size of 869 nonprofits who measure hard ROI, 87% of them say that fundraising is a goal of their commercial social networks compared to 56% generally. They also have Twitter followings that are about 2.4 times larger, Facebook communities about 6.5 times larger, and LinkedIn communities about 7.3 times larger than average.

Table 7.1: Average Community Size for Cost Effective Social Networking Charities

	FACEBOOK	TWITTER	LINKEDIN
All Nonprofits	6,376	1,820	1,200
Only Nonprofits Measuring Hard ROI	42,000	4,370	8,774

Nonprofits measuring hard ROI metrics also raise more money on commercial social networks. One in ten (9.5%) who measure their Facebook fundraising revenue also brought in more than \$10,000 over the last year, compared to less than 3% of nonprofits on Facebook generally.

Table 7.2: Fundraising Revenue for Cost Effective Social Networking Charities

	NOT FUNDRAISING	\$0 – \$1K	\$1K – \$10K	\$10 – \$100K	MORE THAN \$100K
All Nonprofits	52%	35%	11%	2%	0.4%
Only Nonprofits Measuring Hard ROI	23%	43%	24%	7%	3%

Whether measuring ROI is the first step to raising more fundraising revenue or the reverse is true, it is clear that organizations who strive to fundraise, and who measure their progress tend to raise more on social networks than their peers. We find this true despite a widely held belief in the industry that fundraising on social networks is neither appropriate nor successful.

Interestingly, the overall (qualitative) perceived value of social networks does NOT vary much between ROI measurers and non-measurers: 89% of measurers indicate that their social networking efforts are valuable (i.e. “somewhat valuable” or “very valuable”) while 82% of non-measurers report that their social networking efforts are valuable. Presumably this is due to at least two factors: social networks for program and service delivery are rarely ROI-positive programs by their nature, and not every organization focuses on financial return – either because of intrinsic social benefit or a lack of administrative fiscal rigor.

Master Social Fundraisers (Fundraising on Facebook)

We identified a subset (27 organizations) of “Master Social Fundraisers” from the survey respondents. Master Social Fundraisers are defined as nonprofits that raised more than \$100,000 on Facebook over the last year. Our goal was to get insights on how these high performers cracked the code to fundraising on social networks.

Fascinatingly, the first characteristic that jumped out reversed many of our conclusions regarding **organization size**: 30% of the Master Fundraisers were Small organizations (\$1 to \$5MM annual budget) and 8% were Medium-sized (\$6MM to \$50MM) (See Table 1.1; page 4).

The average Facebook following of a Master Fundraiser is nearly 100,000 (99,911)—more than fifteen times the general average, which demonstrates that a prerequisite for raising big dollars via social networks is a big community. Viral or word-of-mouth-marketing within online social networks may reduce the cost of building a community, but nonprofits still need a large base of supporters to bring in the fundraising revenue.

Staffing is important as well – 30% of Master Fundraisers dedicate 2+ staff to managing and fundraising on their social networking presence, compared to just 2% for the industry as a whole.

The easy conclusion is therefore that resourcing matters a lot to get the job done if you want to fundraise successfully on social networks like Facebook, and it does not matter how large or small your nonprofit. If you manage to dedicate the budget and staff to the task even a small charity can raise \$100,000 or more on Facebook.

This is a particularly useful insight given that so many organizations spread themselves thin – attempting to jump-start communities on Facebook, LinkedIn, and Twitter while building out their Flickr and YouTube accounts and content. As we often suggest, it is a far better strategy to marshal your resources around one or possibly two social outlets most suited for your audience and mission. It takes considerable resources to build a large community in any one of these outlets, and clearly it takes a large community to produce sizeable fundraising revenue.

Second, choose carefully: Facebook, Twitter and LinkedIn have spent a lot of effort differentiating their respective products. Learn the difference and build your community with the tools that suit you and that are used by your supporters.

Detailed Reporting Part 3: Trends

Common Knowledge has been talking to nonprofits since 2009 via the annual social networking survey. The social networking industry is still young and developing rapidly but some clear trends are visible.

Commercial Social Networking Trends

In the last two years the percent of nonprofits using Facebook has grown from 74% to 89%, with the largest chunk of that new adoption happening between 2009 and 2010 (i.e. 16% increase from 2009 to 2010, and just 3% from 2010 to 2011). Certainly Facebook has benefitted from the incredible market share tumble of MySpace (dropping from usage by 26% of nonprofits in 2009 to just 7% in 2011) and their own substantive (and innovative) software platform development. Keep in mind that since last year Facebook's overall member base has grown from 450 million active members to 600 million worldwide users, with 42.3% (132.5 million) of the American population using the site, reaching 9 out of 10 U.S. online social network users and 57.1% of American internet users, as of February 2011. eMarketer estimates that Facebook's dramatic growth will slow to single digits (8.2% and 6.1% respectively in 2012 and 2013).*

In addition to the overall slowing in Facebook consumer adoption, the nonprofit slowdown is likely due in part to the platform itself. It has always been quick, easy and cheap to set up a Facebook page, so many organizations did so early on. In many ways then, we drifted from Facebook's early adoption stage in 2007 through 2008, and squarely into mainstream adoption in 2009 and 2010. We are left with the holdouts—the remaining 10% of the nonprofit marketplace who have yet to create a presence on Facebook.

An important note: there is a considerable difference between creating a “casual” presence on Facebook and growing a viable program with a connection to a large audience and scalable results. This year we saw the high performers (those organizations who excel at community building, fundraising and program development on social networks) really break out from the pack. We would expect the next big wave of growth on Facebook in the nonprofit industry to come from development and dissemination of best practices for building and successfully engaging a community to raise money and deliver nonprofit programs via Facebook *on a large scale*.

As we noted in our 2010 Nonprofit Social Networking Benchmark report, the big influx of nonprofits adopting Facebook between 2009 and 2010 caused the average community size to drop from 5,391 in 2009 to 2,440 in 2010. It looks like the 2010 wave of Facebook adopters has been busy building their fan base. 2011 saw the average fan base increase to 6,376 (+161% higher than 2010).

Twitter did not see the same strong user trends. While nonprofit presence on Twitter stayed roughly constant from 2010 to 2011, the size of nonprofits' average follower base grew only 2%. That's a significant plunge given the average follower base grew 524% between 2009 and 2010.

This year's results formalize what most folks have known for some time; MySpace is withering on the vine. About half of nonprofits on MySpace have abandoned it each of the last two years (dropping from 14% in 2010 to 7% in 2011 of nonprofits reporting a presence on MySpace), and between 2010 and 2011 the rate of community shrinkage has accelerated drastically. The average nonprofit MySpace community is 34% smaller this year: 1,189 members compared to last year (1,794).

Fundraising on Facebook is still a minority effort. The number of groups successfully generating a small fundraising revenue stream (\$1 to \$10K annually) has risen each year from 38% in 2009 to 46% in 2011. The number of organizations raising \$100,000 or more per year on social networks doubled this year from 0.2% to 0.4%, but obviously still represents a critically thin slice of the sector.

One variable that has remained unwaveringly steady over the last three years is nonprofits' perception of the value of their commercial social networks – 18%, 18% and 20% of nonprofits in 2009, 2010 and 2011 respectively rate their social networks as “very valuable”, while the “somewhat valuable” cohort remains rock steady at 61% (2009), 63% (2010) and 62% (2011).

Of course some of the value of Facebook and other social networks is that they are cheap means to reach potentially many people, and they enable supporters to share your content with their networks. Nonprofits have responded to this tantalizing value proposition by slowly increasing staffing committed to commercial social networks. Since 2009 about 5% of nonprofits have allocated at least some staff time (at least ¼ FTE) to commercial social networking, bringing the total percent of nonprofits that do so up from 81% to 86% between 2009 and 2011.

Likewise nonprofit commitment to social networking budgets continues to rise with the small budget category (\$25K or less annually attributed to commercial social networks) increasing from 33% (2009) to 36% (2010) to 44% (2011).

Fundraising on CSNs strikes a similar pose with increasingly more charities reporting a small revenue result (\$0 to \$10K) from the individual giving efforts on CSNs – ranging from 38% of groups in 2009 to 46% in 2011.

*eMarketer, February 24, 2011 “Less than 20 million US adults used Twitter at least monthly in 2010”, www.eMarketer.com

Table 8.1: Commercial Social Networking Trends

	2009	2010	2011
# of Survey Respondents	980	1,711	11,196
% on Facebook	74%	86%	89%
Average Members on Facebook	5,391	2,440 (-55%)	6,376 (+161%)
% on Twitter	43%	60%	57%
Average Members on Twitter	287	1,792 (+524%)	1,822 (+2%)
% on MySpace	26%	14%	7%
Average Members on MySpace	1,905	1,792 (-5%)	1,189 (-34%)
Measuring Hard ROI	N/A	5%	9%
Fundraising on Facebook (>\$10K)	1%	2%	2%
Value of Community (Very or Somewhat)	79%	81%	82%
Staffing (FTE)	None: 19% 1/4 to 1/2: 65%	None: 15% 1/4 to 1/2: 67%	None: 14% 1/4 to 1/2: 72%
Overall Budget	None: 56% <\$25K: 33%	None: 53% <\$25K: 36%	None: 48% <\$25K: 44%

House Social Networking Trends

The number of organizations with at least one house network declined from 22% (2010) to 13% (2011). The most likely explanation - as more small networks join the social networking wave and turn first to commercial social networks, they skew the house social network results down.

Similar to the commercial social networks, HSN membership again has risen this year, with the gross majority of nonprofits reporting 2,500 members or less in 2009, an average community size of 3,520 in 2010 and a sizeable 70% increase in 2011, where the average house social network had 5,967 members.

Nonprofit consensus that house social networks are valuable ("somewhat" or "very valuable") to the organization has held steady ranging from 77% (2009) to 74% and 78% in 2010 and 2011 respectively.

We've seen a slight increase in staffing for house social networks, with the ¼ to ½ FTE category, increasing from 52% in 2009 to 61% in 2011. The larger staff commitment group (>2 FTE's) is holding steady at 6% (no change from 2009 to 2011).

Similar to CSNs, a growing (but still minority) of organizations use their house networks to generate some individual giving revenue (\$0 to \$10K annually), an increase from 17% in 2009 to 24% in 2011. Big ticket fundraising (\$100K+ annually) is holding steady at 3% in 2011 compared to 4% in 2009.

Table 8.2: House Social Networking Trends

	2009	2010	2011
# of Survey Respondents	980	1,711	11,196
1+ House Networks	30%	22%	13%
Average # of Members	74% reported 1 – 2,500*	3,520	5,967 (+70%)
Measuring Hard ROI	N/A	7%	12%
Value of Community (Very or Somewhat)	77%	74%	78%
Staffing (FTE)	None: 13% 1/4 to 1/2: 52%	None: 14% 1/4 to 1/2: 57%	None: 13% 1/4 to 1/2: 61%
Overall Budget	None: 31% <\$25K: 41%	None: 30% <\$25K: 47%	None: 34% <\$25K: 41%
Fundraising (>\$10K)	9%	11%	10%

* In 2009 we asked nonprofits to select the size of their house network from a range of options. 74% choose the lowest possible range, 1 to 2500 members.

About

NTEN

NTEN is the membership organization of nonprofit professionals who put technology to use for their causes. NTEN helps you do your job better, so you can make the world a better place.

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.

Common Knowledge

Common Knowledge, an Internet consulting agency, founded in 2002, provides online fundraising and marketing services to nonprofits and higher education. We assist our clients with strategy, digital asset development, and campaign management. An integral part of our work includes the conceiving and deployment of social networks to support our clients' efforts to raise funds from supporters and deliver their programs and services. Since 2006 our team has deployed more than 20 online social communities – delivering the social strategy, selection and deployment of the community infrastructure, and on-going promotion for new member acquisition.

Working with more than 100 nonprofits over the last 10 years, our recent clients include: 4-H, American Heart Association, Arthritis Foundation, ASPCA, Disabled American Vets, Junior Achievement, Operation Smile Train, Save the Children, and UC San Francisco.

Blackbaud

Blackbaud is the leading global provider of software and services designed specifically for nonprofit organizations, enabling them to improve operational efficiency, build strong relationships, and raise more money to support their missions. Approximately 24,000 organizations — including The American Red Cross, Cancer Research UK, Earthjustice, International Fund for Animal Welfare, Lincoln Center, The Salvation Army, The Taft School, Tulsa Community Foundation, Ursinus College, the WGBH Educational Foundation, and Yale University — use one or more Blackbaud products and services for fundraising, constituent relationship management, financial management, website management, direct

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