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**LEVERUS ANNUAL INTERNET SURVEY FOR ASSOCIATIONS AND
NOT-FOR-PROFIT ORGANIZATIONS: 2002**

Prepared by:

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Introduction

This report summarizes the results of Leverus' Annual Internet Survey for Associations and Not-For-Profit Organizations: 2002. The results clearly demonstrate that the Internet has become a pervasive component of not-for-profit organizations' communications, operations, and member service delivery capabilities. Since our inaugural report in 2001, many associations have recognized the sweeping changes occurring in the Information Technology sector and are openly embracing the advantages of a strong Internet presence. The challenges and demands of the not-for-profit sector mirror the technology adaptation efforts for SME's (Small Medium Enterprises)¹. Both sectors are confronted with a rapidly evolving technological environment coupled with limited resources. How are the leading associations in Canada dealing with those stresses? What steps have they taken? Are not-for-profit organizations and their members benefiting from this new Information Economy? Will associations and not-for-profit organizations achieve success in building new electronic communities that can fulfil the potential of the Internet?

Our survey seeks to answer questions related to how associations in Canada are adopting the Internet, future plans for their websites, and how they are using this technology today. Providing association executives and their members with an overall assessment of how their peers are utilizing the strategic member service delivery and operational efficiency gains offered by using the Internet, management and stakeholders can gain insights to help them evaluate the effectiveness of their own Internet capabilities.

Methodology

Leverus relied on a range of information sources in the preparation of this study.

Web-Based Survey

Over a one-month period Leverus contacted more than 2,000 organizations and asked them to complete our custom designed survey for the not-for-profit sector. Participants from each organization completed an interactive form posted on the Leverus website.

Web-Site Analysis

As part of the benchmarking process, Leverus carried out a best practices benchmarking of over 100 association websites. In each case, sites were assessed for the extent to which member services are delivered using Internet technology.

¹ For example, the Canadian e-Business Initiative (CeBI), a voluntary, private sector-led partnership that aims to further Canada's e-business success by focusing on productivity, leadership and innovation. <http://www.cebi.ca>

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Literature Review

Leverus reviewed a number of Canadian and US studies that examined technology usage and IT trends among associations. In addition, we drew on the growing body of literature that reviews association management issues and trends.

Internet Overview

Canada is a leader in adapting and implementing Internet services. In the most recent Ipsos-Reid survey, Canada boasts the second highest Internet penetration rate with 62 percent of adults reporting that they had gone online at least once in the last 30 days. This compares to 60 percent in 2000 and 56 percent in 1999². In addition, as of January 2003, broadband users represented fully 53.6 percent of the Canadian online population³. Businesses, government and the non-profit sector are seeking to satisfy the demands produced by these societal trends. According to Ipsos-Reid, 43 percent of Canadian Internet users have made at least one online purchase since they began using the Net, while 23 percent planned to purchase a gift online during the holiday season.⁴ A new study from NFO CFgroup reveals that online banking is now more popular than telephone banking⁵. The Canadian government has made e-government a priority and this effort is gaining recognition. According to the recent survey from Accenture⁶, for the third year in a row, Canada topped the list in terms of overall eGovernment maturity, and it was the only country to reach the technology stage of overall service transformation. Not surprisingly, the conclusion from their report is that customer satisfaction is the driving force for many of the government's initiatives.

The not-for-profit sector includes volunteer organizations, charities, trade and professional associations and is considered a vital third pillar in Canadian society. Organizations range from small, neighbourhood, issue-specific groups to broad national umbrella agencies. About 175,000 non-for-profit organizations exist in Canada, more than 77,000 of which are registered charities.⁷ This survey is a comprehensive study that focuses solely on Canadian organizations, their use of the Internet, their needs and expectations as well as offering a comment on the prevalent technology trends.

² Internet Use Continues To Climb In Most Markets, Web Access Not Just Routine, But Essential, Ipsos-Reid Study Shows, http://www.ipsos-reid.com/media/dsp_displaypr_us.cfm?id_to_view=1690

³ Canada Trumps U.S. In Broadband Use, comScore Media Metrix Canada Reports, March 17th, 2003, <http://www.comscore.com/press/release.asp?id=312>

⁴ Canadians Expect To Spend \$1.1 Billion For Gifts Online During 2002, Continuing Growth Of Online Spending In Canada, November 26, 2002, http://www.ipsos-reid.com/media/dsp_displaypr_cdn.cfm?id_to_view=1682

⁵NFO CFgroup: Online banking growing in Canada, Jan 23 2003: <http://www.nfocfgroup.com/news/03.01.22-banking.pdf>

⁶Customer Satisfaction is the Leading Factor Influencing Adoption of Online Government Services, Accenture Study Finds , WASHINGTON, D.C.; April 8, 2003- http://www.accenture.com/xd/xd.asp?it=enweb&xd=_dyn/dynamicpressrelease_597.xml

⁷ The Voluntary Sector - Society's Vital Third Pillar, PCO's Secretariat, June 15, 1999.

Who are the Participants?

Response to the survey grew in 2002 with 218 respondents that included a range of associations in terms of geographical dispersion, size, and type of not-for-profit organization. The majority of survey participants were from Ontario that account for 70% of total respondents while representation from other regions included BC that accounted for 12% of respondents, Alberta with 6% and Quebec with 5%. The geographically dispersed nature of the respondents demonstrates some of the unique problems faced by Canadian associations - the ability for organizations to meet the demands of their members over a vast area in a timely fashion, a function that is ideal for Internet technology.

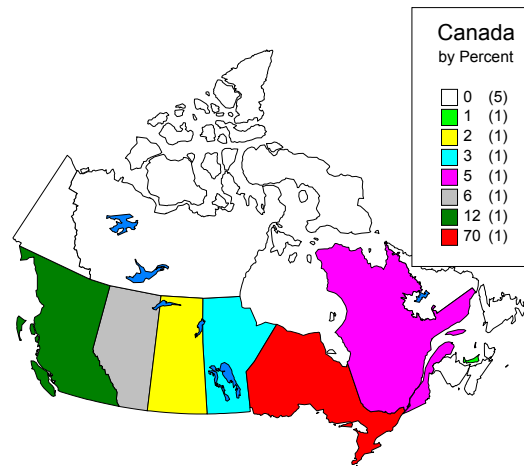


Figure 1. Regional distribution of respondents.

The not-for-profit sector covers a broad spectrum of organizations. In our survey, professional associations, industry associations, and charitable organizations each accounted for a little more than a quarter of respondents. 18% of respondents identified themselves as some "Other" classification, 1.9% identified themselves as a social awareness group and less than 1% classified themselves as a public interest group. This result is an indication of the complexity and sophistication required to provide information to this sector. Associations and not-for profit organizations are governed by a variety of objectives and mandates. Based on our experience, despite those differences, their core technology requirements and operations processes are similar. As a result, even though the mandates of each organization are distinct, they can all benefit from a benchmark and comparison to their peers and others within this sector.

There was a relatively even distribution of organizations of varying staff sizes (full time equivalents). There were 16% of respondents that indicated they have one dedicated staff or a part-time individual only, while 16% of respondents indicated they had a staff size of more than 30. Other staff sizes were relatively evenly distributed with the largest share of respondents, 22%, that have a staff size between 3 and 5 individuals. This is a continued confirmation of our experience, association and organization management are generally resource constrained and in general many staff members can fulfill multiple roles within the organization.

There were 22% of respondents that indicated their organization has had a website for more than 6 years while just under 3% of respondents indicated they do not have a website. About 10% of respondents have had a website two years

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or less - but the majority of respondents, 56%, have had a website for 5 years or longer (Figure 2). Our conclusion is that the majority of Canadian not-for-profit organizations are acquainted with the Internet and our survey will determine how effectively those organizations are using the web.

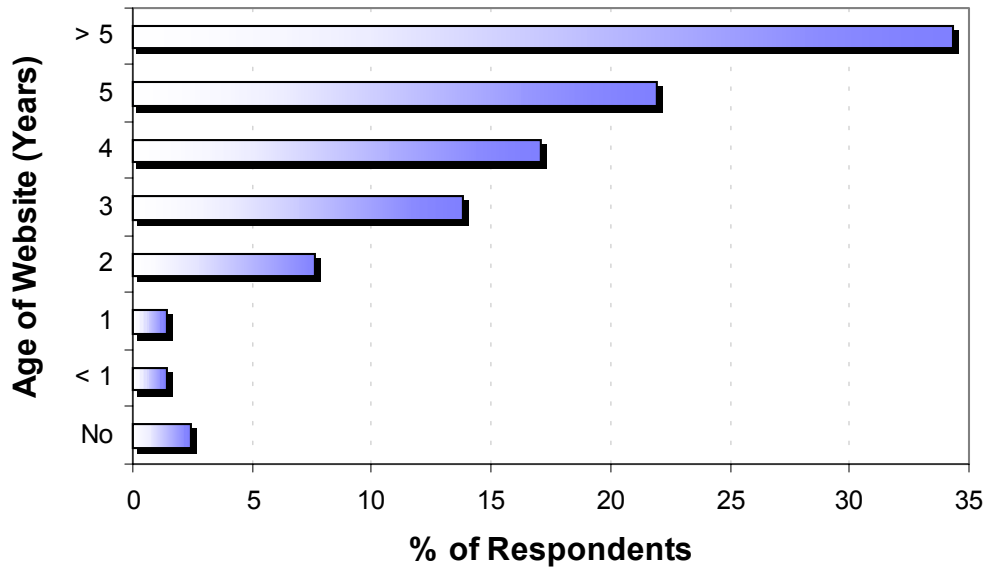


Figure 2. How long has your organization had a website?

Website Planning and Traffic

Strategic planning, while time consuming and challenging, is a critical step for achieving the objectives of an organization. Similarly, the effectiveness and capability of an organization to achieve its Internet potential can be dependent on the development and implementation of a planning effort created with significant forethought. Fortunately, not-for-profit organizations in Canada have begun to recognize the value of a strong plan with 68% of respondents indicating that they do have an Internet strategy as a component of their overall strategic planning efforts (Figure 3). Of those who do have an Internet strategy, 59% had prepared the strategy in-house while another 36% of respondents had created the strategy in combination with external consultants. Other respondents had an external contractor prepare the plan in its entirety (Figure 4). This is expected given the limited resources available to most associations. Technology should not be a core focus for an association and using external consultants might be the best solution to meet the complex requirements in any web strategy. However, care must be taken in the choice of the appropriate consultant. The consultant should have the experience and understand the unique needs and special demands that govern this sector.

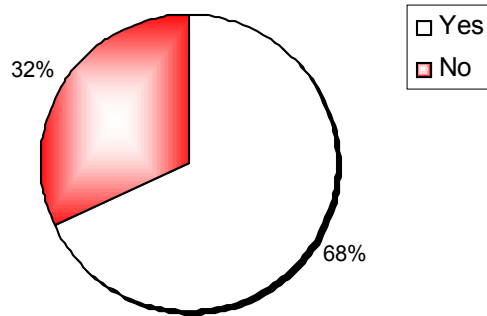


Figure 3. Web strategy as part of overall strategic planning?

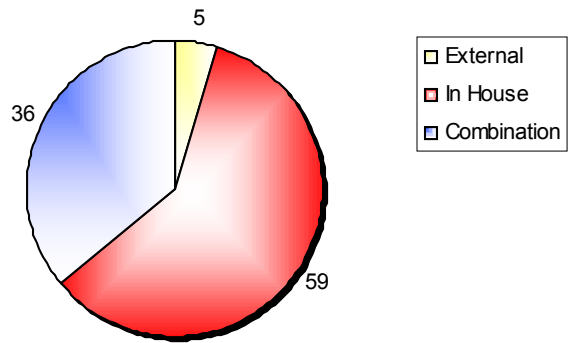


Figure 4. Who develops the Internet strategy for the organization?

It is surprising however that given a relatively high distribution of respondents that have identified a web strategy as an important factor, few have been evaluating their web traffic to assess the strengths and weaknesses of their website on an on-going basis. This type of analysis, we suggest, is a convenient metric to gauge the success or failure of a particular objective of the overall Internet strategy. A thorough analysis of web traffic can identify the most active sections of the website (demonstrating relative effectiveness) and conversely, identifying which elements (or web services) are under utilized. In this survey, it's encouraging to note that 12% of respondents review web traffic weekly and 31% of respondents are reviewing their web traffic on a monthly basis but 39% of respondents only review web traffic occasionally and 4% never review web traffic. More than 2% of respondents will review their web traffic daily and

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another 12% review web traffic weekly (Figure 5). Traffic analysis is relatively simple: it requires the ability to access the server logs (available from your hosting provider or web server) and specific software (known generically as web log analyzer). For most ISP's, rudimentary traffic information should be available as part of the hosting package.

The volume of visitors to a website provides one measure of the success of some websites. Based on our experience, different types of organizations will generate different types of traffic - not every site requires the traffic of commercial sites such as Yahoo! to be deemed successful. Not-for-profit organizations are often serving multiple audiences with their websites. For example, some organizations will focus their efforts on dues paying members in which case the success of the website might be evaluated based on member usage rather than a general review of the number of total visitors. There were 41% of respondents that receive less than 1,000 visits to their website on a monthly basis and another 35% of respondents that receive between 1,000 and 5,000 visits monthly. Almost 12% of respondents receive between 5,000 and 10,000 visits, and 8% of respondents receive between 10,000 and 20,000 visits on a monthly basis. There were 5% of respondents that will receive, on average, more than 20,000 visits per month to their website. (Figure 6)

These results are not surprising given the variance in size (based on the number of staff) of organizations responding to the survey, however there would appear to be a relatively high proportion of organizations receiving lower than expected visitors to their site given their potential audience. Not-for-profit organizations have important messages to share and a strong strategic plan for the Internet coupled with a diligent review of traffic to their site will lead to greater success in achieving organization objectives. A website should reflect the dynamic nature of the organization and change and improve to deliver quality content and services for the audience.

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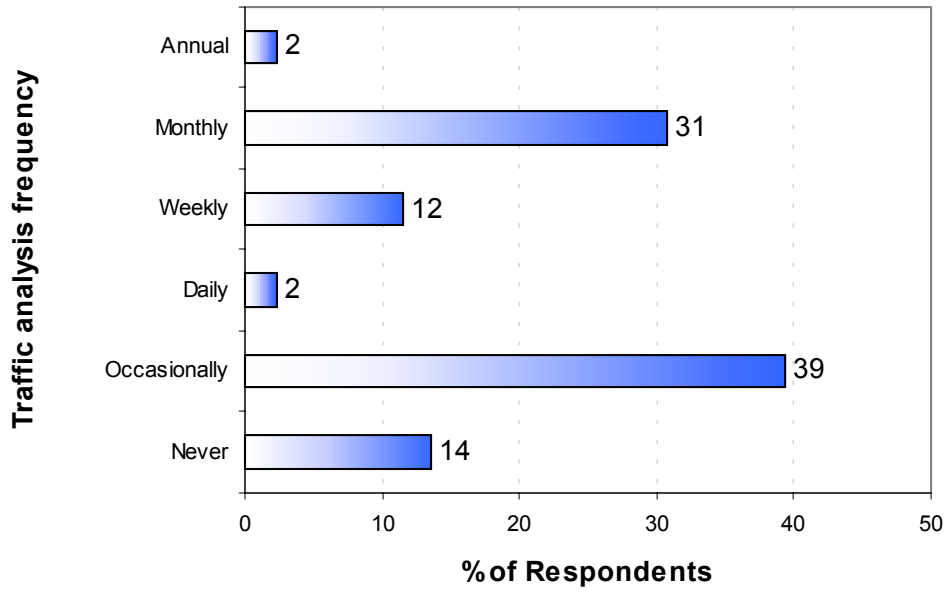


Figure 5. How often does your organization review its web traffic?

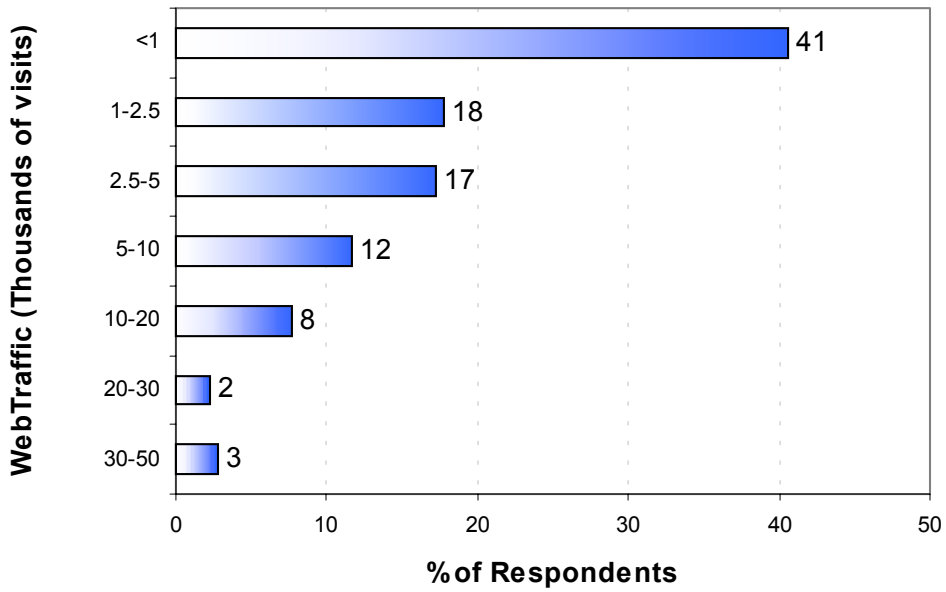


Figure 6. On average, how many visitors per month?

Website Maintenance

Not-for-profit organizations are faced with a multiplicity of decisions regarding how they approach the on-going maintenance and support of their website. A framework that provides staff with information regarding which content is to be posted, how often, in what format, how fast, approvals required, and who is to post the content and with which technology, are all important considerations. This section discusses the website maintenance methods currently applied by Canada's not-for-profit organizations.

Only 15% of respondents have formal web content guidelines while another 44% have informal web content guidelines. There are 41% of respondents placing content on the web with an ad-hoc approach (Figure 7). Given the strategic importance of the Internet, we suggest, that an ad-hoc approach to placing new content on the web will limit the opportunities of an organization to effectively reach its constituent. In general, Leverus suggests time based and process oriented procedures for posting content. This reinforces the dynamic nature of the website while ensuring the integrity and quality of the content.

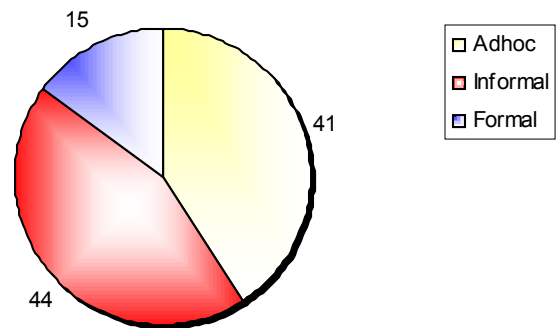


Figure 7. What are the guidelines for posting content on the website?

In most cases, 66% of respondents, in-house personnel are posting new content to their websites. About 19% of respondents use a combination of in-house and an external company for posting new content, while 15% of organizations are relying exclusively on an external web services company or a contractor (Figure 8). Evidently many survey respondents have some in-house html expertise as 54% of respondents will post some or all-new content through this resource (Figure 9). 35% of respondents can post new content to their websites, in-house, using self-managed web interfaces (usually based on web forms that allow data to be automatically uploaded to the website without the requirement for any special technical knowledge). In our opinion, this is a reflection of the advancement of the technology that is supporting the Web. New web editors, easy to use file transfer software, content management techniques and graphic interfaces are enabling the association staff to maintain

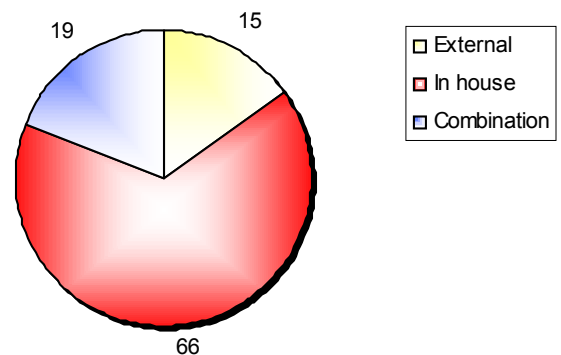


Figure 8. Who posts content on the web?

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and update their websites. In the near future, Leverus expects that associations will incorporate user-friendly technology such as web based administration interfaces for their overall website maintenance. We predict that the future of the web requires carefully designed websites that can be simply managed and maintained by internal staff. External contractors will be relied on to develop and implement leading edge technology (such as e-commerce, online databases, interactive features). There are already signs of this trend.

A website is a dynamic communication tool and requires periodic updating and maintenance. The number of dedicated person hours required to support the website is one measure of the resources applied. The wide range of different sized not-for-profit organizations responding to the survey probably contributes to the variance in terms of the number of hours various organizations are devoting on a monthly basis to supporting and maintaining their websites. Most organizations, 43%, are devoting between 3 to 10 hours per month on website maintenance. However, there are some organizations that devote more hours per month to their website: 14% devote 11 to 20 hours per month, 12% devote 21 to 30 hours and 15% will devote more than 30 hours per month to supporting and maintaining their website. Unlike published documents, an effective web presence requires a regular schedule of updates to create a sense of vibrancy (Figure 10).

More than 50% of respondents indicated their staff had web-related training that included basic Internet usage 33% and html 42%. Types of Internet related training included a range of different html editors (dreamweaver, front page, etc.), custom management systems, cold fusion, java, JavaScript, and other related programming languages, etc. From our experience, with the right tools and website setup, most association staff can be trained to perform routine maintenance of their website. However, the ability to create web services that require actual programming, database connection and network design are probably beyond the scope of most associations. Unless there is a dedicated IT infrastructure within a not-for-profit organization, outside expertise should be contacted to develop the required services. It is also important to understand how to incorporate any new web based services into the workflow of the organization.

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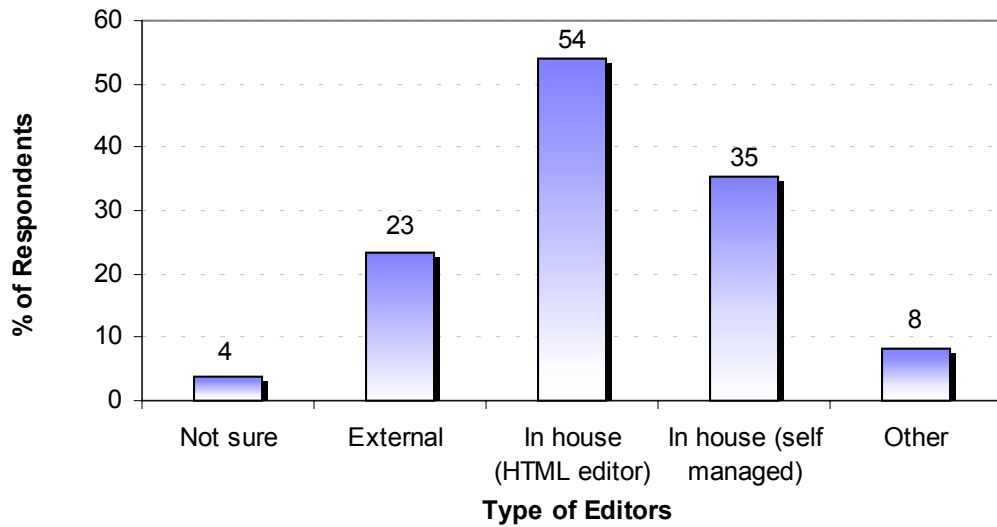


Figure 9. How is new content posted to the website?

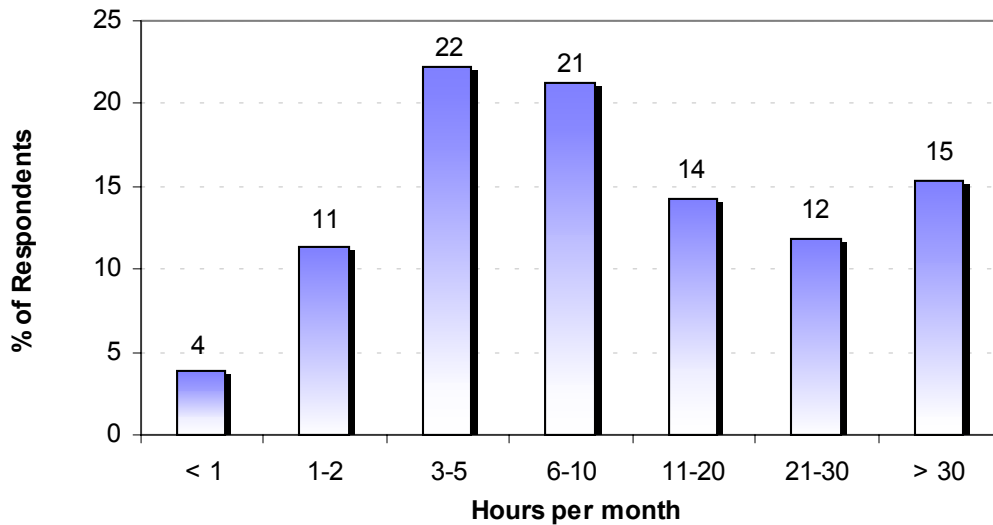


Figure 10. How many hours per month are devoted to supporting and maintaining your organization's website? (Includes internal activities and/or contracted hours)

Website Budgeting

Most organizations, almost 64% of respondents, will now allocate, on an annual basis, a specific budget amount for the Internet. Most often, as with about 50% of respondents, this amount is less than 1% of the total budget. Another 32% will allocate between 1% and 3% of their total budget. That is, most organizations will allocate less than 3% of their total budget for Internet related costs. However about 7% of respondents will allocate 4% to 5% of their total budget for Internet related costs, another 6% of respondents will allocate 6% to 10%, and finally a little more than 4% of respondents indicated they allocated more than 10% of their total budget to Internet related costs (Figure 11).

These budget allocations are reflected in the amount per year that organizations identified they collectively spend on web hosting, external web support, internal web staff and related Internet costs. In terms of dollars, the budget for the web represents thousands of dollars for an association. About 45% of respondents spend less than \$5,000 annually, while 17% of respondents will spend between \$5,000 and \$10,000. While the majority of respondents are spending less than \$10,000 per year on Internet expenses, it is interesting to note that 17% of respondents are spending more than \$30,000 per year on Internet related costs and 5% of respondents are spending more than \$75,000 per year on Internet related costs. A little more than 14% of respondents spend between \$10,000 and \$20,000 annually on Internet related costs and almost 6% of respondents spend between \$20,000 and \$30,000 annually (Figure 12).

The amount of dollars in absolute terms is significant - but is it enough to meet an association's strategic objectives? In our opinion, associations must be aware that there are capital (one time costs) for setting up the web infrastructure and an on-going maintenance cost. From our experience, wise investment in the initial set-up is crucial if on-going maintenance costs are to be optimally managed to obtain the greatest return on any Internet investments. However, websites should be viewed as a dynamic tool and there should be some expectation, whether internal or external, that some on-going costs for achieving a continued value added Internet presence will be required.

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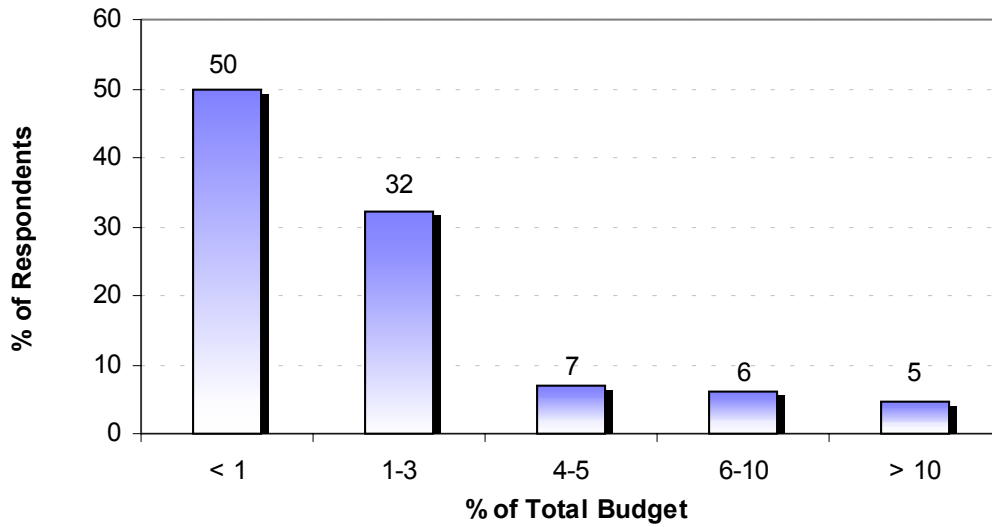


Figure 11. What percentage of your total budget is spent on Internet related costs?

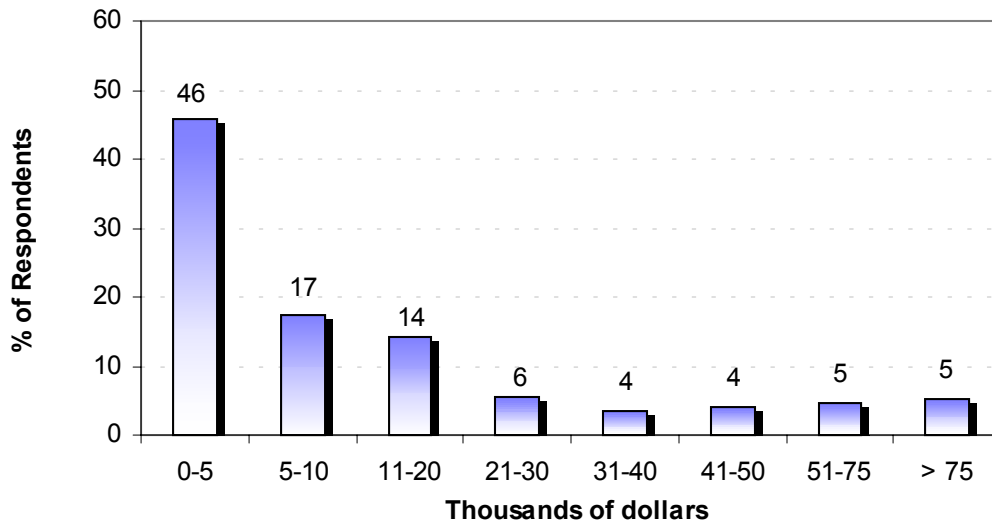


Figure 12. In total, what amount per year does your organization collectively spend on web hosting, external web support, internal web staff and related Internet costs?

Website Hosting

A representative cross section of operating systems is being used by the not-for-profit sector. Windows NT is the most common platform, about 27% of respondents, for organizations to host their website, followed by Windows 2000 (22%), Unix (17%), Windows 98 (15%), Linux (7%), and "Other" at about 12% of respondents (Figure 13). Operating systems are important because they define the technology tract that governs the web services evolution of the association. Linux and Unix environments follows open source paradigms that are inherently distinct from the solutions presented by Microsoft. These issues can affect the development and support of any web services and must be properly addressed.

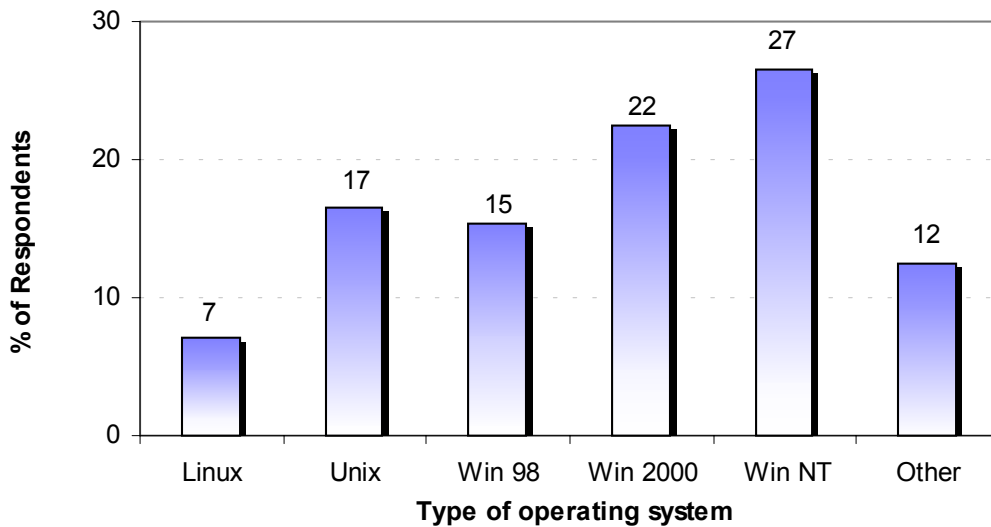


Figure 13. On what platform is your website hosted?

Organizations' websites are most commonly hosted with an Internet service provider (ISP) - about 66% of respondents. Some organizations, almost 15% of respondents, have their own in-house managed server and another 8% use a co-located server with an ISP. Another 10% of respondents indicated "Other" for their hosting arrangements. This could include government hosting, donated web space or shared hosting (Figure 14). The operating system is generally determined by the hosting arrangements and the capability of the Internet Service Provider.

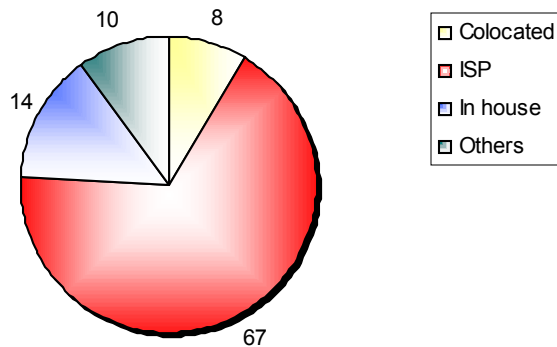


Figure 14. Who hosts your web site?

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Respondents, on a monthly basis, pay anywhere from 0\$ (16%) to over \$3,000 for hosting fees. About 50% of respondents are paying \$60 or less, while about 20% of respondents are paying more than \$200 per month for their hosting fees. There are close to 10% of respondents paying more than \$400 per month for hosting fees and 3% incurring fees of \$1,000 or greater. In general, hosting cost is dependent on the services required (e.g. ASP/JSP/Cold fusion support, databases used, secure website areas, e-commerce) and bandwidth considerations (e.g. how much traffic the website expects). Hosting costs typically increase with function and traffic. Because of the unique demands for this sector, not-for-profit organizations are urged to find a hosting provider that will work with the organization to plan their Internet capacity demands.

Website Design and Site Architecture

A website's design contributes to a user's ease of using that site, the mood and feel of the site, and the overall likelihood that a website visitor will return to that site. A well developed site architecture/navigation of a website is critical for a user to quickly and easily find the important services and content that they seek. There is however, a capital cost required to develop an appropriate website that reflects the unique identity of the association. Often, our experience has shown that this crucial element, site design, has not been properly executed leading to difficulties in satisfying the requirements of the associations' strategic plan.

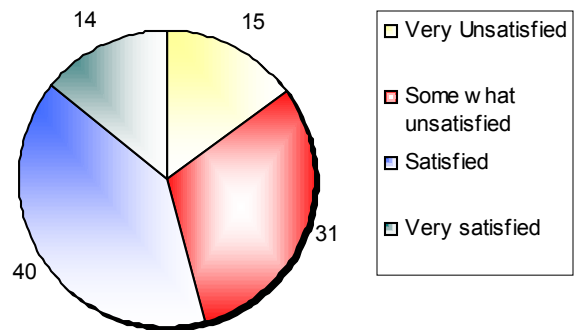


Figure 15. How satisfied are you with your website's current design?

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Only 14% of respondents replied that they are very satisfied with their website's current design. Another 40% of respondents are satisfied with their current design but almost 31% of respondents are somewhat unsatisfied and 15% are very unsatisfied (Figure 15). This information is particularly surprising given that 64% of respondents have re-designed their website within the past two years. It is also interesting to note that most organizations are onto at least their second generation website with 84% of respondents indicating they have had a re-design of their website at some point. A little more than 50% of respondents expect they will re-design their website within the next year and 76% of respondents expect to re-design their websites within the next three years. Websites do require change to continue to serve their audiences effectively. Like any communication venue, the look and feel of the Internet also changes with time. An association and their service providers must be aware of those trends and produce websites that meet the expectations of the general public. A new design often provides a fresh and focussed interface for visitors to the website.

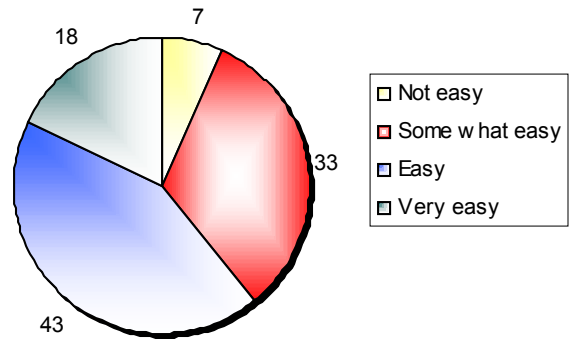


Figure 16. Is your website easy to navigate?

Ease of navigation is one direct indication of the robustness of the underlying information architecture of the website. In terms of navigating their websites, most respondents, 43%, feel their websites are easy to navigate and 18% feel they are very easy to navigate. However, 33% of respondents feel their website is only somewhat easy to navigate and 7% feel their websites are not easy to navigate (Figure 16). In Leverus' experience website navigation and site architecture is often one of the major issues that face Canadian not-for-profit organizations. Websites must be designed from the perspective of a potential user and satisfy a diverse audience.

Website Usage (Objectives)

Close to 35% of respondents rate their website as very important for contributing to the success of achieving overall organizational objectives while 37% of respondents rated their websites as important for achieving overall objectives. A little under 25% rate their websites as somewhat important and only 3% see their websites as not important for contributing to the success of their organization for achieving overall

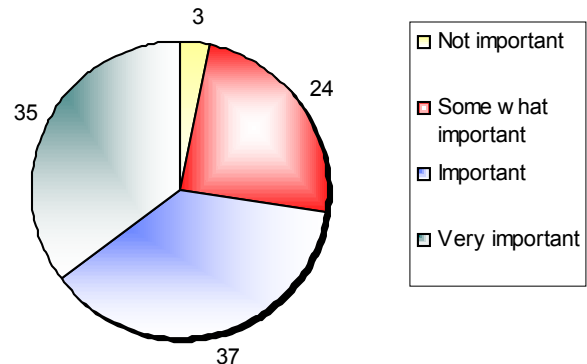


Figure 17. How important is your website to your organization's overall objectives?

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organizational objectives (Figure 17). Most respondents, 40%, feel their website effectively contributes to the success of their organization in meeting its overall organizational objectives but only 12% of respondents feel their websites are very effective at contributing to the success of overall organizational objectives. 43% of respondents rate their websites as somewhat effective in contributing to the success of meeting overall organizational objectives. Only 6% of respondents feel their websites are not effective at contributing to achieving overall organizational objectives.

Respondents to the survey were asked to indicate how important (if applicable) the use of the web is for achieving particular objectives that relate to their organization. Using the web to establish their organization as a key source for related information was given the highest rating of importance by respondents. This was followed by the ability to provide timely communications, providing value added member services, and increasing the credibility of the association or not-for-profit organization (Figure 18).

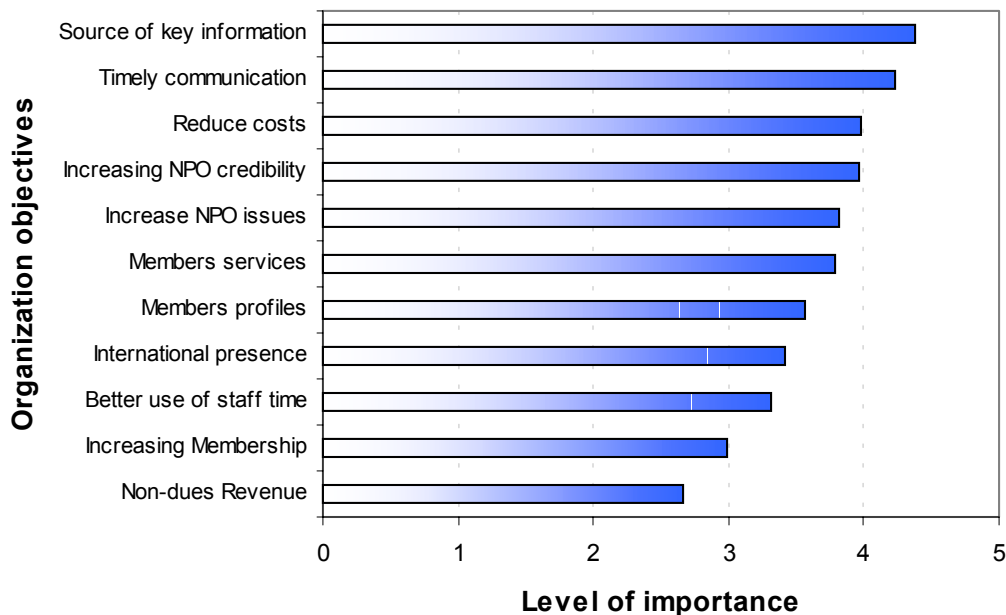


Figure 18. Please indicate how important (if applicable) the use of the web is for achieving the objectives that relate to your organization. (Rating - 1=low importance, 4=very important)

Website Usage (Products, Services and Technology)

Not-for-profit organizations have been adopting new interactive technologies and services into their websites. While a fairly static, html site, that is more of a "brochure" style website may continue to be appropriate for some organizations, most others can benefit from a site that takes advantage of new technologies and resembles a dynamic portal offering key services to users.

In terms of interactive features used on their websites, respondents most frequently indicated that they used an event calendar (58%), followed by web forms (48%), online directories (45%), members' only sections (42%), and job boards (31%). In addition respondents also referenced a number of other interactive features on their websites such as search engines, specialized custom products, online donations, etc. (Figure 19). From our viewpoint, those services represents standard features of a dynamic website - they are services that can be implemented without too much custom development.

The most common "typical" (as defined within the survey questionnaire) association or not-for-profit service conducted on line by respondents to the survey was education opportunities and/or training with 42% of respondents offering an online service. The next most frequently offered "typical" services conducted on line were some form of member directory (40%), conference or tradeshow registration (32%), publication sales (32%), member registration (32%), surveying (22%), followed by an industry/sector directory of some kind (13%). (Figure 20). More than 60% of respondents expect that they will add at least one interactive web service to their website within the next year and more than 70% expect to add an interactive web service within the next three years.

Respondents are using their websites to deliver member services (61%), perform operational or administrative activities (36%), and create non-dues revenues (30%).

Only about a third of respondents indicated that their organization's website and database capabilities are integrated. The integration of a website with the organization's database, although not required by all organizations, provides a powerful solution for managing information for the organization and between the two mediums. Examples where this integration can provide added value, for example, would be the creation of members' only sections, e-commerce, member and conference registrations, publications sales, online directories, etc.

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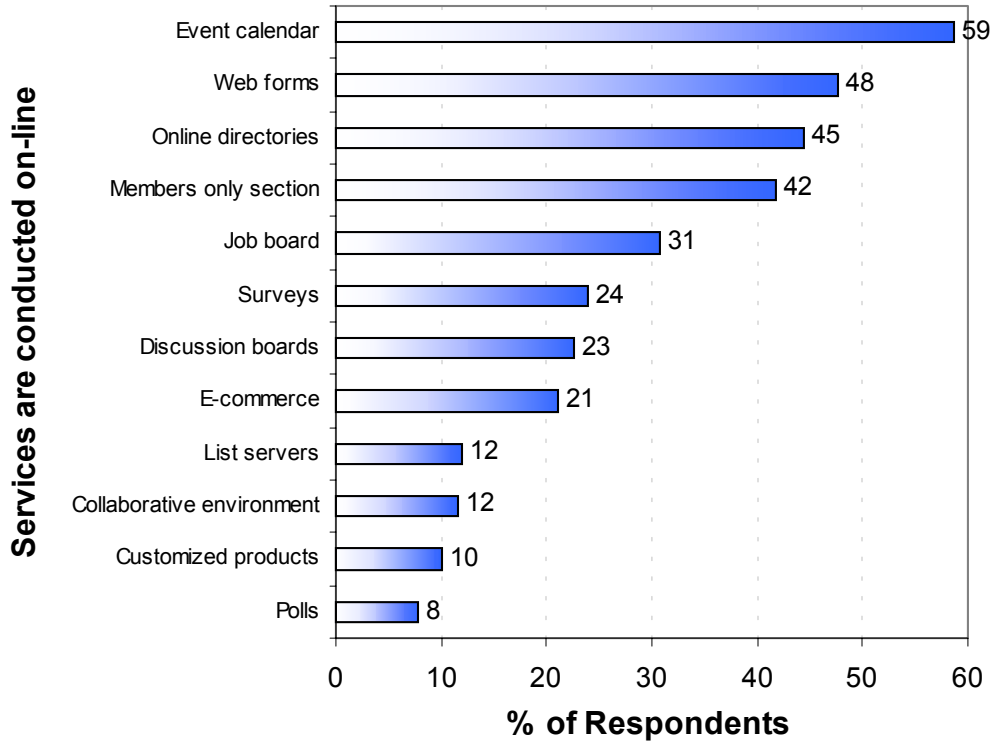


Figure 19. Which of the following interactive features does your organization use on its website?

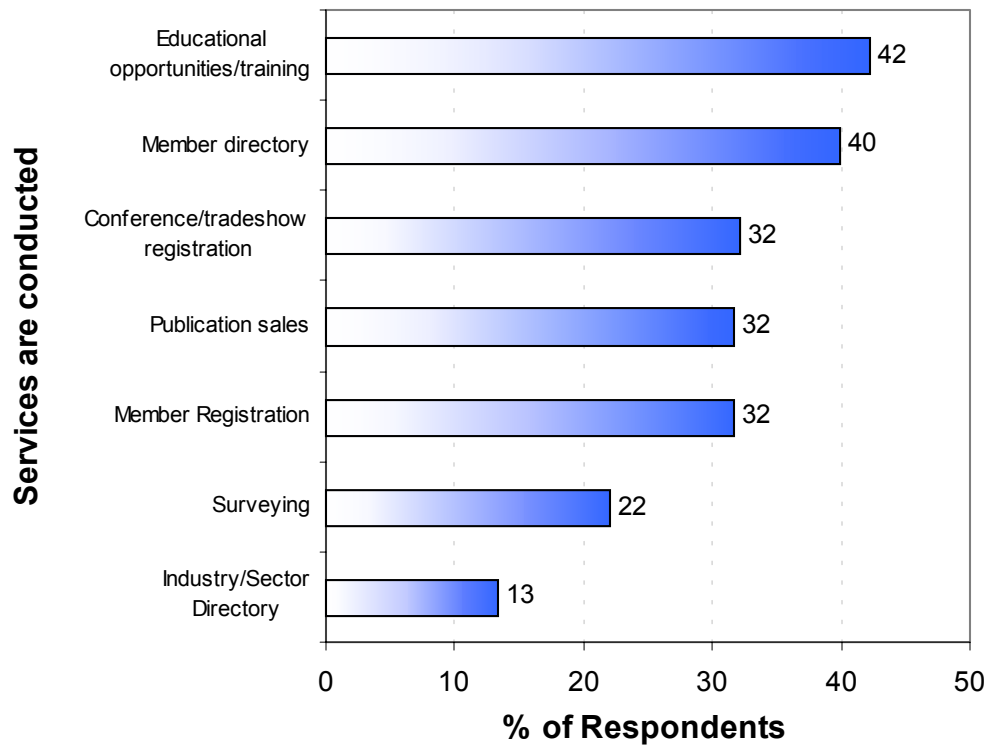


Figure 20. Which of the following "typical" Association or Not-for-profit services are conducted on-line?

Website Communications

The anecdotal evidence of not-for-profit organizations migrating their communications to more extensively include a strong web presence is overwhelming and some organizations are either eliminating print communications altogether or drastically reducing them. Web communications can, in general, be more quickly and cost effectively produced. Furthermore, accessibility to web communications is very good. Most respondents to the survey, 89%, use a combination of print and web communications to disseminate their information. About 10% of respondents continue to use print materials exclusively and only 1% of respondents use the web exclusively (Figure 21). The growth of web communications follows a public that is becoming more web enabled and accepting of web products.

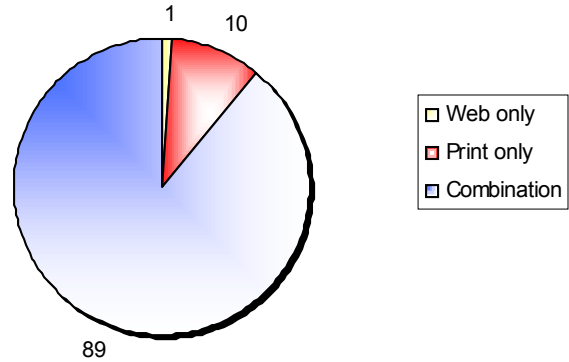


Figure 21. How is information disseminated by your organization?

Newsletters are a commonly produced communication tool amongst respondents to the survey. There were 73% of respondents producing a newsletter and 53% of respondents that were putting their newsletter online. Information brochures are produced by 70% of respondents and 67% of respondents are producing information brochures online. Annual reports are also commonly produced by respondents, 56%, and about 36% of respondents place their annual report online (Figure 22).

The most common barrier to conducting communications on the Internet is a lack of resources to convert to Internet communications. There were 34% of respondents that cited this as a barrier. Other barriers include member apathy (for web materials) at 26%, a perception of lower impact of Internet publications versus traditional print media 24%, and a membership with too few on the Internet 15%. There were 10% of respondents that identified other barriers that included the need to train staff to use the web for promotional purposes, internal capabilities, low availability of high-speed access for members, and time limitations.

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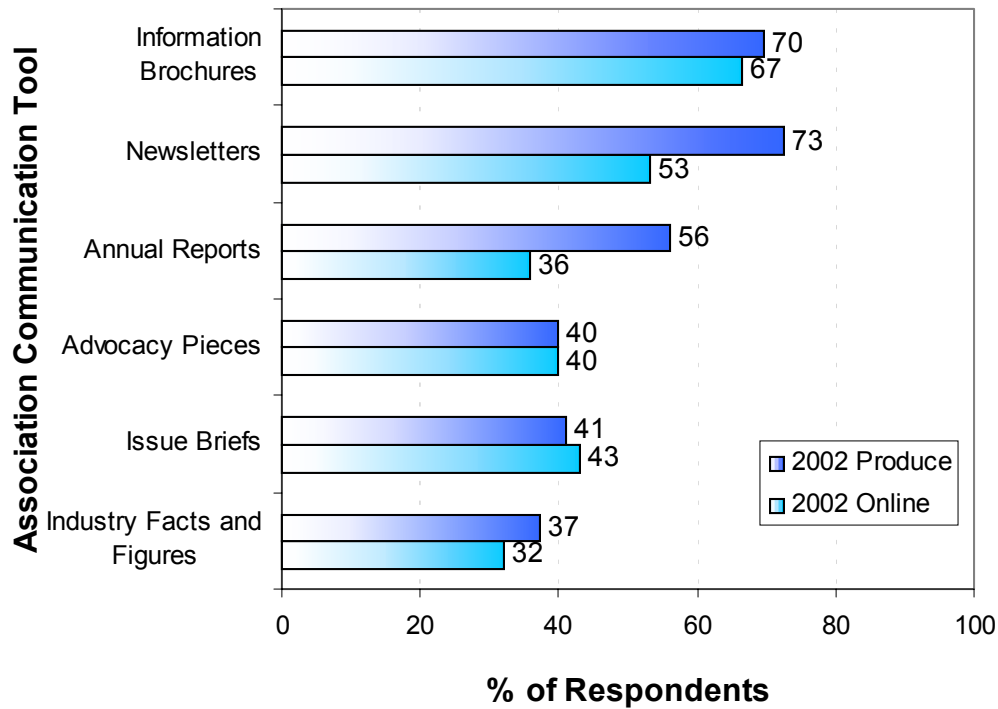


Figure 22. What communication tools does the organization produce and distribute to the general public? Which are on the web?

Website as a Source of Revenue

It is not uncommon for not-for-profit organizations to be challenged to find additional sources of revenues to maintain their budgets. The Internet can provide some opportunities, when used wisely, to generate some additional revenues. A little more than a quarter of respondents are providing a venue for online advertising through their website. There was no specific online advertising method that was particularly more widespread than others. Some respondents were using banners ads (14%), while others used directory listings (12%), website sponsorships (12%), tradeshow or meeting sponsorships (12%), and job board listings (9%)(Figure 23).

Leverus's Second Annual Survey on Internet Usage by Associations

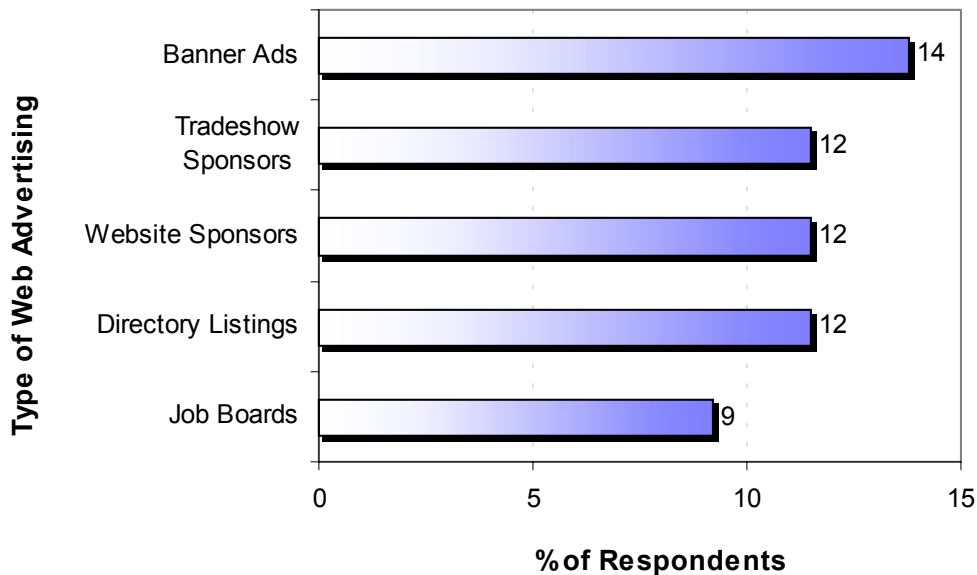


Figure 23. Type of web advertising for associations and not-for-profit organizations.

Over the next two years nearly half of the respondents feel that online advertising returns through association or not-for-profit organization websites will grow slowly while another 35% feel they will remain steady. Only 7% of respondents feel they will decrease and 5% expect them to grow quickly.

NPO Internal Technology Usage

Most organizations are employing some form of high-speed access for connecting to the Internet, however 18% of respondents continue to operate with 56K modem access or less. Some kind of DSL connection is the most prevalent with 33% of respondents using that technology followed by ISDN (16%), Cable (15%), T1 (11%), and T3 (4%). There are practical advantages for associations to have high speed Internet access. These advantages include: easier transfer of information to and from the website, use of more graphics to improve website layout and design and the ability to use more sophisticated techniques such as databases to create new interactive and dynamic web services.

The type of Internet browser most commonly used is Internet Explorer. Most respondents, 44%, have upgraded to IE 6 while another 34% use some version of IE 5. Only 13% of respondents use some version of Netscape and very few use AOL. The type of browser affects the associations site development plans since browser compatibility affects web service implementation.

MS Access continues to be the favoured database software used by respondents with 35% of respondents using that technology. Filemaker Pro is the next most popular with 12% of respondents using the database software. Other database

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packages used include MSSQL (8.9%), Mysql (2%), and Dbase (2%). Lotus, Imis, FoxPro and custom developed database software was mentioned by some respondents as well, among other packages. This result could be an indication of the popularity of MS Access as a personal, easy to design database but associations must remember that there are technical issues relating to the use of this technology on the Internet.

Concluding Comments

It is encouraging to witness the change with which Canadian not-for-profit organizations are beginning to embrace the Internet. The results of the survey demonstrate the growth in adoption of Internet technology and a greater understanding of the need for strategic planning, dedicating an annual budget stream for Internet related costs, delivering important member services through the Internet, and capitalizing on the effectiveness of communications through the Internet.

However not-for-profit organizations need to continue to seek to improve their use of the web by strategically planning the development and use of their websites, establishing guidelines for how they manage their web content, and seeking external assistance by qualified consultants when required. The budget allocated for web development and maintenance must be considered relative to other communications and services offered by the organization and their respective return on investment. Traffic volumes for some organizations are a little low for many organizations and each organization must consider whether they are receiving what they believe is appropriate traffic to their site.

It is clear that the importance of a website for virtually all not-for-profit organizations is no longer challenged. The effective use and integration of this technology, though, requires the active participation and support of the organizations. A successful website can fundamentally alter the procedures and processes of an organization allowing for more efficient administration, deliver a higher level of member services, and even contribute to generating revenues in some circumstances.

About Leverus

Leverus is a web design and development company focused on solutions for not for profit organizations. The company leverages the interactive power of the Internet to enhance the service delivery capability of NPO's. Leverus' expertise in serving not for profit organizations in addition to its Internet technology leadership, position the company as the premier resource for organizations seeking to realize their potential in the developing technological environment.

Our advantage is steeped in the premise that we conceptualize innovative Internet applications from the vantage point of not for profit organizations and the unique service and operational imperatives they face. Our market focus offers us the opportunity to build Internet tools and services that speak to the very challenges that not for profit managers confront on a daily basis.

Leverus offers a complete solution for not for profit organizations seeking services that range from website hosting, design, interactive technologies, custom web development, database services, system administration and many other Internet related services. The company has demonstrated the strength of its service offering through it's successful design and website implementation for a number of clients that have witnessed operational improvements, increased web traffic, enhanced communication capabilities, and the opportunity to generate new revenue streams through online methods such as web advertising.

Note For Further Information:

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