

Arts & I.T. :

Technology Adoption and Implementation in Arts Organizations



Technology in the Arts | www.technologyinthearts.org

Technology in the Arts explores the intersection of arts management and technology to spark dialogue around the role of technology in our planning and programming, share best practices, and provide training in the use of online tools. Our services include consulting, professional development training, webinars, an online resource directory, monthly podcasts, and a discussion-based blog.

Center for Arts Management and Technology | camt.artsnet.org

Technology in the Arts is a program within the Center for Arts Management and Technology (CAMT), an applied research center at Carnegie Mellon University exploring ways in which arts managers can employ online technologies to more effectively meet their organizational goals and engage audiences.



2011

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Thanks!

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Executive Summary

About this Survey

In 2010, the Center for Arts Management and Technology surveyed arts managers to gather baseline information about the ways in which technology is used, implemented and planned for by peer institutions in the arts and cultural field.

In designing this survey, we thought the following information would be useful for other arts managers:

- the types of technology currently used in the field
- the extent to which arts and cultural organizations devote resources to technology
- how organizations seek advice or assistance when dealing with IT-related issues
- how satisfied arts managers are with their organizations' level of technology adoption
- the types of technology that organizations plan to implement in the near future

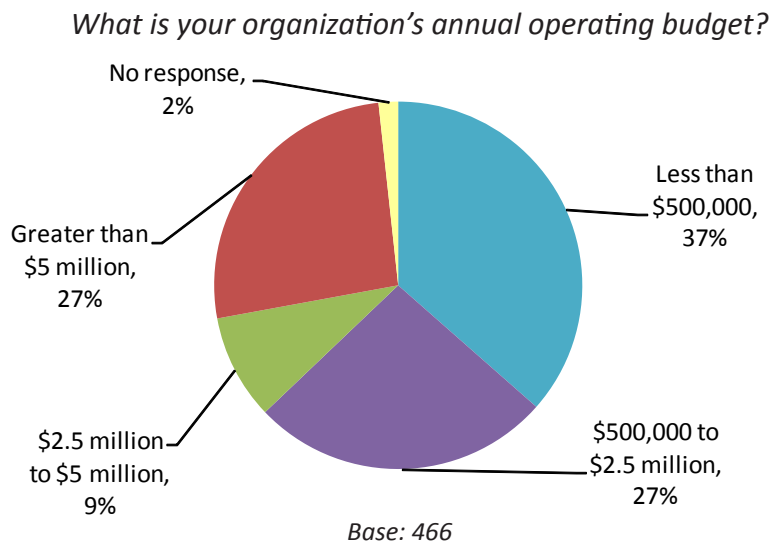
The survey, which included 23 questions, was distributed online via the technologyinthearts.org website, direct email, and links through various social media platforms.

Throughout this report, percentages are rounded to the nearest whole percent. Percentages may not total exactly 100% due to rounding. In addition, some respondents chose to skip certain questions while completing the survey. To account for this differential, we have included the base number of respondents for each question.

Profile of Respondents

This report includes information regarding 466 arts and cultural organizations from a broad spectrum of artistic disciplines, organizational types, and operational budget sizes. Respondents reside mostly within the United States and Canada.

Annual Budget Size



Executive Summary

Unsurprisingly, annual budget size proved to be an important factor in identifying similarities in technology resources, usage and implementation strategies for arts managers. This report will not only present comprehensive findings from all respondents, but it will also examine and compare organizations based upon their annual budgets.

For the purposes of this report, we have defined the budget categories as follows:

Small: less than \$500,000
Mid-Sized: between \$500,000 and \$2.5 million
Large: between \$2.5 million and \$5 million
Very Large: greater than \$5 million

Geography

66% of all respondents were located in the United States and its territories, with New York (57 respondents) Pennsylvania (51), and California (34) represented most often. Another 23% were located in Canada, with Ontario as the most common province represented (68). Just over 2% of those surveyed were located outside the United States and Canada, and 8% did not indicate their location.

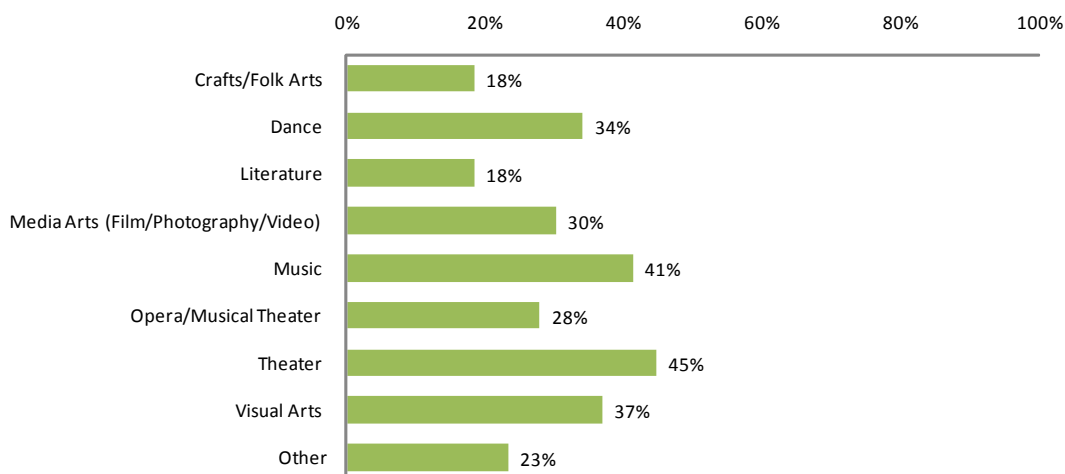
Organizational Type

Organizational types varied widely amongst those surveyed. Commonly cited types include arts service organizations (20%), performing groups (18%), and arts centers (16%). The survey also included museums/galleries, arts councils/government agencies, studios, festivals/fairs, arts consultants, presenters and publishers, to name a few.

Artistic Discipline

Respondents represented disciplines from across the artistic spectrum. “Other” responses included interdisciplinary arts, education, design, architecture, sculpture, culinary arts and policy.

*Your organization focuses on which discipline areas?
(Choose all that apply.)*



Base: 466

Executive Summary

Technology Resources

The survey responses confirmed our assumption that technology usage and implementation rates differ most dramatically in relation to an organization's annual operating budget size. Even so, some results emerged as trends that transcend, or in a few cases, defy budget category.

Unsurprisingly, annual technology spending revealed a strong correlation to organizational budget size. While 78% of small organizations spent less than \$5000 in the past year, 47% of mid-sized organizations spent between \$5,000 and \$20,000. In contrast, 51% of very large organizations spent \$100,000 or more on technology in the past year.

In addition to yearly technology spending, the number of full-time information technology staff employed by arts organizations often correlated to annual budget size. While this may have been a predictable outcome for small organizations, we also found that arts managers from both mid-sized and large organizations frequently reported that their institutions did not have any full-time IT staff. Whereas 82% of small organizations, 69% of mid-sized organizations and 45% of large organizations do not have any full-time staff devoted to technology, 45% of organizations with budgets over \$5 million have four or more full-time IT employees.

Current and Future Technology Implementation

Arts managers were asked to share the specific types of technology currently used by their organizations within three basic groups: website/marketing, multimedia and administrative technologies.

Social networking sites were the most commonly used technology by arts organizations of all budget sizes. Respondents indicated that social networking currently outpaces direct marketing usage in the field. Even so, direct email marketing remains one of the most commonly used technologies by arts organizations in general, followed closely by graphic/print design software.

Static websites were the only type of technology that small organizations used more frequently than all other organizations. Inversely, the use of dynamic websites increased as annual budget size increased. Arts managers from organizations of all sizes indicated plans to shift away from static websites in favor of dynamic websites in the next year.

What About Mobile?

The types of technologies included in this survey are by no means exhaustive (for a complete list of those included, see the graphs on pages 11-16).

This initial version of the survey focused primarily on technologies with a more pervasive adoption pattern among arts and culture organizations. Mobile websites and applications will undoubtedly appear in the next iteration.

Executive Summary

When asked about the types of technology their organizations plan to implement in the next year, a surprising portion of respondents across all budget categories skipped these questions entirely. What is most revealing about the responses in this area may not be what was reported, but instead what was not; that is, non-responses may be an indication of a general lack of future technology planning in arts organizations.

Technology Adoption Self-Assessment

Interestingly, arts managers across budget sizes evaluated the adoption of technology by their organizations at a similar rate. The overall average response was a 3.44 on a 7 point scale, with 1 indicating “lagging behind”, 4 as “just where we need to be” and 7 as “cutting edge”. Therefore, most arts managers believed their organizations were just behind where they needed to be.

A self-assessment of 4, or “just where we need to be” was also remarkably similar across budget sizes, ranging between 12%-14% in each budget category.

While the availability of IT resources and technology usage rates tended to correlate more closely with budget size, self-assessment scores for adoption were less varied across budget categories. This may indicate that arts managers self-assess based upon their perceptions of similar arts organizations as opposed to the field as a whole.

Overall Average Rating: **3.44**

Average Response by Budget Size:

Small Organizations: **3.30**

Medium Organizations: **3.33**

Large Organizations: **3.46**

Very Large Organizations: **3.81**

Getting IT Help/Advice

When asked about the resources used to obtain advice or help with technology, online searches topped the list for respondents across all budget categories. Reliance upon free support from other organizations or volunteers was highest among small organizations (68%) and decreased as budget size increased; however, free support ranked among the top three resources for IT advice amongst all organizations. Inversely, larger organizations tended to rely more heavily upon ongoing contracts with IT companies/consultants than smaller organizations.

Difficulties with Technology Implementation

Regarding technology implementation, arts managers across budget categories generally agreed that building/maintaining technology infrastructure and writing grants for technology were the two most difficult areas for their organizations.

Notably, small and mid-sized organizations found that obtaining buy-in from leadership and staff was one of the least difficult areas of implementation, while very large organizations found this to be one of the most difficult aspects of implementation. In relation to this finding, it is important to note that executive/managing directors of small and mid-sized organizations took the survey more often than any other staff member. Whereas 62% of survey takers from small organizations were directors, only 17% of respondents from very large organizations were executive/managing directors.

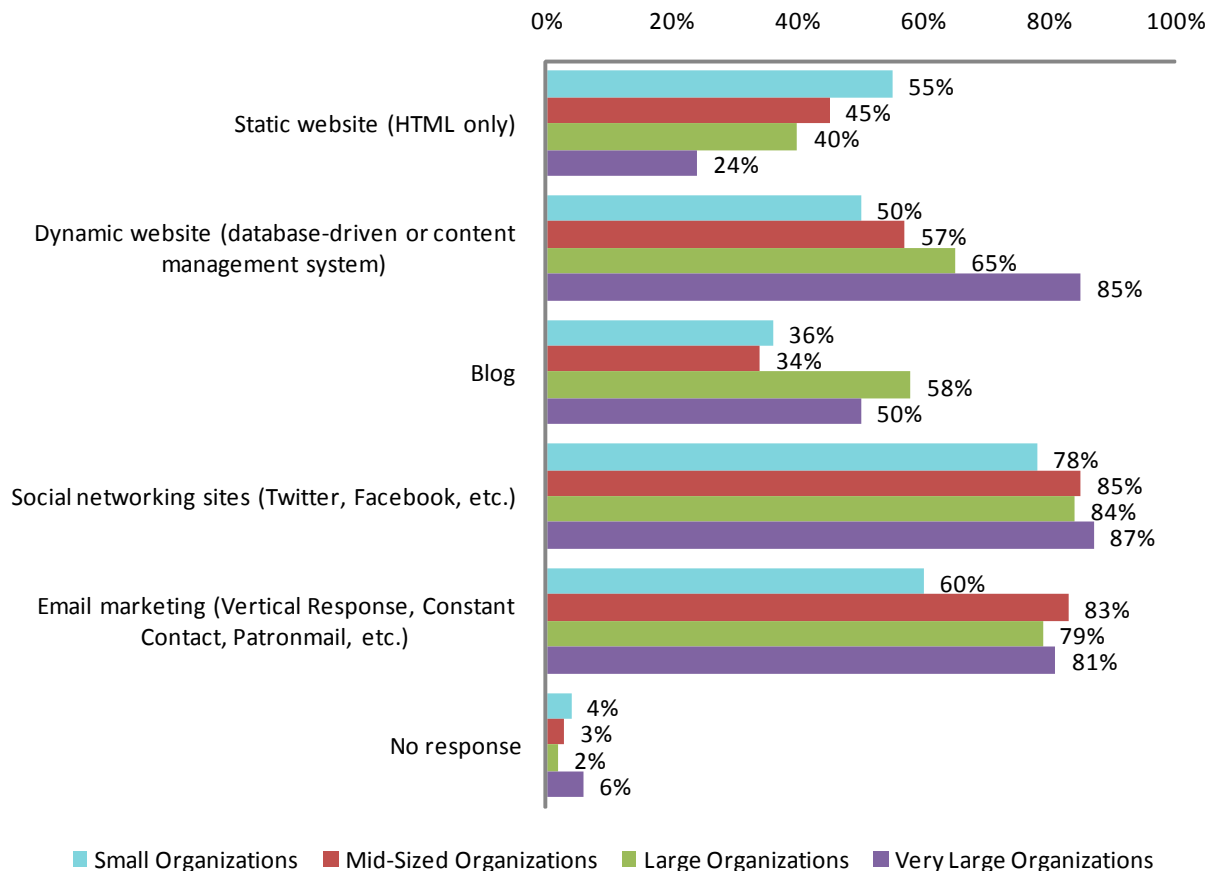
All Organizations

466 Respondents

Website/Marketing Technology Currently Used

We asked survey respondents to indicate the types of technology that their organizations already have in place for three distinct categories: website/marketing, multimedia, and administrative. The following six graphs segment and compare responses based upon annual budget size.

*Which of the following **website/marketing** technology does your organization **currently use**? (Choose all that apply.)*



Base: 466

The use of static websites drops as an organization's budget increases, and inversely, larger organizations tend to use dynamic websites more frequently than smaller organizations.

Organizations with budgets of less than \$2.5 million use blogs at a similar rate (34-36%), while large and very large organizations are overall more likely to maintain blogs.

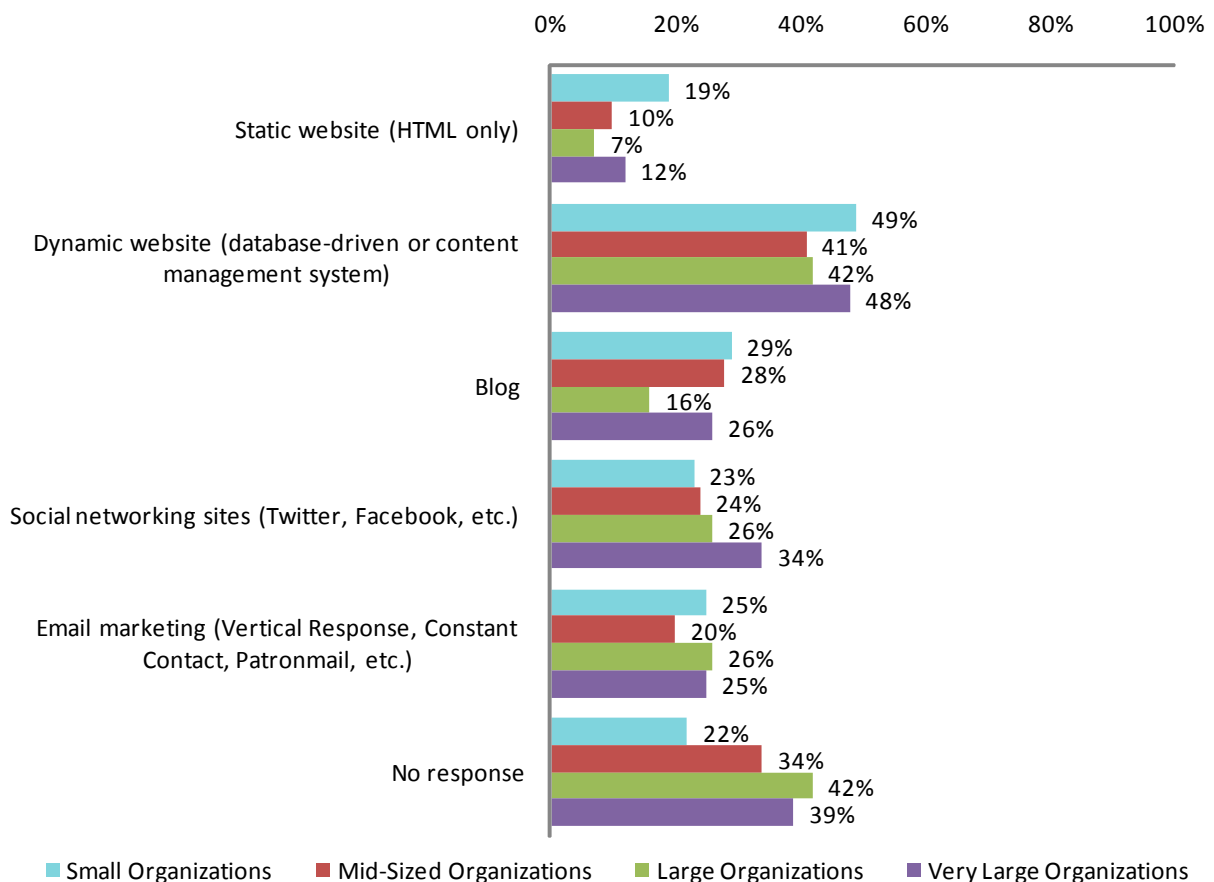
Social networking sites are commonly used among organizations of all sizes, with very large organizations slightly more likely to use social networking than other organizations.

"Other" website/marketing technologies mentioned included online stores, mobile applications, online event management systems, webinars and online grant applications.

Website/Marketing Technology Planned

Respondents were then asked to indicate which website/marketing technologies their organizations plan to implement in the next year. Generally, survey takers were more reluctant to respond to questions about forecasting future technology implementation.

*Which of the following **website/marketing** technology does your organization plan to implement **in the next 12 months**? (Choose all that apply.)*



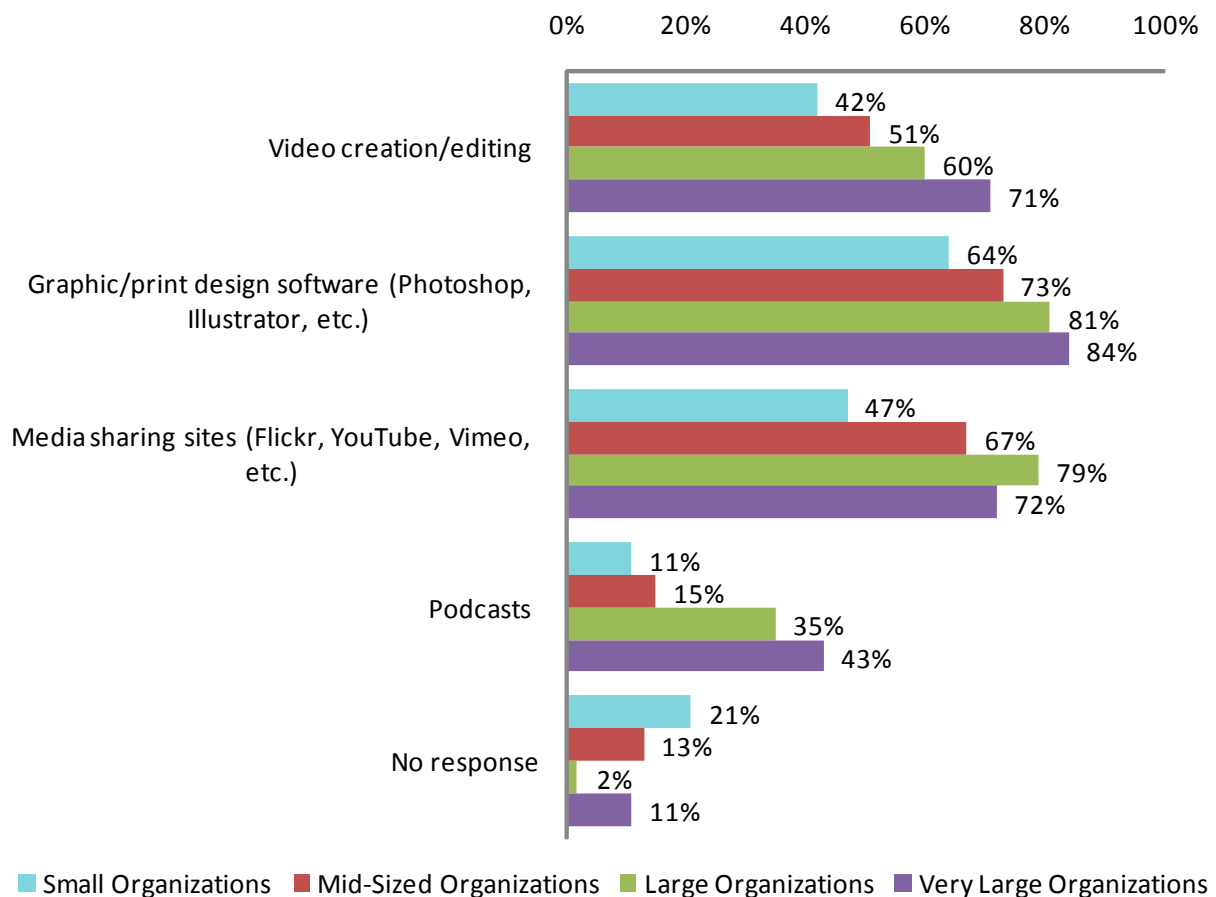
Base: 466

As illustrated above, arts organizations of all sizes are moving away from the use of static websites in favor of dynamic websites. Implementing (or improving) database-driven or content management systems for dynamic websites is the most frequently cited website/marketing technology planned for the coming year.

Blogging has a relatively similar future implementation rate among small, mid-sized and very large organizations, while large organizations are slightly less apt to focus on blog implementation in the next year. However, large organizations currently use blogs at a higher rate (58%) than organizations with smaller budgets, and even slightly more than very large organizations (50%).

Multimedia Technology Currently Used

Which of the following **multimedia** technology does your organization **currently use**? (Choose all that apply.)



Base: 466

1/5 of respondents from smaller organizations did not indicate which multimedia technology they use.

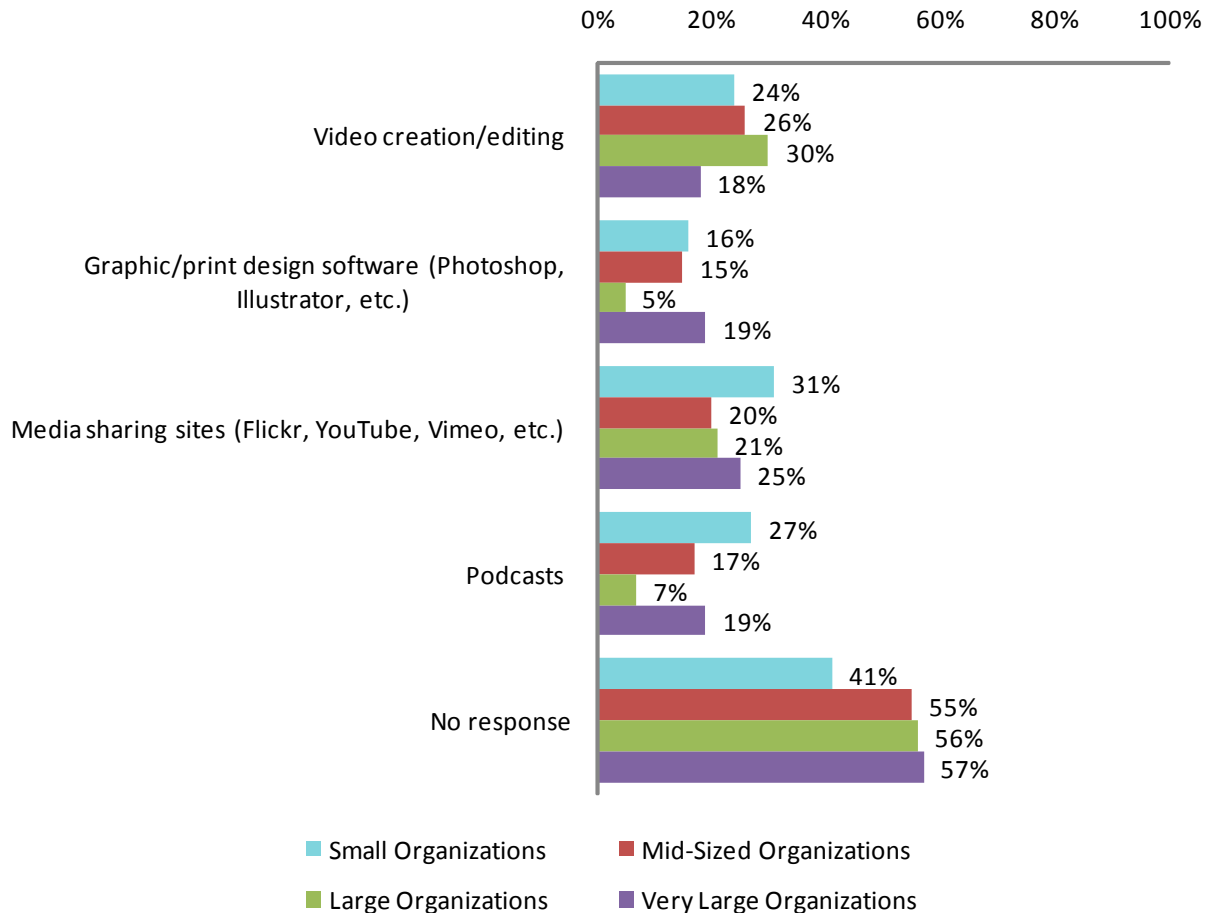
Generally, current multimedia technology usage increases as budget size increases. Podcasts reveal this trend most dramatically, as very large organizations are nearly four times as likely to currently use podcasts than organizations with budgets of less than \$500,000.

Graphic/print design software is the most commonly used multimedia technology across all budget sizes.

“Other” responses include video projections, radio programs and touchscreen kiosks.

Multimedia Technology Planned

Which of the following **multimedia** technology does your organization plan to implement **in the next 12 months**? (Choose all that apply.)

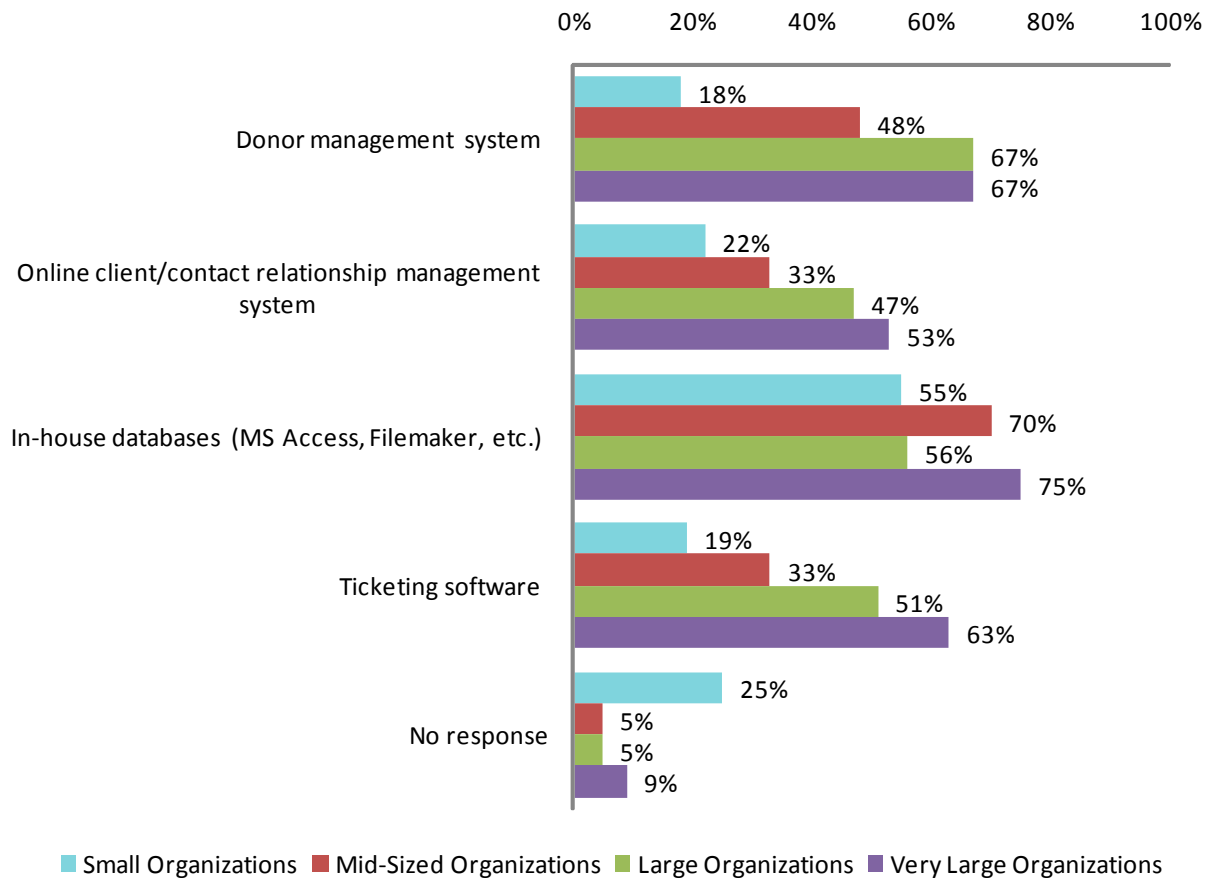


Base: 466

A large portion of respondents, regardless of budget size, did not indicate any multimedia technology planned by their organizations in the coming year. The lack of response suggests that some organizations may not have specific plans in place for multimedia technology in the future.

Administrative Technology Currently Used

Which of the following **administrative** technology does your organization **currently use**? (Choose all that apply).



Base: 466

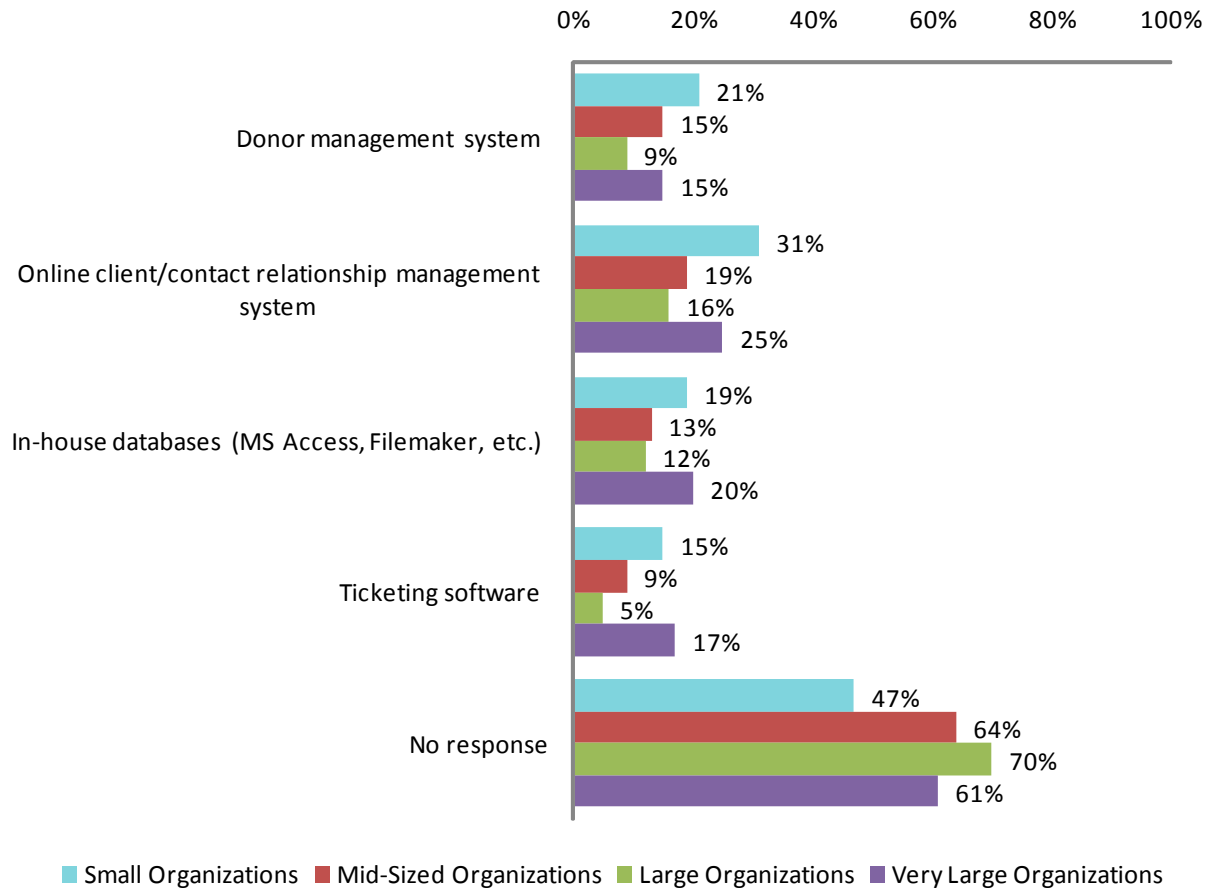
Again, very large organizations currently use administrative technology at a higher rate than organizations with smaller budgets. Very large organizations are nearly four times more likely to use a donor management system than those with budgets of \$500,000 or less. Ticketing software usage also illustrates a dramatic increase as budget size increases.

It is important to note that 1/4 of all respondents from small organizations did not provide a response to this question.

“Other” administrative technologies currently in use include grants management databases, auction software and finance software.

Administrative Technology Planned

Which of the following **administrative** technology does your organization plan to implement **in the next 12 months**? (Choose all that apply.)



Base: 466

Overall, a large portion of survey respondents from all budget categories declined to choose which administrative technologies they have planned for the next 12 months.

Online client/contact relationship management systems were the most often cited administrative technology to be implemented in the next year, regardless of budget size.

Small organizations intend to implement online client/contact relationship management systems and donor management systems at a higher rate than other organizations in the coming year.

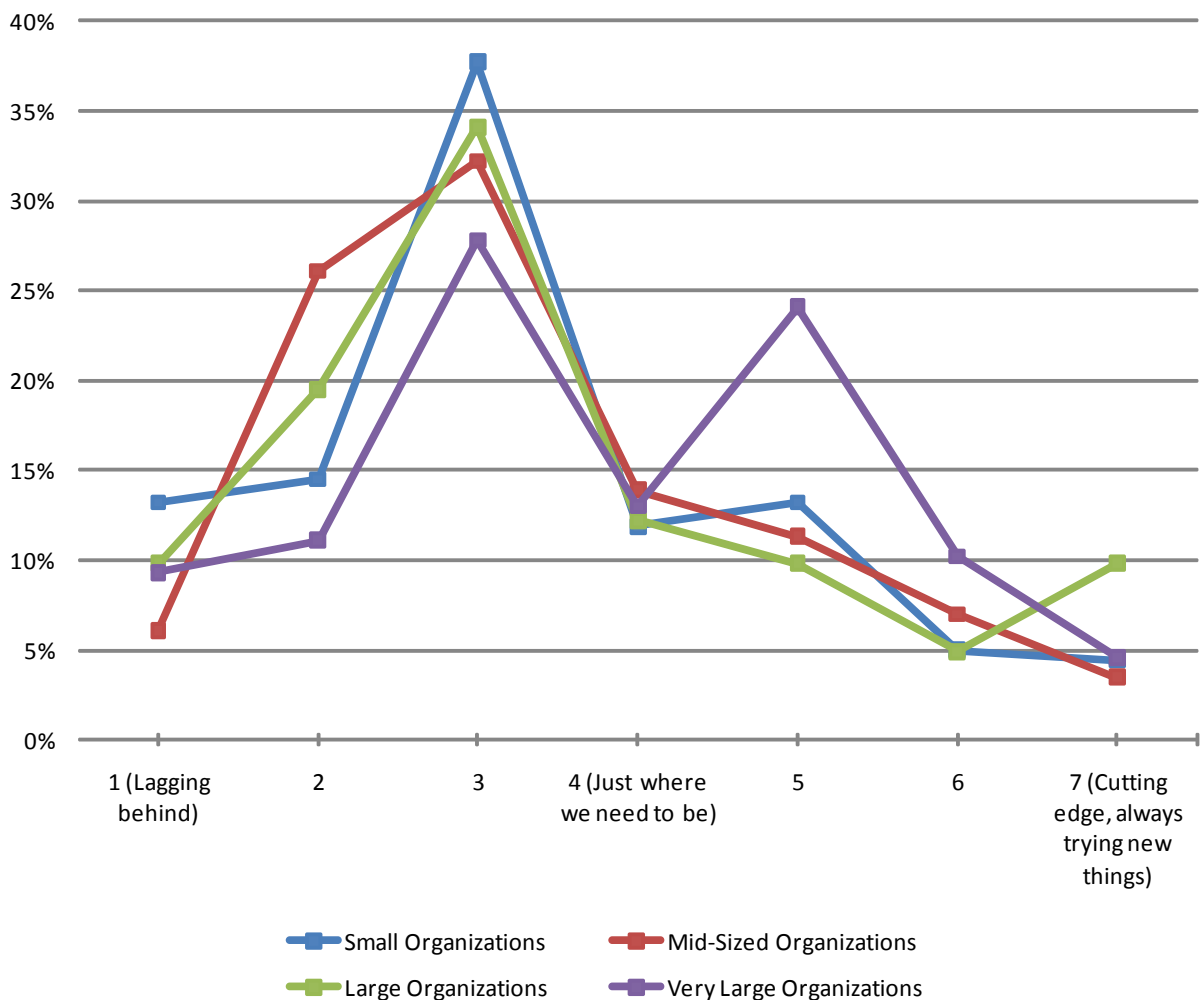
Technology Adoption Self-Assessment

We asked respondents to assess their organizations' adoption of technology on a scale with 1 indicating "lagging behind", and 7 as "cutting edge". Regardless of budget size, a rating of 3 (or one point behind "just where we need to be") was by far the most common response. Average ratings tended to be slightly higher as annual budget size increased, ranging from 3.30 for small organizations to 3.81 for very large organizations. The overall average response was 3.44.

The percentage that rated their organization as a 4, or "just where they need to be", was similar across budget size, ranging from 12% to 14% in each budget category.

12% of all respondents rated their organization as 6 or 7 ("cutting edge, always trying new things"), while 27% overall thought that their organization was "lagging behind" (ratings of 1 or 2).

How would you rate the adoption of technology by your organization?



Base: 426

Small Organizations

Annual Budget Size less than \$500,000

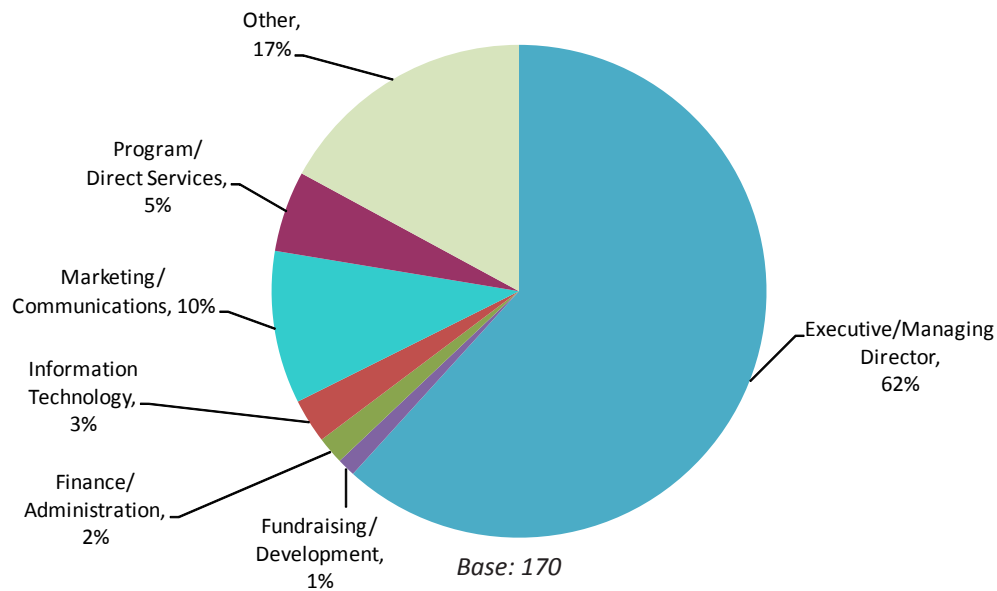
170 Respondents

Profile of Respondents

Job Function

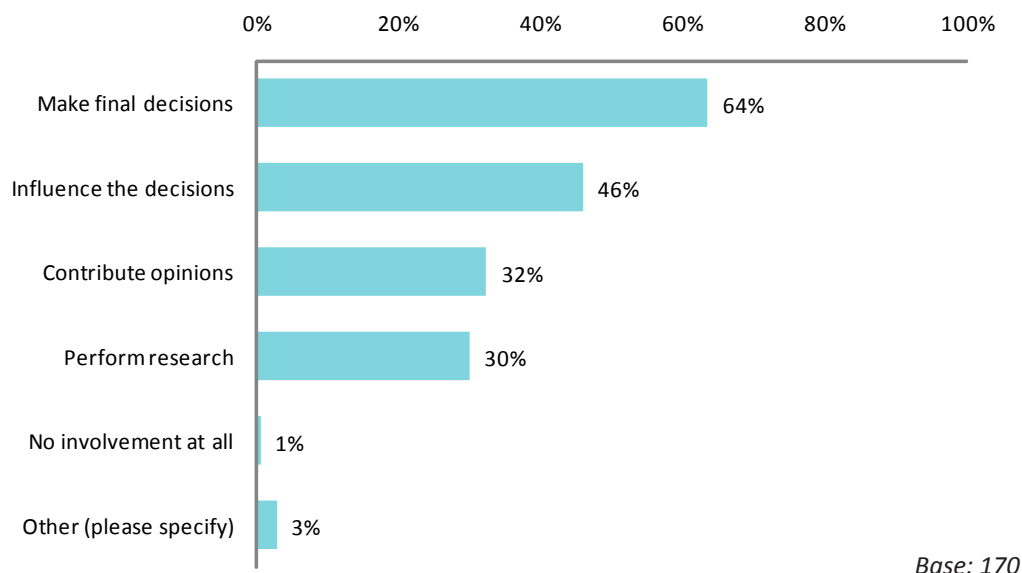
Nearly 2/3 of all survey respondents were Executive/Managing Directors, almost double the percentage of Executive Directors reporting on behalf of medium organizations. When choosing “Other”, several described themselves as performing most or all of the listed roles. More specific positions listed as “Other” include Board Member, Artistic Director, Proprietor, Founder, and Volunteer.

Which of the following best describes your position?



Technology Decision-Making

Please describe your role in the technology decision-making process at your organization.

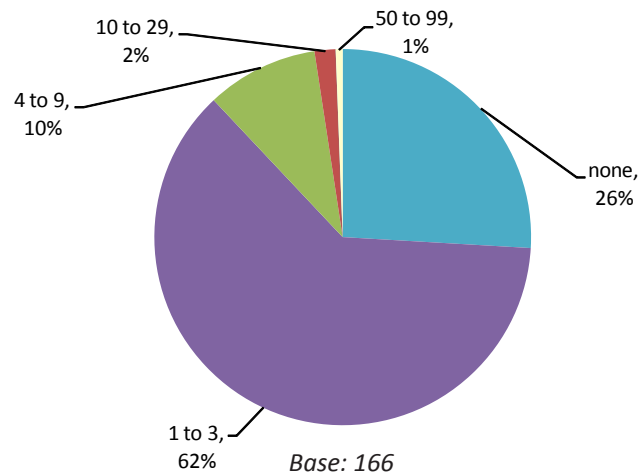


Profile of Respondents

Full-Time Staff

Most organizations with budgets of less than \$500,000 had 3 or fewer full-time employees (88%), and just over 1/4 had no full-time staff.

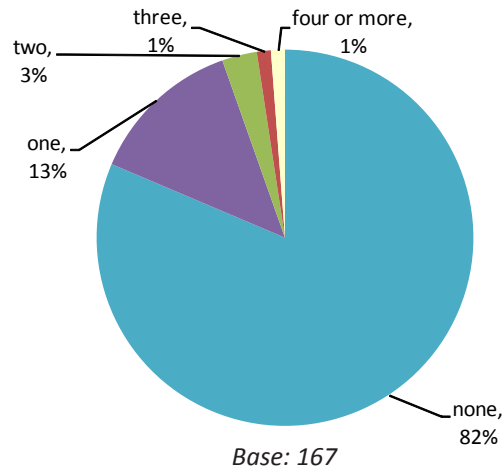
How many full-time staff members are employed by your organization?



Full-Time Staff Devoted to Technology

The vast majority of small organizations have no full-time staff dedicated to technology.

How many full-time staff members do you have devoted to technology in your organization?

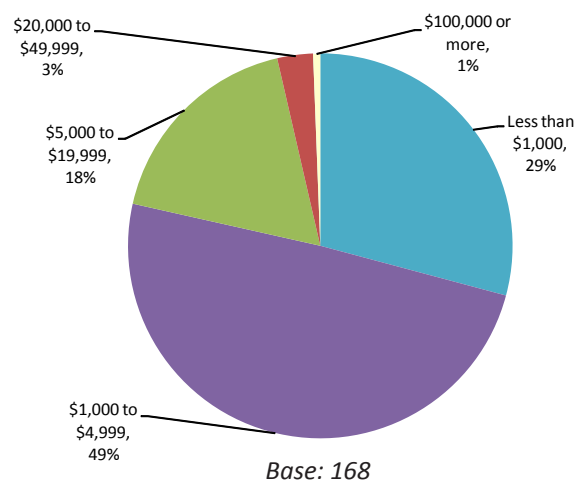


IT-Related Expenses

78% of organizations with annual budgets of less than \$500,000 spent less than \$5000 on technology, while 99% spent less than \$50,000.

Only one respondent, representing a media arts education organization, reported spending \$100,000 or more on IT-related expenses in the past year. No small organization reported a yearly spending of \$50,000 to \$99,999.

How much would you estimate that your organization spent on IT-related expenses in the past 12 months?

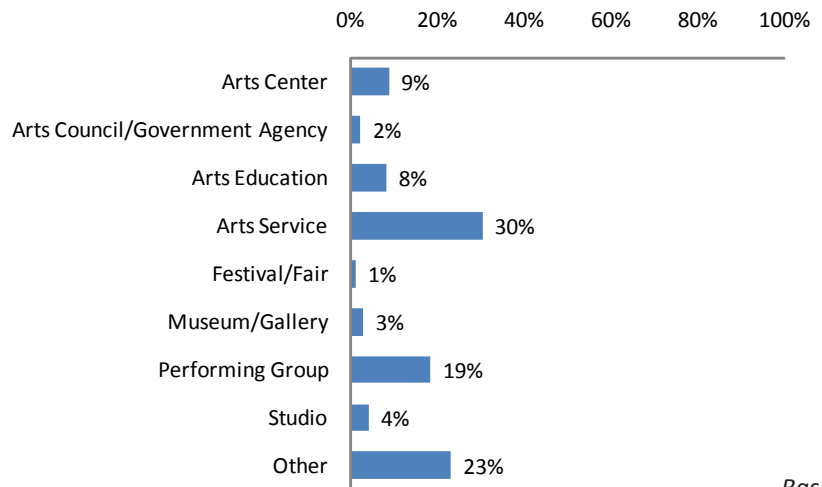


Profile of Respondents

Type(s) of Organization

Nearly 1/3 described themselves as an arts service organization. “Other” responses included presenters, arts consultants, arts societies, professional associations, and small press publishers.

*Which of the following best describes your organization?
(Choose all that apply.)*

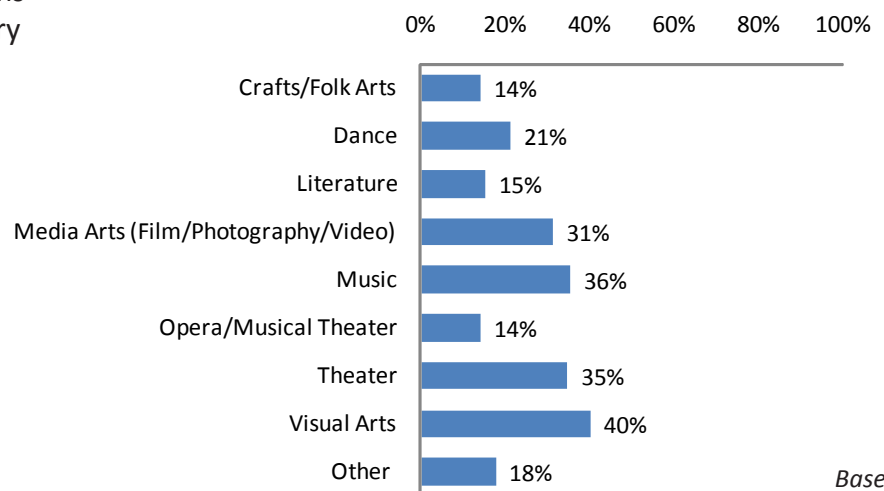


Base: 168

Organization Discipline(s)

Frequently cited “Other” responses included organizations that focused on multidisciplinary and/or interdisciplinary arts.

Which of the following disciplines represents your organization's focus area? (Choose all that apply.)



Base: 169

Current Technology Use

Respondents were asked to indicate which of the following technologies are currently used within their organizations.

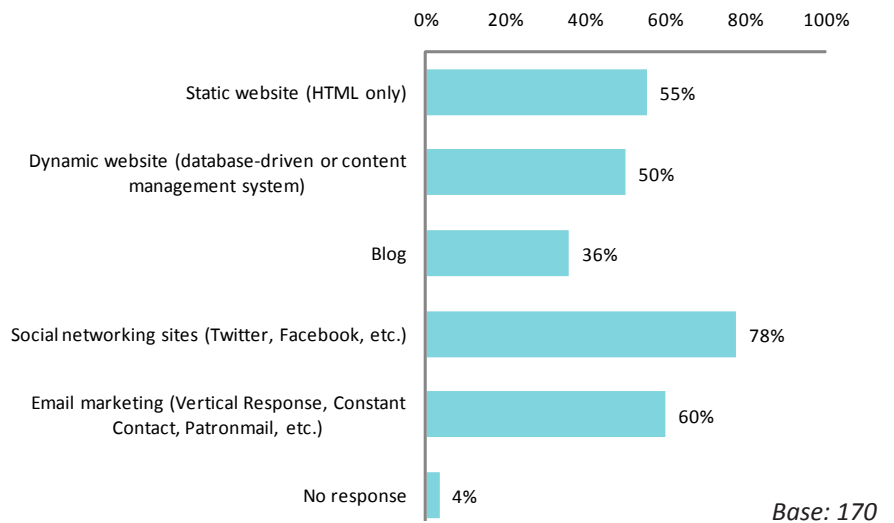
Across the three technology categories, social networking sites, graphic/print design software, and in-house databases are the most commonly used types of technology within small organizations.

Podcasts, donor management software and ticketing software were the least likely to be currently implemented.

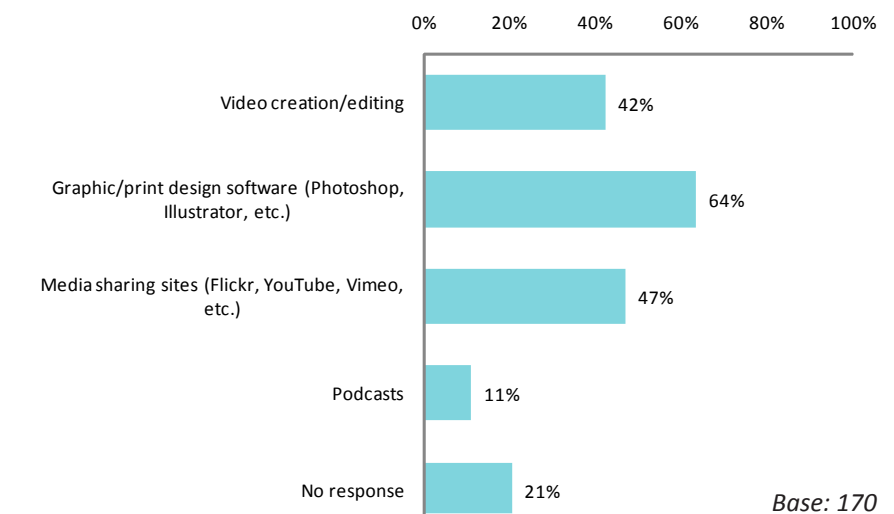
Small organizations use static websites more than any other budget size, and is the only budget category where a higher percentage of respondents reported having static websites compared to dynamic websites.

Regarding administrative and multimedia technology, respondents from small organizations were more likely than those from other budget categories to skip questions about current usage.

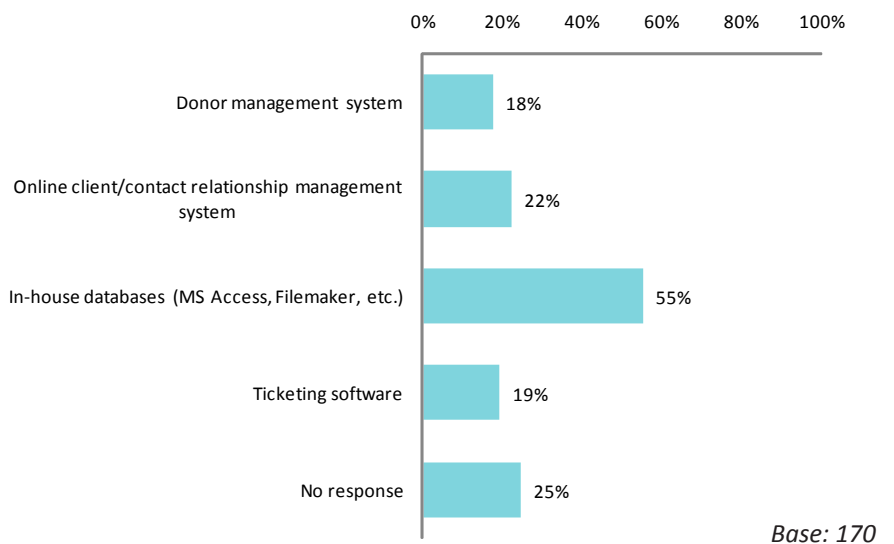
Website/Marketing



Multimedia

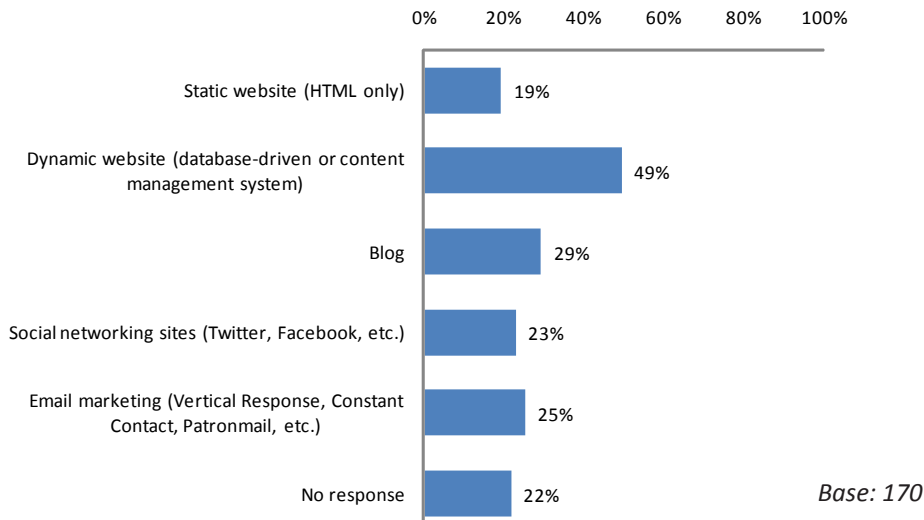


Administrative



Future Technology Implementation

Website/Marketing

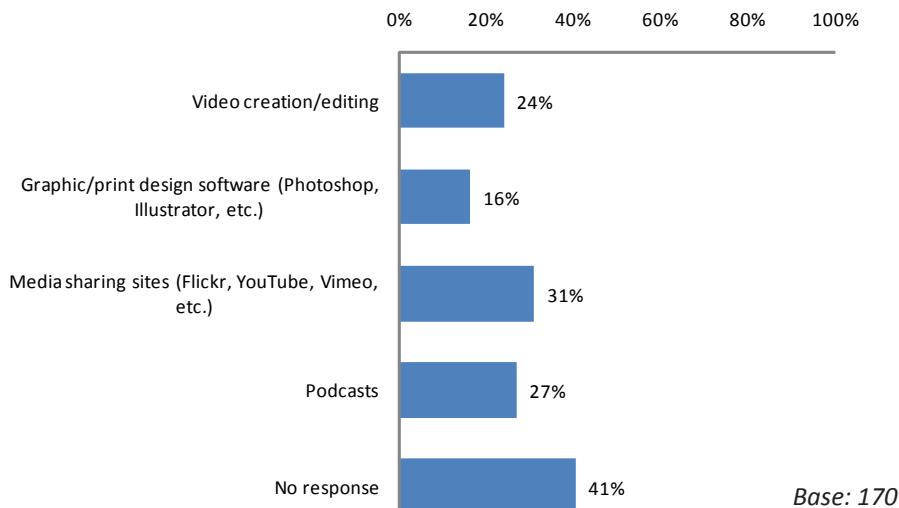


Respondents were then asked to indicate which of the following technologies their organizations plan to implement in the next 12 months.

It is important to note that questions about future technology implementation remained unanswered by a large portion of survey respondents.

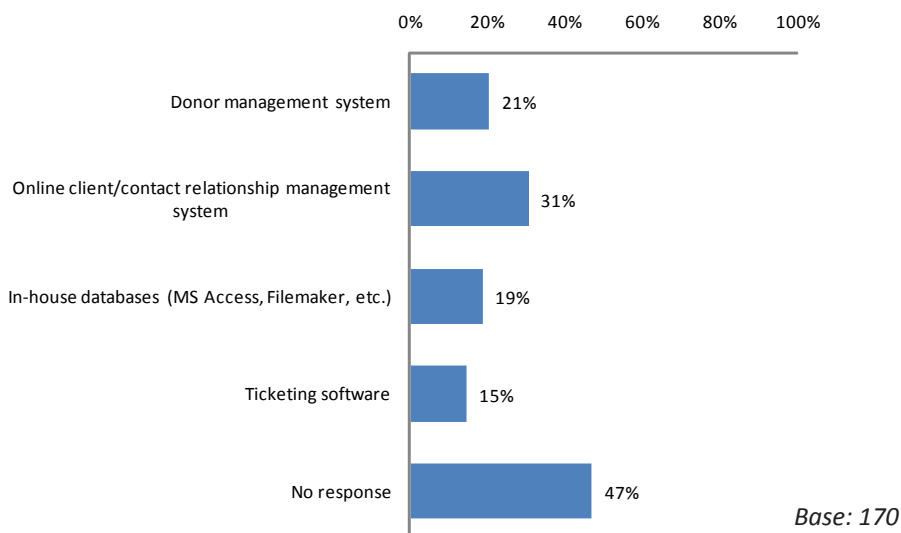
Nearly 1/2 indicated a plan to implement dynamic websites, which suggests that small organizations are shifting away from the use of static websites.

Multimedia



In addition to dynamic websites, media sharing websites, online/contact relationship management systems and blogs are the most frequently cited technologies planned for the next year.

Administrative



“Other” planned technologies include copyright management, interactive installation spaces, eLearning software, art submission platforms, smartphone applications, mobile-enabled websites, robotics, and online surveys.

Difficulties with Technology Implementation

When asked to rate how difficult they found certain areas of technology implementation, 1/3 of all respondents chose to write-in specific difficulties as well.

In “Other”, 13% of all respondents described funding as a major challenge to technology implementation. Other difficulties mentioned included a lack of time to devote to implementation, a lack of staff equipped to deal with technology, and difficulties in keeping up with rapid changes in technology.

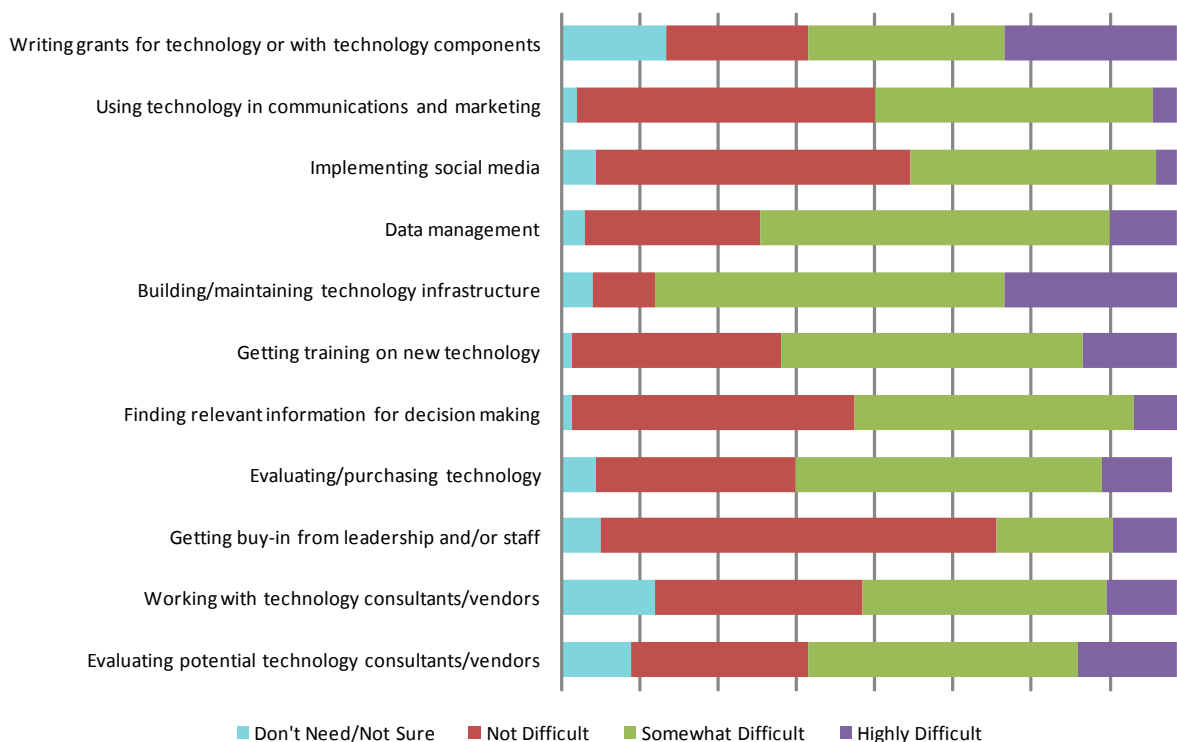
3 Most Difficult:

1. Writing grants for technology or with technology components (28%)
2. Building/maintaining technology infrastructure (28%)
3. Evaluating potential technology consultants/vendors (16%)

3 Least Difficult:

1. Getting buy-in from leadership and/or staff (64%)
2. Implementing social media (51%)
3. Using technology in communications and marketing (48%)

Please rate how difficult the following areas are for your organization.



Base: 159

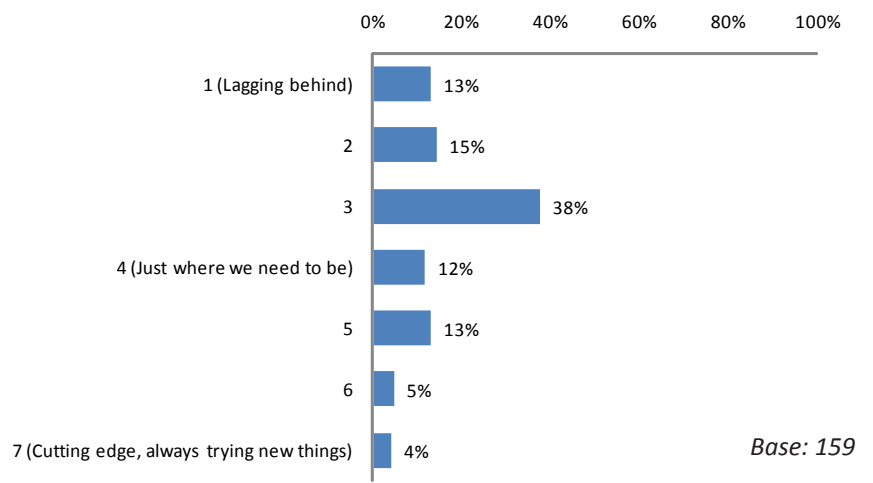
Technology Needs

Technology Adoption

About 1/3 of small organization respondents rated their organizations as “just where they need to be” or better in terms of technology adoption.

The remaining 2/3 reported that their organizations are not yet “where they need to be” with a rating between 1 and 3.

How would you rate the adoption of technology by your organization?

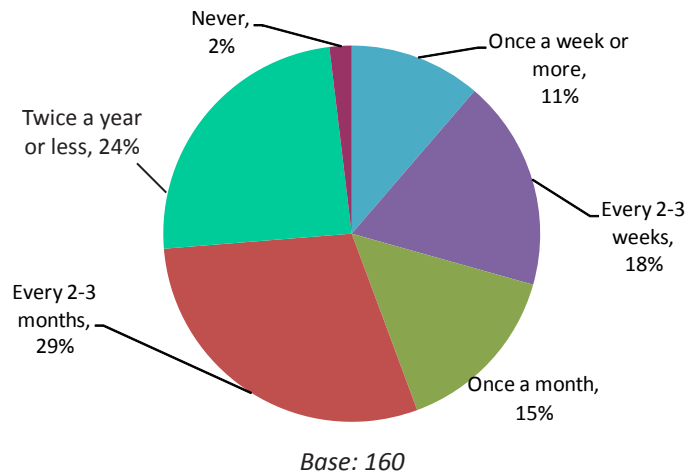


Seeking Help

44% of small organizations seek help outside their organization at least once a month.

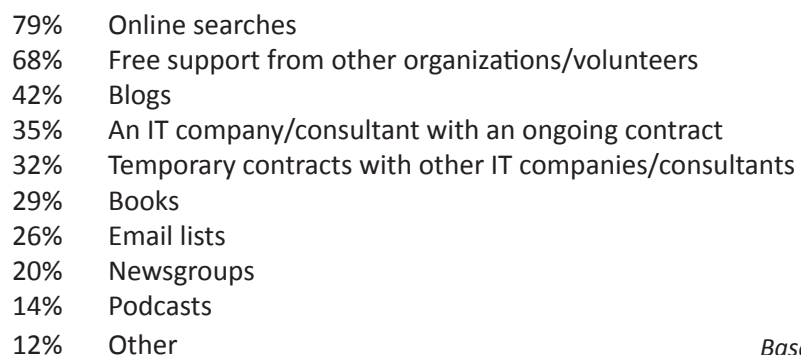
Smaller organizations tend to seek outside advice on technology issues slightly less frequently, in general, than those with larger budgets.

*How often do you feel the need to seek help or advice on technology **outside** your organization?*



*What ways do you currently use to get advice or help about technology?
Choose all that apply.*

Respondents from small organizations are more likely to receive free support from other organizations/volunteers than any other budget size. Regardless of annual budget, all organizations use online searches frequently.



Satisfaction with Technology Advice/Help

Highly or Somewhat Satisfied:

- 45% Reliability
- 41% Cost
- 37% Authority
- 25% Personal Time Commitment Required

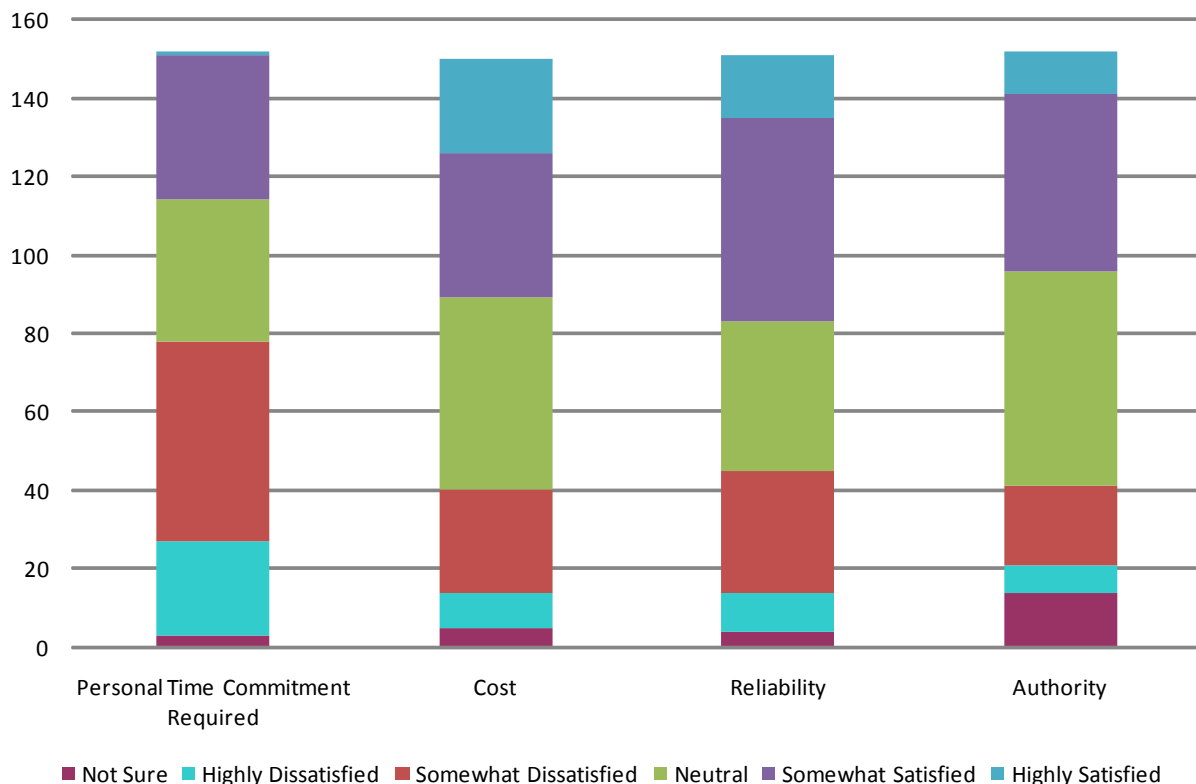
Highly or Somewhat Dissatisfied:

- 50% Personal Time Commitment Required
- 28% Reliability
- 23% Cost
- 18% Authority

The top three ways in which small organizations get advice or help with technology are online searches (79%), free support from other organizations/volunteers (68%) and blogs (42%). Since each of these methods are obtained free of charge, it follows that respondents from small organizations were more likely to be satisfied with cost than personal time commitment required and authority.

Personal time commitment emerged as the least satisfying aspect of technology advice/help for small organizations, with 1/2 dissatisfied and only 1/4 satisfied.

With the ways that you currently use to get help or advice regarding technology, how satisfied are you with the following?



Base: 153

Mid-Sized Organizations

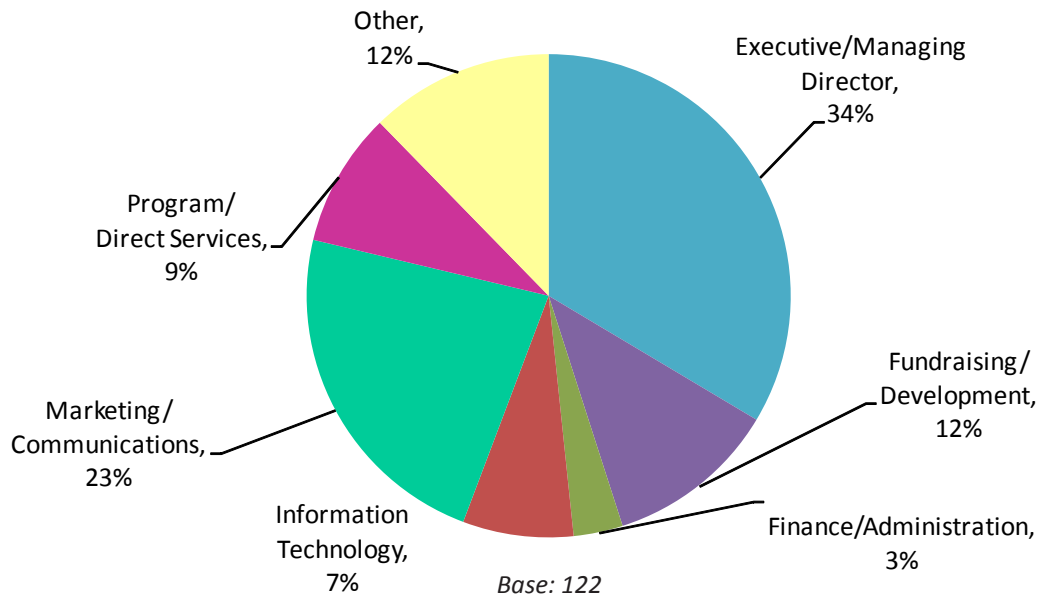
Annual Budget Size \$500,000 to \$2.5 million
123 Respondents

Profile of Respondents

Job Function

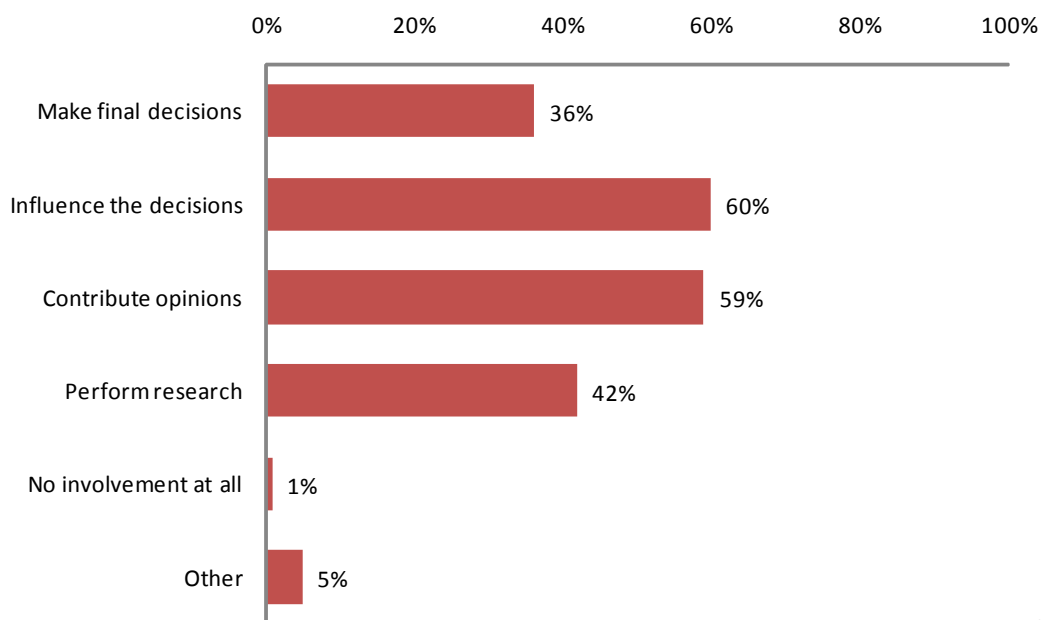
Respondents from mid-sized organizations most frequently identified themselves as Executive/Managing Directors, or Marketing/Communications Specialists. “Other” responses included Curator, Artistic Director, Board Member, Production Manager, and Office Manager.

Which of the following best describes your position?



Technology Decision-Making

Please describe your role in the technology decision-making process at your organization.

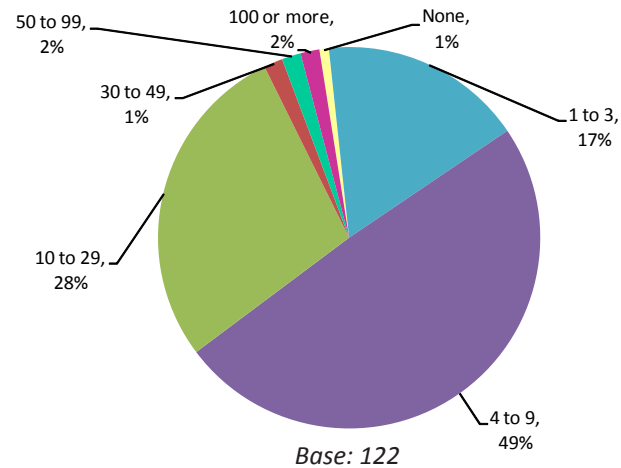


Profile of Respondents

Full-Time Staff

Nearly 1/2 of all mid-sized organizations reported that they had 4 to 9 full-time staff members. Over 1/4 had a total of 10 to 29, and only 5% had 30 or more full-time staff members.

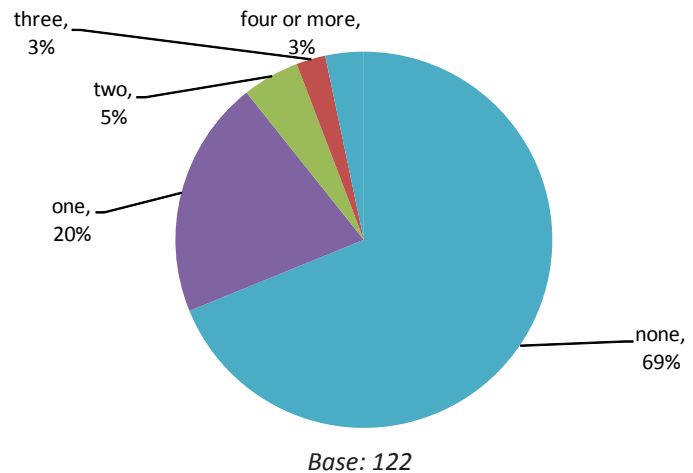
How many full-time staff members are employed by your organization?



Full-Time Staff Devoted to Technology

Over 2/3 of all mid-sized organizations did not have IT-related staff devoted to technology, while another 1/5 had only one full-time technology staff person.

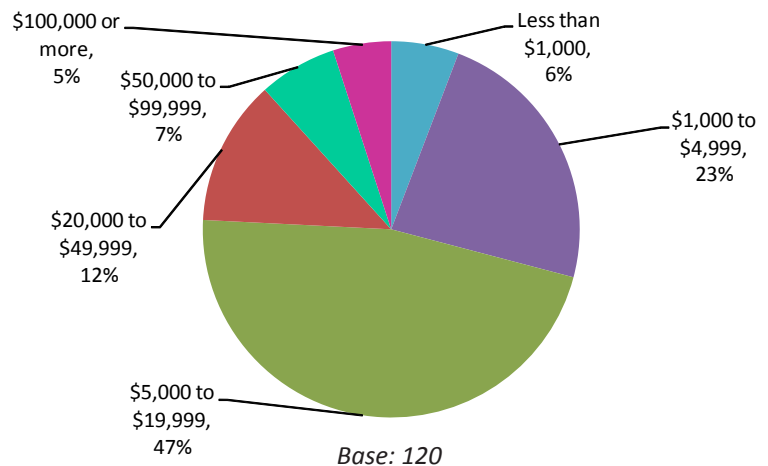
How many full-time staff members do you have devoted to technology in your organization?



IT-Related Expenses

3/4 of organizations with budgets between \$500,000 and \$2.5 million spent less than \$20,000 on technology expenses in the past year.

How much would you estimate that your organization spent on IT-related expenses in the past 12 months?



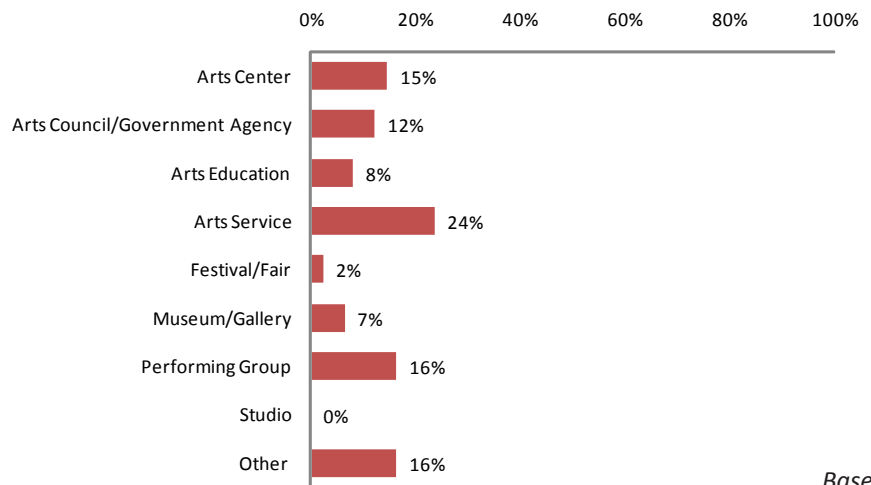
Profile of Respondents

Type(s) of Organization

The top three most frequently cited types of mid-sized organizations (arts service, arts center and performing group) are also the top three types for survey respondents across all budget categories.

“Other” responses included nonprofit arts council, arts advocacy, arts professional development organization, university cinema center, and public radio station.

*Which of the following best describes your organization?
(Choose all that apply.)*

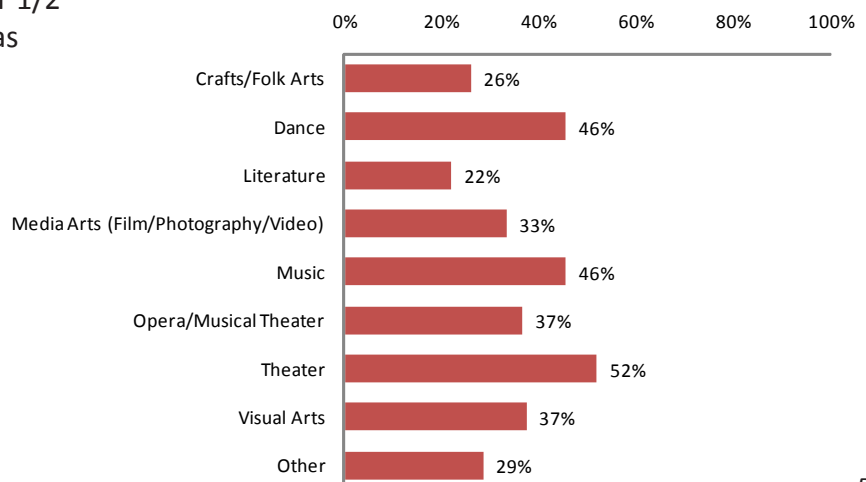


Base: 123

Organization Discipline(s)

Of those respondents that listed “Other” disciplines, just under 1/2 classified their organizations as multidisciplinary or interdisciplinary.

Which of the following disciplines represents your organization's focus area? (Choose all that apply.)



Base: 123

Current Technology Use

Survey respondents were asked to indicate which of the following technologies they currently use within their organizations.

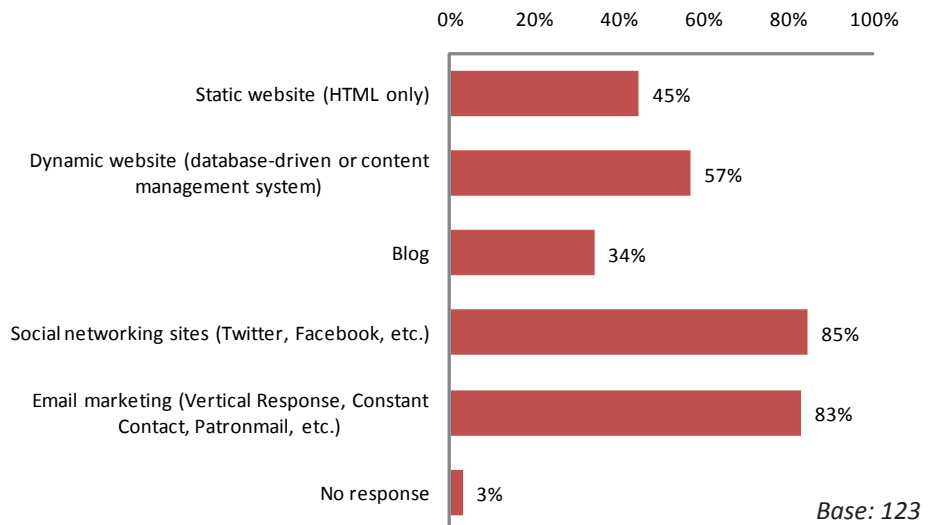
Mid-sized organizations most commonly use social networking sites, email marketing tools and graphic/print design software.

Podcasts are the least popular type of technology used by medium organizations.

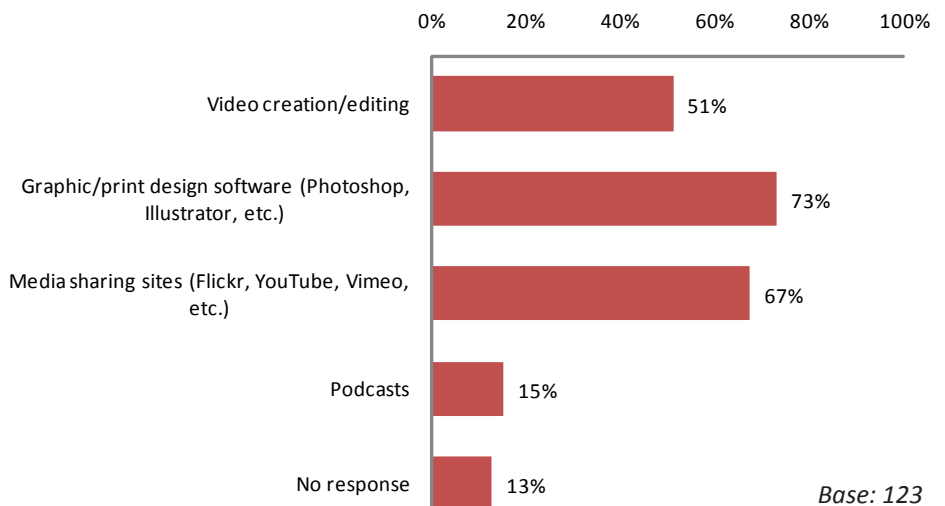
Blogs, ticketing software and online client/contact relationship management software are each represented by about 1/3 of all medium organizations.

“Other” technologies included library software, Google AdSense, online surveys, online giving platforms, project management software, and webinar platforms.

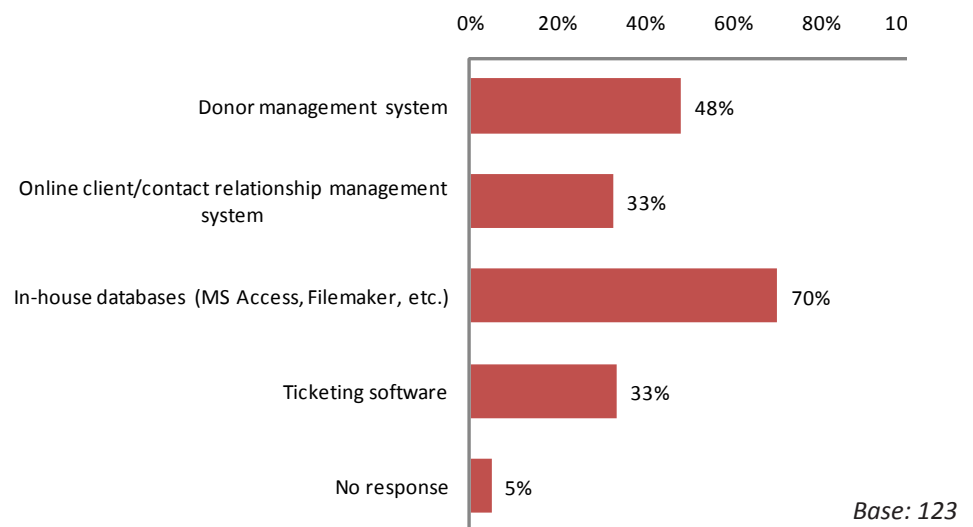
Website/Marketing



Multimedia

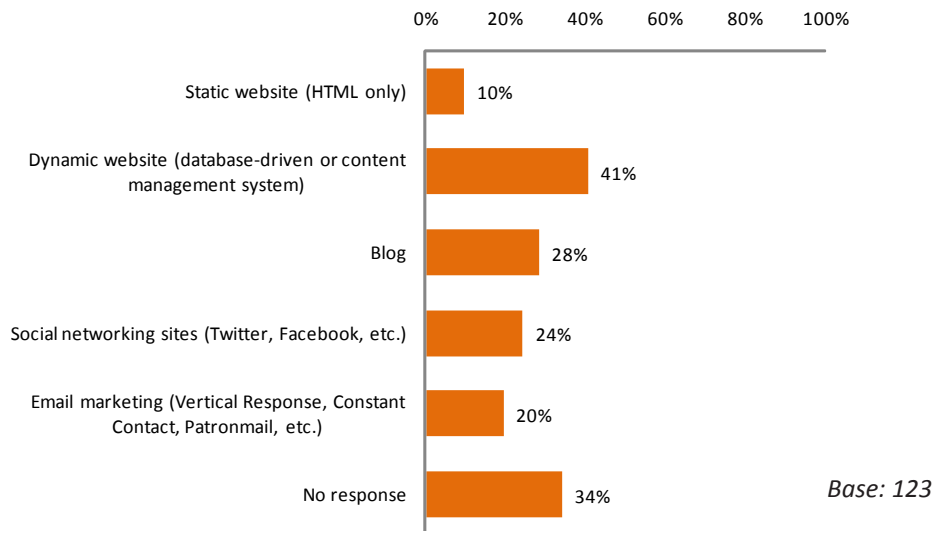


Administrative



Future Technology Implementation

Website/Marketing

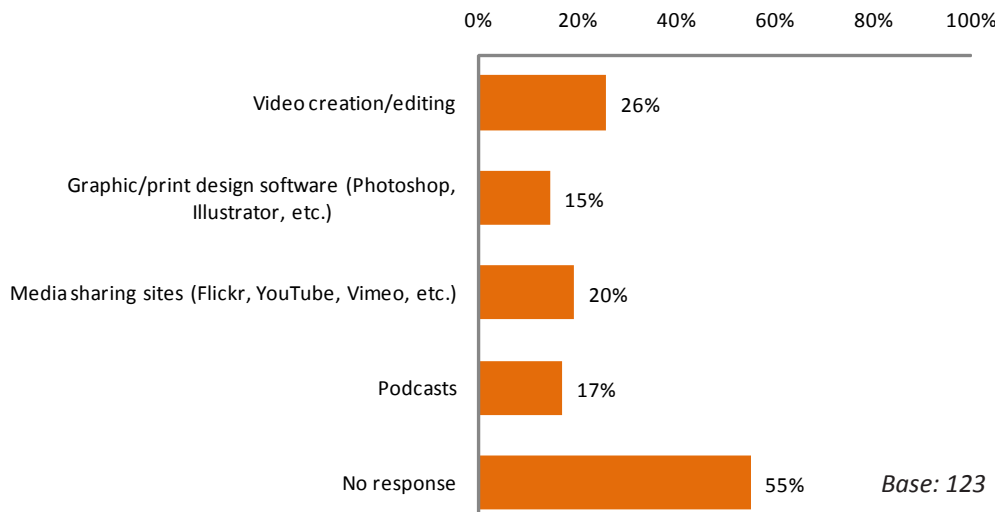


Respondents were then asked to identify types of technology their organization plans to implement in the next year.

A significant number of respondents chose not to answer these questions, which may indicate that they do not have specific technology plans in place for the coming year.

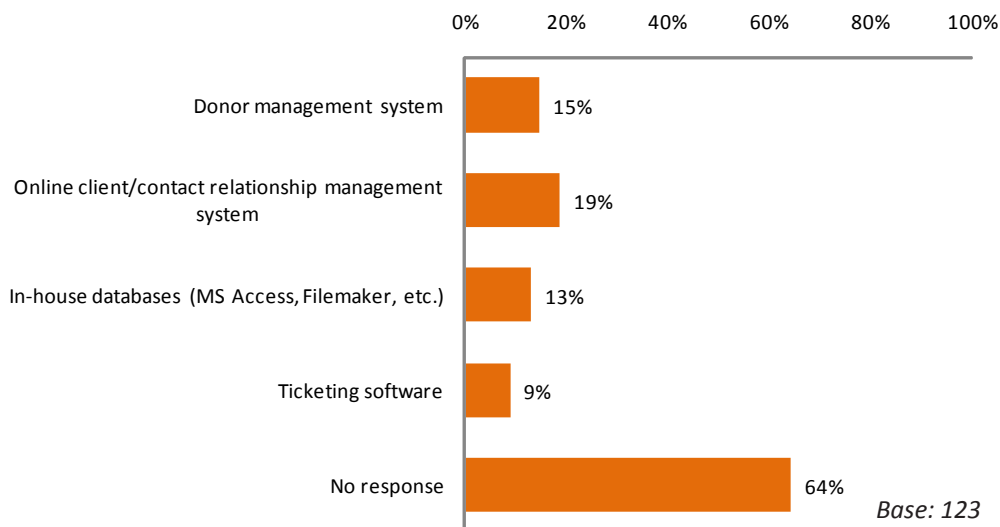
Dynamic websites were the most common technology planned for the next 12 months, illustrating a shift away from the use of static websites.

Multimedia



“Other” technologies planned for the coming months included online submission platforms, interactive displays, improved storage for digitized collections, geolocational software/ applications, self-created social networks, and e-grants.

Administrative



Difficulties with Technology Implementation

When asked to rate how difficult they found certain areas of technology implementation, 20% of respondents also chose to write-in specific difficulties as well.

Common write-in responses included a lack of funding, a lack of staffing, and a lack of integration across platforms. Some respondents also noted that keeping up with and/or finding the time to devote to technology were challenging areas as well.

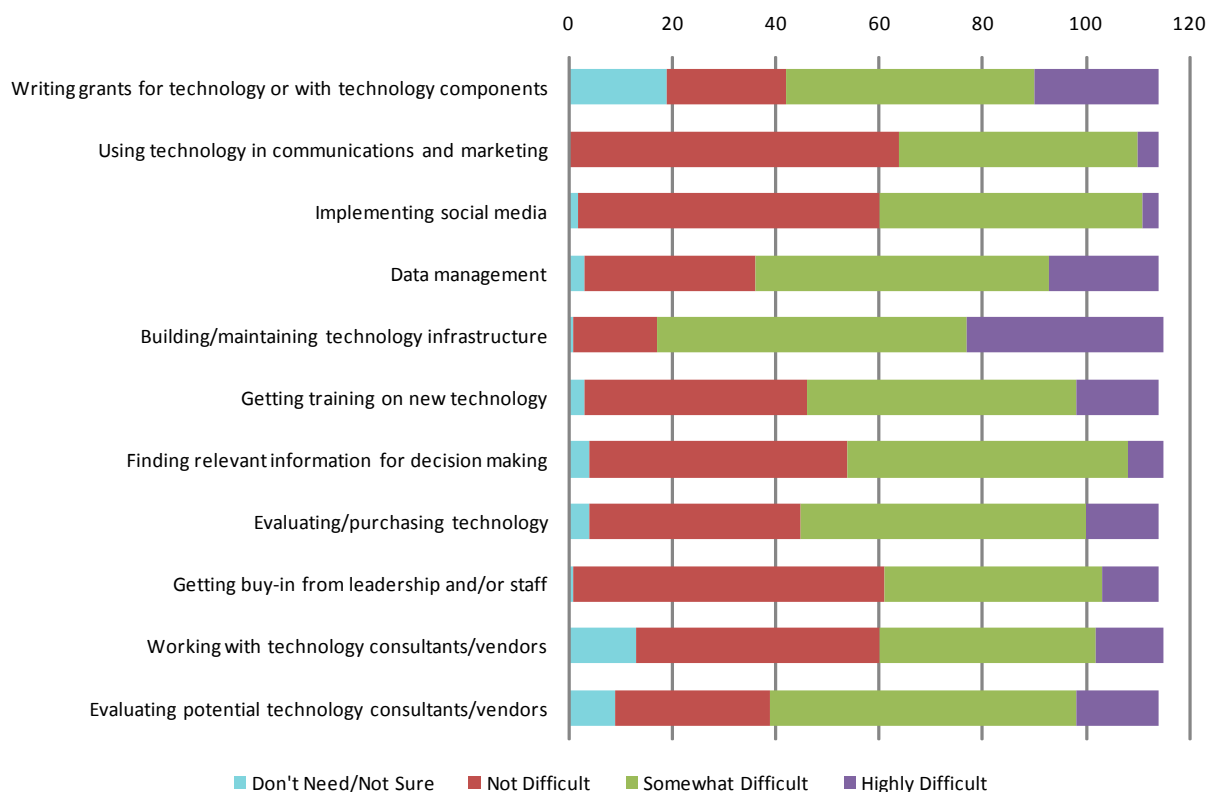
3 Most Difficult:

1. Building/Maintaining technology infrastructure (33%)
2. Writing grants for technology or with technology components (21%)
3. Data management (18%)

3 Least Difficult:

1. Using technology in communications and marketing (56%)
2. Getting buy-in from leadership or staff (53%)
3. Implementing social media (51%)

Please rate how difficult the following areas are for your organization.



Base: 115

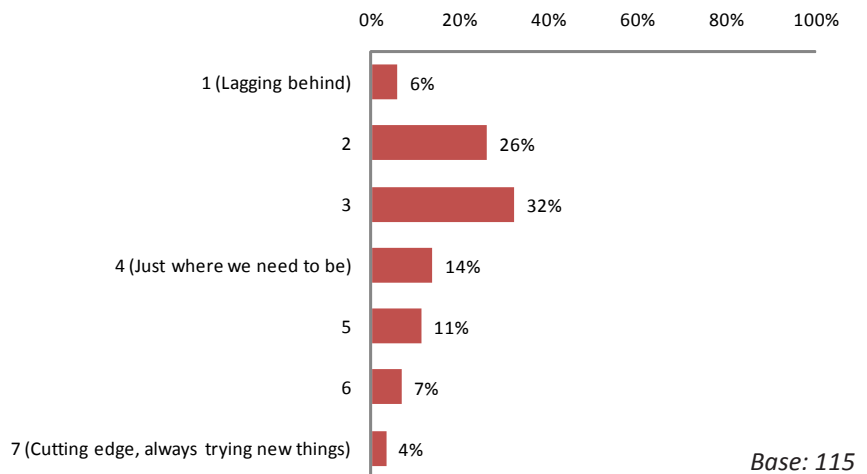
Technology Needs

Technology Adoption

36% of respondents believe that their organization is “just where they need to be” or better in regards to technology adoption, rating themselves a 4 or higher.

The remaining 64% rated their organization behind “just where they need to be” with a rating of 3 or below.

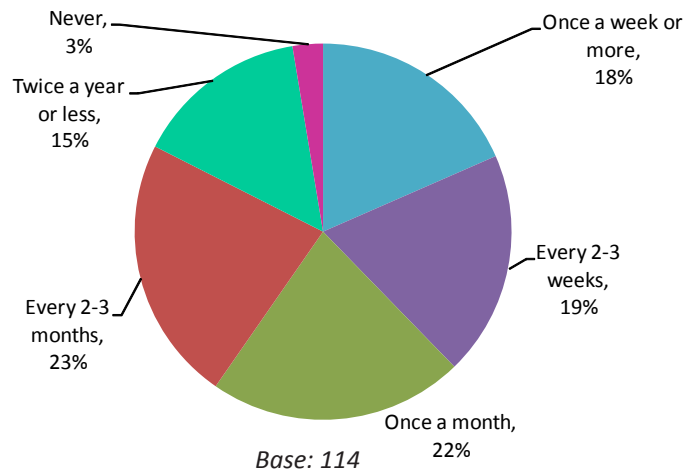
How would you rate the adoption of technology by your organization?



Seeking Help

59% of respondents seek help or advice outside of their organizations at least once per month.

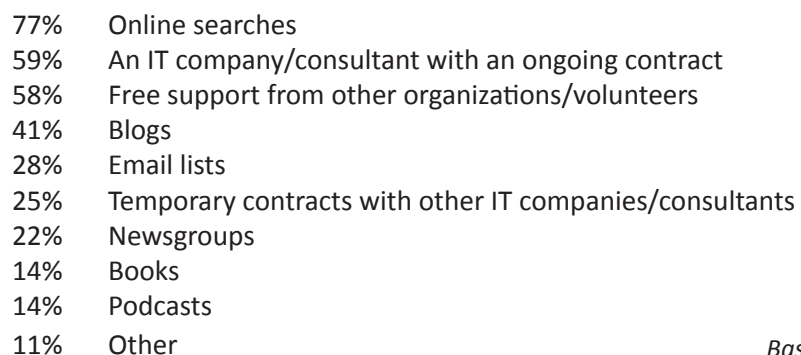
*How often do you feel the need to seek help or advice on technology **outside** your organization?*



Advice

Mid-sized organizations use ongoing contracts with IT consultants and free support from volunteers/other organizations at about the same rate. “Other” responses include colleagues, friends, family, online forums and YouTube tutorials.

What ways do you currently use to get advice or help about technology? Choose all that apply.



Satisfaction with Technology Advice/Help

Highly or Somewhat Satisfied:

- 53% Reliability
- 47% Authority
- 40% Cost
- 31% Personal Time Commitment Required

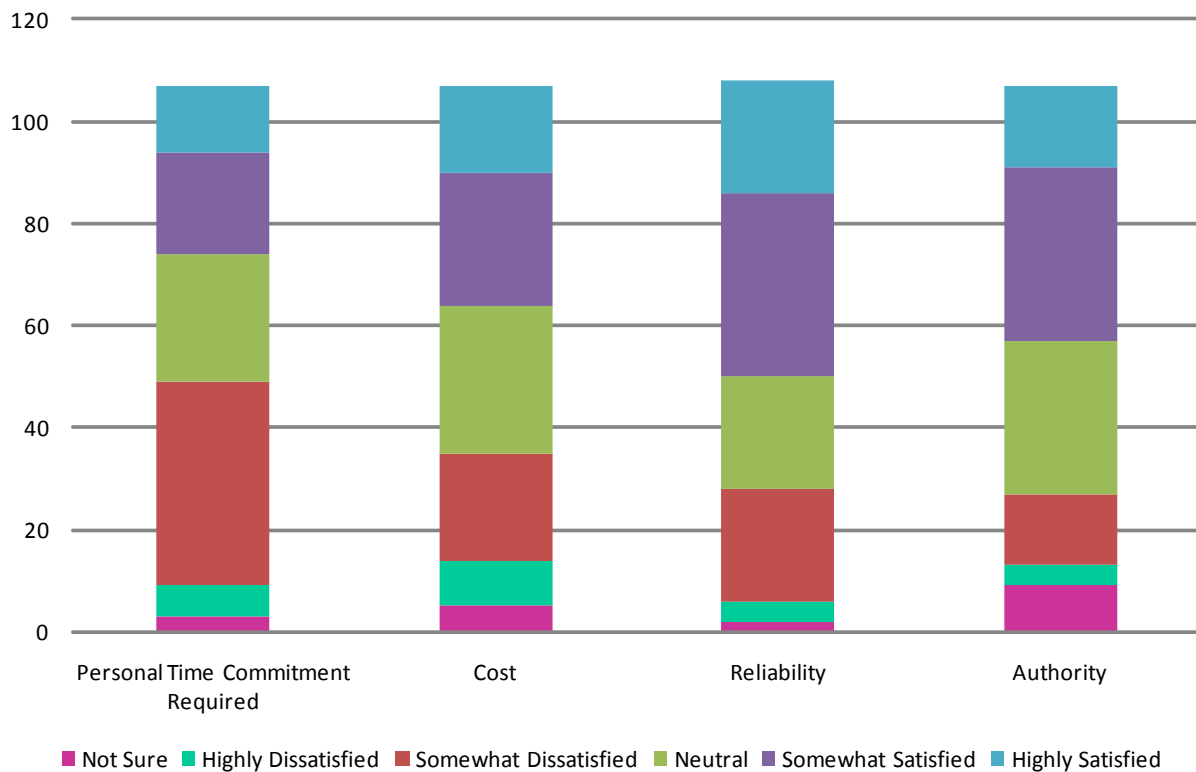
Highly or Somewhat Dissatisfied:

- 43% Personal Time Commitment Required
- 28% Cost
- 24% Reliability
- 17% Authority

Consistent with organizations across all budget categories, arts managers from mid-sized organizations found the amount of personal time commitment required to be the least satisfying aspect of obtaining help or advice with technology.

In addition, respondents from mid-sized organizations were most satisfied with the reliability of their methods of getting technology advice, which is consistent with results from both small and very large organizations.

With the ways that you currently use to get help or advice regarding technology, how satisfied are you with the following?



Base: 108

Large Organizations

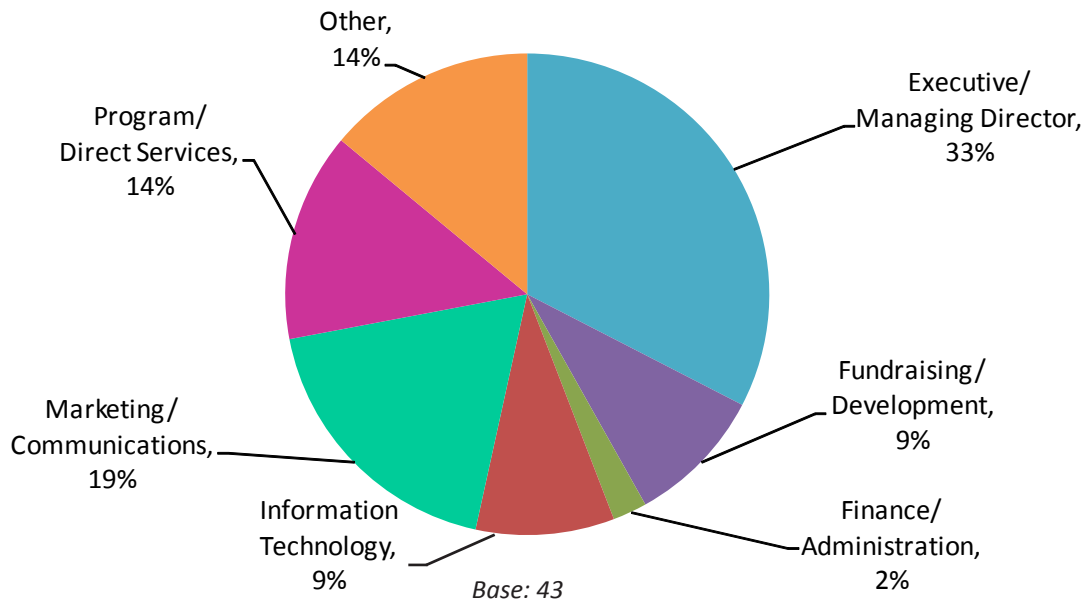
Annual Budget Size \$2.5 million to \$5 million
43 Respondents

Profile of Respondents

Job Function

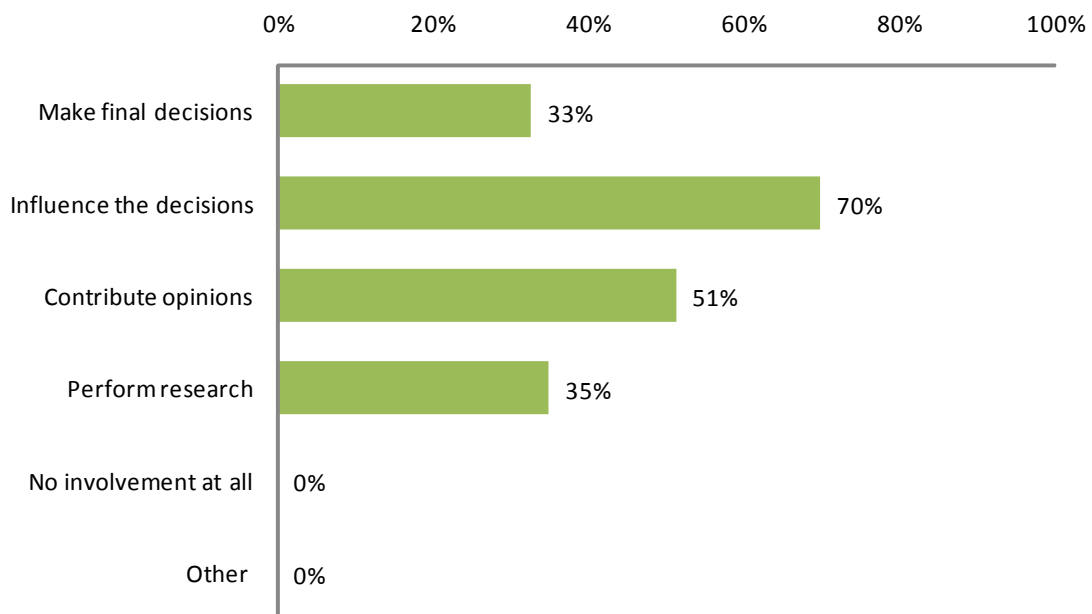
“Other” responses include: Artistic Director, Deputy Director, Graphic Designer, Manager and IT combined with Programming and Content Development.

Which of the following best describes your position?



Technology Decision-Making

Please describe your role in the technology decision-making process at your organization.



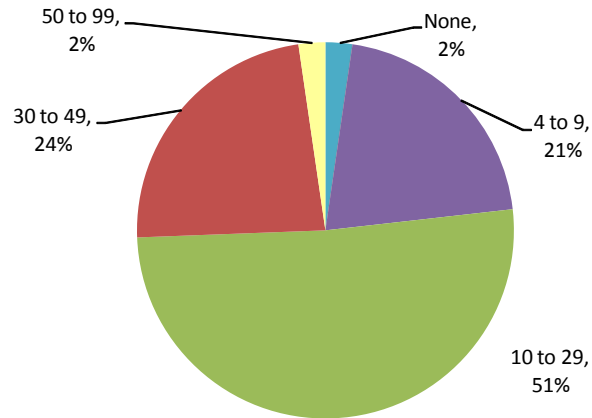
Profile of Respondents

Full-Time Staff

1/2 of arts organizations with annual budgets between \$2.5 and \$5 million employ 10 to 29 staff members full-time, while about 1/4 employ over 30 people and nearly 1/4 employ less than 9.

No large organizations reported a staff of over 100 people, yet 43% of very large organizations have at least 100 full-time employees.

How many full-time staff members are employed by your organization?

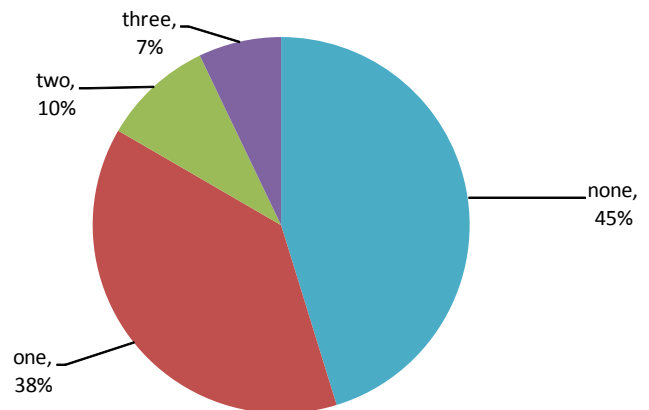


Base: 43

Full-Time Staff Devoted to Technology

Nearly 1/2 do not have a single full-time staff member devoted to IT, although this is less likely among large organizations than small or mid-sized organizations. By comparison, 16% of very large organizations lacked a single full-time technology staff member.

How many full-time staff members do you have devoted to technology in your organization?

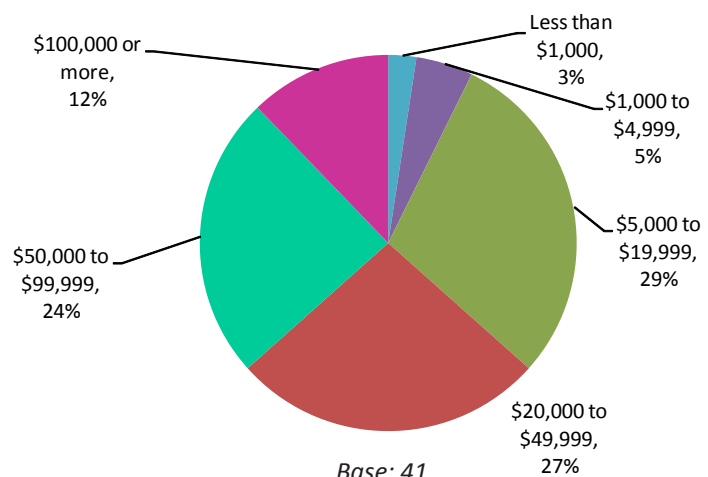


Base: 42

IT-Related Expenses

Technology spending in the past year was distributed across a wide range among large organizations, whereas other annual budget sizes tended to have a higher concentration of spending in one distinct category.

How much would you estimate that your organization spent on IT-related expenses in the past 12 months?



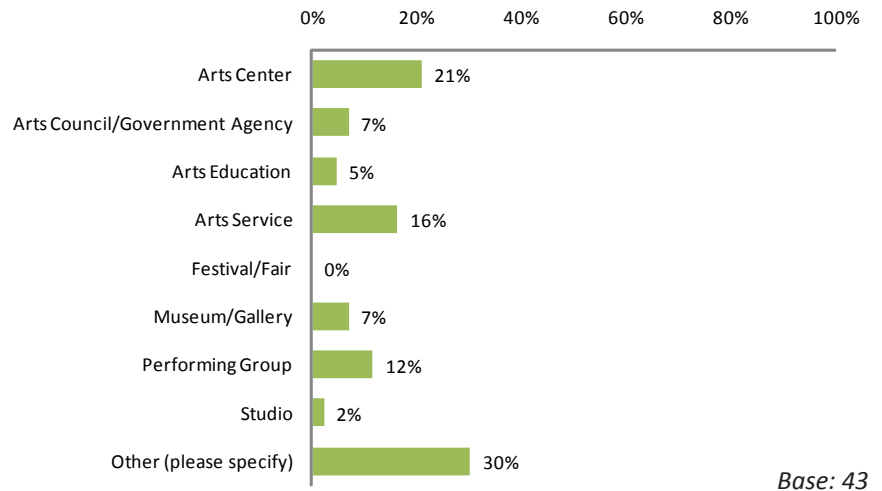
Base: 41

Profile of Respondents

Type(s) of Organization

“Other” responses included professional association, grantmaker, theater producer or presenter, cultural center, historic house museum, and arts foundation.

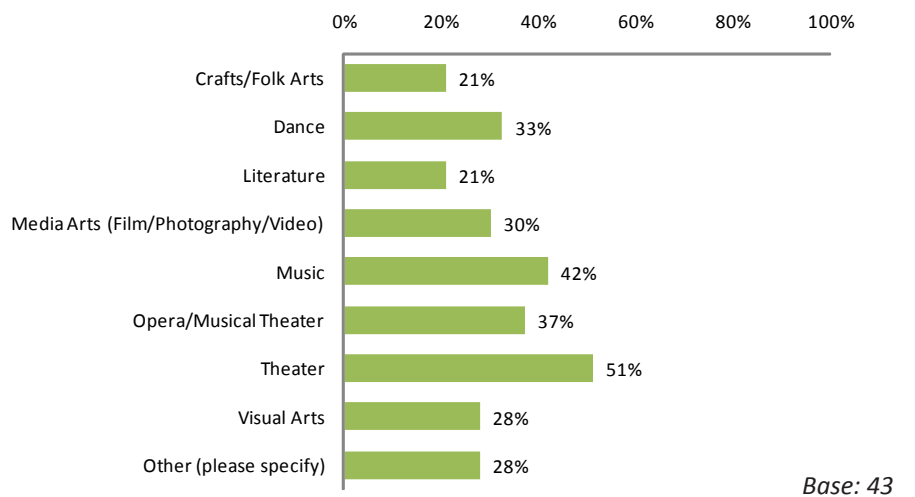
*Which of the following best describes your organization?
(Choose all that apply.)*



Organization Discipline(s)

Listing themselves in the “Other” category, 11% of all large organization respondents defined their focus as multidisciplinary. More specific “Other” disciplines included history, horticulture and architecture.

Which of the following disciplines represents your organization's focus area? (Choose all that apply.)



Current Technology Use

Respondents were asked to indicate which of the following technologies are currently used within their organizations.

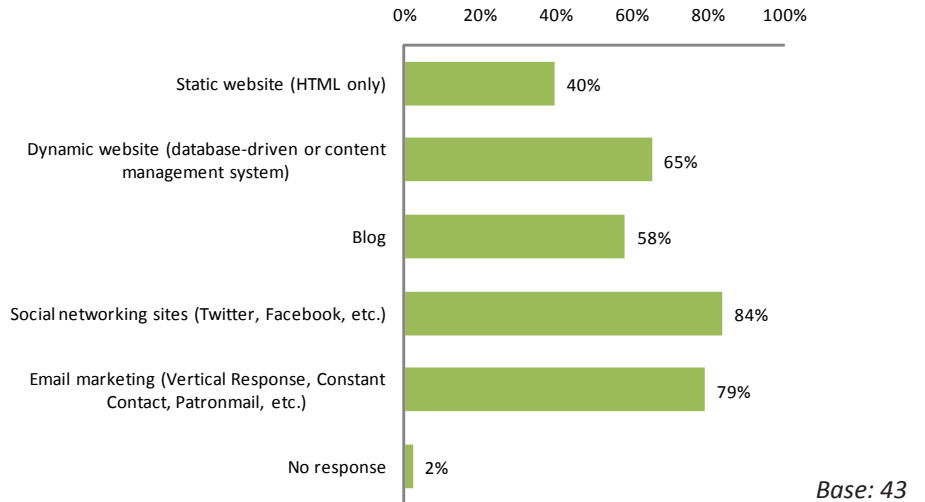
The most frequently used technologies by large organizations include social networking sites, graphic/print design software, email marketing, and media sharing sites.

Large organizations were the most likely of all budget categories to report using media sharing sites such as Flickr, YouTube and Vimeo.

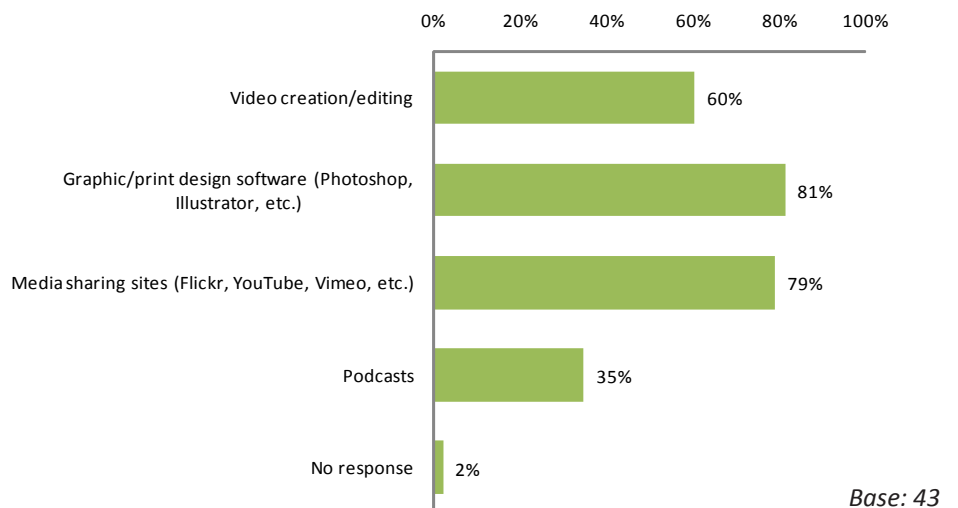
Again, podcasts and static websites are the least often used types of technology.

“Other” responses included videos, touchpad kiosks and other interactive gallery technology, facilities management software, online grants management systems, accounting/finance software, and online registration systems.

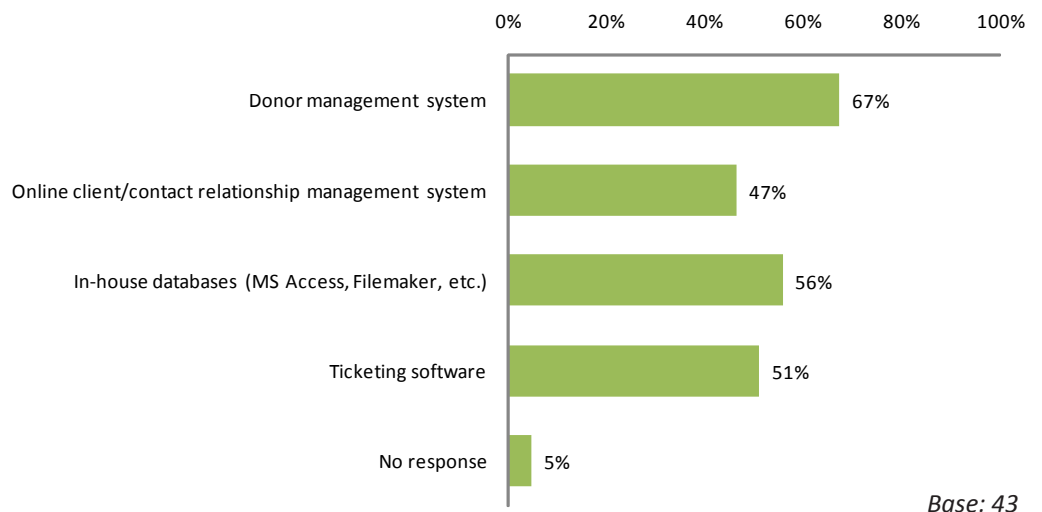
Website/Marketing



Multimedia

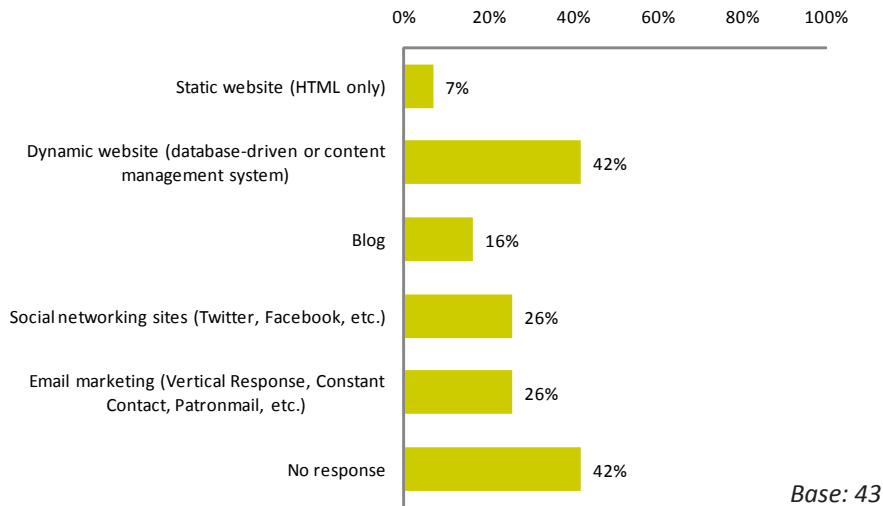


Administrative



Future Technology Implementation

Website/Marketing



Respondents were then asked to indicate which of the following technologies their organizations plan to implement in the next 12 months.

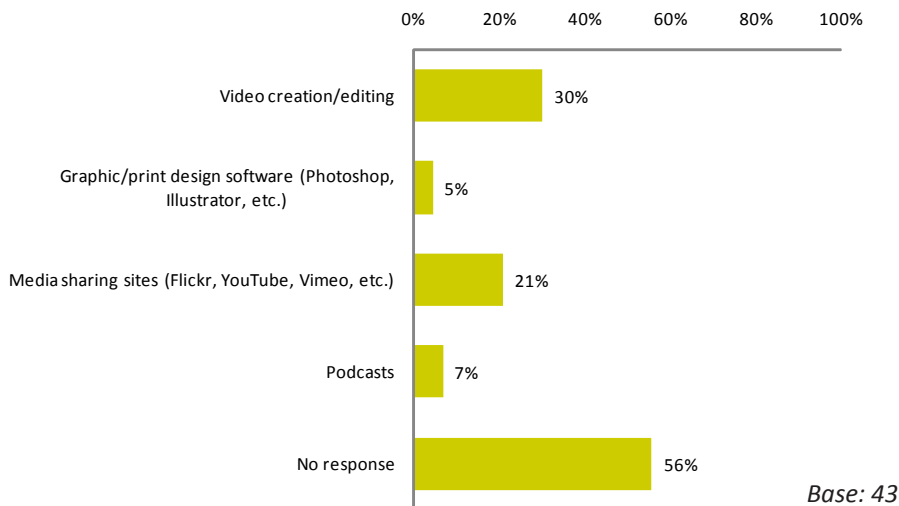
As in other budget categories, large organization respondents often chose to not indicate their future plans for technology.

While only 5% plan to implement graphic/print design software in the coming year, it is important to note that 81% indicated that they currently use such technology.

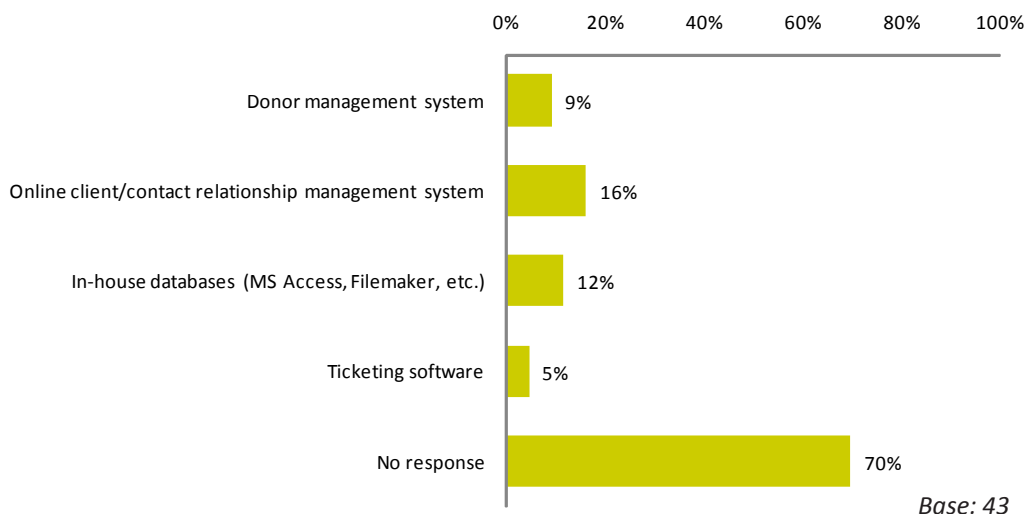
Large organizations also tend to be moving away from static websites, which is consistent across budget sizes.

“Other” technologies planned include mobile applications, on-site touchscreen tables, digital archiving projects, and educational tour technology.

Multimedia



Administrative



Difficulties with Technology Implementation

When listing “Other” difficulties with technology that their organizations face, several respondents mentioned a lack of funding as a highly difficult area.

Additional “Other” responses included keeping up with changes to technology, a lack of staff time/training to learn new technologies, and difficulties with integrating across systems.

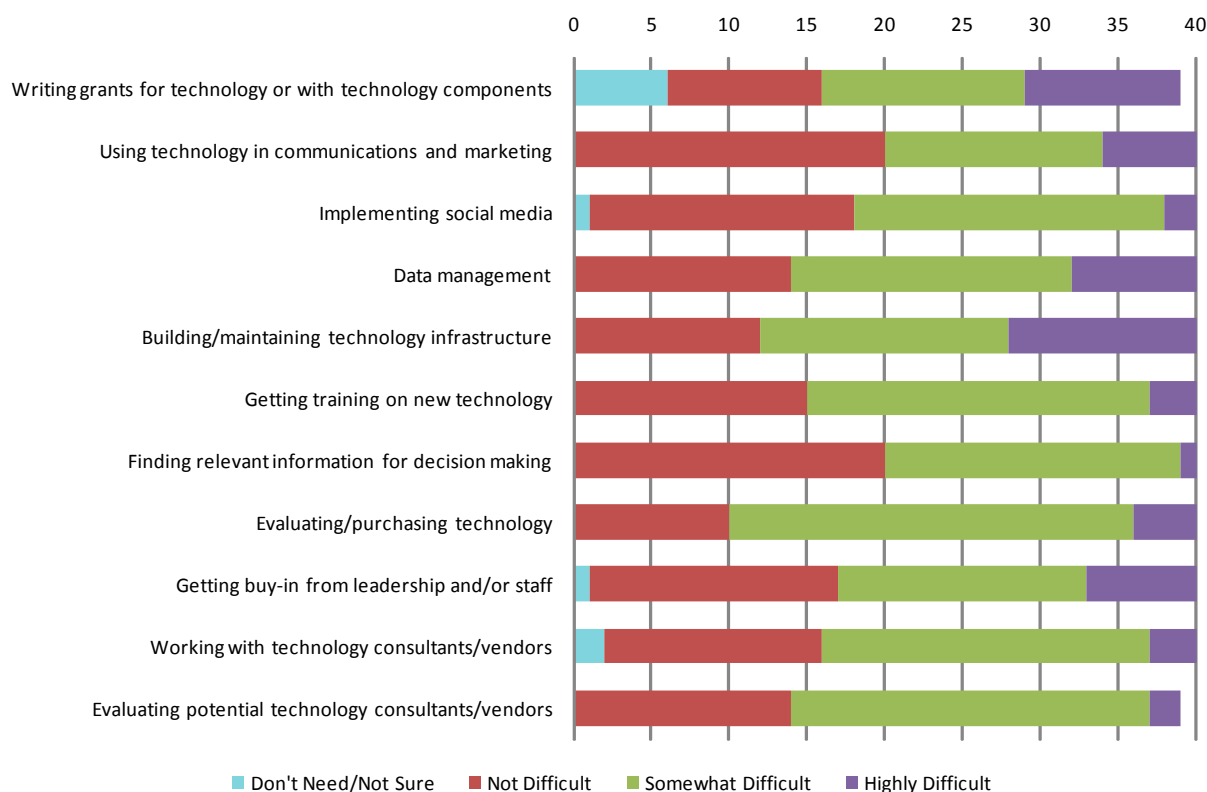
3 Most Difficult:

1. Building/maintaining technology infrastructure (30%)
2. Writing grants for technology or with technology components (26%)
3. Data management (20%)

3 Least Difficult:

1. Using technology in communications and marketing (50%)
2. Finding relevant information for decision-making (50%)
3. Implementing social media (43%)

Please rate how difficult the following areas are for your organization.

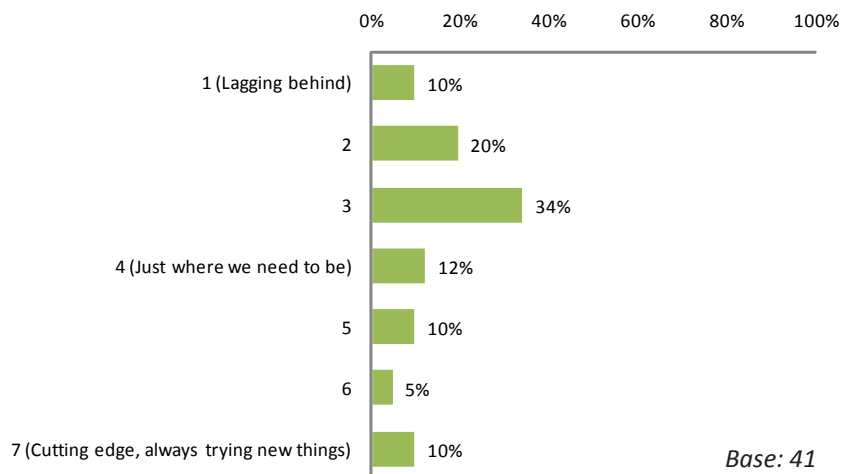


Technology Needs

Technology Adoption

64% of large organizations found their technology adoption to be below “just where we need to be”, rating themselves at a 3 or below.

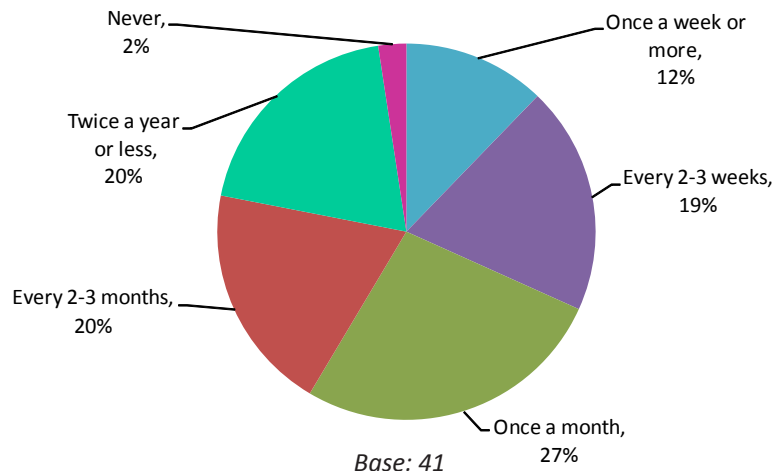
How would you rate the adoption of technology by your organization?



Seeking Help

58% of respondents stated that they seek technology advice outside of their organization at least once a month.

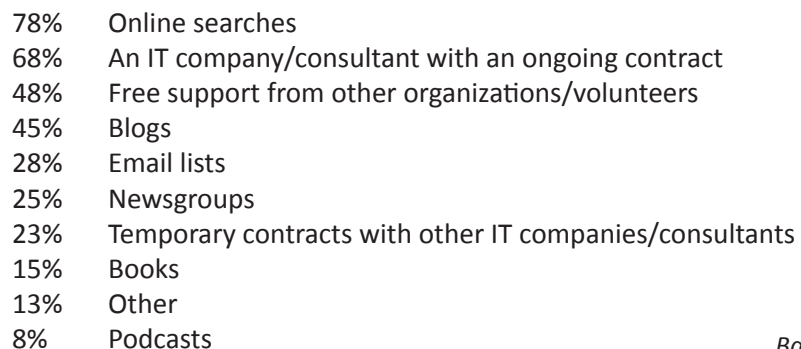
*How often do you feel the need to seek help or advice on technology **outside** your organization?*



Advice

Under “Other”, 8% of all respondents from large organizations indicated that a parent organization (such as a university or government) provided them with additional IT help.

*What ways do you currently use to get advice or help about technology?
Choose all that apply.*



Satisfaction with Technology Advice/Help

Highly or Somewhat Satisfied:

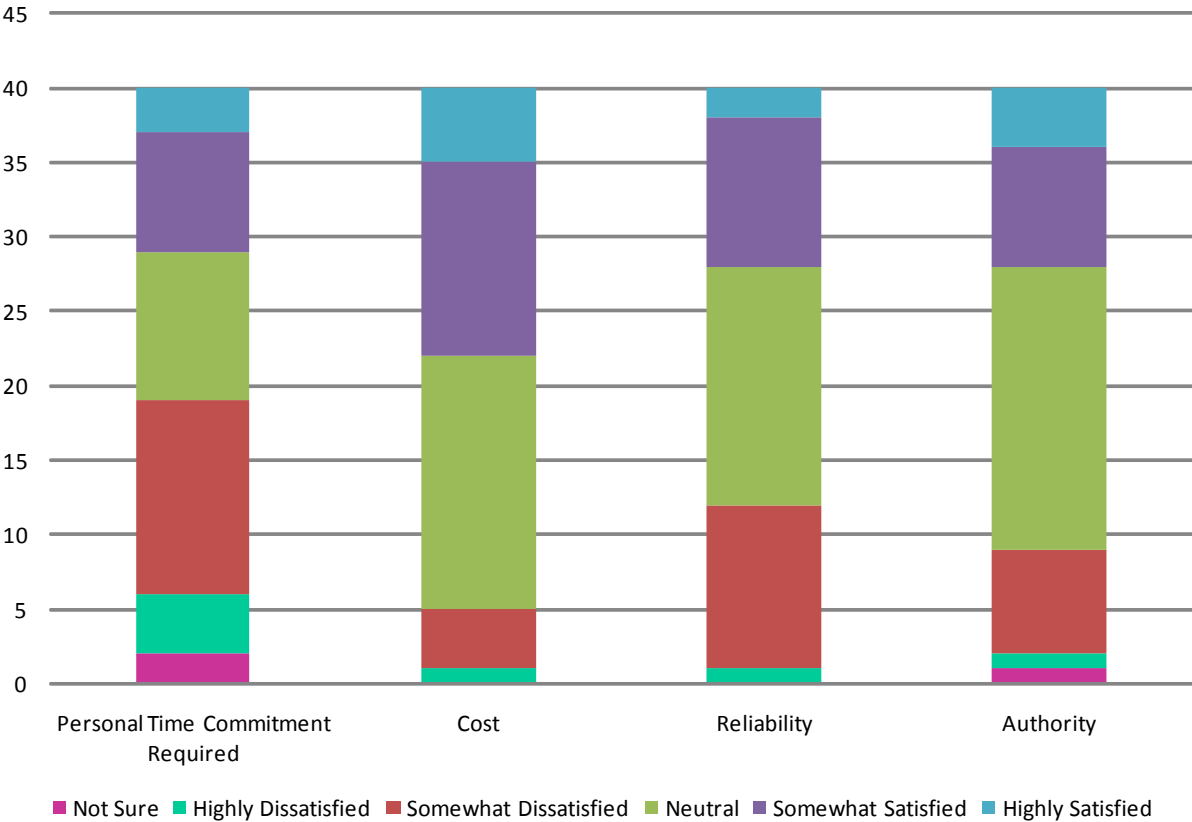
- 46% Cost
- 30% Reliability
- 30% Authority
- 28% Personal Time Commitment Required

Highly or Somewhat Dissatisfied:

- 43% Personal Time Commitment Required
- 31% Reliability
- 21% Authority
- 13% Cost

Large organizations were the only budget category to indicate cost as the highest rated area in terms of satisfaction with technology advice (respondents from all other budget sizes considered reliability to be the most satisfying aspect of the help they receive).

With the ways that you currently use to get help or advice regarding technology, how satisfied are you with the following?



Base: 40

Very Large Organizations

Annual Budget Size greater than \$5 million

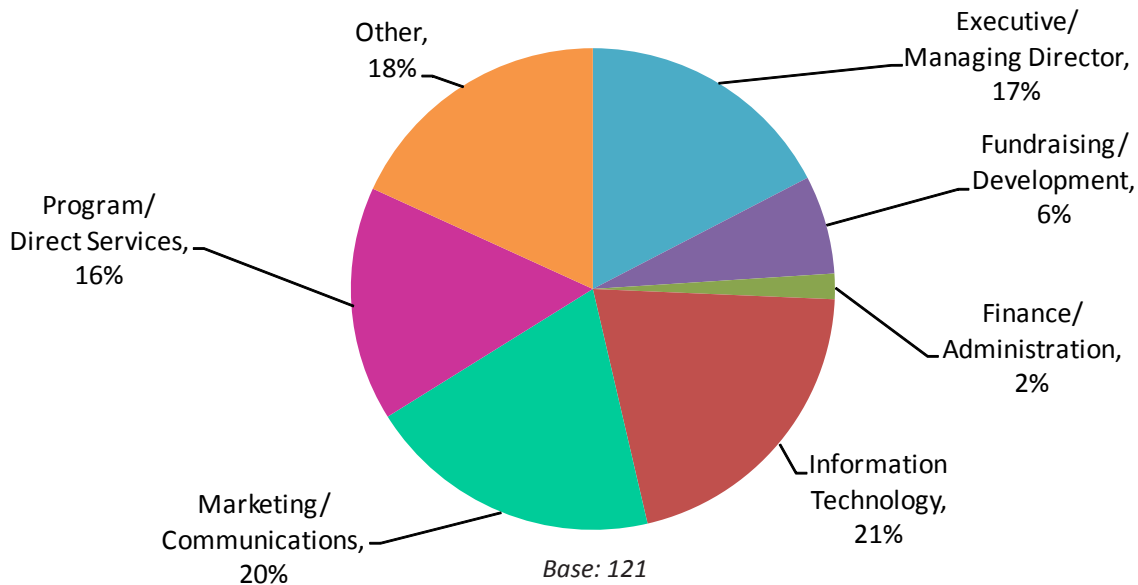
122 Respondents

Profile of Respondents

Job Function

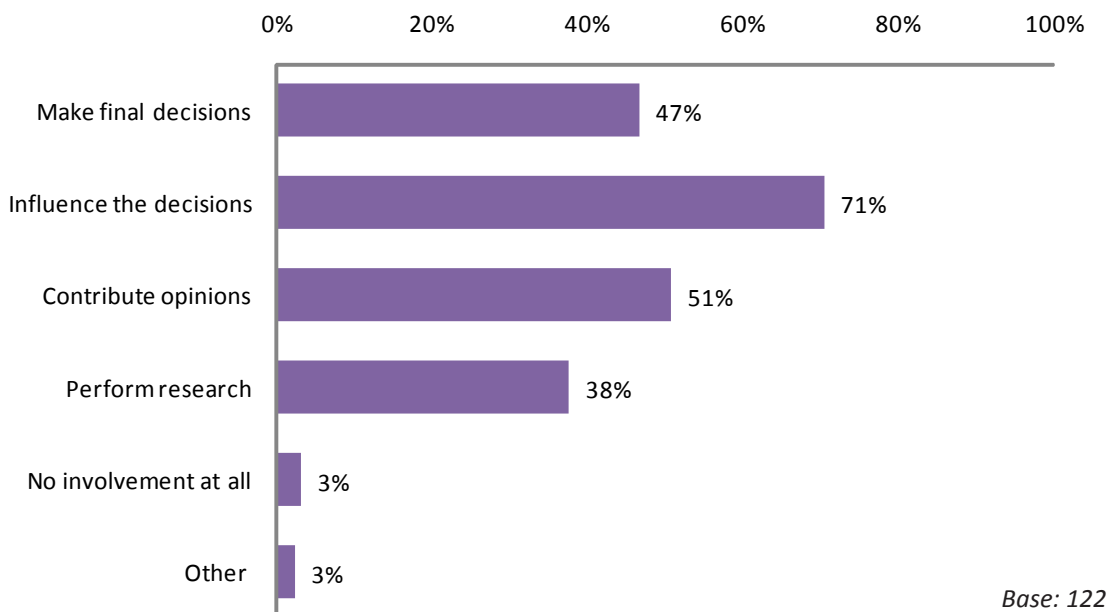
Very large organizations emerged as the only budget category where Executive/Managing Directors were *not* the most likely staff member to complete this survey. The percentage of Information Technology respondents also increases dramatically for very large organizations (21% here, as compared to 3% to 9% for all organizations with budgets of less than \$5 million).

Which of the following best describes your position?



Technology Decision-Making

Please describe your role in the technology decision-making process at your organization.



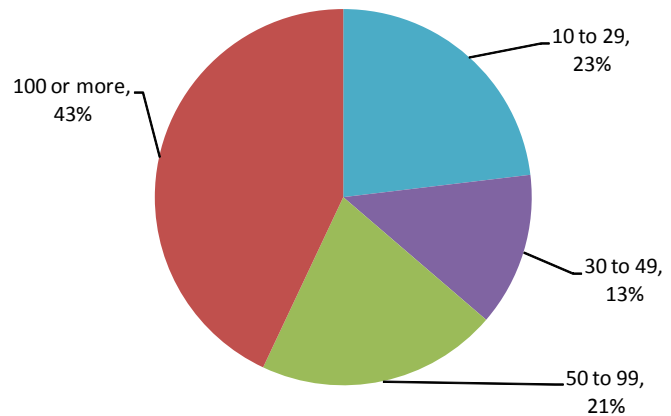
Profile of Respondents

Full-Time Staff

Whereas 1/2 of large organizations employ 10 to 29 full-time staff, the most common staff size for organizations with budgets of \$5 million or more is over 100 people.

No very large organizations reported having less than 10 full-time staff members.

How many full-time staff members are employed by your organization?



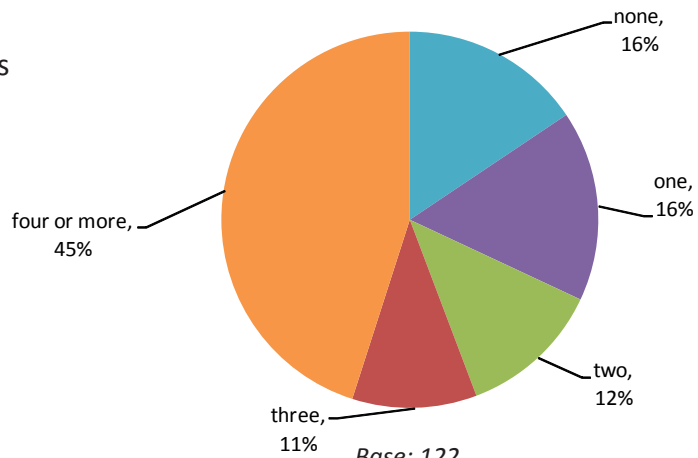
Base: 121

Full-Time Staff Devoted to Technology

The number of full time IT staff grows dramatically for very large organizations in comparison with other budget sizes.

By contrast, the most frequently cited number of technology staff for all other budget categories was “none”.

How many full-time staff members do you have devoted to technology in your organization?



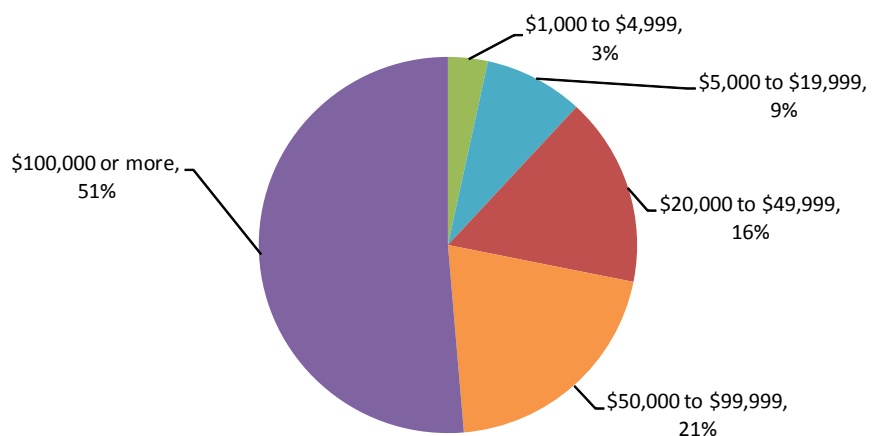
Base: 122

IT-Related Expenses

While only 12% of large organizations with annual budgets between \$2.5 million and \$5 million spend at least \$100,000 on technology, that number jumps to 51% for organizations with budgets greater than \$5 million.

No very large organization reported spending less than \$1000 on technology in the past year.

How much would you estimate that your organization spent on IT-related expenses in the past 12 months?



Base: 117

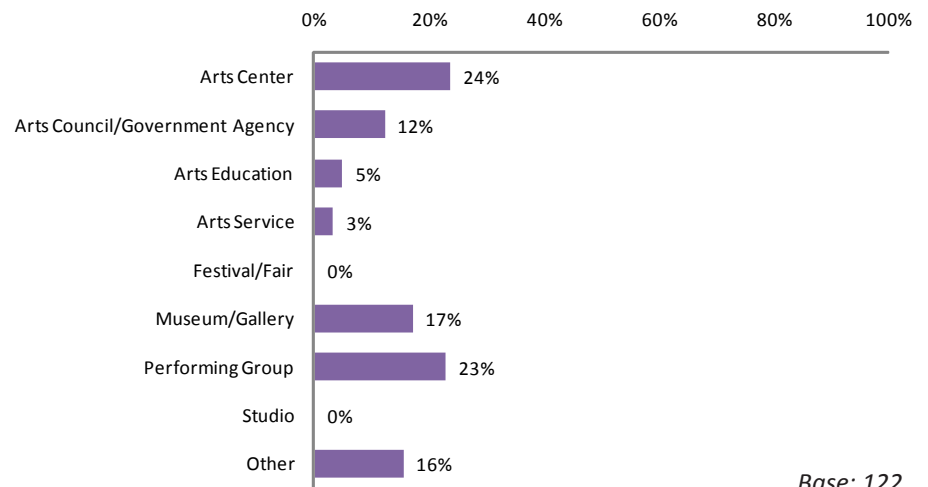
Profile of Respondents

Type(s) of Organization

Respondents from very large organizations most often described themselves as arts centers, performing groups or museum/galleries.

“Other” responses included national arts organizations, arts foundations, publishers, university programs, and theater/producers.

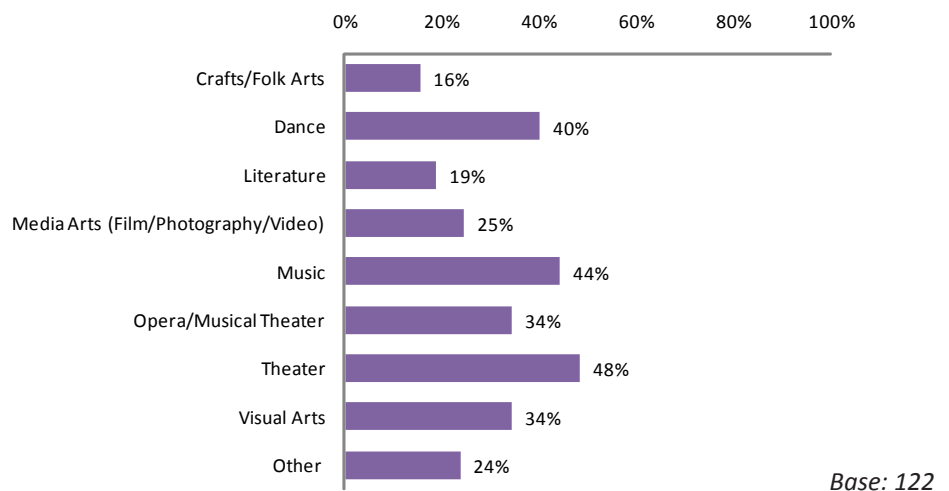
*Which of the following best describes your organization?
(Choose all that apply.)*



Organization Discipline(s)

Of those respondents that chose “Other”, many indicated that their organizations encompass a variety of disciplines. More specific “Other” responses included science, public art, humanities, history, electronic media, comedy/lectures and circus.

Which of the following disciplines represents your organization's focus area? (Choose all that apply.)



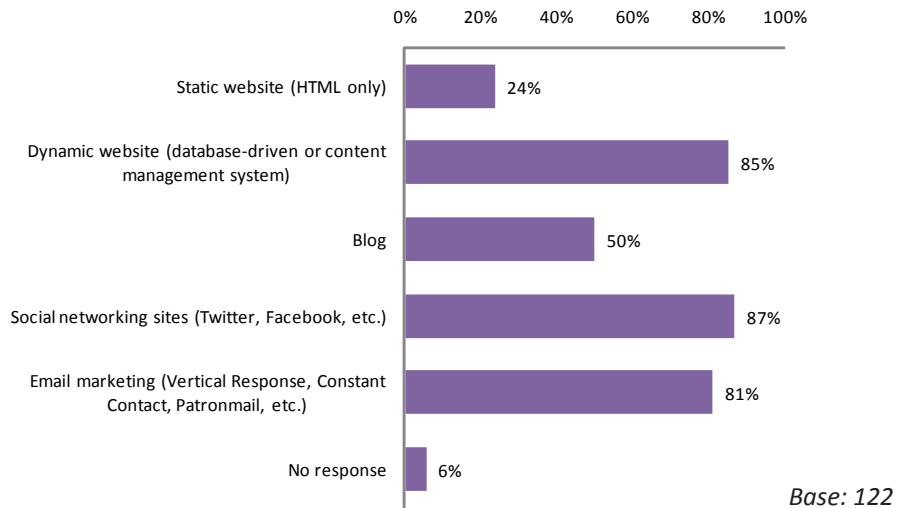
Current Technology Use

Respondents were asked to indicate which of the following technologies are currently used within their organizations.

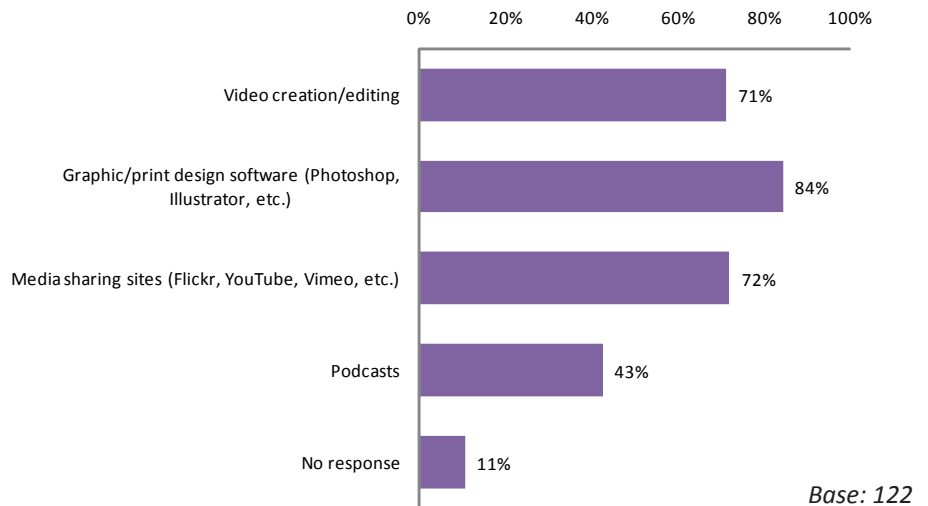
The most frequently used technologies for very large organizations include social networking sites, dynamic websites and graphic/print design software.

Frequently cited “Other” responses included grants management software, events management and Tessitura as an all-in-one database option.

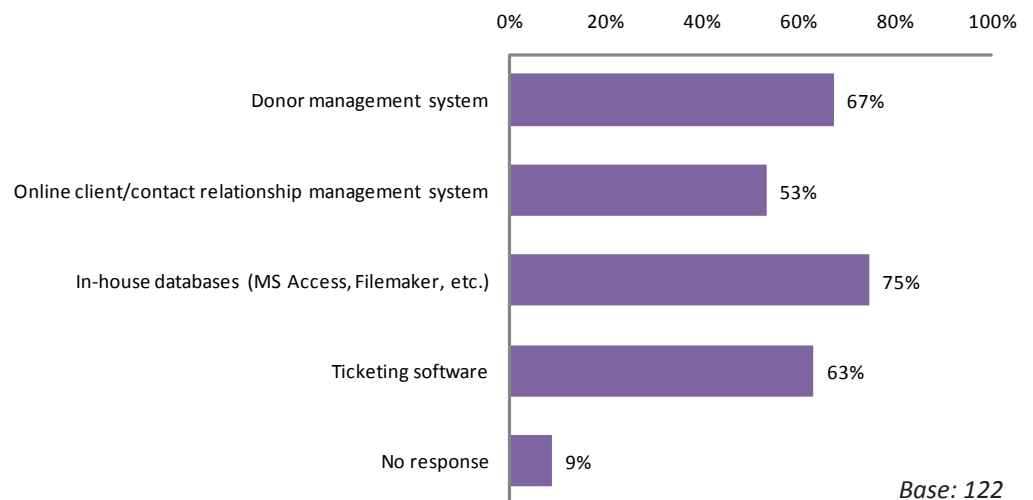
Website/Marketing



Multimedia

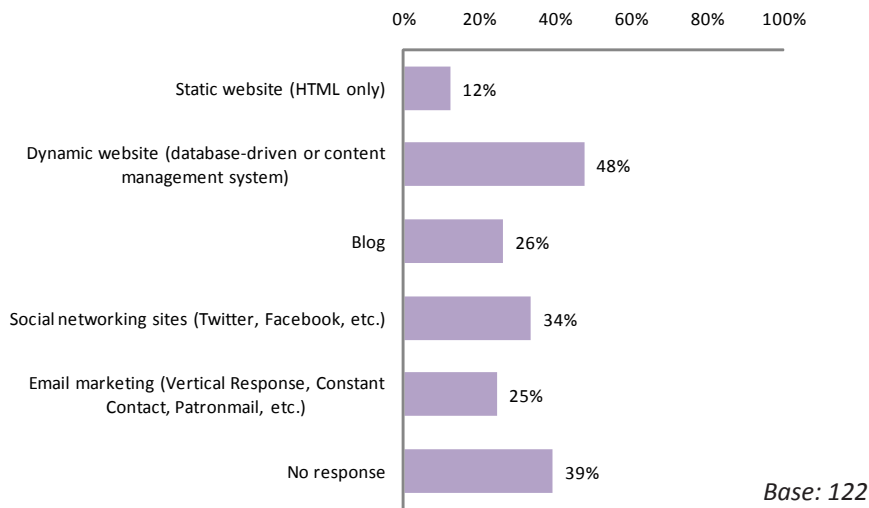


Administrative



Future Technology Implementation

Website/Marketing

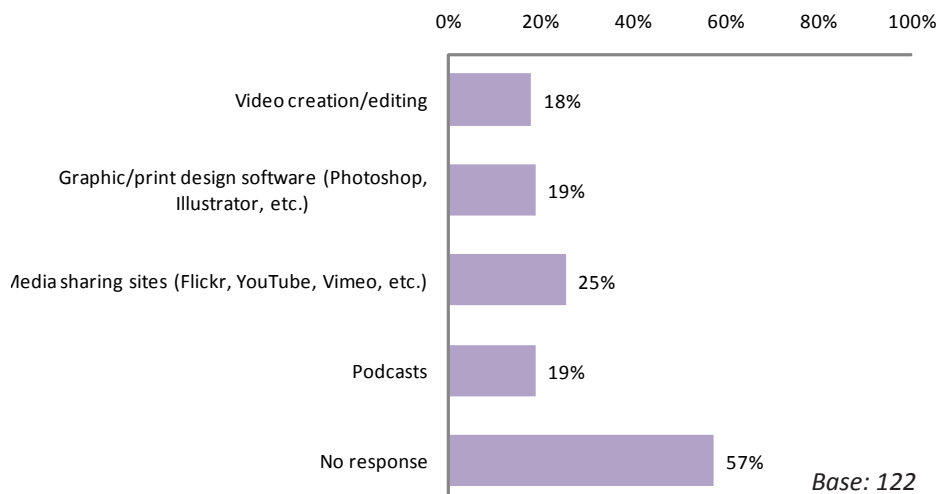


Respondents were then asked to indicate which of the following technologies their organizations plan to implement in the next 12 months.

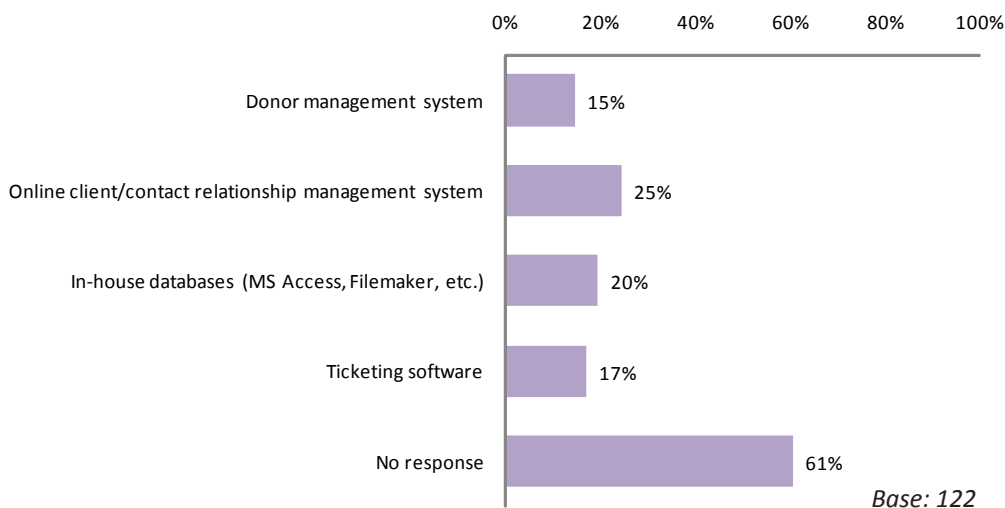
It should be noted that questions about future technology implementation frequently remained unanswered by very large organization respondents.

“Other” responses included fully integrated systems, asset management systems, and season management software.

Multimedia



Administrative



Difficulties with Technology Implementation

Respondents were also able to describe specific difficulties not listed below. The most common “Other” responses included the high costs associated with technology, as well as finding/hiring staff with the appropriate knowledge.

Integrating systems, keeping up with innovations, lack of time, finding appropriate vendors, getting board buy-in, compliance and security were also listed as “Other” challenges for very large organizations.

While getting buy-in from leadership and staff was among the top 3 most difficult areas for very large organizations, small and mid-sized organizations listed this same area among their top 3 *least* difficult.

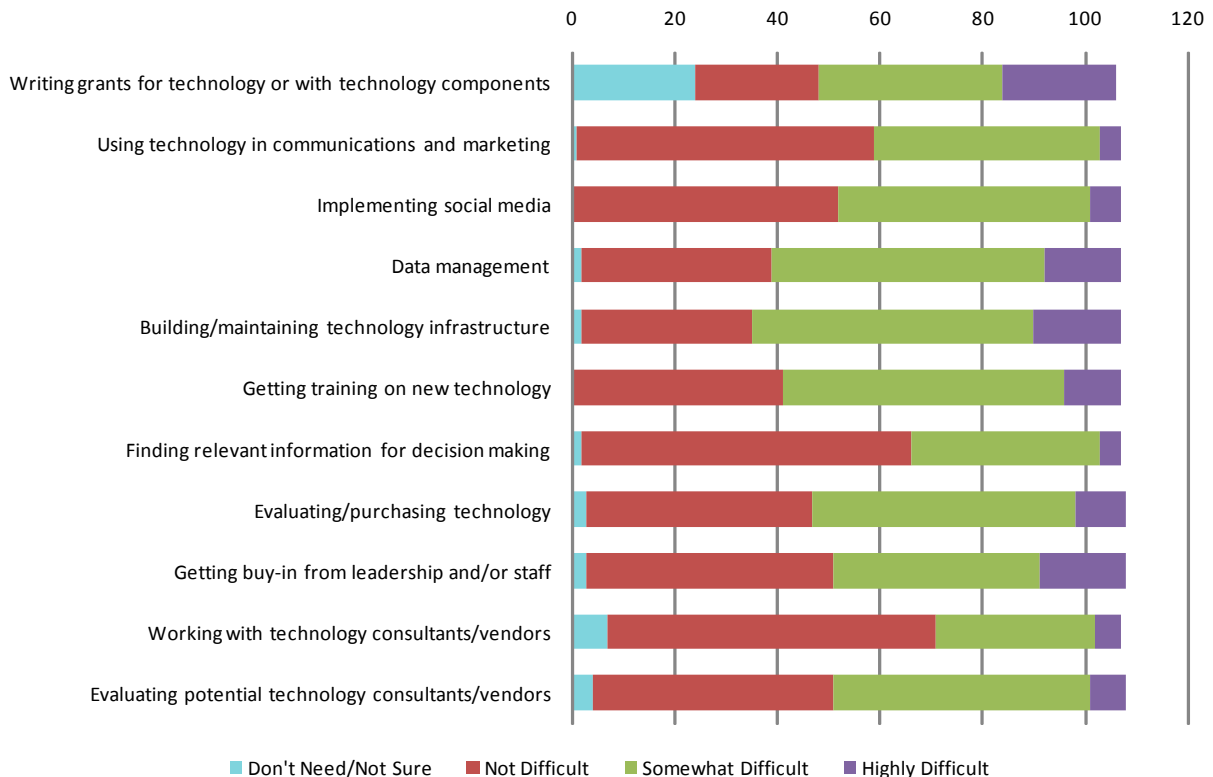
3 Most Difficult:

1. Writing grants for technology or with technology components (21%)
2. Building/maintaining technology infrastructure (16%)
3. Getting buy-in from leadership and staff (16%)

3 Least Difficult:

1. Finding relevant information for decision-making (60%)
2. Working with technology consultants/vendors (60%)
3. Using technology in communications and marketing (54%)

Please rate how difficult the following areas are for your organization.



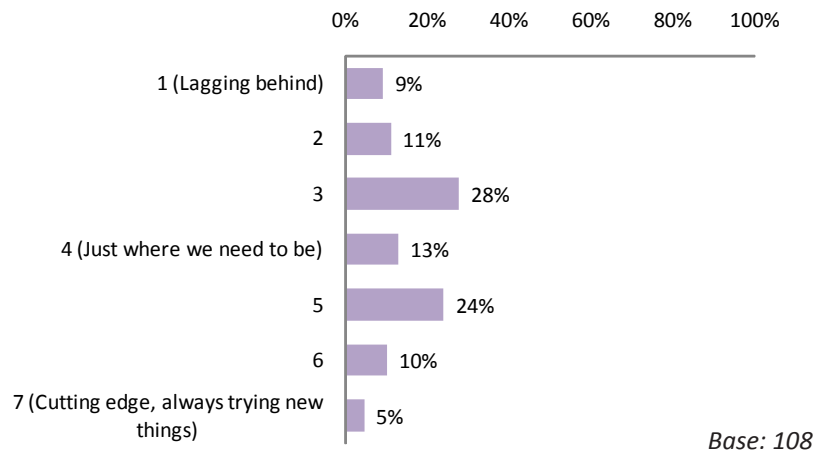
Base: 108

Technology Needs

Technology Adoption

Nearly 1/2 of very large organizations believe that they are below “just where they need to be” regarding technology adoption, while among all organizations with budgets of less than \$5 million, that proportion was around 2/3.

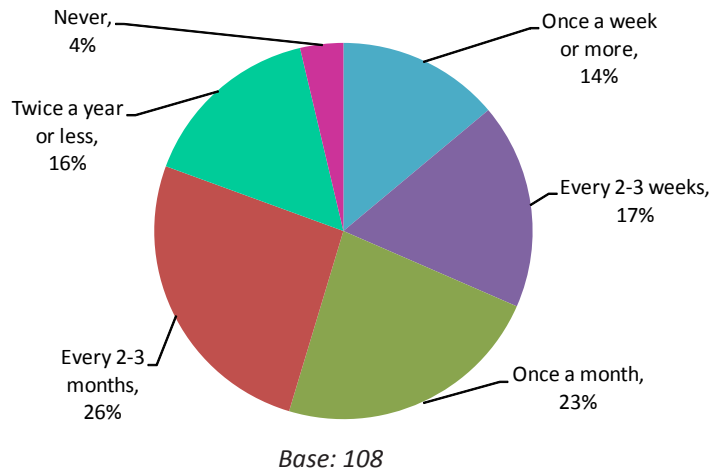
How would you rate the adoption of technology by your organization?



Seeking Help

54% of respondents seek advice outside of their organization at least once per month.

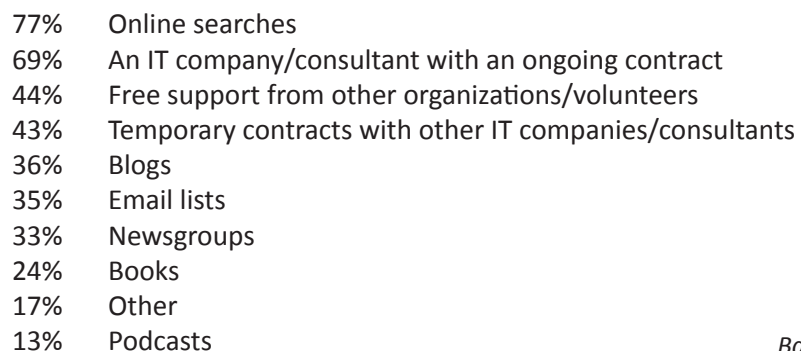
*How often do you feel the need to seek help or advice on technology **outside** your organization?*



Advice

Colleagues and peers were the most commonly cited “Other” source of advice or help about technology.

*What ways do you currently use to get advice or help about technology?
Choose all that apply.*



Satisfaction with Technology Advice/Help

Highly or Somewhat Satisfied:

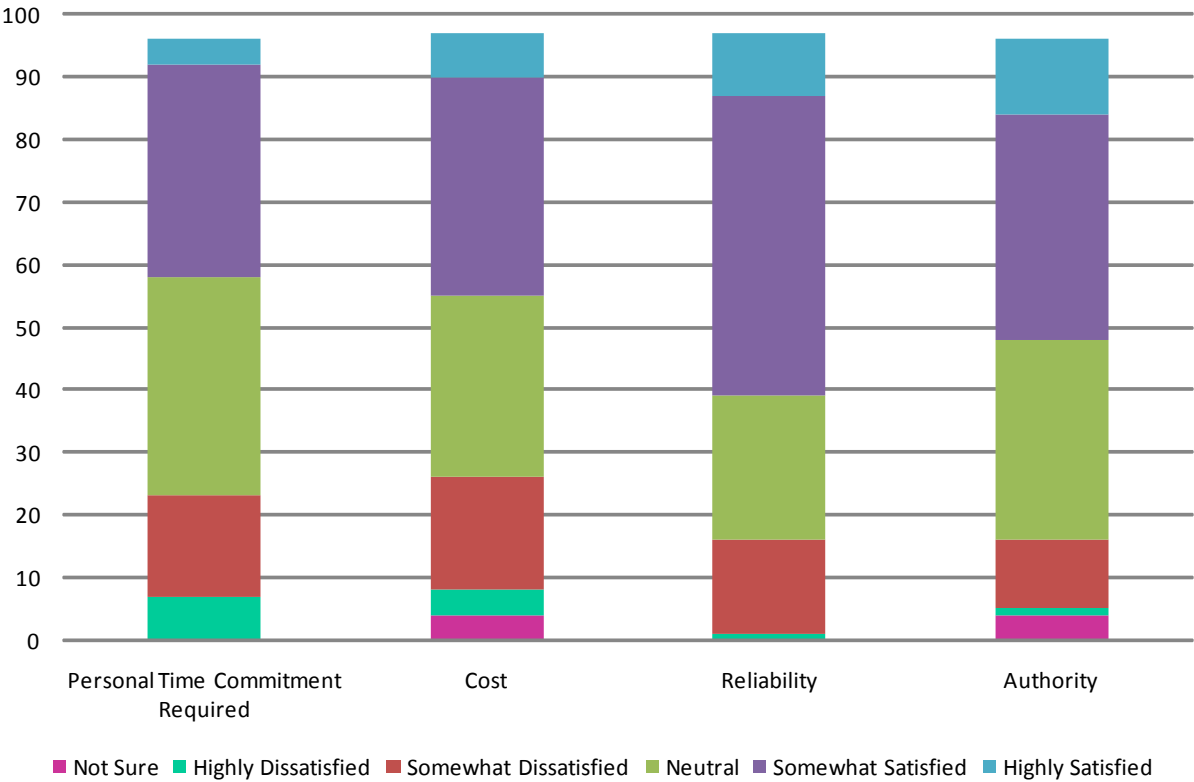
- 59% Reliability
- 49% Authority
- 43% Cost
- 39% Personal Time Commitment Required

Highly or Somewhat Dissatisfied:

- 23% Personal Time Commitment Required
- 23% Cost
- 16% Reliability
- 12% Authority

As with all other budget categories, the amount of personal time commitment required was reported by very large organizations as the least satisfying component of getting help with technology. It is important to note, however, that the overall percentage of dissatisfaction with this area (23%) is significantly lower than the other budget sizes (ranging from 50% dissatisfied for small organizations to 43% for mid-sized and large organizations).

With the ways that you currently use to get help or advice regarding technology, how satisfied are you with the following?



Base: 97

Resources

Are you considering adopting or implementing a certain type of technology but are unsure where to start? The following online resources provide practical advice, information and free services about a variety of tools that are particularly useful for arts organizations.

Websites

Comparing Open Source Content Management Systems: Wordpress, Joomla, Drupal and Plone Report: Idealware

<http://www.idealware.org/reports/2010-os-cms>

Google Analytics

<http://www.google.com/analytics/>

Website Grader

<http://websitegrader.com/>

Social Media

How to Make the Most of your Facebook Page: Technology in the Arts webinar

<http://bit.ly/goUfaB>

Social Media Tool Box: We Are Media

<http://www.wearemedia.org>

Nonprofit Social Media Decision Guide: Idealware

<http://www.idealware.org/reports/nonprofit-social-media-decision-guide>

The Arts & Social Media: Turning Strategy into Results, Parts I & II: Technology in the Arts webinars

<http://bit.ly/gzizq0>

Getting the Most Out of Twitter: Technology in the Arts webinar

<http://bit.ly/fDqoBn>

Resources

Multimedia

The Quick and Dirty: Making a Video: Technology in the Arts webinar

<http://bit.ly/eSLAob>

Creating a Podcast: A Fundamentals Tutorial: Technology in the Arts tutorial

<http://bit.ly/f1LEA2>

ReelSEO for online video:

<http://www.reelseo.com/>

Administrative

2009 Ticketing Software Satisfaction Survey Report: Technology in the Arts

<http://bit.ly/f1479F>

A Consumer's Guide to Donor Management Systems: Idealware/Nonprofit Technology Network

<http://bit.ly/hIRiWt>

Resource list for nonprofit databases: Techsoup

<http://www.techsoup.org/learningcenter/databases/index.cfm>

Mobile

Going Mobile –Websites vs Apps: ArtsBlog 2010 Arts Marketing Blog Salon

<http://blog.artsusa.org/2010/10/12/going-mobile-website-vs-app/>

How to Optimize Your Mobile Site Across Multiple Platforms: Mashable

<http://mashable.com/2010/07/13/mobile-web-optimization/>

8 Tools for Easily Creating a Mobile Version of Your Website: Mashable

<http://mashable.com/2010/12/16/create-mobile-site-tools/>

The MuseumMobile Wiki focuses on mobile technology for museums and cultural sites:

<http://wiki.museummobile.info/>