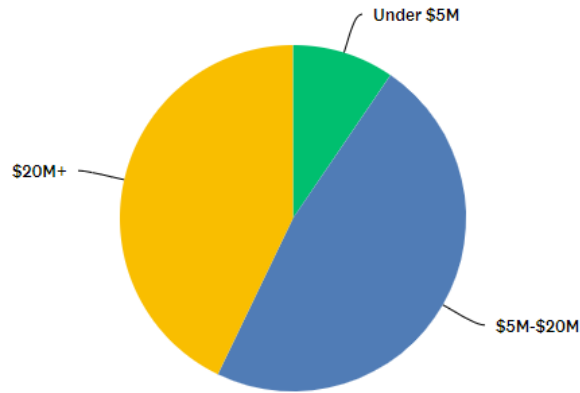


# Survey to Tessitura Network Development Forum about use of Plans L. Potiomkin- November 2018

Q1

What is your organization's overall budget?

Answered: 21 Skipped: 0



Q2

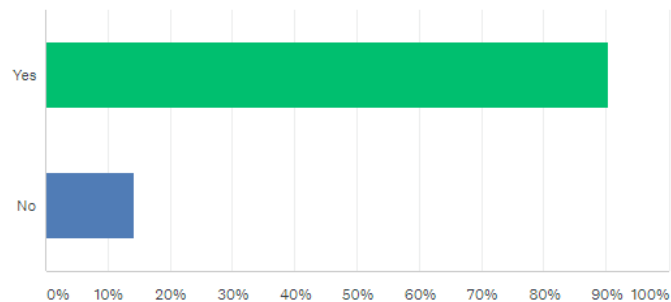
How many staff members within your team/department are responsible for a prospect/donor portfolio?

*Median- 6 (middle number) Mode- 4 (most frequent number) Range- 0-25*

Q3

Do you manage your prospects in Tessitura using Plans?

Answered: 21 Skipped: 0



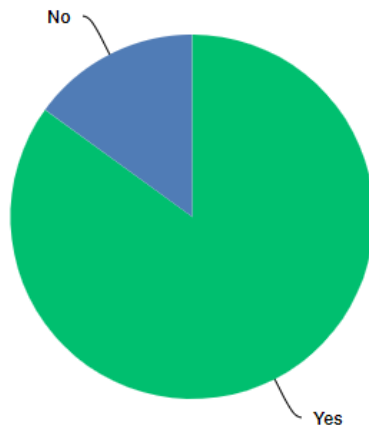
*If not, what are you using:*

- *“memory and spreadsheets”*
- *“We are working on transitions. MS Excel”*
- *“We have hoped to but haven’t had the time. We have spreadsheets, and just go off the contribution screen.”*

Q4

Do you use canned (or custom) reports to share activity within your team?

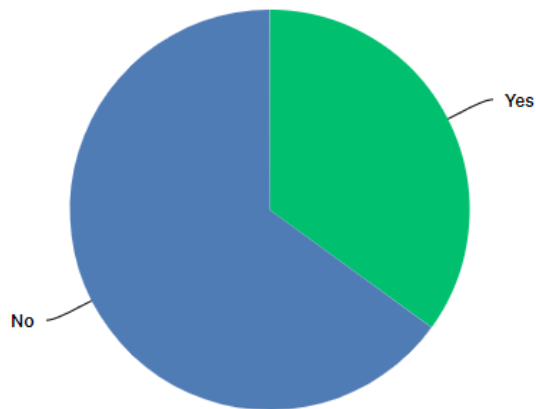
Answered: 20 Skipped: 1



Q5

Do you use canned (or custom) reports to share activity outside of your team?

Answered: 20 Skipped: 1



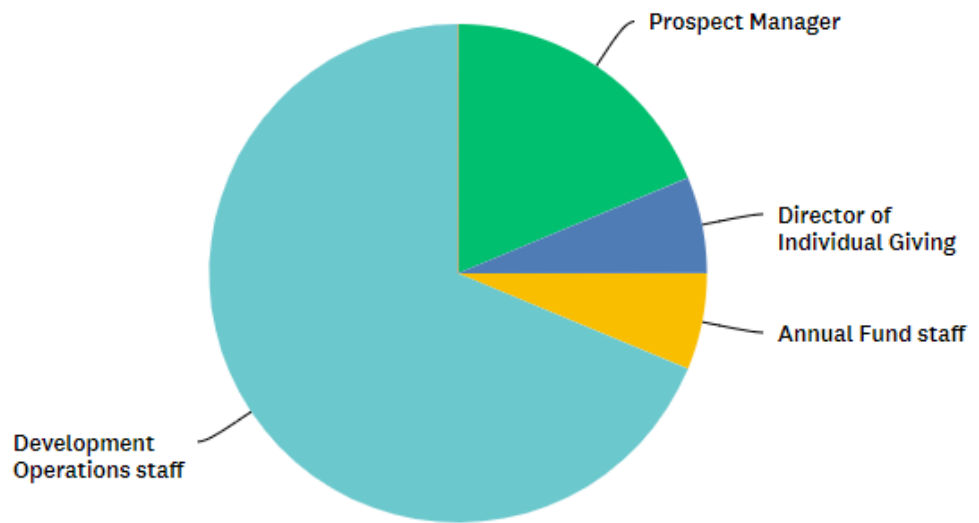
*If so, with whom do you share your reports?*

- *“University staff”*
- *“We are still new to Plans and it has remained internal to Development so far”*
- *(3) “Board/Development Committee”*
- *(2) “Executive office”*
- *“Business/Finance office”*

Q6

Which team member creates and distributes the report?

Answered: 16 Skipped: 5



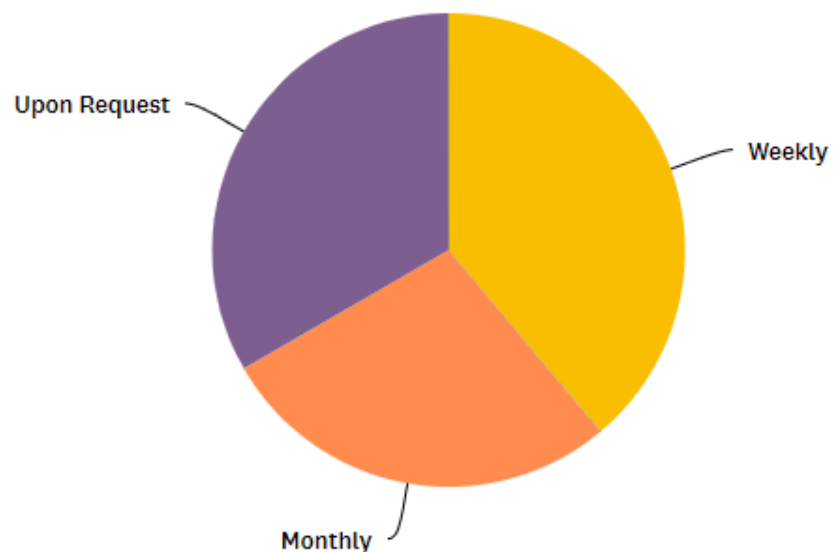
Other staff?

- *“Major Gifts Associate”*
- *“Everyone does their own”*
- *It varies between each MGO, DB coordinator or Development Associate”*

Q7

How frequently are your prospect reports distributed?

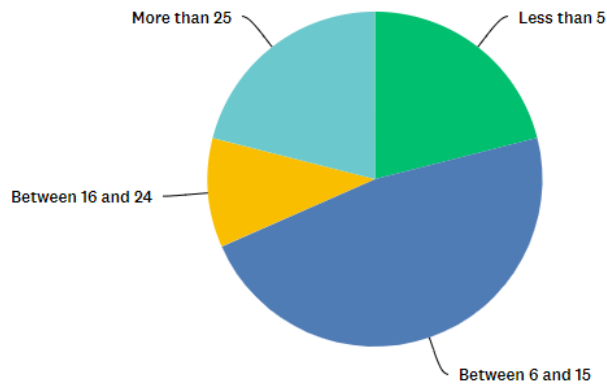
Answered: 18 Skipped: 3



Q8

Over the average week, how many Steps is your team recording in Plans?

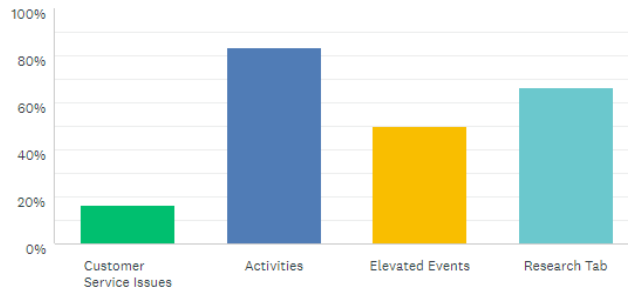
Answered: 19 Skipped: 2



Q9

Are you using an additional feature within Tessitura to supplement Plans?

Answered: 12 Skipped: 9



Q10

Are you using Plans:

Answered: 18 Skipped: 3

