

Proceedings NYC TUG: Managing Education Programs through Tessitura: An unconference

June 10, 2015 from 9:00 AM to 12:15 PM (EDT)
BAM Fisher Hillman Studio
321 Ashland Place, Brooklyn, NY 11217



1 OUR THEME



2 INVITATION

Managing Education Programs through Tessitura: An unConference

[NYCTUG](#)

Wednesday, June 10, 2015 from 9:00 AM to 12:15 PM (EDT)

[Brooklyn, NY](#)

Event Details

We are actively working on opening up more spaces for this event. Please use the Wait List to let us know of your interest. As we can open more spaces you will be informed of this opportunity.

You are invited to an Un-Conference:

OUR THEME – **Managing Education Programs through Tessitura**

Educations is an important part of our organization's mission. As our organizations use Tessitura to Support Educational Relationships and events. We the educational leadership and staff maintain thousands, tens of thousands, or even millions of relationships with Students, Teachers, educational organizations around our communities and the world. However, our needs are often different from those of the organizations we work in. How can we leverage Tessitura and related tools to make our lives easier and more effective? As the Tessitura technology develops and provides a richer feature set, how do we adapt our systems and organizational practices to use these new features? Finally how can we work together, across organizational boundaries, to move all of our organizations toward better delivery of our educational missions?

This ½ day un-conference may not be for everybody, especially those who expect, or require, a tightly structured, carefully controlled event. During our gathering we will enter into [Open Space](#), without a prepared agenda or clear-cut knowledge as to where we will end up. We only know the theme, who is coming, and what they are interested in. Be prepared to be surprised, and to learn.

Wednesday, June 10th, 2015 9am – 12:15pm

BAM Fisher Hillman Studio

321 Ashland Place, Brooklyn, NY 11217

(Near Atlantic Terminal a major transit hub in Brooklyn, NY.)

Doors open at 8:45am we will open our space together at 9:15am prompt.

Please share this invitation with your co-workers and colleagues from other organizations that use Tessitura to support their educational mission.

Join us on the Tessitura Network: our online community group can be found at <http://www.tessituranetwork.com/Community/groups/greaternyc/default.aspx>. Don't forget to "subscribe to email alerts" on the group page!

3 ATTENDEES

- **92nd Street Y**
 - Larisa Gelman
 - Matthew Hanagan
 - Tatiana Jofat
 - Howard Levine
 - Julian Levine
 - Carla Moy (NYC TUG Leadership)
 - Sabrina Segui
- **American Museum of Natural History (AMNH)**
 - Crystal Byler
 - Melanie Cohen
 - Dominic Davis
 - Emily Edmonds-Langham
 - Asish George
 - Emily Haidet
 - Eric Hamilton
 - Sarah Moshenberg
 - Thomas Norcott
 - Edin Wall
 - Daniel Zeiger
- **BAM**
 - Tom Brown (NYC TUG Leadership)
 - Melanie Cherry
 - Nancy Chow
 - Victoria Collado
 - Jeremy Dewey
 - Tighe John
 - Jaclyn Katz
 - Jennifer Leeson
 - Shana Parker
 - Molly Silberberg
- **Cooper Hewitt**
 - Kameko Branchaud
- **Cooper Hewitt (cont'd)**
 - Helynsia Brown
 - Susannah Brown
 - Josué Urbina
- **Liberty Science Center**
 - Melissa Alicea
 - Harold Clark
 - Mark DuBose
- **Metropolitan Museum of Art**
 - Michael Johnson
- **New 42nd Street/New Victory Theater**
 - Joseph Yoga
- **NYU Skirball Center For the Performing Arts**
 - Ashley Miskoff
- **Round About Theatre**
 - Julia Borowski
 - Andrea Jo Martin
 - Yelena Ingberg
- **State Theatre**
 - Lian Farrer
 - Erik Stratton
- **Tessitura Network**
 - Alaine Arnott
 - Barbara Gross
 - Tom O'Connor
 - Don Youngberg
- **The Jewish Museum**
 - Susan Weisbrod

4 OUR SCHEDULE

Our Schedule

8:45	Registration and light refreshments
9:15	Welcome -- review the convening schedule
9:30	Agenda creation and Marketplace
10:00	Session 1
10:50	Moving to Next Session
10:55	Session 2
11:45	Reform our opening circle
11:50	Share Learning & Next Actions
12:15	Adjournment

5 OPENING CIRCLE

5 Guiding Principles

5 Guiding Principles

1. *Whoever comes is
the right people*

2. *Whenever it starts
is the right time*

3. *Wherever it is,
is the right place*

4. *Whatever happens
is the only thing
that could have*

*be prepared to be
surprised!*

5. *When it's over,
it's over*

The Law of 2 Feet

The Law of 2 Feet



The Bumble Bee



The Butterfly



Our Marketplace (Agenda)

The Marketplace

(Our Agenda)

1. Choose a Session
Time / Location

SESSION
1
LOCATION
1

SESSION
1
LOCATION
2

SESSION
1
LOCATION
3

SESSION
1
LOCATION
5

SESSION
2
LOCATION
6

SESSION
1
LOCATION
4

2. Post Session

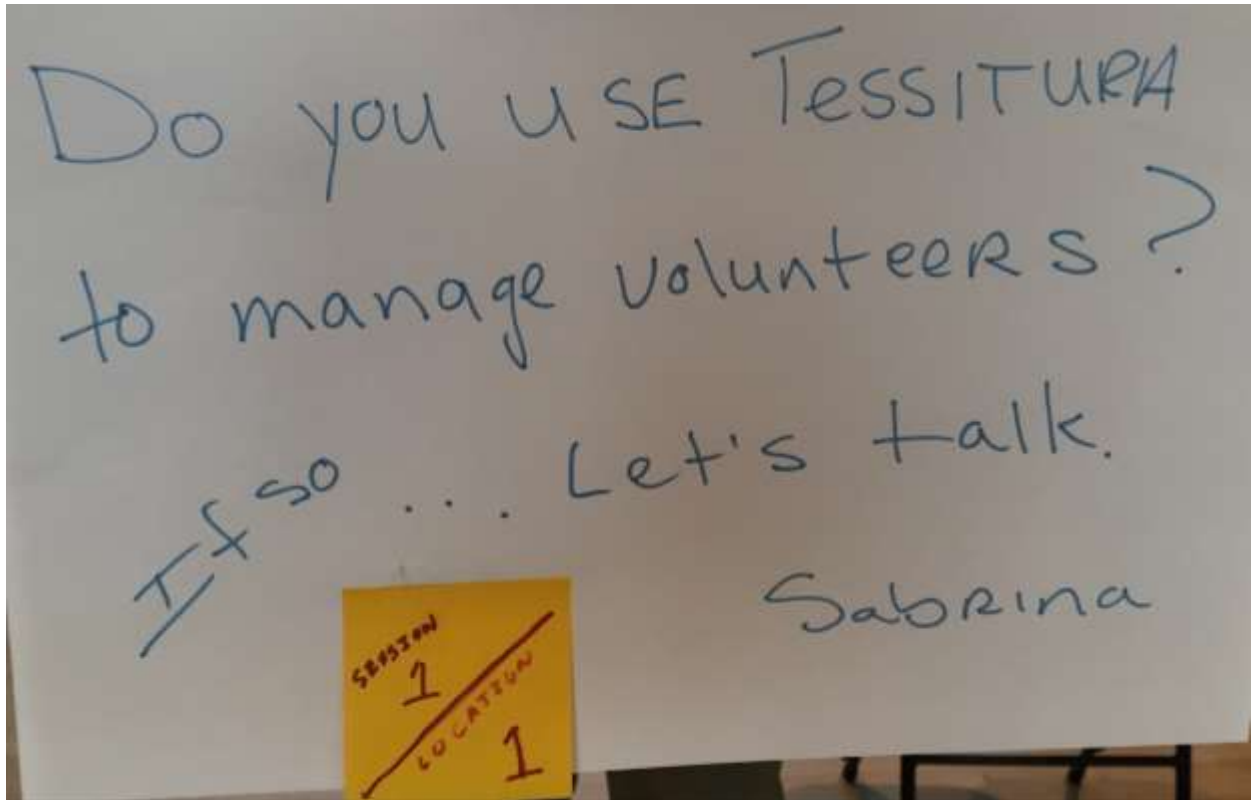


6 SESSIONS 1 QUESTIONS

6.1 SESSION 1 LOCATION 1

Leaders: Sabrina – 92Y

Attendees: Emily AMNH, Sabina – 92Y, Carla – 92Y



Title: Tessitura Volunteers

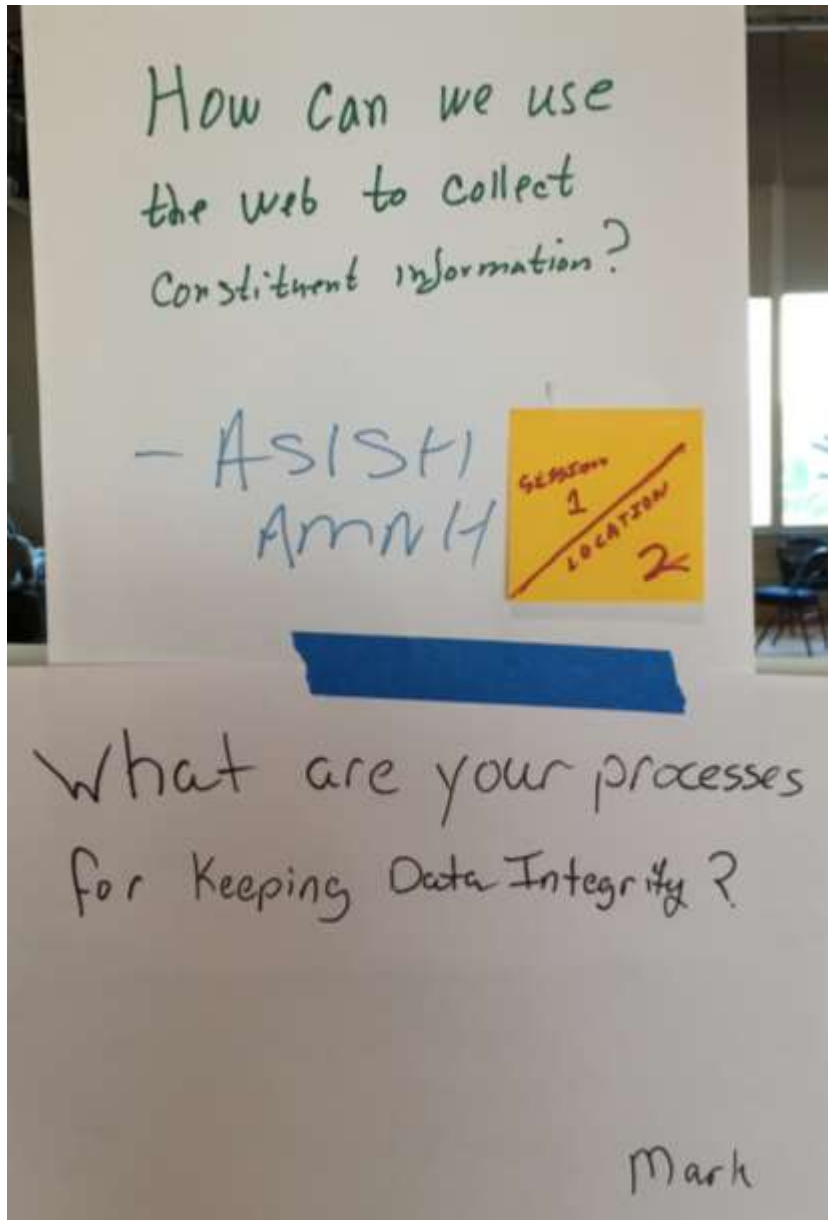
By: Emily Edmonds – Langham

- What do you use volunteers for?
 - 92Y just starting a volunteer program, so can integrate w/ tessitura. AMNH is using a different program. We have 65 – 80 volunteers in the Discovery Room.

6.2 SESSION 1 LOCATION 2

Leaders: Asish - AMNH & Mark – Liberty Science Center

Attendees: Asish George - AMNH, Mark - Liberty Science Center, Daniel Zeiger - AMNH, Tatiana - 92Y, Matthew - 92Y, Shana Parker - BAM, Helynisia – Cooper Hewitt



Title: Data integrity & collecting constituent data

By: Daniel Zeiger

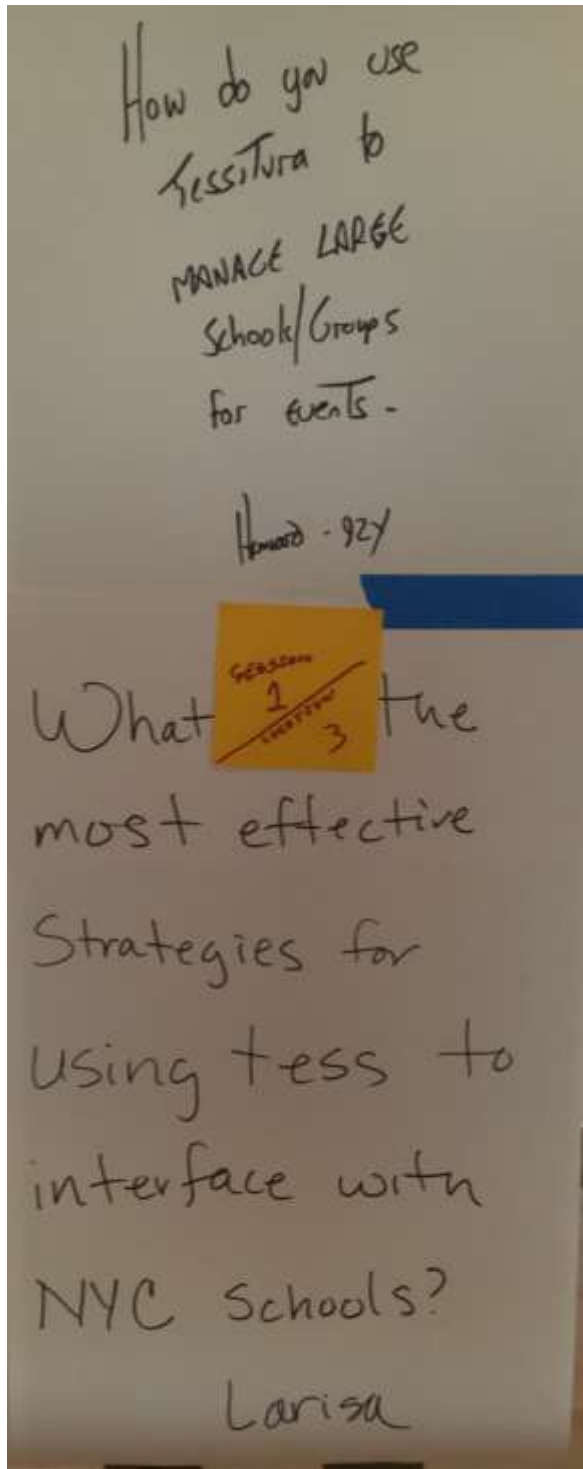
- 92 Y has integrated registration and enrollment into tessi
 - Took a year or more to implement
 - Some duplicate records that require manual merging

- Parent purchase online, then receive an email with link to a parent portal with login info, parents can manage their information
- Built in house
- Can Tracking, application / and registration be integrated?
 - My Account lets parents track history and update information, build future orders from that account
 - Future program registration not yet implemented
 - Problems arise as Separated parents fight out custody disputes on platform... two household records for a single child
- Let's all go hang out at 92Y
 - Work program to but build flexible fields that can scale up to future programs

6.3 SESSION 1 LOCATION 3

Leaders: Howard - 92Y & Larisa - 92Y

Attendees: BAM, Met Museum, 92Y, Roundabout, AMNH, Liberty Science Center



Title1: Teaching Artist Tracking: Out of the box ways to track your teaching artists

- Main Points
 - Using Plans
 - Excellent person #1 gave details about how she uses Plans to track her teaching artists
 - Using Attributes
 - Excellent person #2 detailed how he uses Attributes
- Call to Action:
 - Using Plans for Teaching Artists

Title 2: School Group Performances in Tessitura

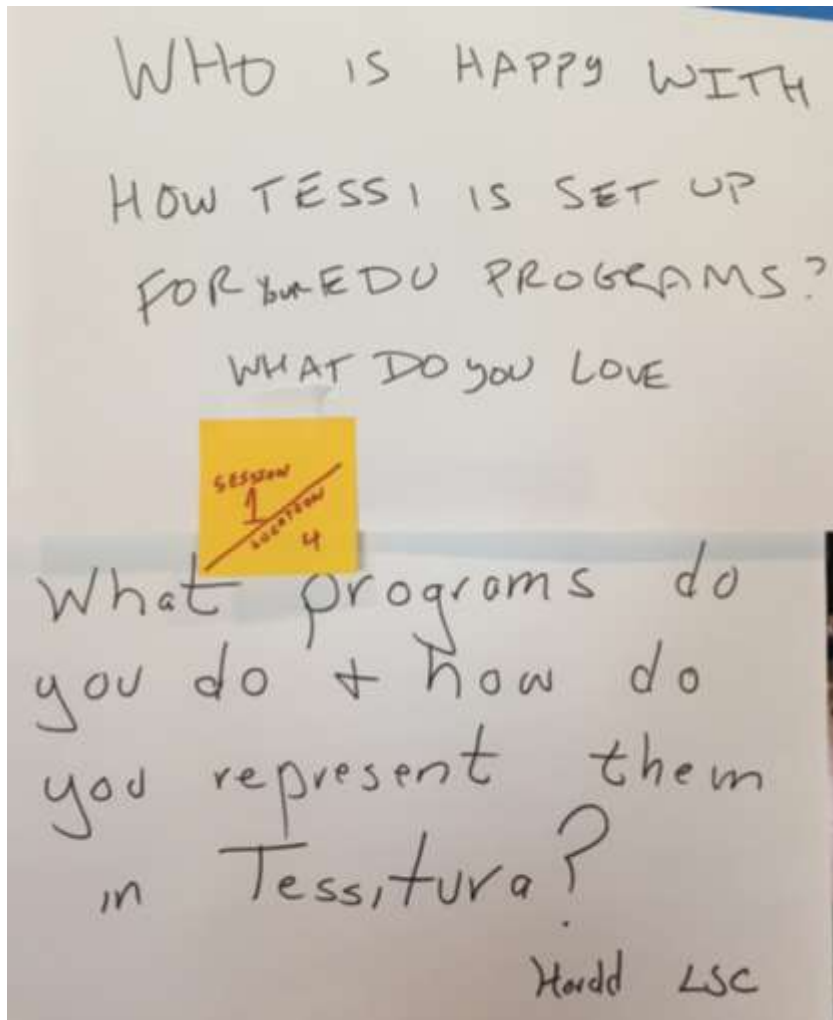
By: Jun 10 - Howard at 92Y

- How do you Handle Payments
 - Most organizations need to allow for Purchase orders from school groups. Many have a policy that all money must be paid at least 30 days prior to the event date. Some organizations will tell their schools that their reservations will be released to others if payment is not made by that date.
- Teacher portals
 - AMNH is building a teacher portal allowing teachers to see what programs are available with options for buying multiple programs at once. (planetarium, lunch, exhibit)
- School Listings
 - It's hard to keep school listings clean in Tessitura.
Roundabout enhances the search function for school names by applying nicknames to the schools in Tessitura.
- Brainstorming with other orgs
 - As we implement school attendance to events we are going to continue to brainstorm on best practices with the organizations in this group.

6.4 SESSION 1 LOCATION 4

Leaders: _____ & Harold – Liberty Science Center

Attendees: Harold Clark – Liberty Science, Julia Borowski - Roundabout, Melissa Alicea – Liberty Science, Susannah Brown – Cooper Hewitt, Nancy Chow - BAM, Jeremy Dewey - BAM, Jaclyn Katz - BAM, Barbara Gross - Tessitura, Crystal Byler - AMNH, Edin Wall - AMNH



LSC Example & Data Integrity

By: Crystal Byler

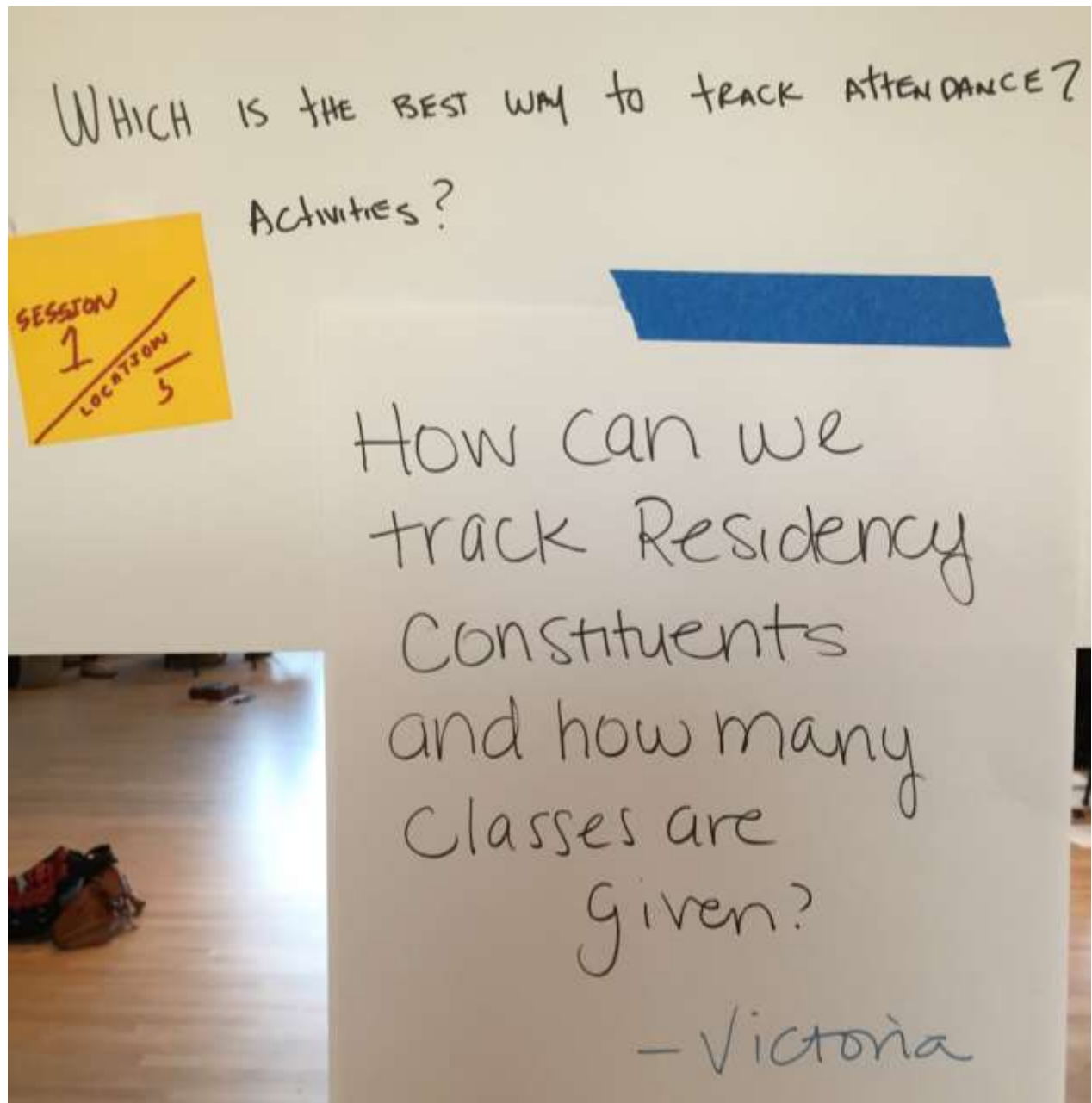
- Examples of how Tessitura is being used for education programs
 - run a report on members who attended by "constituents" or "price type" 250 character limit under "Notes" section
 - you can create a customer service info page (CSI) and you can put unlimited entries here w/ all your contact w/ the customer/person
 - you can put in their payment method (some places even enter each of the PO #s)
 - Price type ("standard", "at-risk" for discounts for schools, "grant", "free of chg")

- invoices can be generated as a pdf directly from Tessitura (both w/ and w/o pricing) Liberty Science Center has this setup; Tell IT how you want invoice setup and they can create the invoice template for you
- category can change from booked to confirmed to postponed
- create a template for each program that you offer (for each session, you would copy the template and enter in all the exact dates)
- there's a Copy Wizard (created for center for puppetry arts) you can use to copy a template form for the days needed (M-F) w/in a specific time range such as quarters/sessions
- IT adds all the drop-down options
- Methods for Reporting
 - You can put a barcode (one barcode can count for multiple ppl); scan the barcoded tix as ppl enter the event
 - "In-scan" can be used to get the final attendance count at an event
 - 200 standard reports w/ Tessi (good for hard #s and accurate to the day); use this for rosters
 - t-stats data is good for trending data (overnight, it will trend/pile your data); use to search for zip codes served over a period of time; good for generalized attendance tracking; also good for tracking revenue
 - Price Types are very flexible, and you can segment however you want
- Maintaining data integrity & constituent analysis
 - -start w/ what you need to deliver on and work backwards
 - Liberty Science Center uses t-stats for most of their reporting
 - develop consistency down to the detail (spell out First Ave. or 1st Ave.), so this may be a reason NOT to carry fwd old data
 - if moving data over/fwd from a previous system, start w/ the most active records to clean up and then bring into new system
 - if you see duplicates, you can merge two accts so you only have 1
 - have the conversation w/ your dept mgmt so they know why #s from 5-10yrs ago look different from the #s you're reporting now since starting to use Tessi
- Develop templates that we need IT to create for our educational programs
 - It would be helpful to develop templates for our forms in order to create consistency across the information being gathered, as well as to identify what information we need to report on to satisfy grant needs. This conversation would have to happen internally first, with our Director and educational program managers. Once we have a rough draft of our form needs, we would take this to the IT Tessi team to develop the form and discuss ways to best capture the needed info.

6.5 SESSION 1 LOCATION 5

Leaders: _____ & Victoria - BAM

Attendees: Josue Urbina - Cooper Hewitt, Kameko Branchard - Cooper Hewitt, Don - Tessitura, Victoria Collada - BAM



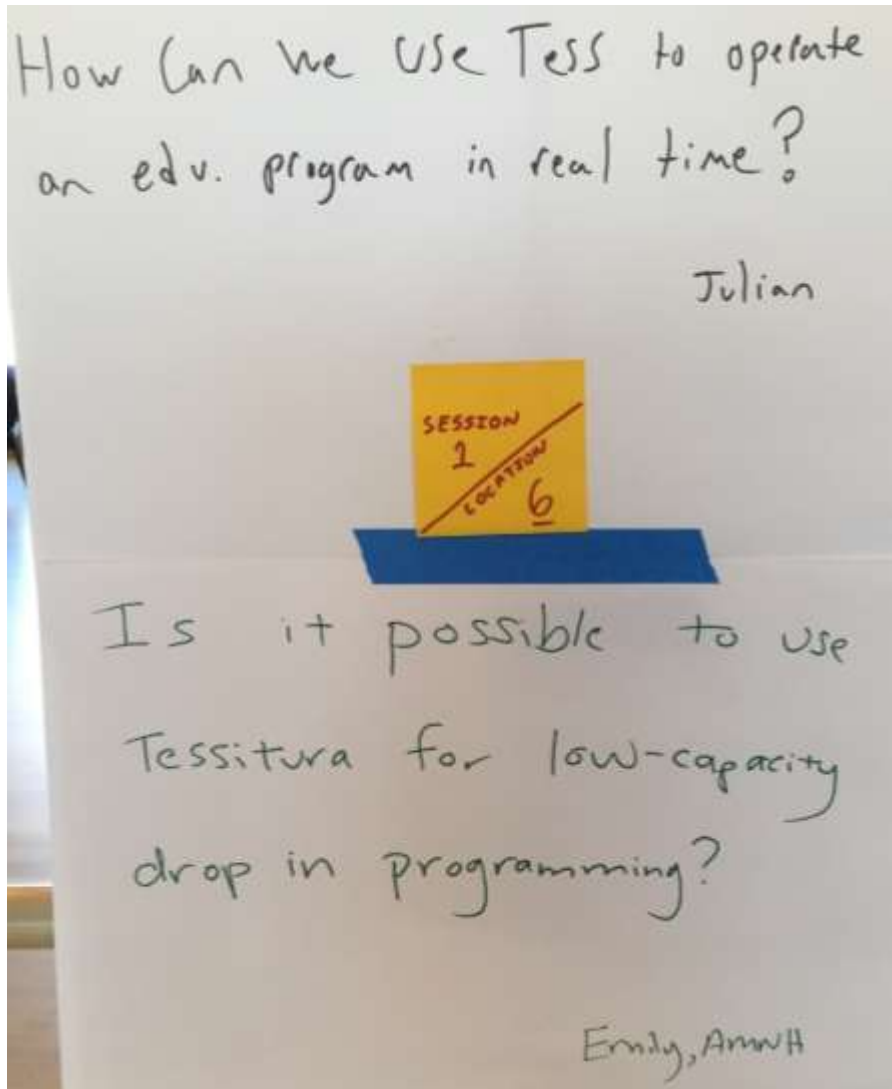
Title: Tracking Attendance and Events

- What's an efficient way to track free drop-in attendance?
 - N-Scan -> scan program barcode + punch in total #2
 - Turbo - for onsite registration

6.6 SESSION 1 LOCATION 6

Leaders: Julian & Emily - AMNH

Attendees: 92Y, AMNH, New Victory Theater, State Theater, etc.



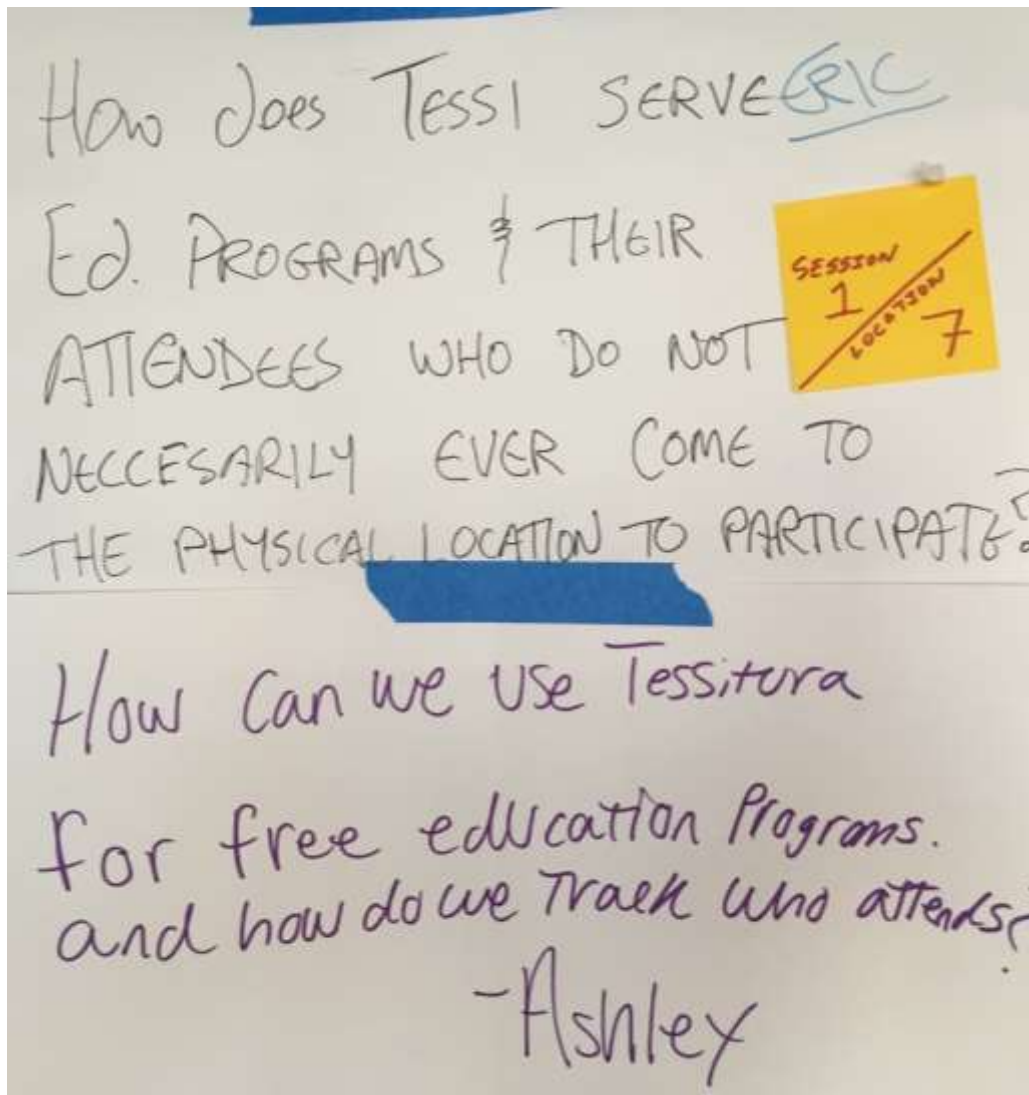
Out of the box ways to track your teaching artists: How can we use the information in tessitura to help streamline our process of admission and ticketing?

- No one knows what they're doing
 - Need training via the tech side to help inform on reporting and access for edu program managers.
- Problems with custom reports
 - Can't catch things as its happening because of the audience involved. Need to have confidence in the program.
- Come together to raise issues to tech side and then get trained. make the custom the regular

6.7 SESSION 1 LOCATION 7

Leaders: Eric – AMNH & Ashley - Skirball

Attendees: Aric, Emily - AMNH, Ashley - SKirball, Erik – State Theater



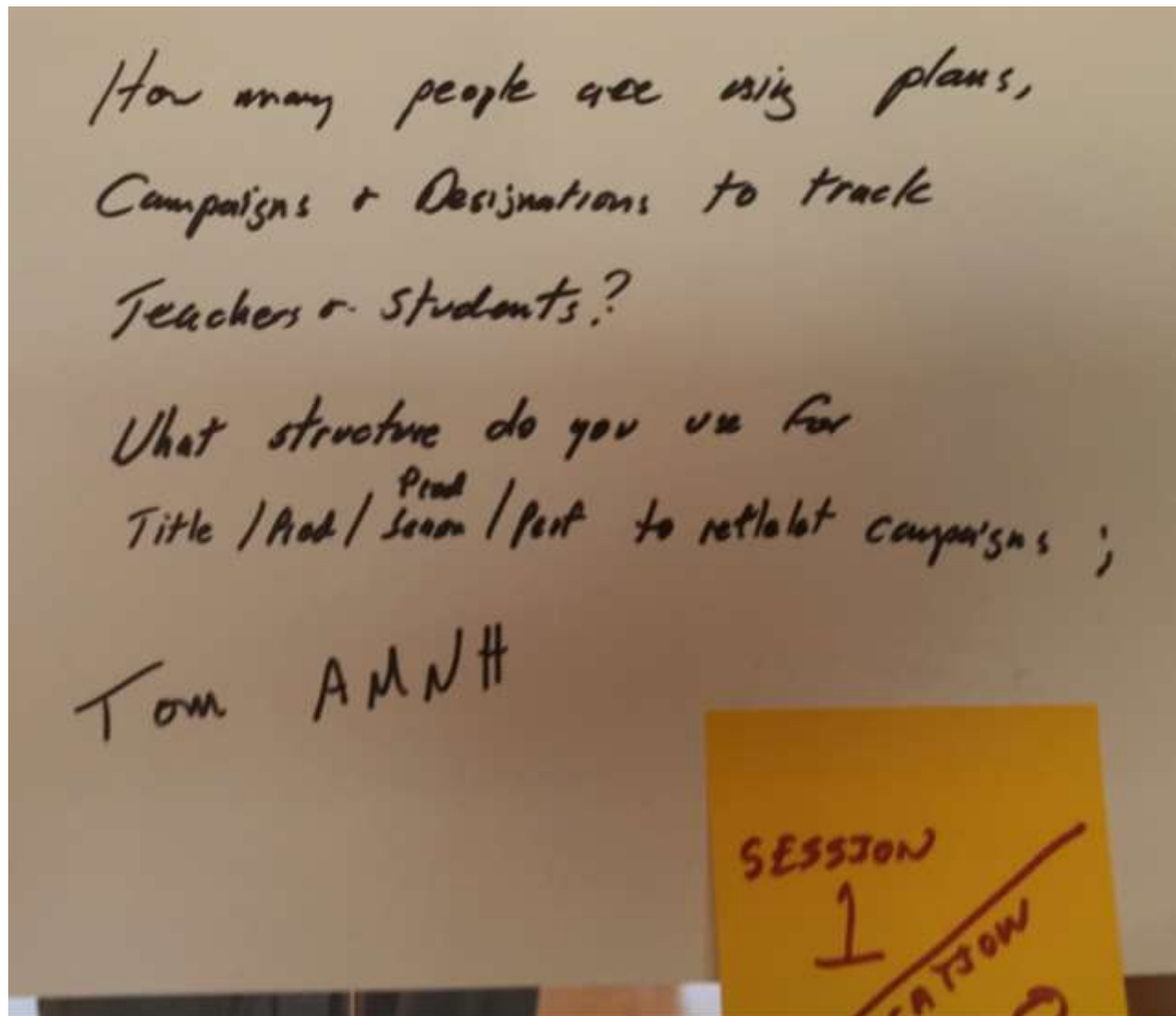
Title: Managing Free Registration

- Find out who's coming and tracking attendance
 - Turbo – to use on tablet day of
 - Barcode you get at admission to scan info on attendee.
 - Try to get people re-registered.
 - On-site data collection.
- Who's coming to large / Non – Preregistered events
- What we want to find out is how to customize reporting and confirmation e-mails / barcodes.
- And more about turbo – what tools can be needed.

6.8 SESSION 1 LOCATION 8

Leaders: Tom - AMNH

Attendees: Thomas - AMNH, Don - Tessitura Network, Tom - Tessitura Network, Tom - BAM



Title: Out of the box use of Plans

By: Tom Brown

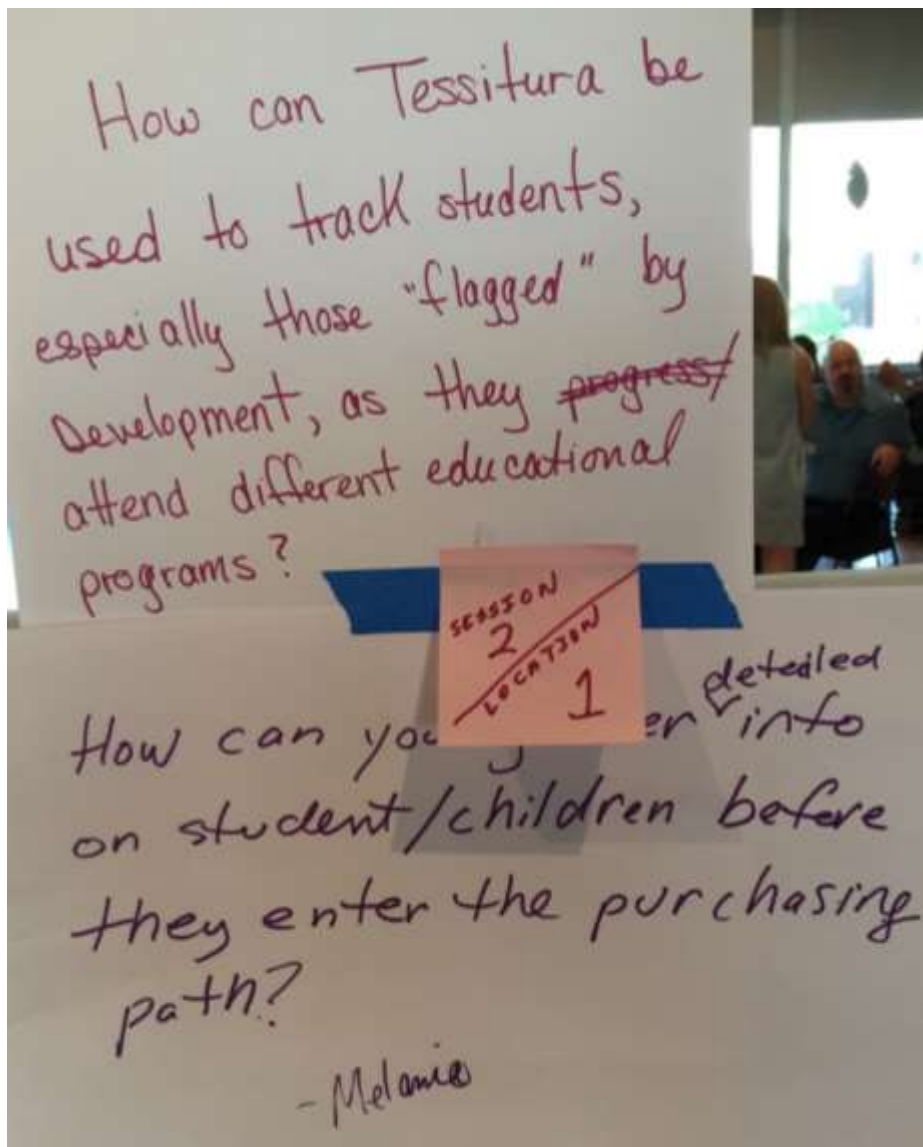
- Out of the Box use of Plans
 - Folks are considering education use of plans to track business interaction with educational organizations.

7 SESSIONS 2 QUESTIONS

7.1 SESSION 2 LOCATION 1

Leaders: _____ & Melanie - AMNH

Attendees: -Emily Edmonds-Langham - AMNH, Danny Zeiger - AMNH, Crystal Byler - AMNH, Barbara Gross - Tessitura, Thomas, Melanie – Cohen - AMNH, Nancy Chow - BAM, Matt Hanagan – 92Y



How to track students through educational programs and lead through the purchasing process

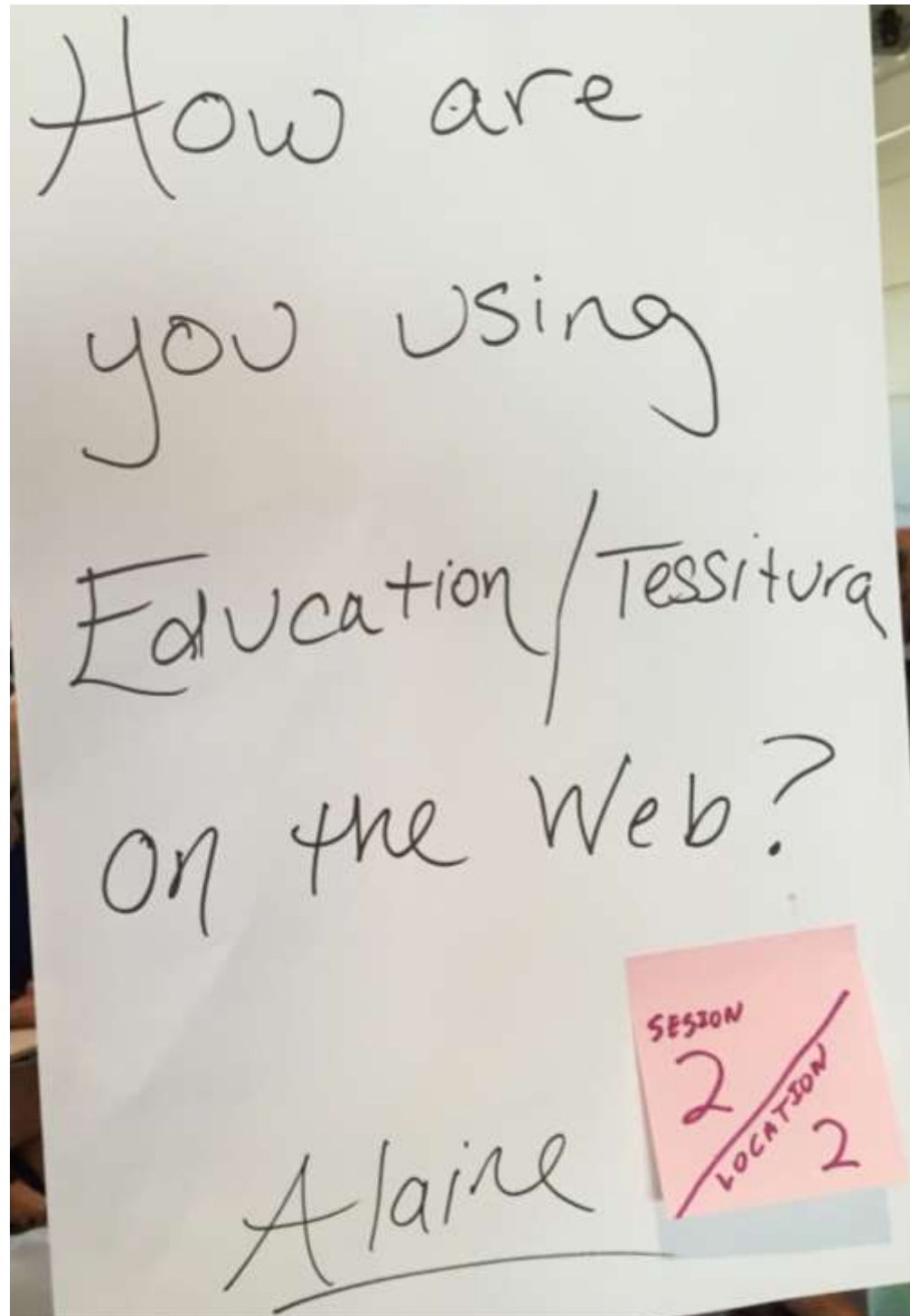
By: Crystal Byler

- Payment and Scholarship tracking
 - at BAM, participants fill out a form in CMS, and then the person is contacted for Purchasing process

- Purchasing vs getting the student info first (how to handle scholarships for students)
- How to handle scholarships (how to record partial vs full scholarships) and link them to the appropriate GL codes
- we sell 25 slots and then we overlay scholarship awarding on top of that, and we're tracking the latter separately
- how many buses (price zone for buses vs subways) are coming; just have IT setup a separate form w/ different price zones; you can put a seat map on it and everything
- track attendance through price types
- for Sackler (at AMNH), the labs are booked as 1 class, but attendance gets tracked through a 2-step process by comparing general admissions tickets to tickets used at Sackler
- it may not make sense to have tickets sold up-front for drop-in programs b/c then ppl have no buy-in/commitment to then actually GO to the drop-in; perhaps we could put a ticketing machine and a trained staff at the drop-in location to "sell" a separate ticket on-site; we could also track museum members who attend drop-ins by scanning their membership cards upon drop-in entry
- Using "attributes" in Tessi & how to "flag" ppl/schools
 - "Food preferences" attribute to list allergies/etc
 - To "flag" something, you use a keyword
 - search keywords (Asish would be using this feature at AMNH, not the actual admin ppl w/in the Edu dept) vs functional keywords (used for entitlements, like 6 free tix a day for members)
 - you have an unlimited # of attributes to add to a constituent
"internal referral source" w/ an option for Development (and potentially, Development would have access to this)
- Registration & attendance via Tessi
 - you can add a barcode to the invoice in order to track attendance at a class
 - Adage Technologies did the web interface for Milwaukee Theater, which has all the program registrations done online (really nice interface)
 - WordFly or MailChimp or MailTo can be used for email batches
 - attendance reporting done in t-stats
 - you can sell adult tix vs kid tix to track teachers vs students
 - student tix could take the form of an actual paper tix, or something on their phone that they activate and scan when they arrive to class (for attendance)
 - at AMNH, the website has limitations that we cannot offer online registration for all programs
- Think about different attributes we want to capture
 - Internally discuss what attributes we want to identify and different keywords that we may want to use to "flag" individuals, such as from Development. Once these are identified, we can go to IT to come up w/ a plan to implement it.

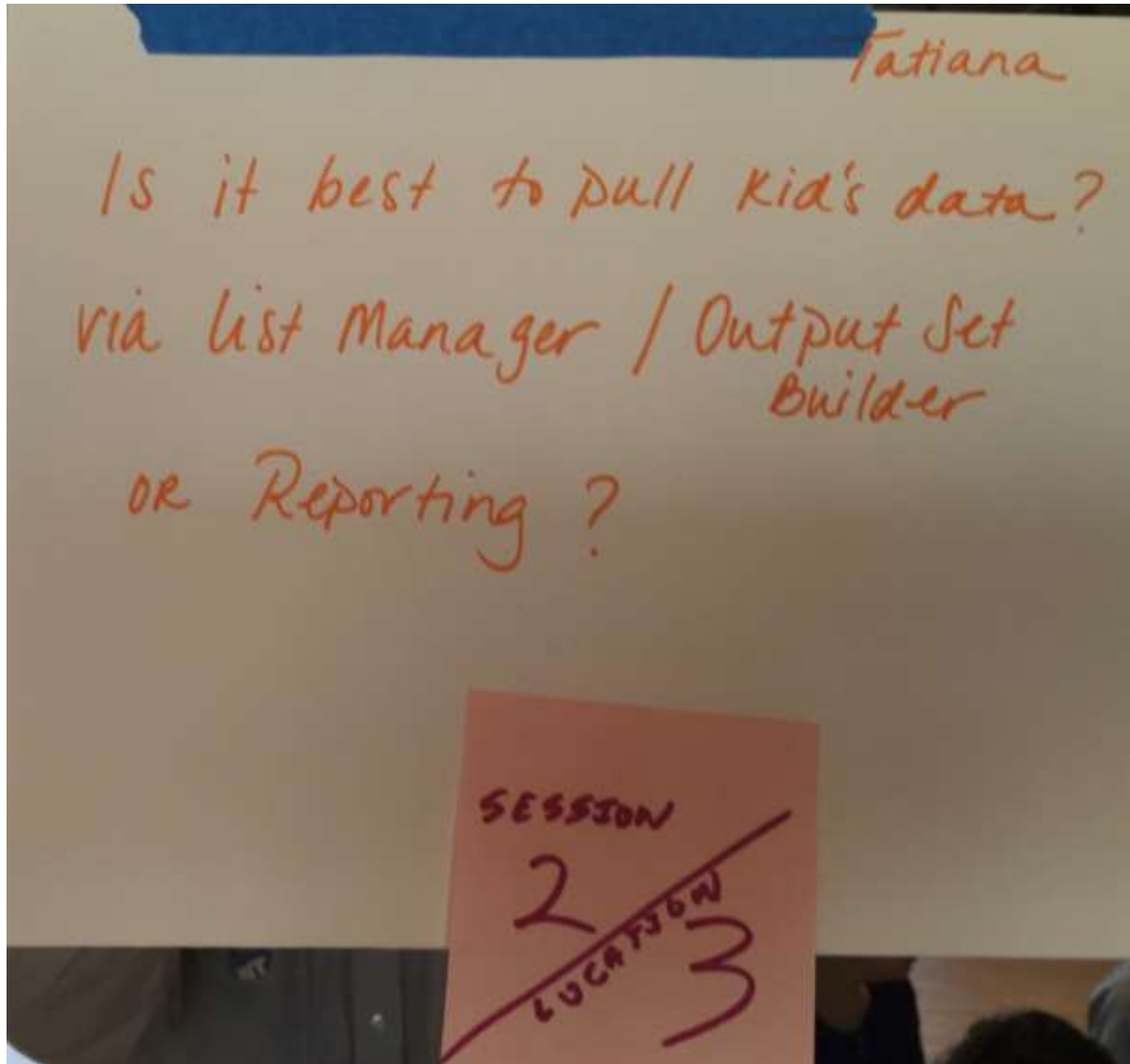
7.2 SESSION 2 LOCATION 2

Leaders: Alaine - Tessitura



7.3 SESSION 2 LOCATION 3

Leaders: Tatiana - 92Y



7.4 SESSION 2 LOCATION 4

Leaders: Melissa Alicea – Liberty Science Center & John

How do I track teachers
who booked in a Fiscal year?

SESSION
2
LOCATION
4

Melissa Alicea

How can you
Track teachers
by School District, and
Subject/Content area?

John

7.5 SESSION 2 LOCATION 5

Leaders: Erik – State Theater & Dominic - AMNH

Is there a way
to integrate survey
programs like survey monkey
into tessitura?

-Erik

SESSION
2
LOCATION
5

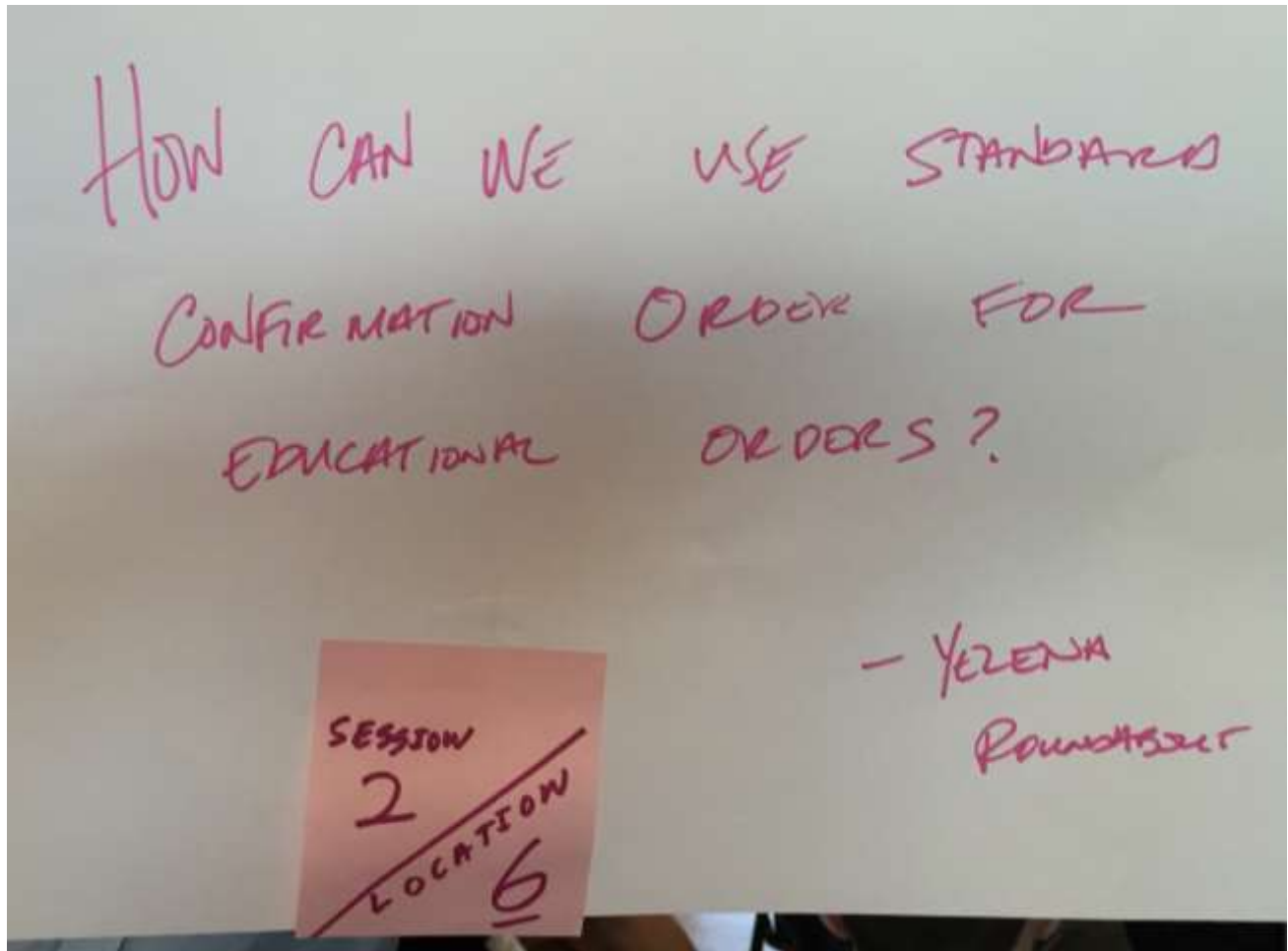
How DO I CONVERT PHYSICAL
MAILING ADDRESSES
RECORDS TO EMAIL
SUBSCRIBERS.

-DOMINIC

7.6 SESSION 2 LOCATION 6

Leaders: Yelena

Attendees: Yelena I. – Roundabout, Andrea M. – Roundabout, Tom B.- BAM

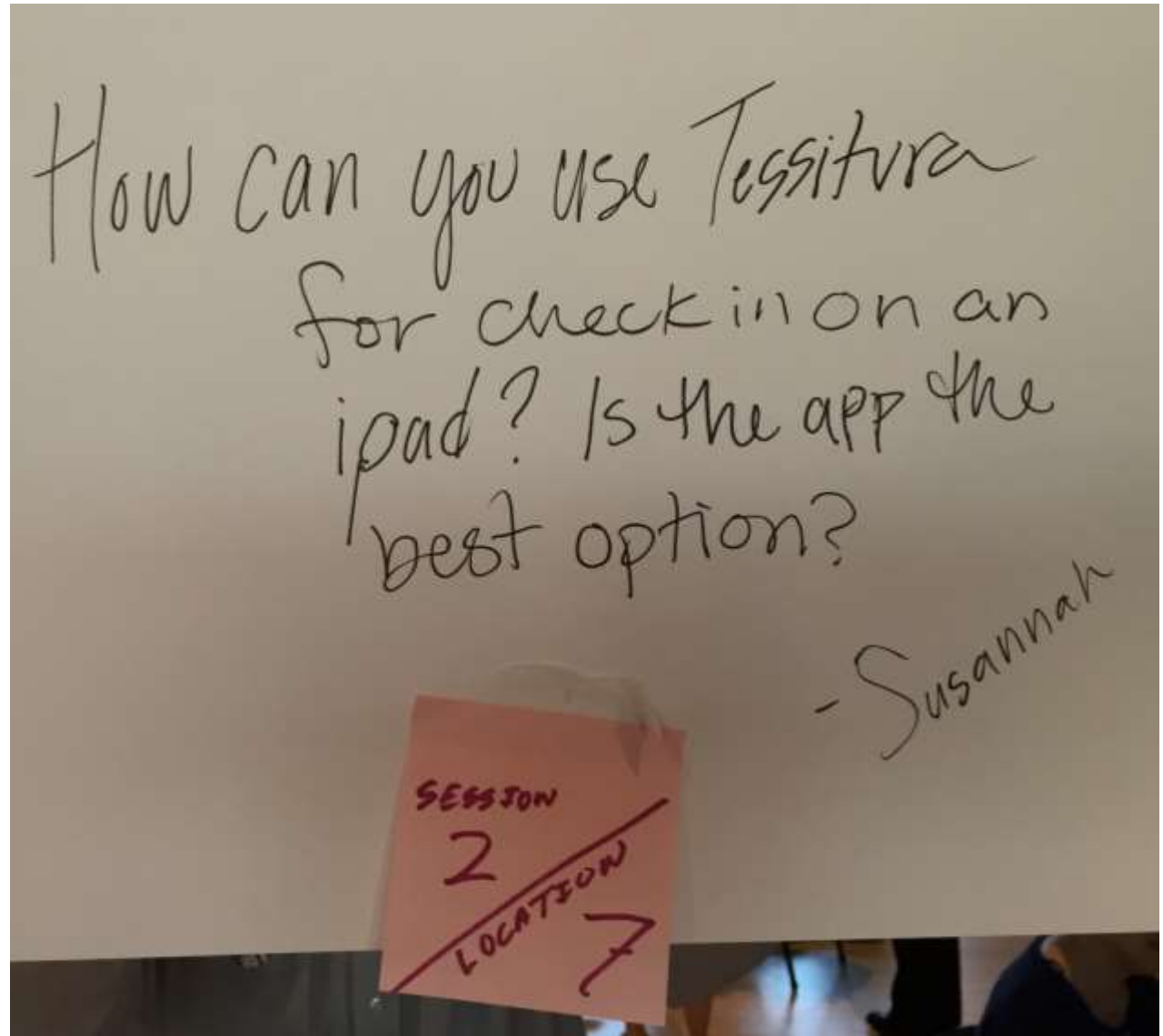


Order Confirmation: Using order confirmation for education orders

- Delivery method
 - Create confirmation templates for educational orders and send them using delivery methods available on Tess - special delivery type with mode of sale.

7.7 SESSION 2 LOCATION 7

Leaders: Susannah – Cooper Hewitt



How can you use Tessitura
for check in on an
ipad? Is the app the
best option?

- Susannah

SESSION
2
LOCATION 7 →