

May Consortium Leaders Community Meet Up

Date and Time:

17 May 2023 - All items on the board
17:01 (UTC+00:00)

Facilitator:

Beth Dietzler

Attendees:

Maureen (She/Her), Laura House (she/her) Kansas City, Katie Hathaway, Christopher, Henry Kelly, Dana, Gina Harrower, Kaylin Cranmer, Katie Cullen - CAPA, Heather Laidlaw Kraft, Laura House (she/her)

Summary:

Actions:

Learnings:

Topics discussed:

Any consortium-specific stories about Tessitura Merchant Services?

Votes: 8

Suggested by: Henry Kelly

Comments:

- Maureen (She/Her)
Henry went live with TMS 5/1. Aside from saved cards on file issue, any other concerns to pop up? Cards that fail to tokenize because of billing schedules - maybe the card belongs to more than one org. Could cause some concern.
- Maureen (She/Her)
Atlanta Ballet first to go live as consortium - things better in .35 version. TN advises TMS first, v16 next. Surprises that cropped up - ask as many questions you can, ask have I missed anything, example - tokenized codes being saved everywhere. Saved card checkbox...will be on all sites, for all orgs. Added language that Ballet is part of a consortium with other members. Boiler plate. Did not tokenize a bunch of cards, hold off and start with clean slate -

but consider billing schedules. Good for using real payment plans. Payment plans are better. Secured device entry clunky, not meant to be a replacement to EMV. Better in .35.

- Maureen (She/Her)
CAPA live about a week. Deviceless entry workstations still have to be set up as they are emv like but in .35 that will be better. Whoever needs to save a card on file, needs an EMV. Moving EMV from one station to another is not too hard. Aidian puts hold on deposits if you have a spike until you build up a resolve.

what is your v16 timeline?

Votes: 7

Suggested by: Laura House (she/her) Kansas City

Comments:

- Maureen (She/Her)
TN recommends switch to Merchant Services first before v16. PRAC v16 timeline keeps getting pushed back based on work on DEV and upcoming concerns and questions. Members tired of Windcave so there's a push to TMS.
- Maureen (She/Her)
Tulsa v16 start November, Live Feb 24
- Maureen (She/Her)
CAPA resuming talks on v16 - target of January 24. Not a lot of customizations or memberships.
- Maureen (She/Her)
Atlanta Ballet waiting on EDU extension before updating (Q3). Hopefully before April 24
- Maureen (She/Her)
Woodruff in a similar boat - January
- Maureen (She/Her)
PCT - brand new on TMS. Donors write CC info, but no CVV but that's required. So working through who calls them, how to get a hold of them etc.

How many of you are using current EDU customization?

Votes: 6

Suggested by: Dana

Comments:

- Maureen (She/Her)
Customization bought from TN. Two parts - parent buys class, child is recipient. Forms with all the info (allergies) are part of the purchase. Lives in multiple system tables, with then custom screen, reports.
- Maureen (She/Her)
Heather TN: Extension will be a piece of what is in the customization currently. Have the convo sooner than later. Adding add-ons with regarding the extra questions and forms etc. Recipient piece is coming over but camp doc

How many folks from your consortium will be going to TLCC Orlando ?

Votes: 2

Suggested by: Laura House (she/her) Kansas City

Comments:

- Maureen (She/Her)
CAPA: send about 6. we do small year then big year. Last year was big year.
- Maureen (She/Her)
CAPA: send about 6. we do small year then big year. Last year was big year. tries to spread out from Jazz group, theater group.
- Maureen (She/Her)
Virtual pass will be good for some where \$\$ is an issue. Tulsa sending a dozen.

Do you do monthly payment plans for membership? If so, how do you implement these? Do you solicit for a renewal at the end of the membership?

Votes: 2

Suggested by: Kaylin Cranmer

Comments:

- Maureen (She/Her)
PCT - have not had monthly plans in the past, some for high level donors but it's a manual process.
- Maureen (She/Her)
Woodruff - Donate2 is good and implements with Tessitura.
- Maureen (She/Her)
From CAPA: not memberships but we give the option for recurring donations to say either list an end date or check this box for no end date until you choose to notify us that you want to terminate

What are you most looking forward to at this years Conference?

Votes: 1

Suggested by: Maureen (She/Her)

Comments:

- Maureen (She/Her)
Goals: Maureen tries to ask one question at each attended session. Dana will be presenting on using standard over customize options.
- Maureen (She/Her)
As much feedback on v16 as possible
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