Staff survey for Raiser’s Edge (RE) 2016

Instructions: Please fill out this survey and return to Karen H in hard copy or by email.

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. How do you currently use RE?
   1. Do you record meeting information with donor/prospect \_\_ Yes \_\_ No
   2. Do you search for existing relationships to donors/funds \_\_ Yes \_\_ No
   3. Do you look up gift information \_\_ Yes \_\_ No

Please list the top 3-5 ways you use the database; and how frequently you are in the database program each day/month.

1. Do you understand how to:
   1. Send a letter from RE and create an action? \_\_ Yes \_\_ No
   2. Send an email to a constituent and add as an action? \_\_ Yes \_\_ No
   3. Print envelopes or MaineCF labels for a constituent from RE? \_\_ Yes \_\_ No
   4. Search for Fund information or advisors? \_\_ Yes \_\_ No
   5. Search for Event participants \_\_ Yes \_\_ No
   6. Add a constituent \_\_ Yes \_\_ No

Comments:

1. Do you understand when to use **Actions** (and the related notes field) and when to use the **Notes tab** in RE? \_\_Yes \_\_No

Comments:

1. Do you know how to search for a constituent in RE when you are sure they are in the system but you can’t find them (use of wildcards)? \_\_ Yes \_\_No
2. Would you prefer a private training session or as part of a group?

\_\_ Private \_\_ Group

What time of day is better for you? \_\_\_\_\_\_\_\_\_\_

Return by May 30. Training sessions will be set up based on staff responses.