

08132020 -- Consortium Leadership TUG Meeting

Date and Time:

13 August 2020 - All items on the board
16:05 (UTC+00:00)

Facilitator:

Brian Parker

Attendees:

Beth Dietzler, Beth Dietzler, Lauren Gruber, Lauren Gruber, Andrew Chew, Mindee, Meredith, Beth Dietzler, Lauren Gruber, Howard, Shana

Summary:

Actions:

Learnings:

Topics discussed:

Implementation Planning: How to manage expectations for historical data? How much is too much? Do you limit what members bring in?

Votes: 7

Suggested by: Beth Dietzler

Comments:

- **Brian Parker**
Recent experience of organization that wanted to import Development data going back to the 1990s.
- **Brian Parker**
Lauren: No hard limit on data, but it seems to regulate itself because imports are a billable service from the consortium.
- **Brian Parker**
Lauren: A recommendation is given to new organizations based on their size and metrics to find the sweet spot for useful data.
- **Brian Parker**
Lauren: Encourage new organizations to use interns or other staff to clean data before it gets sent to the consortia for importing.
- **Brian Parker**
Lauren: Onboarding and implementation is included, but historical data imports are considered billable on an hourly basis (\$80/hour).

- **Brian Parker**
Shana: Question for new organization -- What strategy are they trying to attain, and how much historical data is relevant to that end?
- **Brian Parker**
Andrew: Beginning with a question of relevancy to narrow down the scope of important/useful data.
- **Brian Parker**
Mindee: Natural division of data -- When was the last time there was a data conversion?
- **Brian Parker**
Mindee: Exceptions to be made for "lifetime giving" on patrons; but this can be calculated without also bringing in the raw historical data.
- **Brian Parker**
Brian: Adding a +1 to Mindee's call for data conversion being a natural cut-off.
- **Brian Parker**
Gawain: Campaign redesigns in their long-term dataset, which can also impact the utility of data for conversion.

How do/should consortia define success?

Votes: 5

Suggested by: Brian Parker

Comments:

- **Brian Parker**
Howard: Fairly new consortium, just over a year old. Goal of having better database/system management through a partnership versus a single organization working with it alone.
- **Brian Parker**
Mindee: Different answers for different audiences. Vision/Mission/Values statement: are those targets being hit? Regardless of metrics, are the goals of that statement still being met? Allowing smaller organizations to make data-driven decisions using tools they would not be able to access alone. Also: one user ah-ha! moment per month, please.
- **Brian Parker**
Lauren: Success happens when a user becomes a power user at a member organization. Sense of member organizations not having ownership of Tessitura/database as a tool for them, versus something that Overture owns and uses.
- **Brian Parker**
Andrew: Important to understand the foundations that were established with the consortium, and be able to return to that and measure whether or not the organization is staying in line or growing too quickly.
- **Brian Parker**
Andrew: Also finding success in fewer help tickets, or less confusion among users at member organizations.
- **Brian Parker**
Shana: Questions/concerns about fewer questions potentially meaning less engagement with the tool.
- **Brian Parker**
Andrew: Operations committees helps to serve as a representation of where users are at related to the tools.
- **Brian Parker**
Beth: Difference between questions stopping versus the quality of questions becoming worse.
- **Brian Parker**
Lauren: Helping reinforce a user's sense of themselves and their knowledge, especially when we view them as a power user.

Return Request Feature & Event Cancellation Utility: Use and Management in Consortia.

Votes: 4

Suggested by: Lauren Gruber

Comments:

- **Brian Parker**
Lauren: Seeking use case stories, successes, failures, "wish we could've/would've" insights.
- **Brian Parker**
Lauren: Recent upgrade to TNEW v7, so access to new/more functionality now.
- **Brian Parker**
Mindee: Withheld new functionality from all user groups because of difficulties with regard to managing utility runs at the same time, especially with the Event Cancellation Utility.
- **Brian Parker**
Mindee: Testing functionality as a case of rolling through different user groups and learning from those experiences to inform the next roll-out.
- **Brian Parker**
Gawain: Understanding messaging and data collection from customers surrounding how these features are used. So many variables to be considered, and the rules may be different based on every individual performance being considered.
- **Brian Parker**
Gawain: At the end of the work, realized that the number of customers being messaged might not warrant a large-scale automation and instead could be managed more personally.
- **Brian Parker**
Andrew: Working through tools which were internally developed versus what was made available directly through Tessitura. Interfacing with Finance to ensure that nothing gets lost or missed in the processing.
- **Brian Parker**
Andrew: Also used WordFly for the purpose of determining return requests versus that functionality introduced to TNEW v7.
- **Brian Parker**
Andrew: Return request on TNEW v7 might have an obstacle in patrons needing to be logged in to their TNEW accounts.
- **Brian Parker**
Brian: Local Ballet used Event Cancellation Utility to process refunds and re-appropriation of funds based on money left from tuition at the point of academic year being cancelled.
- **Brian Parker**
Gawain, Andrew: Cost considerations with regard to WordFly pages to manage patron responses on cancelled programming.

Investing in your users- How do you add value to Consortium membership?

Votes: 1

Suggested by: Beth Dietzler

Comments:

- **Brian Parker**
Beth: With PRAC, because the organization is so large, the thought is that the only way to define success is to grow larger (and potentially cheaper for member organizations, though not in all cases).
- **Brian Parker**
Beth: Brainstorming educational programming to engage with the userbase for continued development.
- **Brian Parker**
Lauren: Realization of needing to meet users closer to where they were at/their current comfort level in order to overcome the sense of not being able to do something.
- **Brian Parker**
Lauren: "Tessitura Office Hours" plan and user survey.
- **Brian Parker**
Lauren: Users can schedule an open-ended amount of time to meet together. Users have full direction of how they want to spend the time. Can be used to problem-solve. If users don't have a strong sense of how to use time, survey responses can inform the best use.

- **Brian Parker**
Beth: PRAC has annual check-in meetings with organizations and user groups. What's working, what's not, what's on your wish list? Conversation is followed up by a 2-hour meeting.
- **Brian Parker**
Beth: "Support Associates" program allows power users at member organizations to learn more about support and provide 5-10 hours/week or additional support to other users in the consortium.
- **Brian Parker**
Shana: 35 people in monthly operational team meeting with power users, and also a spin-off of a social group for happy hours to learn and also network/connect more strongly between staff.
- **Brian Parker**
Mindee: Problem being faced (perhaps pandemic-specific) is that staff members are technologically-challenged, so the ability to meet people where they are becomes significantly more difficult.
- **Brian Parker**
Mindee: September meeting that would normally be for power users is now an all-users data standards review.
- **Brian Parker**
Mindee: Fundamental issues of technological accessibility with regard to attending meetings/calls.
- **Brian Parker**
Lauren: Most successful face-to-face story was born from frustration of a staff member who felt as though they were being under-served.
- **Brian Parker**
Andrew: One member organization recently dropped to a single staff member, so there are fundamental issues with regard to approaching Tessitura and understanding its usefulness. The Network has actually stepped in to help the organization rediscover their needs as well as the tools that are available to address them.
- **Brian Parker**
Andrew: Ability for this organization to undergo a "reset" of sorts to help re-engage.
- **Brian Parker**
Shana: Question of whether it's beneficial to schedule a semi-annual review with power users to get a stronger sense of what's going on at each organization.
- **Brian Parker**
Mindee: Sense of end-users not asking the questions they need to ask if the bosses are around. (Conversational Context)
- **Brian Parker**
Mindee: Support desk is open for any staff member to submit tickets, so needs are driven by end-users and not bosses.
- **Brian Parker**
Brian: Growing sense of the importance of developing users at the organizations, and ensuring that they have solid access to educational opportunities around become better arts administration professionals in general, could result in a significant value-add to consortium members and also cut down on some of the more basic/entry-level support requests handled by consortium support staff members.

Topics voted on but not discussed:

Consortia Mission Statement Content and Tone: Aspirational? Functional? Transactional?

Votes: 3

Suggested by: Brian Parker

Comments: