

08272020 -- Consortium Leadership TUG Meeting

Date and Time:

28 August 2020 - All items on the board
01:02 (UTC+00:00)

Facilitator:

Brian Parker

Attendees:

Beth Dietzler, Lauren Gruber, Andrew Chew, Mindee, Beth Dietzler, Karyn Elliott, Mindee, Nancy Hackett PTT, Katie Springer, Andrew Chew

Summary:

Actions:

Learnings:

Topics discussed:

Protected Constituent Records in a Consortium: Possible Use Cases?

Votes: 5

Suggested by: Mindee

Comments:

- **Brian Parker**
Mindee: New users in the consortium who have "glommed on" to new functionality, inexplicably. Difficulty of working with new functionality (per documentation, anyway) within a shared consortium environment. New user tried to protect a child record which was shared between two member organizations. Are there off-label uses of this functionality that might work in the consortium setting? Or is it too dangerous?
- **Brian Parker**
Mindee: One potential use case -- "door sales" constituent for each organization. One way to prevent these records from being renamed and merged into organization records.
- **Brian Parker**
Katie: Pittsburgh is using protected records for child records currently. One example: Ballet has school child records, but they're not fully in Tessitura. Could also see it used for the "door sales" scenario (since one user creates a new "door sales" record for every performance).

Giving Back: How can we nurture strong employees who are then willing, and able, to share their expertise back to the community?

Votes: 3

Suggested by: Brian Parker

Comments:

- **Brian Parker**
Andrew: Experience of sharing expertise has been encouraging the sharing of even "small" subjects or topics because even those insights can have larger impacts within the community, whether local or global. Doesn't need to be a fantastic feat of automation if it's interesting and leads to success.
- **Brian Parker**
Nancy: Question of whether staff have the time and/or resources to put together something to share back to the community alongside their other job tasks. Sometimes the perception of returning expertise back to the consortium isn't viewed as an appropriate investment/function.
- **Brian Parker**
Katie: Since all of Pittsburgh's orgs are in the consortium together, there's a strong sense of the questions that come up being faced by all organizations. "As the District Turns" scenario where staff end up rotating through the various organizations and positions. When people move on from a job, they thankfully seem to end up staying within the consortium. Cross-pollination of knowledge within a single consortium between staff as they develop experience.
- **Brian Parker**
Andrew: As people say that they aren't the expert or a reference to talk about something, they inevitably are able to point you in the direction of somebody who does know, whether inside the consortium or in the global Tessitura Network.
- **Brian Parker**
Katie: Maybe now is a time to "skill up" staff members and develop power users.

Part of Your Team: How and when (or if!)
to integrate consortia staff with member organizations.

Votes: 2

Suggested by: Brian Parker

Comments:

- **Brian Parker**
Katie: Emphasis on working through problems together, and also documenting the process as it is happening so that there is a physical takeaway for the user. (Kelly Mednis-ing it!) Allows for the creation of a solid consortia knowledgebase to share forward as the question returns or new functionality is developed.
- **Brian Parker**
Katie: Develops a collaborative process between the staff being taught and the expert doing the teaching.
- **Brian Parker**
Mindee: Watch one. Do one. Teach one.
- **Brian Parker**
Mindee: Allows for ownership of documentation which makes the most sense for the person learning.

Are any of you using Tessitura Contact Point Purposes with WordFly Preferences and writing from Tessitura to WordFly by having the Preference Values in your output sets? Just a quick question and we can take details offline if anyone has tips or tricks to offer (since it's less of a discussion question and more of a "how to")

Votes: 2

Suggested by: Mindee

Comments:

- **Brian Parker**
Mindee: Year-long push towards contact permissions in the Kalamazoo consortium to prepare for the inevitable deployment of some form of GDPR in the US. Main holdback lies in the Marketing departments. Setting up WordFly permissions per organization to keep the

data clear. Difficulty in the process of letting WordFly learn from Tessitura in updating information. WordFly wants to grab primary email addresses, which can't be control-grouped in a shard consortium database.

- **Brian Parker**
Mindee: Potentially needing a local view for every email type, and then specific output elements for purpose values from there.
- **Brian Parker**
Brian: #ButWhatIfItsAConsortium World Tour. Forever.
- **Brian Parker**
Andrew: No contact point purposes in place yet, but preparation work has begun in the background in advance of v16 since that's the direction that contact information is moving for Tessitura.
- **Brian Parker**
Andrew: Views are potentially the right track towards a solution to this issue.
- **Brian Parker**
Mindee: Maybe WordFly doesn't *need* to get the data back from Tessitura.

Defaulting of consortium member on consortium dues/fees - what to do?

Votes: 1

Suggested by: Nancy Hackett PTT

Comments:

- **Brian Parker**
Nancy: Hypothetical question at the moment, but certainly feels relevant in the current COVID reality. Perth invoices consortia members on a quarterly basis.
- **Brian Parker**
Mindee: This is one of those things that keeps me up at night. The Advisory Committee is responsible for those considerations.
- **Brian Parker**

Karyn: Tessitura is willing to work with members related to financial relief at this moment. Consortia still tend to be problematic because of the aggregate amount of budgets leading to larger dues categories.
- **Brian Parker**
Nancy: Perth is interested in growing the consortium further, and organizations are interested in exploring the possibility of joining, but there might not be any due diligence with regard to the organization being prepared for long-term membership.