

09292022 / 30092022 -- Consortium Leadership Community Meeting

Date and Time:

29 September 2022 - All items on the board
17:08 (UTC+00:00)

Facilitator:

Brian Parker

Attendees:

Ashley Dawson, Maureen Cotellese, PRAC, Katie Lachance-Duffy, PRAC, Beth Dietzler, PRAC (She/her), Dana, Tami fox, Laura H, Andrew Chew, Nancy, Ashley Dawson, Lauren Gruber, Janet, Ashley Dawson

Summary:

Actions:

Learnings:

Topics discussed:

Do you detail training opportunities (and requirements) in an SLA for your users to follow?

Votes: 10

Suggested by: Nancy

Comments:

- Brian Parker
Nancy: Topic came up again this morning. SLAs have been pretty loose and open in the past (within reason), but lately are finding that turnover is blurring lines, especially when member organizations expect consortium staff to train all of the new users that come on in. Does it make sense to set up a monthly or weekly training session for users? Do people need to look at TCPD classes offered by Tessitura? Is it strictly a training-the-trainer model? How do you address issues with people potentially making core errors in the database?

- Brian Parker
Maureen: When new user requests are made, there is a form question asking whether the new user is entry level and being trained in-house or whether the person is at the manager level and may need additional training attention from consortium staff. PRAC has a small staff with only one dedicated trainer, so there are considerations about how that works with over 100 users in place that potentially need training. One TLCC takeaway was how to continue to support power users long-term so that there is a strong sense that the resources are available long-term. There is also a new community group for Upskilling Staff in Tessitura, which could be a great space to continue exploring these concepts.
- Brian Parker
Lauren: Have been operating in an unspoken agreement about what support work is billable and what is not. Generally, basic support (something is broken) is not billable, but projects like imports from legacy systems or specific work for just one member of the consortium is billable directly to that member. Now in the process of formalizing what that actually looks like. Can be dicey, however, because it can be difficult to convince people to pay for support. One other element is if somebody continuously asks for the same type of training, that should be billable instead of continuing to be free.
- Brian Parker
Beth: Recent conversations on this topic as well and trying to determine what ends up being billable and what doesn't. How does the rubric get established? How are organizations assessed for their membership currently? Vast differences between what organizations in the same consortium are paying to use Tessitura as part of the group.
- Brian Parker
Ashley: Operate with a similar model to what Lauren described. Have a small group of long-term power users, but some organizations have no internal knowledge left at all when those power users are not present. Have been providing "included" services on simple requests, but will bill for more complicated projects like having to build performances from scratch, for example. Try to offer resources first, and then move to a billable model when direct assistance has to be provided by the consortium staff. One organization has done 18 training sessions since June, which benefits the consortium staff for income.
- Brian Parker
Ashley: Since the start of COVID, have been working to help users more, but now trying to reevaluate and build consistency about what services are billable and what continues to be included for free. Understanding with organizations that whatever the organization has access to (i.e., TNEW, N-Scan, TRBO), somebody at the organization should be a power user who can handle it internally.
- Brian Parker
Lauren: Big topic that they frequently run into is building out the structure each year. Understanding is that the organization should know how to do these things with power users, but sometimes the reality of the moment is that they request assistance and the consortium staff bills for those services provided.
- Brian Parker
Nancy: What has been the practice if an organization doesn't want to pay extra and end up making a mess in the database as a result? Do self-inflicted errors still receive free troubleshooting?
- Brian Parker
Maureen: Haven't faced that situation in the past, thankfully. Reiterate the frustration expressed in the conversation about users who frequently come back requesting the same training multiple times.

- Brian Parker
Laura: Do not currently charge for training because it's safer to provide the training and avoid issues in the database versus having organizations strike off on their own and potentially break things.

Where are you starting for training in v16?

Votes: 9

Suggested by: Maureen Cotellese, PRAC

Comments:

- Brian Parker
Maureen: Planning to do a number of training sessions with any users that want to attend, but curious if anyone has made the transition or started yet and where the training start point has been determined (if at all yet).
- Brian Parker
Lauren: Current rough plan is to do some repeated sessions (required for all users) as a v16 overview to talk through what is changing. From there, move on to functional or department-specific trainings to dive deeper into what is changing in those specific areas. Plan is to record the sessions (but not necessarily advertise as such) to encourage people to attend the meeting in the first place. Trying to avoid a full time job of answering, "Where did the buttons go?" Difficulties around requiring attendance, however, without it feeling like an exercise in gatekeeping.
- Brian Parker
Dana: Potential to do a "test that isn't really a test"? Ensure that users have gone through the training sessions with a non-training/non-Tessitura question from the recording or presentation. Less emphasis on gatekeeping.
- Brian Parker
Beth: Offered a \$5 Starbucks gift card for anyone who got to the end of a survey or test to have a soft requirement.
- Brian Parker
Lauren: At TLCC, colleague heard that there was a v16 training being rolled out. Is that true?
- Brian Parker
Maureen: Looks like this referred to the v16 webinars from over the summer.
- Brian Parker
Tami: Combination of webinars produced to this point, but the Learning team is also putting together specific v16 training to come in the future with the general training that can be adapted to your more specific needs as an organization.
- Brian Parker
Lauren: In many ways, treating v16 as an implementation and not an upgrade because of how much is changing for front-end users.
- Brian Parker
Tami: Some additional resources are available from organizations in the beta with their feedback about the v16 learning curve, etc.

If you had the opportunity to give one specific piece of feedback to Tessitura as they continue developing the platform as it relates to consortia, what would it be?

Votes: 6

Suggested by: Brian Parker

Comments:

- Brian Parker
Maureen: Always consider consortia.
- Brian Parker
Katie: When I started, needed a better way to map ownership of items between members in a consortium. Specific to technical setup related to connecting organizations and control groups in the database. Makes it difficult to share custom work in the community because of how much specific ownership code is written.
- Brian Parker
Nancy: +1 to Katie, plenty of local tables in the database to try to track ownership between organizations and funds, etc. Also, not to assume that all consortia have organizations that work independently of one another. In Pittsburgh, there's a shared website, for example. Recent move to plug-in-able vendors that are locked down to single organizations has made it more difficult to share initiatives between members in a consortium.
- Brian Parker
Lauren: Payment processing has always been a pain point for the finance team. Sell tickets for all member organizations, which makes it tricky. Looking into Tessitura Merchant Services as a potential solution on this front.
- Brian Parker
Nancy: As a response to Lauren, really need pay-by-link functionality in Tessitura Merchant Services to make it usable in the shared consortium space or for non-consortia with outsourced phone teams.
- Brian Parker
Katie: N-Scan is great but has difficulties related to control groups (specifically around messaging related to a constituent's arrival, etc.) which means that it is not necessarily useful for consortia.
- Brian Parker
Katie: For TNEW organizations, it can be difficult to manage multiple websites over upgrades, etc., such as when the data encryption key needs to be regenerated but you may need to take down 18 TNEW sites.
- Brian Parker
Lauren: Space for sub-licensee users to encourage ownership within their organizations. Situations where power users at organizations don't feel as though they are the point person in that case. Sometimes there is hesitancy to take on that role. Maybe there should/could be a community for those people, similar to this Leadership Community.
- Brian Parker
Katie: +1 to Lauren's suggestion, end users should have a community space like this for power users.
- Brian Parker
Lauren: Trying to encourage end users to feel ownership and benefit from the tools available, and not just that they're using it because other organizations (or the consortium) does.
- Brian Parker
Beth: Feels like a community for consortium power users would help to fill a gap for smaller organizations.
- Laura H
We build 2 TLCC scholarships for each res org, their choice of power users attend
Likes:1

Back to TLCC: how do you encourage your organizations to send staff to TLCC?

Votes: 5

Suggested by: Katie Lachance-Duffy, PRAC

Comments:

- Brian Parker
Katie: Some of the larger organizations have been regularly sending staff to conference, but how does this translate to the smaller organizations in your consortium so that they get similar experiences?
- Brian Parker
Ashley: Face a similar issue, always comes down to the hard reality of budgets. Organizations that don't go annually can find that some of the topics are still over their head when they do go, which weakens the value proposition for the organization's leadership. For future TLCCs, encourage more hands-on training and entry-level training to cater to some of these users from smaller organizations with fewer opportunities. Broad topics and conversation can be overwhelming to people who aren't in leadership roles.
- Brian Parker
Lauren: Executive track exists, but perhaps needs to be balanced out by a "Here for the Basics" track.
- Brian Parker
Ashley: TLCC is viewed as an opportunity to return with knowledge of using Tessitura at the executive level.
- Laura H
Follow up for those who do get to attend TLCC is key--so the managers / decision managers get confirmation that their investment in TLCC was valuable
- Brian Parker
Katie: The "training track" could be a good selling point for organizations to drum up budget to support attendance.
- Brian Parker
Maureen: Setting a reminder now for when scholarship opportunities are announced so that it can be shared with member organizations to encourage attendance.
- Brian Parker
Brian: Maybe scholarship opportunities for organizations with less than \$X budget.
- Brian Parker
Andrew: Budget is primarily at the forefront related to TLCC attendance. Made the pitch earlier today about the value of face-to-face networking as well to make the value argument.

Topics voted on but not discussed:

What can the Consortium Leadership Community do in the future to best help you?

Votes: 5

Suggested by: Brian Parker

Comments: