

Minutes for Oct. 3-4, 2023 IT Committee Meeting

Location: NATCA Headquarters

Members Present:

Jason Doss (Chair,
NSO/ZJX)
Matt Fritz (NEA/ADW)
Kristena Jones (NEA/ZDC)
Jason Michaud (NNE/A90)
Pamela Rusk (NRX/ECE)
John Tornatore-Pili
(NWP/SFO)
Ryan Durbin (NAL/ZAN)

Present for meeting day 2 only:

Joe Allen (NNE/ZBW)
Nick Daniels (RVP Liaison,
NSW/ZFW)
Aaron Merrick (RVP
Liaison, NCE/ZKC)

Staff Present:

Thom Metzger (NAT)
Meagan Roper (NAT)
Julian Weaver (NAT)
Phil Yanchulis (NAT)

Not Present:
Bill Holtzman (retired)
Matt Heer (NAT)
Ryan Durbin (NAL/ZAN)
Gersan Urraca (NSO/PDK)

Notes:

Meeting started on Tuesday, Oct. 3, 2023, at 1:03 p.m.

Meeting adjourned on Tuesday, Oct. 3, 2023 at 4:11 p.m.

Meeting started on Wednesday, Oct 4, 2023, at 9:00 a.m.

Meeting adjourned on Wednesday, Oct 4, 2023, at 1:00 p.m.

Doss welcomed participants and pointed to the NATCA Code of Conduct. He started the meeting by giving an overview of the agenda.

Big goal for the week: look at a bigger picture of where the committee is headed.

Question: Data Analytics

- Could we use AI to crunch numbers or automate any of the data analysis leadership is looking for?

Support Tickets

Committee members walked through and demonstrated the processes for self-serve account resets and creation.

Number one item for support tickets received by the ITC is email. Second is login help (which is tied to email).

- Does a new membership form need an ink signature, or will e-signature be sufficient?

Live Chat / Tickets: Responding, Tracking, Creating. Committee discussed each process.

Creating

- Automatic creation sometimes creates duplicates.

Responding (live chat)

- Need to modify response process and time, because response rates haven't been consistent. Structure and education for those answering chats would help increase responses. Set up a FAQ for ITC members or a Wiki.
- "Live" chat can be automated to answer specific questions without a live representative.
- Discussed alternative contact methods for faster/easier response: Google Voice, Slack, Beeper, text messages etc.
- Edit the page to emphasize the self-serve options over the live chat. Simplify the page.
- May not need to use chat features to get members to self-serve options faster, and reduce nonresponse.
- We're taking down live chat, adding to the knowledge base, and then working on some AI solutions to go through the knowledge base with automatic answers for easier requests.

Tracking tickets

- Chair proposed a solution like Monday or the bid tool ticket system (work task management) to track ticket status.
- Currently using Teams planner, but could be more effective. Need a process that emphasizes follow ups and closing/resolving tickets.
- Group looked at Zendesk and Intercom FinAI.

Handling Support Tickets

Chair asked members to discuss the current process for creating and managing tasks using Planner cards.

- Group discussed what works and doesn't work. Group discussed how to improve processes.
- Jason provided the group a demo of Monday to demonstrate how he uses it to manage other projects.
- Chair described his needs to be able to manage committee tasks.
- Group discussed best way to assign tasks to both members and staff who serve on the committee.
- Committee decided to transition to Monday project management tool.

Email

- Group discussed where we are at with shutting down natcad.org email accounts on Rackspace.

Teams

- Group discussed processes for tracking Office 365 licenses.
- Group discussed how to improve processes.

1Password

- Chair talked about transitioning all ITC passwords to shared 1Password ITC accounts.
- Doss will coordinate with Julian to migrate all existing IT passwords from PA's 1Password account to ITC account.

UnionWare and MyNATCA Update

- Chair described where we are at with MyNATCA.
- Pay file import module is getting closer.
- Grievance module is in final testing.
- The local update module is in final testing and beginning use.
- Event registration piece is in unit testing.

2024 Meetings

- Group discussed options for meetings next year, including extending current two meetings, possibly adding a third meeting, and piggybacking our meetings onto other NATCA events including CFS, ATX, and Convention.

Website

- Group discussed the organization of MOUs in the documents section of the website.
- Nick suggested that we come up with better descriptions for each of them on the website and that we make them searchable for keywords in the document.
- Joe said we need to make sure that all MOUs (current and archived) are present.
- Doss showed the group the Digital Ocean web page to demonstrate how they present their PDF archive.
- Group discussed doing some surveying with members about how they find items on the site, what they like and don't like about the website to inform plans in preparation of a sitewide website design refresh.
- Doss suggested that staff begin preparing design options during 2024 for a site refresh with the goal of implementing a design refresh for the entire site in early 2025.
- Jonesie suggested that the committee review the site to improve the information architecture, shrinking the number of plug-ins, improving load times,
- Julian and Phil will coordinate to update the Congressional overlay map on the NLC page of the website.

IOU's from the Meeting

- JTP will look up pricing for ZenDesk and Intercom FinAI to create, respond to, and track responses for support tickets.
- Fritz will create a mock-up of a knowledge base draft articles for review by the group that can be used with these bot tools.
- Doss will disable the live-chat on the website, with an explanation that it is a temporary suspension, while we re-tool that functionality.
- Doss will set up licenses for committee for Monday tool and work with Fritz to transition current planning from Teams into Monday.
- JTP will work with Doss to analyze Office 365 usage for budget purposes.
- Jonesie will create a local officer update communication plan, coordinating with the NATCA Communications Committee and NATCA PA staff.

- Joe suggested that ITC work on a credentials/voting module for MyNATCA in 2024 to be prepared for next convention. Committee should think about booth for May 2025 Convention.