

**Society of American Archivists
Council Meeting Agenda
May 7-9, 2018
Chicago, Illinois**

**Staff Report: Technology
(Prepared by Web and IT Systems Administrator Matt Black)**

Selection of New Association Management System

We have selected a new AMS! Our process included the majority of SAA staff at most stages. The systems we reviewed are excellent, and we required extra demos to narrow the field to two finalists. The decision then became even more difficult. A virtual tie between the two finalists prompted us to spend several weeks refining the proposals, seeking deeper information about the companies and their processes, and speaking with additional references.

The result is a very thorough vetting and a very confident decision in selecting NimbleUser as our new AMS vendor.

A few of our favorite things about NimbleUser:

1. The system is built on Salesforce, a powerful, industry-leading CRM solution that is extremely well resourced and supported across many industries. This means in years to come Salesforce will not only be supported, but it will be a cutting-edge technology for the foreseeable future. There is also an ancillary benefit for professional development for current staff and recruiting—SalesForce training and experience is valuable in today's market.
2. Ecommerce and User Portal. Customer-facing aspects of NimbleUser are very strong. Our members and users will experience vastly improved usability when making online transactions or updating their user settings. NimbleUser also supports new features such as promotional codes, flash sales, and product bundles.
3. Usability and flexibility. NimbleUser is easier for staff to use, and it will create basic efficiencies across all departments.
4. Automation. NimbleUser will allow us to automate many activities we currently do manually, freeing staff to focus their energy on more strategic work rather than mundane tasks.

5. Reporting. Salesforce has very powerful, usable reporting tools that will allow staff to create their own reports easily and make data-driven decisions.
6. Integrations. Salesforce has powerful support for connecting to other systems, and NimbleUser has built additional features to support integrating with other systems.

Next Steps:

We have contracted with our selection consultants, Ellipsis Partners, to support us through contract negotiation. This stage typically takes at least one month, and upon completion we will be assigned an implementation team from Nimble and will begin the implementation process (which typically takes 6-9 months).

SAA Connect

We transitioned to our new platform for online communities and discussion lists (“SAA Connect,” powered by Higher Logic) on January 8, 2018. The launch went very smoothly and overall feedback from membership has been extremely positive.

With the transition to a new platform and the decommissioning of the Archives & Archivists (A&A) list, we soon noticed an increase in cross-postings on sections lists as users sought to reach a large audience. Our response has been to create a new Announcements List to provide a single, centralized place for SAA members to make announcements that have broad appeal, such as conference announcements, standards updates, surveys, and job announcements.

The new Announcements List launched on March 22. It was quickly adopted and cross-postings on sections lists have reduced dramatically. Feedback from members to staff has been overall positive and enthusiastic.

Higher Logic has many features that we have yet to explore for SAA Connect. We plan to continue experimenting with features and improvements throughout the year, though our top priority will be AMS implementation.