Society of American Archivists Foundation
Board of Directors Meeting
November 4-5, 2017
Chicago, Illinois

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

Selection of New Association Management System

Since the Annual Meeting in July, the search process for a new Association Management System (AMS) has been the top priority of the technology department. On August 18, we engaged Ellipsis Partners, LLC, as our consultant for the selection process. Their expertise has already proven to be very valuable, and we are already seeing excellent progress. Below is a full timeline.

AMS Selection Timeline

Date	Event	Description
Aug 25, 2017	Kickoff Meeting	
Sep 12-13	Onsite Interviews	All SAA staff met in person with Ellipsis Partners for in-depth interviews on each major business area.
Oct 13	RFP Released	The Request for Proposals was sent to the seven most likely vendors.
Nov 8	Proposals Due from Vendors	SAA and Ellipsis will review proposals and narrow the field to three candidates.
Dec 4-18	Structured Demonstrations	SAA & Ellipsis will view demonstrations of key function areas from the top vendors.
Jan 2018	Final Selection & Contract Negotiation	Contract negotiated and finalized with top vendor.
Jan-July 2018	Implementation	Vendor will do their own discovery of SAA business processes and configure the system to meet SAA's specific needs. Import data from old system.
September 2018	Launch of new system	Launch will likely be scheduled to avoid any conflicts with the 2018 Joint Annual Meeting. Because the event is critical to SAA and relies heavily on the AMS for management and registrations, it is safer to switch to the new system after the event is concluded.

Highlights of RFP

The process to create the Request for Proposals document has helped define critical areas of SAA's business processes which are emphasized in the RFP. Among them are:

- **Ecommerce:** The online transaction experience for SAA members is critical. We require a robust online interface to support all of our critical revenue centers: SAA Bookstore, Membership Renewals, Education Classes, and Annual Meeting Registrations.

- **Fundraising:** As the SAA Foundation grows, we need to manage online donations, track our fund accounting appropriately, and support the Foundation's outreach and donor management efforts.

- **Integrations:** SAA is increasingly adopting the practice of acquiring "best of breed" systems rather than a holistic enterprise system. Although the AMS is central and critical, we need it to communicate data to other systems and support Single Sign-On (SSO) for many of our user-facing systems, such as our new learning management system (LMS) from BlueSky and *The American Archivist* online.

- **Communities:** Within the scope of this project is replacing our listserv system, Lyris ListManager, with a more robust and flexible system. Modern systems use the language of "online communities," because they offer many more features than just listservs. Strong integration with this new communities system is critical, as our lists are often defined and controlled by membership and component group membership. This new system will provide features and reliability that we've been craving for our listservs, as well as paving the way to grow into new features and practices that are designed to improve member engagement.

- **Reporting:** A common frustration with our current AMS is the difficulty in extracting data in meaningful ways. We need our new system to make it easier for SAA leaders and staff to make data-informed decisions and better understand the needs and behavior of our members.