

**Society of American Archivists Foundation
Board of Directors Meeting
November 4-5, 2018
Chicago, Illinois**

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

Implementation of New Association Management System

It is “All AMS All the Time” for me these days, as we are in full swing with our discovery and implementation process with NimbleAMS.

All SAA staff participated in three days of discovery meetings in September. As of this writing, we are reviewing the documents generated from the discovery to verify requirements, and then we will confirm the scope of our implementation project. Staff will be participating in trainings in both October and early November as we prepare to begin the implementation phase.

I am particularly excited that we have chosen to have some of our staff directly involved with the base configuration of the new system. This approach serves a dual purpose of providing hands-on training for SAA staff as well as reducing costs by having some of the basic setup tasks performed by SAA rather than Nimble’s team.

We have also begun our data migration conversations, and we are getting more specific with the details of our integrations with third-party systems (most notably PathLMS, which is integral to our Education programs).

We are scheduled for launch in March 2019, and we can expect all staff to have a heavier workload related to the AMS implementation during January and February, when the bulk of our Q&A testing will occur.

Of particular interest to SAAF, this system will improve our ability to solicit and process online donations, especially the processes for staff to generate thank you letters and acknowledgements. And the robust reporting tools that come with a Salesforce platform will provide a significant improvement in our ability to identify and nurture donors in the future.

We continue to be impressed and confident with Nimble’s technology, process, and personnel.

New System for Grant Proposals

We will be using a new system to manage grant proposals this year. SmarterSelect is a platform designed for proposal submission and review, and SAA has used it with great success to manage our awards program this past year.

Felicia drafted a form for the initial letter of inquiry submissions and reviewed thoroughly with Scott Cline and Nancy Beaumont. The form opened on November 1 and letters are due by December 1. A secondary submission form will be created and shared with those applicants who are encouraged to submit a full grant proposal.