

**Society of American Archivists
Council Meeting
May 20-22, 2019
Chicago, Illinois**

Staff Report: Technology

(Prepared by Web and IT Systems Administrator Matt Black and Peter Carlson)

Implementation of New Association Management System (AMS)

After years of planning and preparation, SAA has a new Association Management System!

This is the culmination of years of planning by the Council and staff, and represents a great deal of effort from the entire staff to prepare for, train on, and launch the new system.

The new AMS went live on Wednesday, April 17. Although we experienced many small issues with the launch, the overall transition was remarkably smooth. Projects and systems of this scale are inherently fraught with complexity and unforeseen complications, and we have emerged relatively unscathed.

There is a lot to celebrate:

- Most orders are now processed automatically, without any staff time required. (The old system required staff to process all orders, including e-commerce transactions, manually.)
- SAA members now benefit from some of the best security technology available today.
- Customer support requests have been minimal. The bulk of our inquiries since launch relate to members needing assistance with changing their passwords in the new system, which was expected.
- Many users have reported an improved experience in renewing their memberships or registering for events, particularly the Annual Meeting.
- The single sign-on (SSO) login integration among several of our primary systems (Main website, AMS, LMS, SAA Connect) is greatly improved and working much more reliably than with the previous system.
- The integration with the LMS (PathLMS by BlueSky) is significant. It will deliver great efficiencies for the Education staff, automatically registering customers and reporting credits, providing better security, and significantly improving the accounting and marketing data we have for our education programs. It has been a disruptive change, but we are all excited about doing things differently in ways that are better for everyone.
- Staff adoption of and proficiency in the system is excellent. We have more ideas for how the new system can improve our services than we can act on right now. The future is bright!

There is a lot still to do:

- Changes to the procedures for how our education classes are configured, purchased, and delivered have been drastic. There are many small issues to correct, particularly for courses with registrations purchased in both the old system and the new system.
- We have many updates still to make on the bookstore, and on the “Community Hub” portal in general, to make it easier for members to find what they are looking for.
- Given the cost and complexity of this substantial upgrade, our strategic approach was to focus on launching with just the basics in place. As such, our implementation of NimbleAMS will have a very long tail as we leverage the flexibility and scalability of an improved member database.
- There are many features that will improve our services that we have yet to implement, such as:
 - The ability to use coupon codes, which has been on our wish list for years;
 - Enhanced automation and customization of welcome and on-boarding messages for new members;
 - The ability to create and market product bundles with special discounting, and “flash sales” to promote important events or products;
 - Efficient handling of purchase orders and pro-forma invoices;
 - Efficient handling of acknowledgments and thank-yous for donations; and
 - Related products and other “suggestive marketing” techniques—helping members find content related to what they are viewing on a given page, and connecting products of different types (classes, books, etc.) when they relate to the same topic.

Discussion List and Community Platform

The scope of this project included a major upgrade of our discussion list platform—from Lyris to Higher Logic—to what became SAA Connect. Originally, we had planned to make this shift at the same time as the AMS launch. We changed strategy last year when Lyris, acquired by a new company, raised their prices exorbitantly and forced our hand. Through contract negotiation, we minimized the cost impact of integrating Higher Logic with both the old and new systems. And there has been benefit to both staff and members to deliver the upgrade both earlier and separately. This has also meant that Higher Logic is another system that has untapped potential. Indeed, leveraging the power of these new systems will be the driving work of the coming year. It’s also worth noting that the quality of the integration between Higher Logic and NimbleAMS is much better, faster, and more reliable than before, and it has already reduced the time staff spends supporting issues with list subscriptions.

A Future Built on Solid Technology

One of the most important aspects of this transition is one of the hardest to see or quantify, which is that we are making a paradigm shift from old technology to new. Our legacy system, MemberMax, was fraught with limitations, patches, and workarounds and SAA had outgrown it. The new system, NimbleAMS, is built on leading technology, and both the platform (Salesforce) and the vendor (Community Brands) are forward-looking organizations that are continually updating their systems to handle emerging needs. Certainly, we can see some immediate results, but the full benefit of this shift for SAA and its members will be seen in the months and years to come.

FY2019 Capital Budget (Technology Fund)

Overall the project is under budget. Nimble has performed work that we had originally budgeted for consultants.

NimbleAMS Project Cost to Complete Estimate

Activity as of May 10, 2019

	FY19 Budget				
	<u>Line</u>	<u>Activity</u>		Variance	
	<u>Amount</u>	<u>Total</u>	<u>Actual</u>	<u>\$</u>	<u>%</u>
AMS Selection					
AMS selection (Ellipsis Partners, LLC)	\$44,482		35,088		
Higher Logic implementation			7,500		
Sub-total Selection		44,482	42,588	1,894	-4.26%
Contract Review & Licensing					
AMS contract review (legal)	4,500		4,661		
Purchase of NimbleAMS (first-year licensing)	32,160		32,160		
Sub-total Review		36,660	36,821	(161)	0.44%
Design, Discovery, & Implementation					
Nimble discovery, data, and configuration services	287,200		345,050		
Travel and lodging (Nimble staff onsite at SAA HQ)	15,250				
Salesforce administration staff support - consulting	30,000		1,588		
Design and implementation project management - consulting	14,000		1,920		
Third-party integration costs	22,200		5,738		
Sub-total Project Implementation		368,650	354,295	14,355	-3.89%
		449,792	433,704	16,088	-3.58%