

**Society of American Archivists  
Council Meeting Agenda  
August 1, 2019  
Austin, Texas**

**Staff Report: Technology**  
(Prepared by Web and IT Systems Administrator Matt Black and  
Director of Administration and Finance Peter Carlson)

**Implementation of New Association Management System (AMS)**

Since the successful launch of our new AMS on April 17, our technology priorities have been focused on fully living into the new system. Recent highlights include:

- Improvements to the online store, particularly in navigation, searching, and using featured categories.
- Improvements to invoice and order confirmation templates.
- Initial issues with the integration to the LMS have been corrected, and constituents can easily access their online portals for classes. And we're continuing to introduce new efficiencies into the administrative processes for the education staff.
- Ongoing work to implement best practices in mailing address management (particularly for mailing the magazine and journal).
- Staff are quickly gaining proficiency in reporting and using dashboards, so strategic decisions can be made based on real-time data. This is a particularly drastic improvement over our previous system.

The to-do list is still very long, but we're making steady progress. And staff proficiency in the system continues to grow.

We also recently transitioned from our implementation team of NimbleAMS, our vendor, to the support team. This represents a shift from "fixing" and "building" to learning and implementing best practices. Staff is moving from a post-launch phase to a normalcy phase: from re-learning how to do tasks in a new system to leveraging the system to begin doing new things.

**Annual Meeting**

As with all other staff, IT concerns shift to the annual meeting at this time of year. This year extra effort has been given to supporting live streaming, and also to exploring best practices for supporting onsite work with a new AMS, particularly regarding taking payments onsite and ensuring proper data control with the new system.

**SOCIETY OF AMERICAN ARCHIVISTS**  
**Technology Fund**  
**For the Period Ending June 30, 2019**

<b>Expenses</b>	<b>Year-To-Date</b>	<b>Budget</b>	<b>This Year Vs. Budget</b>	
	<b>6/30/2019</b>	<b>6/30/2019</b>	<b>\$ Variance</b>	<b>% Variance</b>
<b>Staff Salaries, Wages, &amp; Bonuses</b>	<b>31,000.00</b>	<b>-</b>	<b>31,000.00</b>	<b>N/A</b>
<b>Total Salaries, Wages, &amp; Benefits</b>	<b>31,000.00</b>	<b>-</b>	<b>31,000.00</b>	<b>N/A</b>
<b>Services:</b>				
<b>Project Consulting</b>	<b>56,657.36</b>	<b>110,682.00</b>	<b>54,024.64</b>	<b>(48.81%)</b>
<b>Configuration and Customization- -Software</b>	<b>336,260.00</b>	<b>334,610.00</b>	<b>(1,650.00)</b>	<b>0.49%</b>
<b>Legal Fees</b>	<b>4,660.65</b>	<b>4,500.00</b>	<b>(160.65)</b>	<b>3.57%</b>
<b>Total Services</b>	<b>397,578.01</b>	<b>449,792.00</b>	<b>52,213.99</b>	<b>(11.61%)</b>
<b>Total Expenses</b>	<b>428,578.01</b>	<b>449,792.00</b>	<b>21,213.99</b>	<b>(4.72%)</b>