

**SAA Foundation
Board of Directors Meeting
February 19 & 20, 2025
Virtual Meeting**

**Staff Q2: Operations Report
(Prepared by: Astoria Edwards, Assistant Director, Foundation)**

The focus for FY25 is donor engagement, enhancing the donor experience, and sharing the impact of the Foundation’s Grant Programs. The Society & Foundation utilizes Nimble AMS to manage members. Staff are working with Nimble AMS support to begin their pilot program, “Donations in Experience Cloud.” The features included online donation forms, recurring gifts, abandoned cart reminders, microsites dedicated to individual funds or appeals, peer-to-peer campaigns, text-to-give, personalized thank-you messages, predictive analytics, and campaign thermometers. Anticipate implementation to begin in the 3rd quarter of FY25.

Contribution Report

Current FY25 donation trends as of December 2024 indicate that the Catalyst Fund and NDRFA Fund are trending upward compared to FY24 and FY23.

Overall Trends (FY23 - FY25):

- Total funding is declining:
 - FY23: \$66,424.00
 - FY24: \$39,818.01 (↓40% from FY23)
 - FY25 (as of Dec 2024): \$36,382.40 (↓9% from FY24 so far)
- Record count also dropping:
 - FY 2023: 632 transactions
 - FY 2024: 549 transactions
 - FY 2025 (so far): 466 transactions

Fund-Specific Insights:

- Stable or Increasing Funds:
 - Catalyst Fund (\$15,149 → \$17,243 → \$17,608.91) ↑16% since FY23
 - Mosaic Scholarship (\$17,652 → \$5,432 → \$6,511.11) ↑20% from FY24

* Restricted Funds (R)

* Unrestricted Funds (UR)

- National Disaster Recovery Fund for Archives (\$10,649 → \$10,591 → \$8,278.91) ↓22% from FY23 but still a top fund
- Biggest Declines:
 - Margaret Cross Norton Fund (\$13,125 → \$360 → \$317.91) ↓97% since FY23
 - Linda J. Henry Fund (\$988 → \$2,043 → \$192.91) ↓90% from FY24
 - Harold T. Pinkett Student of Color Award (\$5,810 → \$1,844 → \$1,828.91) ↓68% since FY23

Current FY Report

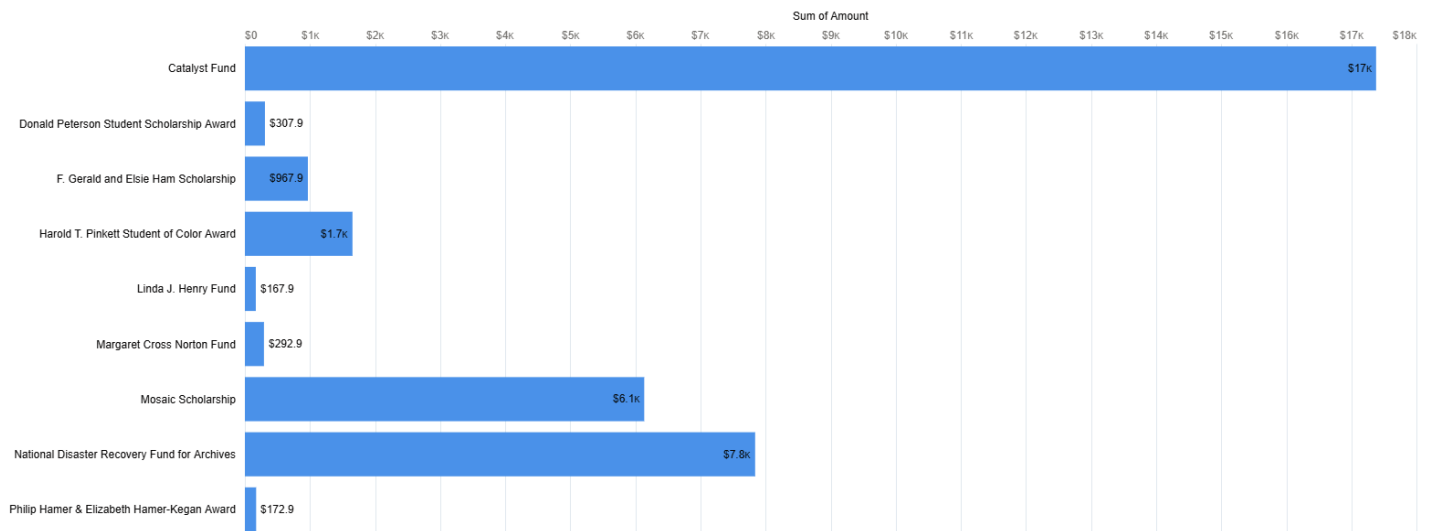


Figure 1: Current FY25 Donor Contribution

FY Trends Report

* Restricted Funds (R)
 * Unrestricted Funds (UR)

Funds	Amount & # of Donors	FY 2025	FY 2024	FY 2023	Total
Catalyst Fund (UR)	Donation amount	\$17,378.91	\$17,243.01	\$15,149.00	\$49,770.92
	# of Donations	67	115	95	277
Donald Peterson Student Scholarship Award (R)	Donation amount	\$307.92	\$250.00	\$455.00	\$1,012.92
	# of Donations	14	11	13	38
F. Gerald and Elsie Ham Scholarship (R)	Donation amount	\$967.91	\$1,790.00	\$1,961.00	\$4,718.91
	# of Donations	18	35	39	92
Harold T. Pinkett Student of Color Award (R)	Donation amount	\$1,652.91	\$1,844.00	\$5,810.00	\$9,306.91
	# of Donations	34	57	80	171
Linda J. Henry Fund (UR)	Donation amount	\$167.91	\$2,043.00	\$988.00	\$3,198.91
	# of Donations	5	15	15	35
Margaret Cross Norton Fund (UR)	Donation amount	\$292.91	\$360.00	\$13,125.00	\$13,777.91
	# of Donations	9	11	20	40
Mosaic Scholarship (R)	Donation amount	\$6,135.11	\$5,432.00	\$17,652.00	\$29,219.11
	# of Donations	157	100	140	397
National Disaster Recovery Fund for Archives (R)	Donation amount	\$7,838.91	\$10,591.00	\$10,649.00	\$29,078.91
	# of Donations	122	196	217	535
Philip Hamer & Elizabeth Hamer-Kegan Award (R)	Donation amount	\$172.91	\$265.00	\$635.00	\$1,072.91
	# of Donations	9	9	13	31
	Donation amount	\$34,915.40	\$39,818.01	\$66,424.00	\$141,157.41
	# of Donations	435	549	632	1,616

Table 1: FY23- Jan 14 2025 Trends

The quarterly donor contribution report provides a detailed summary of donations received from FY23 to January 14, 2025.

In Q1 of FY25, The Development Committee prioritized three key appeals, Mosaic, Catalyst, and NDRFA, aligning their efforts to maximize engagement and contributions.

In Q2 of FY25, the committee focused its fundraising initiatives on the Catalyst Fund, channeling resources into the Giving Tuesday campaign and End-of-Year appeals to drive donor participation.

- ❑ Catalyst Fund (UR): Significant increase in Q2 FY23 (\$11,326.00) compared to Q1 FY23 (\$595.00). Donations peaked in FY23 Q2 but dropped substantially in FY24 Q2 and FY25 Q2, showing fluctuating trends.
- ❑ Donald Peterson Student Scholarship Award (R): Low donations throughout, with peaks in Q2 FY23 (\$200.00) and Q1 FY25 (\$122.91). Q2 FY25 showed a decline to \$50.00.
- ❑ F. Gerald and Elsie Ham Scholarship (R): Highest donation in Q2 FY23 (\$960.00). Consistent decreases in FY24 and FY25, with the lowest in Q2 FY25 (\$145.00).

* Restricted Funds (R)

* Unrestricted Funds (UR)

- ❑ Harold T. Pinkett Student of Color Awards (R): Donations were highest in Q1 FY23 (\$3,089.00). FY24 and FY25 saw decreased and inconsistent trends, with the lowest in Q1 FY25 (\$422.91).
- ❑ Linda J. Henry Fund (UR): Consistently low donations across all quarters.Q2 FY25 (\$0.00) had no donations
- ❑ Margaret Cross Norton Fund (UR): Notable peak in Q2 FY23 (\$6,725.00). Donations remained modest in FY24 and FY25, with minimal fluctuation.
- ❑ Mosaic Scholarship (R): Peak donations occurred in Q2 FY23 (\$11,900.00). Significant decline in FY24 and FY25, with Q2 FY25 only receiving \$620.00.
- ❑ National Disaster Recovery Fund for Archives (R): High initial donations in Q2 FY23 (\$1,650.00). Subsequent years saw decreased and inconsistent donations, with a notable drop in Q2 FY25 (\$2,543.00).
- ❑ Philip Hamer & Elizabeth Hamer-Kegan Award (R): Fluctuating trends with the highest donations in Q2 FY23 (\$375.00). Donations remained consistently low after FY23, with Q2 FY24 showing slight improvement (\$125.00).

Quarterly Trends Report

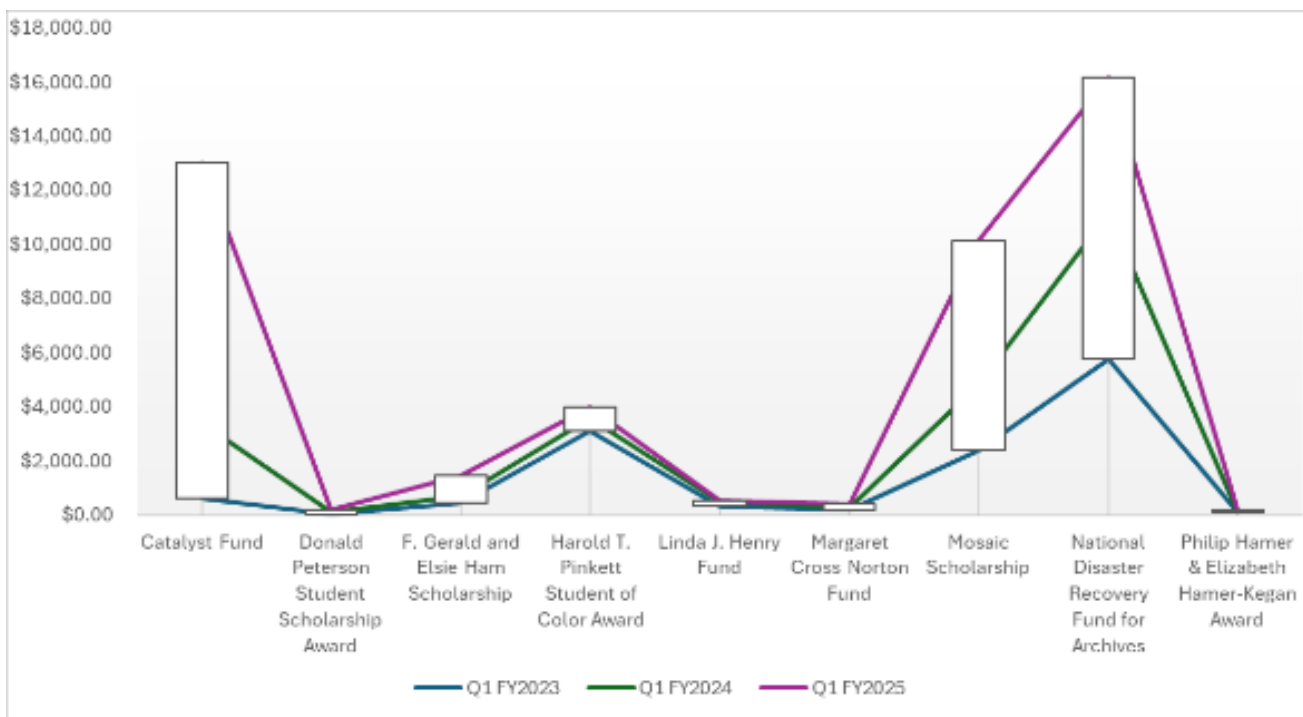


Figure 2: 1st Quarter FY 23 - Jan 14 2025 Trends

* Restricted Funds (R)
 * Unrestricted Funds (UR)

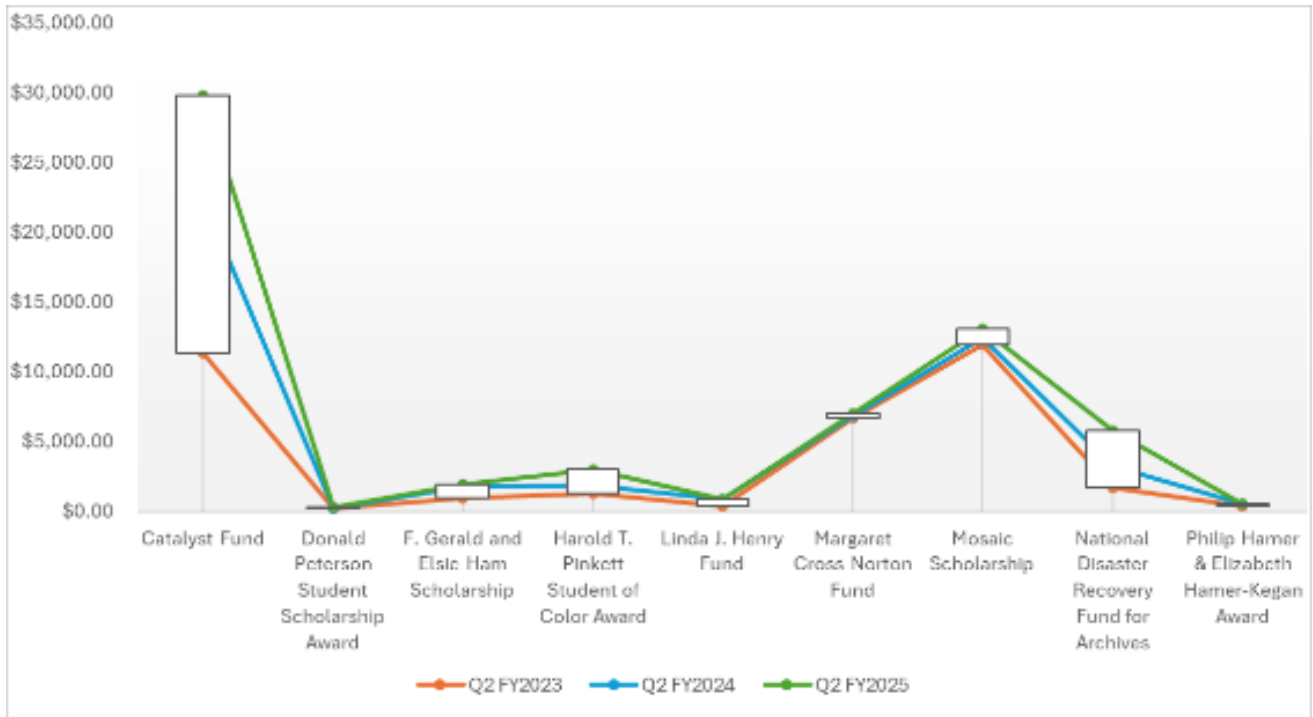


Figure 3: : 2nd Quarter FY 23 - Jan 14 2025 Trends

* Restricted Funds (R)
 * Unrestricted Funds (UR)

Quarter	Catalyst Fund	# of Donors	Peterson Fund	# of Donors	Ham Fund	# of Donors	Pinkett Fund	# of Donors	Henry Fund	# of Donors
Q1 FY2023	\$595.00	15	\$25.00	1	\$425.00	12	\$3,089.00	24	\$300.00	4
Q2 FY2023	\$11,326.00	46	\$200.00	5	\$960.00	8	\$1,300.00	19	\$400.00	4
Q3 FY2023	\$1,580.00	14	\$80.00	4	\$285.00	9	\$571.00	18	\$200.00	4
Q4 FY2023	\$1,648.00	20	\$150.00	3	\$291.00	10	\$850.00	19	\$88.00	3
Q1 FY2024	\$2,800.00	27	\$60.00	3	\$270.00	10	\$478.00	20	\$175.00	3
Q2 FY2024	\$11,142.99	47	\$10.00	1	\$835.00	8	\$580.00	14	\$500.00	4
Q3 FY2024	\$1,450.02	20	\$30.00	2	\$400.00	7	\$436.00	10	\$250.00	3
Q4 FY2024	\$1,850.00	21	\$150.00	5	\$285.00	10	\$350.00	13	\$1,118.00	5
Q1 FY2025	\$9,625.91	17	\$122.91	7	\$762.91	10	\$422.91	15	\$57.91	3
Q2 FY2025	\$7,343.00	46	\$50.00	3	\$145.00	6	\$1,095.00	14	\$0.00	0
Q3 FY2025	\$410.00	4	\$135.01	4	\$60.00	2	\$135.00	5	\$110.00	2
Total	\$49,770.92	277	\$1,012.92	38	\$4,718.91	92	\$9,306.91	171	\$3,198.91	35

Quarter	Norton Fund	# of Donors	Mosaic Fund	# of Donors	NDRFA Fund	# of Donors	Hamer-Kegan Fund	# of Donors	Total Donations	Total # of Donors
Q1 FY2023	\$200.00	8	\$2,370.00	36	\$5,747.00	112	\$100.00	4	\$12,851.00	216
Q2 FY2023	\$6,725.00	4	\$11,900.00	37	\$1,650.00	33	\$375.00	3	\$34,836.00	159
Q3 FY2023	\$100.00	3	\$2,291.00	40	\$846.00	29	\$60.00	2	\$6,013.00	123
Q4 FY2023	\$6,100.00	5	\$1,091.00	27	\$2,406.00	43	\$100.00	4	\$12,724.00	134
Q1 FY2024	\$85.00	4	\$2,446.00	29	\$5,410.00	105	\$25.00	1	\$11,749.00	202
Q2 FY2024	\$150.00	3	\$550.00	19	\$1,623.00	22	\$125.00	4	\$15,515.99	122
Q3 FY2024	\$50.00	1	\$941.00	26	\$573.00	20	\$90.00	3	\$4,220.02	92
Q4 FY2024	\$75.00	3	\$1,495.00	26	\$2,985.00	49	\$25.00	1	\$8,333.00	133
Q1 FY2025	\$132.91	5	\$5,305.11	131	\$5,015.91	87	\$62.91	4	\$21,509.39	279
Q2 FY2025	\$150.00	3	\$620.00	18	\$2,543.00	28	\$75.00	3	\$12,021.00	121
Q3 FY2025	\$10.00	1	\$210.00	8	\$255.00	6	\$35.00	2	\$1,360.01	34
Total	\$13,777.91	40	\$29,219.11	397	\$29,053.91	534	\$1,072.91	31	\$141,132.41	1615

Table 2: Q1 & Q2 FY 23 - Jan 14 2025 Trends

* Restricted Funds (R)

* Unrestricted Funds (UR)

Monthly Trends Report

Funds		December				November			
		FY25	FY24	FY23	Subtotal	FY25	FY24	FY23	Subtotal
Catalyst Fund (UR)	Amount	6845	6980	6375	20201	450	3637.99	4725	8812.99
	Count	38	21	21	80	6	24	19	49
Donald Peterson Student Scholarship Award (R)	Amount	\$0.00	\$0.00	\$150.00	\$150.00	\$25.00	\$0.00	\$25.00	\$50.00
	Count	0	0	3	3	2	0	1	3
F. Gerald and Elsie Ham Scholarship (R)	Amount	\$50.00	\$150.00	\$275.00	\$475.00	\$25.00	\$575.00	\$525.00	\$1,125.00
	Count	2	1	2	5	1	3	2	6
Harold T. Pinkett Student of Color Award (R)	Amount	\$70.00	\$75.00	\$575.00	\$720.00	\$300.00	\$380.00	\$475.00	\$1,155.00
	Count	4	3	5	12	3	6	7	16
Linda J. Henry Fund (UR)	Amount	\$0.00	\$500.00	\$350.00	\$850.00	\$0.00	\$0.00	\$25.00	\$25.00
	Count	0	4	2	6	0	0	1	1
Margaret Cross Norton Fund (UR)	Amount	\$0.00	\$0.00	\$225.00	\$225.00	\$150.00	\$100.00	\$6,500.00	\$6,750.00
	Count	0	0	3	3	3	1	1	5
Mosaic Scholarship (R)	Amount	\$185.00	\$275.00	\$440.00	\$900.00	\$210.00	\$100.00	\$11,000.00	\$11,310.00
	Count	5	8	11	24	7	4	13	24
National Disaster Recovery Fund for Archives (R)	Amount	\$885.00	\$1,225.00	\$1,100.00	\$3,210.00	\$75.00	\$40.00	\$175.00	\$290.00
	Count	8	7	16	31	3	2	4	9
Philip Hamer & Elizabeth Hamer-Kegan Award (R)	Amount	\$25.00	\$75.00	\$325.00	\$425.00	\$25.00	\$0.00	\$50.00	\$75.00
	Count	1	2	2	5	1	0	1	2
	Amount	\$8,060.00	\$9,280.00	\$9,816.00	\$27,156.00	\$1,260.00	\$4,832.99	\$23,500.00	\$29,592.99
	Count	58	46	65		26	40	49	115

Table 3: Monthly FY 23 - Jan 14, 2025 (November – December) Trends

Funds		October				September			
		FY25	FY24	FY23	Subtotal	FY25	FY24	FY23	Subtotal
Catalyst Fund (UR)	Amount	48	525	225	798	\$7,525.00	\$508.00	\$188.00	\$7,866.00
	Count	2	2	6	10	4	11	4	9
Donald Peterson Student Scholarship Award (R)	Amount	\$25.00	\$10.00	\$25.00	\$60.00	\$5.00	\$10.00	\$0.00	\$30.00
	Count	1	1	1	3	1	1	0	2
F. Gerald and Elsie Ham Scholarship (R)	Amount	\$70.00	\$110.00	\$160.00	\$340.00	\$655.00	\$160.00	\$100.00	\$835.00
	Count	3	4	4	11	8	4	1	13
Harold T. Pinkett Student of Color Award (R)	Amount	\$725.00	\$125.00	\$250.00	\$1,100.00	\$55.00	\$208.00	\$115.00	\$355.00
	Count	7	5	7	19	2	9	5	14
Linda J. Henry Fund (UR)	Amount	\$0.00	\$0.00	\$25.00	\$25.00	\$25.00	\$150.00	\$100.00	\$150.00
	Count	0	0	1	1	1	2	1	3
Margaret Cross Norton Fund (UR)	Amount	\$0.00	\$50.00	\$0.00	\$50.00	\$25.00	\$60.00	\$25.00	\$50.00
	Count	0	2	0	2	1	3	1	2
Mosaic Scholarship (R)	Amount	\$225.00	\$175.00	\$460.00	\$860.00	\$1,206.00	\$260.00	\$425.00	\$3,392.00
	Count	6	7	13	26	4	8	8	22
National Disaster Recovery Fund for Archives (R)	Amount	\$1,583.00	\$358.00	\$375.00	\$2,316.00	\$265.00	\$595.00	\$333.00	\$823.00
	Count	17	13	13	43	7	11	8	17
Philip Hamer & Elizabeth Hamer-Kegan Award (R)	Amount	\$25.00	\$50.00	\$0.00	\$75.00	\$5.00	\$25.00	\$75.00	\$80.00
	Count	1	2	0	3	1	1	3	4
	Amount	\$2,701.00	\$1,403.00	\$1,520.00	\$5,624.00	\$9,766.00	\$2,454.00	\$1,361.00	\$13,581.00
	Count	37	36	45	118	29	26	31	86

Table 4: Monthly FY 23 - Jan 14, 2025 (September - October) Trends

* Restricted Funds (R)
 * Unrestricted Funds (UR)

Funds		August				July			
		FY25	FY24	FY23	Subtotal	FY25	FY24	FY23	Subtotal
Catalyst Fund (UR)	Amount	\$1,918.00	\$508.00	\$198.00	\$2,624.00	\$182.91	\$2,139.00	\$209.00	\$2,530.91
	Count	8	11	7	26	5	15	4	24
Donald Peterson Student Scholarship Award (R)	Amount	\$10.00	\$10.00	\$25.00	\$45.00	\$107.91	\$25.00	\$0.00	\$132.91
	Count	1	1	1	3	5	1	0	6
F. Gerald and Elsie Ham Scholarship (R)	Amount	\$0.00	\$160.00	\$175.00	\$335.00	\$107.91	\$30.00	\$150.00	\$287.91
	Count	0	4	7	11	2	2	4	8
Harold T. Pinkett Student of Color Award (R)	Amount	\$260.00	\$208.00	\$215.00	\$683.00	\$107.91	\$85.00	\$2,759.00	\$2,951.91
	Count	8	9	9	26	5	4	10	19
Linda J. Henry Fund (UR)	Amount	\$25.00	\$150.00	\$25.00	\$200.00	\$7.91	\$0.00	\$175.00	\$182.91
	Count	1	2	1	4	1	0	2	3
Margaret Cross Norton Fund (UR)	Amount	\$25.00	\$60.00	\$125.00	\$210.00	\$82.91	\$25.00	\$50.00	\$157.91
	Count	1	3	5	9	3	1	2	6
Mosaic Scholarship (R)	Amount	\$3,491.20	\$260.00	\$1,551.00	\$5,302.20	\$607.91	\$425.00	\$394.00	\$1,426.91
	Count	114	8	12	134	13	11	16	40
National Disaster Recovery Fund for Archives (R)	Amount	\$4,543.00	\$595.00	\$5,259.00	\$10,397.00	\$207.91	\$4,590.00	\$155.00	\$4,952.91
	Count	73	11	97	181	7	92	7	106
Philip Hamer & Elizabeth Hamer-Kegan Award (R)	Amount	\$25.00	\$25.00	\$0.00	\$50.00	\$32.91	\$0.00	\$25.00	\$57.91
	Count	1	1	0	2	2	0	1	3
	Amount	\$10,297.20	\$1,976.00	\$7,573.00	\$19,846.20	\$1,446.19	\$7,319.00	\$3,917.00	\$12,682.19
	Count	207	50	139	396	43	126	46	215

Table 5: Monthly FY 23 - Jan 14, 2025 (July - August) Trends

* Restricted Funds (R)

* Unrestricted Funds (UR)