

# **SAA Foundation Board Meeting February 23-24, 2026 Virtual Meeting**

## **Staff Q2 (October – December 2025): Operations Report (Prepared by: Astoria Edwards, Governance Director)**

The second quarter of FY26 demonstrated strong revenue performance in several key funds, continued growth in average gift size, and a stabilizing donor participation pattern following early declines observed in Q1. Total giving in Q2 reflects the influence of seasonal generosity in the December giving cycle, with notable increases across core funds, including the Catalyst Fund, Mosaic Fund, and NDRFA (National Disaster Recovery Fund for Archives).

While donor volume remains below FY25 levels, Q2's performance indicates improving engagement as we entered the mid-year period.

### **Fiscal Performance Overview (Q2 FY26)**

Across all funds, Q2 FY26 giving totaled:

- October: \$2,750
- November: \$3,320
- December: \$10,552

December produced the strongest performance of the quarter across nearly all funds, with particularly notable surges in the Catalyst and NDRFA funds.

### **Year-to-Date Snapshot (FY26 YTD)**

- Total FY26 revenue to date: \$43,523.09
- Total number of donations: 475
- Average gift size: \$91.63, the highest in three years and a meaningful indicator of increasing per donor value despite overall lower participation.

### **Fund-Level Performance (Q2)**

- Catalyst Fund: Steady growth across the quarter culminating in a strong December spike.
- NDRFA: Significant year-end performance driven by December giving.

- Mosaic Fund: Rebounded from a quieter October with strong giving in November and December.
- Other Designated Funds (Henry, Pinkett, Peterson, Ham, Hamer Kegan): Activity remained modest but consistent, reflecting typical small-dollar patterns. December accounted for most of their quarterly revenue.

### **Donor Activity Trends**

- Year-to-date donor participation is 26.6% lower than FY25.
- Annual donor counts:
  - FY26: 475
  - FY25: 647
  - FY24: 549
- Despite lower participation, the average gift size is at a three-year high, indicating deeper engagement among current donors:
  - FY26: \$91.63
  - FY25: \$72.80
  - FY24: \$72.53

Q2's stronger gift activity, particularly in December, suggests a positive trajectory as we move into Q3.

## Fiscal Year Trends

Fiscal Year	FY26		FY25		FY24		Total	
Fund Name	Amount	# of Donations	Amount	# of Donations	Amount	# of Donations	Amount	# of Donations
Catalyst Fund	\$19,530.00	118	\$20,388.91	91	\$17,243.01	115	\$57,161.92	324
Donald Peterson Fund	\$165.00	6	\$582.92	24	\$250.00	11	\$997.92	41
F. Gerald and Elsie Ham Fund	\$1,295.00	27	\$1,227.91	26	\$1,790.00	35	\$4,312.91	88
Harold T. Pinkett Fund	\$1,794.00	25	\$2,423.91	57	\$1,844.00	57	\$6,061.91	139
Linda J. Henry Fund	\$400.00	7	\$1,360.91	13	\$2,043.00	15	\$3,803.91	35
Margaret Cross Norton Fund	\$6,275.00	11	\$472.91	16	\$360.00	11	\$7,107.91	38
Mosaic Fund	\$6,303.00	150	\$9,462.11	227	\$5,432.00	100	\$21,197.11	477
National Disaster Recovery Fund for Archives	\$7,646.09	127	\$10,896.91	179	\$10,591.00	196	\$29,134.00	502
Philip Hamer & Elizabeth Hamer-Kegan Fund	\$115.00	4	\$282.91	14	\$265.00	9	\$662.91	27
Total	\$43,523.09	475	\$47,099.40	647	\$39,818.01	549	\$130,440.50	1671

## Quarterly Funds Trends

Fund Name	Catalyst Fund		Donald Peterson Fund		F. Gerald and Elsie Ham Fund	
Quarter	Amount	# of Donations	Amount	# of Donations	Amount	# of Donations
Q2 FY2026	\$11,192.00	52	\$65.00	3	\$920.00	15
Q1 FY2026	\$8,338.00	66	\$100.00	3	\$375.00	12
Q4 FY2025	\$1,705.00	9	\$175.00	7	\$100.00	4
Q3 FY2025	\$1,715.00	19	\$235.01	7	\$220.00	6
Q2 FY2025	\$7,343.00	46	\$50.00	3	\$145.00	6
Q1 FY2025	\$9,625.91	17	\$122.91	7	\$762.91	10
Q4 FY2024	\$1,850.00	21	\$150.00	5	\$285.00	10
Q3 FY2024	\$1,450.02	20	\$30.00	2	\$400.00	7
Q2 FY2024	\$11,142.99	47	\$10.00	1	\$835.00	8
Q1 FY2024	\$2,800.00	27	\$60.00	3	\$270.00	10
Total	\$57,161.92	324	\$997.92	41	\$4,312.91	88

Fund Name	Harold T. Pinkett Fund		Linda J. Henry Fund		Margaret Cross Norton Fund	
Quarter	Amount	# of Donations	Amount	# of Donations	Amount	# of Donations
Q2 FY2026	\$844.00	16	\$375.00	6	\$175.00	6
Q1 FY2026	\$950.00	9	\$25.00	1	\$6,100.00	5
Q4 FY2025	\$370.00	12	\$1,143.00	6	\$50.00	2
Q3 FY2025	\$536.00	16	\$160.00	4	\$140.00	6
Q2 FY2025	\$1,095.00	14	\$0.00	0	\$150.00	3
Q1 FY2025	\$422.91	15	\$57.91	3	\$132.91	5
Q4 FY2024	\$350.00	13	\$1,118.00	5	\$75.00	3
Q3 FY2024	\$436.00	10	\$250.00	3	\$50.00	1
Q2 FY2024	\$580.00	14	\$500.00	4	\$150.00	3
Q1 FY2024	\$478.00	20	\$175.00	3	\$85.00	4
Total	\$6,061.91	139	\$3,803.91	35	\$7,107.91	38

Fund Name	Mosaic Fund		National Disaster Recovery Fund for Archives		Philip Hamer & Elizabeth Hamer-Kegan Fund		Total	
Quarter	Amount	# of Donations	Amount	# of Donations	Amount	# of Donations	Amount	# of Donations
Q2 FY2026	\$1,446.00	37	\$1,515.00	35	\$90.00	2	\$16,622.00	172
Q1 FY2026	\$4,857.00	113	\$6,131.09	92	\$25.00	2	\$26,901.09	303
Q4 FY2025	\$2,686.00	50	\$2,210.00	34	\$75.00	3	\$8,514.00	127
Q3 FY2025	\$851.00	28	\$1,128.00	30	\$70.00	4	\$5,055.01	120
Q2 FY2025	\$620.00	18	\$2,543.00	28	\$75.00	3	\$12,021.00	121
Q1 FY2025	\$5,305.11	131	\$5,015.91	87	\$62.91	4	\$21,509.39	279
Q4 FY2024	\$1,495.00	26	\$2,985.00	49	\$25.00	1	\$8,333.00	133
Q3 FY2024	\$941.00	26	\$573.00	20	\$90.00	3	\$4,220.02	92
Q2 FY2024	\$550.00	19	\$1,623.00	22	\$125.00	4	\$15,515.99	122
Q1 FY2024	\$2,446.00	29	\$5,410.00	105	\$25.00	1	\$11,749.00	202
Total	\$21,197.11	477	\$29,134.00	502	\$662.91	27	\$130,440.50	1671

## Monthly Fund Trends

Month	December					
Quarter & Fiscal Year	Q2 FY2026		Q2 FY2025		Q2 FY2024	
Funds	Amount	# of Donations	Amount	# of Donations	Amount	# of Donations
Catalyst Fund	\$7,327.00	38	\$6,845.00	38	\$6,980.00	21
Donald Peterson Fund	\$25.00	1	\$0.00	0	\$0.00	0
F. Gerald and Elsie Ham Fund	\$300.00	9	\$50.00	2	\$150.00	1
Harold T. Pinkett Fund	\$469.00	10	\$70.00	4	\$75.00	3
Linda J. Henry Fund	\$350.00	5	\$0.00	0	\$500.00	4
Margaret Cross Norton Fund	\$125.00	4	\$0.00	0	\$0.00	0
Mosaic Fund	\$896.00	21	\$185.00	5	\$275.00	8
National Disaster Recovery Fund for Archives	\$970.00	21	\$885.00	8	\$1,225.00	7
Philip Hamer & Elizabeth Hamer-Kegan Fund	\$90.00	2	\$25.00	1	\$75.00	2
Total	\$10,552.00	111	\$8,060.00	58	\$9,280.00	46

Month	November					
Quarter & Fiscal Year	Q2 FY2026		Q2 FY2025		Q2 FY2024	
Funds	Amount	# of Donations	Amount	# of Donations	Amount	# of Donations
Catalyst Fund	\$1,790.00	7	\$450.00	6	\$3,637.99	24
Donald Peterson Fund	\$15.00	1	\$25.00	2	\$0.00	0
F. Gerald and Elsie Ham Fund	\$595.00	5	\$25.00	1	\$575.00	3
Harold T. Pinkett Fund	\$250.00	2	\$300.00	3	\$380.00	6
Linda J. Henry Fund	\$25.00	1	\$0.00	0	\$0.00	0
Margaret Cross Norton Fund	\$25.00	1	\$150.00	3	\$100.00	1
Mosaic Fund	\$425.00	11	\$210.00	7	\$100.00	4
National Disaster Recovery Fund for Archives	\$195.00	7	\$75.00	3	\$40.00	2
Philip Hamer & Elizabeth Hamer-Kegan Fund	\$0.00	0	\$25.00	1	\$0.00	0
Total	\$3,320.00	35	\$1,260.00	26	\$4,832.99	40

Month	October					
Quarter & Fiscal Year	Q2 FY2026		Q2 FY2025		Q2 FY2024	
Funds	Amount	# of Donations	Amount	# of Donations	Amount	# of Donations
Catalyst Fund	\$2,075.00	7	\$48.00	2	\$525.00	2
Donald Peterson Fund	\$25.00	1	\$25.00	1	\$10.00	1
F. Gerald and Elsie Ham Fund	\$25.00	1	\$70.00	3	\$110.00	4
Harold T. Pinkett Fund	\$125.00	4	\$725.00	7	\$125.00	5
Linda J. Henry Fund	\$0.00	0	\$0.00	0	\$0.00	0
Margaret Cross Norton Fund	\$25.00	1	\$0.00	0	\$50.00	2
Mosaic Fund	\$125.00	5	\$225.00	6	\$175.00	7
National Disaster Recovery Fund for Archives	\$350.00	7	\$1,583.00	17	\$358.00	13
Philip Hamer & Elizabeth Hamer-Kegan Fund	\$0.00	0	\$25.00	1	\$50.00	2
Total	\$2,750.00	26	\$2,701.00	37	\$1,403.00	36

Month	September					
Quarter & Fiscal Year	Q1 FY2026		Q1 FY2025		Q1 FY2024	
Funds	Amount	# of Donations	Amount	# of Donations	Amount	# of Donations
Catalyst Fund	\$533.00	4	\$7,525.00	4	\$153.00	1
Donald Peterson Fund	\$0.00	0	\$5.00	1	\$25.00	1
F. Gerald and Elsie Ham Fund	\$50.00	2	\$655.00	8	\$80.00	4
Harold T. Pinkett Fund	\$100.00	3	\$55.00	2	\$185.00	7
Linda J. Henry Fund	\$0.00	0	\$25.00	1	\$25.00	1
Margaret Cross Norton Fund	\$6,050.00	3	\$25.00	1	\$0.00	0
Mosaic Fund	\$1,581.00	14	\$1,206.00	4	\$1,761.00	10
National Disaster Recovery Fund for Archives	\$270.00	8	\$265.00	7	\$225.00	2
Philip Hamer & Elizabeth Hamer-Kegan Fund	\$25.00	1	\$5.00	1	\$0.00	0
Total	\$8,609.00	35	\$9,766.00	29	\$2,454.00	26

Month	August					
Quarter & Fiscal Year	Q1 FY2026		Q1 FY2025		Q1 FY2024	
Funds	Amount	# of Donations	Amount	# of Donations	Amount	# of Donations
Catalyst Fund	\$2,705.00	59	\$1,918.00	8	\$508.00	11
Donald Peterson Fund	\$0.00	0	\$10.00	1	\$10.00	1
F. Gerald and Elsie Ham Fund	\$100.00	5	\$0.00	0	\$160.00	4
Harold T. Pinkett Fund	\$50.00	2	\$260.00	8	\$208.00	9
Linda J. Henry Fund	\$0.00	0	\$25.00	1	\$150.00	2
Margaret Cross Norton Fund	\$0.00	0	\$25.00	1	\$60.00	3
Mosaic Fund	\$2,976.00	90	\$3,491.20	114	\$260.00	8
National Disaster Recovery Fund for Archives	\$5,168.09	69	\$4,543.00	73	\$595.00	11
Philip Hamer & Elizabeth Hamer-Kegan Fund	\$0.00	1	\$25.00	1	\$25.00	1
Total	\$10,999.09	226	\$10,297.20	207	\$1,976.00	50

Month	July					
Quarter & Fiscal Year	Q1 FY2026		Q1 FY2025		Q1 FY2024	
Funds	Amount	# of Donations	Amount	# of Donations	Amount	# of Donations
Catalyst Fund	\$5,100.00	3	\$182.91	5	\$2,139.00	15
Donald Peterson Fund	\$100.00	3	\$107.91	5	\$25.00	1
F. Gerald and Elsie Ham Fund	\$225.00	5	\$107.91	2	\$30.00	2
Harold T. Pinkett Fund	\$800.00	4	\$107.91	5	\$85.00	4
Linda J. Henry Fund	\$25.00	1	\$7.91	1	\$0.00	0
Margaret Cross Norton Fund	\$50.00	2	\$82.91	3	\$25.00	1
Mosaic Fund	\$300.00	9	\$607.91	13	\$425.00	11
National Disaster Recovery Fund for Archives	\$693.00	15	\$207.91	7	\$4,590.00	92
Philip Hamer & Elizabeth Hamer-Kegan Fund	\$0.00	0	\$32.91	2	\$0.00	0
Total	\$7,293.00	42	\$1,446.19	43	\$7,319.00	126