

**Society of American Archivists Foundation
Board of Directors Meeting
May 9-10, 2016
Chicago, Illinois**

**SAAF Development Committee: Development Plan
2016 Updates – Yearly Giving and Time Line**

(Development Committee, Carla Summers, Chair, Nancy Beaumont, James Fogerty, Brenda Gunn, and Chris Ward; SAA staff, Peter Carlson)

Elements of the SAAF 2015-2016 Development Plan, approved August 2015, are updated in this document focusing on the yearly giving tables and the time line. These updates should be read in the context of the Plan’s full document.

STRATEGY 1 ESTABLISH RELIABLE EXPECTATIONS FOR THE ANNUAL APPEAL

The table below, although not specific to the Annual Appeal, reflects the yearly history of all fundraising. The donor numbers reflect unique number of donors; please note that many donors give to more than one fund throughout the year including the Cross and Pinkett funds.

Fiscal Year	Donors	Amount Given OVERALL
Holdings Overall		
2016 to March	351	\$44,817.00
2015	304	\$41,741.00
2014	210	\$55,680.00
2013	189	\$34,960.00

It was recommended that the SAAF define parameters for identifying gifts received only during the Annual Appeal. The table below defines all gifts received in December – January for the 2015-16 winter appeal. By far the greatest giving activity is during the traditional Annual Appeal. The committee will report in August on the success of the Day of Giving. These numbers are a subset of yearly giving. Numbers of donors in the subsets of yearly giving by fund reflect total number of donors.

Fiscal Year	Donors	Amount Given ANNUAL APPEAL
2016 Dec. and Jan.	117 (unique donors)	\$28,760.00

Overview of giving for the Strategic Growth Fund is as follows. These numbers are a subset of yearly giving. Numbers of donors in the subsets of yearly giving by fund reflect total number of donors.

Fiscal Year	Donors	Amount Given STRATEGIC GROWTH
Holdings in Fund		
2016 to March	52	\$10,900.00
2015	79	\$24,882.00
2014	66	\$24,430.00
2013	31	\$11,464.00

STRATEGY 2 EXTEND THE SUCCESSFUL WORK OF THE NATIONAL DISASTER RECOVERY FUND FOR ARCHIVES

Established by the Society of Southwest Archivists and SAA to address archival repositories' stabilization and recovery needs in the wake of Hurricanes Katrina and Rita, support has been broadened to provide grants for recovery of archival collections from major disasters, regardless of region or repository type. SAA's Preservation Section and other groups have been instrumental in raising money for this Fund. Overview of giving for this Fund is as follows. These numbers are a subset of yearly giving. Numbers of donors in the subsets of yearly giving by fund reflect total number of donors.

FY	Donors	Amount Given NDRFA
Holdings in Fund		
2016 to March	57	\$4,257.00
2015	51	\$2,719.00
2014	68	\$5,306.00
2013	92	\$6,966.00

STRATEGY 3 PROMOTE THE DIVERSITY OF THE PROFESSION

SAA has adopted as its core value and central mission the creation of a diverse profession and an inclusive historical record. The Mosaic Scholarship Fund is the premier way in which SAAF promotes diversity in the American archives profession. This Fund provides financial support to minority students who are pursuing graduate education in archival science. **The Mosaic Fund was the focus of our 2015 annual appeal.** History of giving is as follows. The numbers are a subset of yearly giving. Numbers of donors in the subsets of yearly giving by fund reflect total number of donors.

FY	Donors	Amount Given MOSAIC
Holdings in Fund		
2016 to March	107	\$19,109.00
2015	38	\$2,875.00
2014	32	\$2,340.00
2013	25	\$1,453.00

Remember, one Mosaic scholarship = \$5,000.

Time Line Dates as Defined in 2015-2016

August 2015, Appoint Annual Appeal Committee, Board
October 2015, Create mailing lists for annual appeal, Staff
October 2015, Deadline for Nov/Dec Outlook -- submit copy for annual report, Annual Appeal Committee
October 2015, Draft of Annual Appeal Letters to Board, Annual Appeal Committee
October 2015, Annual Appeal Letters Approved, Board and Staff
November 2015, Annual Appeal Letters Go Out, Staff
November 2015, Personalize website for annual appeal, Annual Appeal Committee
November and early December 2015, Personal calls, Board
January 2016, Annual Fund Thank You letters completed and mailed as appropriate, Board and Staff
April, 2016, Create Society wide list for direct mail for MayDay, **Annual Appeal Committee**
May 1, 2016, Direct mailing, Staff
May, 2016 Call target prospects, Board

Time Line Dates Proposed in 2016-2017

August 2016, Appoint Annual Appeal Committee, Board – tasks will be to manage traditional annual appeal and to decide on nature of appeal in spring.
October 2016, Create mailing lists for annual appeal, Staff
October 2016, Deadline for Nov/Dec Outlook -- submit copy for Foundations annual report, Annual Appeal Committee
October 2016, Draft of Annual Appeal Letters to Board, Annual Appeal Committee
October 2016, Annual Appeal Letters Approved, Board
November 2016, Annual Appeal Letters Go Out, Staff
November 2016, Personalize website for annual appeal, Annual Appeal Committee and Staff
November and early December 2016, Personal calls, Board
January 2017, Annual Appeal Thank You letters completed and mailed as appropriate, Board and Staff
April, 2017, Initiate spring appeal – a day of giving on social media or a direct mail for MayDay, Annual Appeal Committee
May 1, 2017, Mount online campaign or do direct mailing, Staff
May, 2017 Call target prospects, Board