

**Society of American Archivists Foundation  
Board of Directors Meeting  
May 6 & 10, 2024  
Chicago, IL (Virtual)**

**2<sup>nd</sup> Quarter Staff Report: Operations  
(Prepared by Astoria Edwards, Assistant Director, Foundation)**

The operational work plan spanning FY24-27 is intricately linked to the SAA Foundation Strategic Plan (2022-2025), specifically targeting the goals of diversifying and expanding the Foundation's donor community and funding streams, as well as building infrastructure to enhance fundraising and giving opportunities. The initiatives outlined below directly align with various components of the strategic plan:

- 2.2.A. Simplify and expand methods for giving to the SAA Foundation.
- 2.2.B. Foster collaboration with various SAA stakeholders to develop targeted appeals.
- 3.3.A. Establish a Planned Giving Program to encourage long-term philanthropic commitments.
- 3.3.B. Develop a corporate giving program to engage businesses in supporting the Foundation's mission.

These initiatives are strategically designed to achieve the SAA Foundation's overarching objectives, as outlined in its strategic plan, by facilitating easier and more diverse avenues for donations, fostering partnerships for targeted fundraising efforts, and establishing sustainable giving programs to ensure the Foundation's long-term success.

Fiscal Year 2024 (FY24)

Q4 (April - June):

- Research and select charity registration vendors: Explore options and select vendors for charity registration.
- Finalize FY25 development schedule and plan for cultivation communications before the Annual Meeting: Detail the development schedule for the upcoming fiscal year and plan communications strategies.
- Planned Giving Preparation: Review and clarify current planned giving policies and secure legal/financial advisor.
- Begin building a recognition society (Development Committee): Collaborate with the Development Committee to initiate the process of establishing a recognition society.

## Fiscal Year 2025 (FY25)

### Q1 (July - September):

- Begin charity registration process for top 10 states: Commence the charity registration process in the top 10 states where SAA Foundation receives donations.
- Prepare Annual Report for the Foundation: Compile and prepare the Annual Report documenting the Foundation's achievements and financial status.

### Q2 (October - December):

- Design and develop website content for the Foundation: Develop engaging website content to enhance the Foundation's online presence.
- Finalize Annual Report: Complete and review the Annual Report for public distribution.
- Explore online giving options: Investigate various online giving platforms and strategies to facilitate donations and membership growth.
- Explore and design a social media plan for the SAA Foundation: Develop a comprehensive plan for leveraging social media to enhance visibility and engagement.
- Explore establishing a Sustainer Program: Investigate the feasibility of implementing a sustainer program for ongoing donor support.
- Explore a digital list growth campaign: Strategize methods for expanding the Foundation's prospect pool through digital outreach.

### Q3 (January - March):

- Test and implement online giving options: Execute selected online giving strategies and evaluate their effectiveness.
- Share plans for social media plan and digital list growth campaign: Communicate finalized plans for social media and digital outreach initiatives.

### Q4 (April - June):

- Finalize FY26 development schedule and plan for cultivation communications before the Annual Meeting: Detail the development schedule for the next fiscal year and plan communications strategies.
- Refresh online giving options: Review and update online giving platforms and strategies for optimal performance.

## Fiscal Year 2026 (FY26)

### Q1 (July - September):

- Charity registration process for top 11-20 states: Phase II
- Prepare Annual Report for the Foundation: Compile and prepare the Annual Report for the fiscal year.
- Planned Giving rollout: Launch planned giving messaging, promotional materials, and recognition society initiatives.

### Q2 (October - December):

- Explore corporate giving program: Investigate the establishment of a corporate giving program to diversify funding sources.
- Finalize the Annual Report: Complete and review the Annual Report for distribution.

### Q3 (January - March):

- Share refreshed plans for SAAF philanthropic outreach: Communicate updated strategies for philanthropic outreach to stakeholders.

Q4 (April - June):

- Explore establishing a Sustainer Program: Assess the feasibility and implementation plan for a sustainer program.
- Finalize FY26 development schedule and plan for cultivation communications before the Annual Meeting: Detail the development schedule for the upcoming fiscal year and plan communications strategies.
- Develop a corporate giving program: Further develop and finalize the corporate giving program.

Fiscal Year 2027 (FY27)

Q1 (July - September):

- Prepare Annual Report for the Foundation: Compile and prepare the Annual Report for the fiscal year.
- Promote corporate giving program: Launch promotional activities to increase awareness and participation in the corporate giving program.