

# Society of American Archivists Council Meeting May 12 & 15, 2025

## Staff 3<sup>rd</sup> Quarter: Operations Report (Prepared by Cherie Newell, COO)

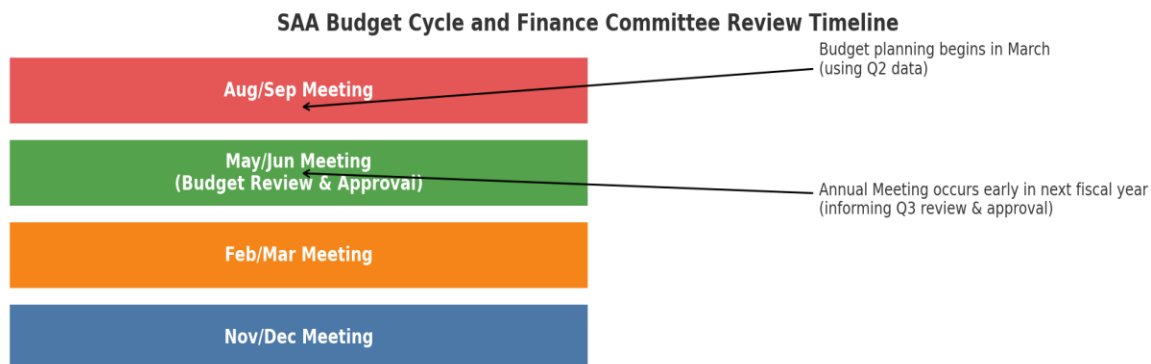
### I. Executive Summary

In the third quarter of FY25, SAA maintained momentum in strengthening financial and administrative operations. Core efforts focused on infrastructure optimization, internal process improvements, and continued progress in member engagement.

### II. Finance

SAA follows a structured **fiscal year budget cycle** that aligns financial reporting with key Finance Committee & Council meetings throughout the year.

Period	Meeting Period
Q1 July – September	August/September Meeting
Q2 October – December	February/March Meeting
Q3 January – March	May/June Meeting
Q4 April – June	August/September Meeting



SAA has completed several key financial milestones this quarter:

- **FY23 Form 990:** The organization's FY23 federal tax return (Form 990) was filed and taxes paid.
- **FY24 Audit Preparation:** The audit engagement letter was reviewed by legal counsel and returned to the auditor. The audit is expected to begin in **May 2025**.
- **FY25 Financials:** With core compliance tasks on track, the **focus has shifted to enhancing financial reporting and analysis** to support stronger, data-informed decision-making across the organization.

As part of this shift, **preliminary quarterly financial statements** have been posted for internal review:

- **Q2 (as of December 31, 2024)** was the first posted.

- **Q3 (as of March 31, 2025)** was the most recent and reflects continued monitoring of financial performance through the fiscal year.

These reports provide SAA leadership with timely visibility into revenue and expense trends, enabling more proactive and responsive management of resources. *See the document library for Financials.*

### **III. Information Technology and Operational Infrastructure**

Our IT transition continues to deliver improvements in workflow and collaboration.

Notable third-quarter activities include:

- Advancing SharePoint adoption for document management and team collaboration.
- Progress on automating appointments letters to reduce manual processing.
- Ongoing efforts in the Donor Experience pilot project to enhance constituent engagement.
- Website implementation is expected to begin in May 2025.

In addition, our managed service providers (MSPs) have placed a strong emphasis on staff education and training, particularly around the use of Office 365 tools, including SharePoint and OneDrive. This training is a key enabler for improved adoption and long-term success of our digital infrastructure improvements.

### **IV. Service Center Transition**

The evolving role of the Operations Manager, formerly Service Center Manager, has proven integral to aligning day-to-day tasks with strategic program needs across departments. This transition remains on track and supports long-term organizational agility.

### **V. Membership**

See Council document library or [link to report](#).

### **VI. Conclusion**

The third quarter of FY25 reflects solid progress in financial and administrative functions, with continued emphasis on:

- Ensuring **fiscal responsibility** through timely filings and audit readiness.
- Strengthening **internal systems and workflows**.
- Supporting **membership health** through thoughtful engagement and retention strategies.