

**SAA Foundation
Board Meeting
May 18 & 19, 2026
Virtual Meeting**

**Staff Q3 (January – March 2026): Operations Report
(Prepared by: Astoria Edwards, Governance Director)**

Q3 Performance Overview (January-March 2026)

Q3 performance lagged behind the same quarter in prior fiscal years, driven by lower overall donor volume and reduced participation across multiple funds. January revenue was supported by a concentrated gift to the Harold T. Pinkett Fund; however, this level of giving was not sustained in February or March.

February represented the most significant year-over-year decline, suggesting the absence of a campaign to trigger and weaker broad-based donor engagement during that month. Although a February campaign was conducted for the Catalyst Fund, it generated only two donations totaling \$100. This result indicates that the Foundation's existing donor pool may be exhausted and highlights the need to acquire new donors.

March revenue remained stable relative to February but continued to fall below FY25 levels. Overall, Q3 results reflect an increased reliance on isolated high-value gifts rather than consistent, diversified monthly participation.

Q3 FY26 Giving Totals (Across All Funds):

- January: \$1,473
- February: \$525
- March: \$655

Q3 is the weakest quarter in FY26 when compared to the same period in FY24 and FY25. While FY26 benefits from occasional high-value gifts, it lacks consistency and sufficient donor volume across all three months.

Year-to-Date Snapshot (FY26 YTD)

- Total FY26 revenue to date: \$39,818
- Total number of donations: 549
- Average gift size: \$73

Fund Level Performance (Q3)

- **NDRFA & Mosaic Fund:** These funds remain generally consistent but showed weakening performance in the third quarter, potentially due to donor fatigue or a lack of refreshed messaging.
- **Pinkett Fund:** Performance was driven by a one-time donation in January, with minimal activity throughout the remainder of the quarter.
- **Catalyst, Henry, and Peterson Funds:** These funds were largely inactive during 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	\$17,243.01	115	\$20,388.91	91	\$19,790.00	124	\$57,421.92	330
Donald Peterson Fund	\$250.00	11	\$582.92	24	\$215.00	7	\$1,047.92	42
F. Gerald and Elsie Ham Fund	\$1,790.00	35	\$1,227.91	26	\$1,745.00	32	\$4,762.91	93
Harold T. Pinkett Fund	\$1,844.00	57	\$2,423.91	57	\$2,944.00	32	\$7,211.91	146
Linda J. Henry Fund	\$2,043.00	15	\$1,360.91	13	\$400.00	7	\$3,803.91	35
Margaret Cross Norton Fund	\$360.00	11	\$472.91	16	\$6,300.00	13	\$7,132.91	40
Mosaic Fund	\$5,432.00	100	\$9,462.11	227	\$6,652.00	163	\$21,546.11	490
National Disaster Recovery Fund for Archives	\$10,591.00	196	\$10,896.91	179	\$7,965.09	140	\$29,453.00	515
Philip Hamer & Elizabeth Hamer-Kegan Fund	\$265.00	9	\$282.91	14	\$140.00	5	\$687.91	28
Total	\$39,818.01	549	\$47,099.40	647	\$46,151.09	523	\$133,068.50	1719

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
Q3 FY2026	\$260.00	6	\$50.00	1	\$450.00	5
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	\$57,421.92	330	\$1,047.92	42	\$4,762.91	93

Fund Name	Harold T. Pinkett Fund		Linda J. Henry Fund		Margaret Cross Norton Fund	
Quarter	Amount	# of Donations	Amount	# of Donations	Amount	# of Donations
Q3 FY2026	\$1,175.00	7	\$0.00	0	\$25.00	2
Q2 FY2026	\$819.00	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	\$7,211.91	146	\$3,803.91	35	\$7,132.91	40

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
Q3 FY2026	\$349.00	13	\$319.00	13	\$25.00	1	\$2,653.00	48
Q2 FY2026	\$1,446.00	37	\$1,515.00	35	\$90.00	2	\$16,597.00	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	\$21,546.11	490	\$29,453.00	515	\$687.91	28	\$133,068.50	1719

Monthly Fund Trends

Month	March 2026					
Quarter & Fiscal Year	Q3 FY2026		Q3 FY2025		Q3 FY2024	
Fund	Amount	# of Donations	Amount	# of Donations	Amount	# of Donations
Catalyst Fund	\$110.00	3	\$65.00	3	\$65.00	3
Donald Peterson Fund	\$0.00	0	\$25.00	1	\$0.00	0
F. Gerald and Elsie Ham Fund	\$275.00	2	\$0.00	0	\$25.00	1
Harold T. Pinkett Fund	\$25.00	1	\$125.00	5	\$160.00	4
Linda J. Henry Fund	\$0.00	0	\$0.00	0	\$0.00	0
Margaret Cross Norton Fund	\$0.00	0	\$80.00	3	\$0.00	0
Mosaic Fund	\$110.00	5	\$165.00	7	\$305.00	8
National Disaster Recovery Fund for Archives	\$110.00	5	\$208.00	10	\$158.00	7
Philip Hamer & Elizabeth Hamer-Kegan Fund	\$25.00	1	\$0.00	0	\$15.00	1
Total	\$655.00	17	\$668.00	29	\$728.00	24

Month	February					
Quarter & Fiscal Year	Q3 FY2026		Q3 FY2025		Q3 FY2024	
Fund	Amount	# of Donations	Amount	# of Donations	Amount	# of Donations
Catalyst Fund	\$100.00	2	\$1,110.00	10	\$450.02	9
Donald Peterson Fund	\$50.00	1	\$25.00	1	\$0.00	0
F. Gerald and Elsie Ham Fund	\$125.00	2	\$150.00	3	\$75.00	3
Harold T. Pinkett Fund	\$25.00	1	\$226.00	4	\$176.00	2
Linda J. Henry Fund	\$0.00	0	\$50.00	2	\$200.00	1
Margaret Cross Norton Fund	\$25.00	2	\$50.00	2	\$50.00	1
Mosaic Fund	\$100.00	4	\$276.00	7	\$301.00	7
National Disaster Recovery Fund for Archives	\$100.00	4	\$500.00	6	\$120.00	4
Philip Hamer & Elizabeth Hamer-Kegan Fund	\$0.00	0	\$25.00	1	\$25.00	1
Total	\$525.00	16	\$2,412.00	36	\$1,397.02	28

Month	January					
Quarter & Fiscal Year	Q3 FY2026		Q3 FY2025		Q3 FY2024	
Fund	Amount	# of Donations	Amount	# of Donations	Amount	# of Donations
Catalyst Fund	\$50.00	1	\$540.00	6	\$935.00	8
Donald Peterson Fund	\$0.00	0	\$185.01	5	\$30.00	2
F. Gerald and Elsie Ham Fund	\$50.00	1	\$70.00	3	\$300.00	3
Harold T. Pinkett Fund	\$1,125.00	5	\$185.00	7	\$100.00	4
Linda J. Henry Fund	\$0.00	0	\$110.00	2	\$50.00	2
Margaret Cross Norton Fund	\$0.00	0	\$10.00	1	\$0.00	0
Mosaic Fund	\$139.00	4	\$410.00	14	\$335.00	11
National Disaster Recovery Fund for Archives	\$109.00	4	\$420.00	14	\$295.00	9
Philip Hamer & Elizabeth Hamer-Kegan Fund	\$0.00	0	\$45.00	3	\$50.00	1
Total	\$1,473.00	15	\$1,975.01	55	\$2,095.00	40

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	\$444.00	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	\$10,527.00	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