

Society of American Archivists Foundation 2016-2017 Development Plan Actions List

(Prepared by Nancy Beaumont and Felicia Owens)

ACTIVITY 1: Implement the Annual Appeals

GOAL: Increase total giving for FY 2017 by 10%, or \$4,146.

Annual Appeal Committee: McGovern, Eaton, Gates, Lowell, Beaumont.

Recommendation: Hire a consultant to increase staff capacity for Annual Appeal. (\$5,000)

Proposed Appeals:

Nov-Dec:	Annual Appeal + #GivingTuesday (November 29)
May 1:	May Day Appeal for NDRFA
June 20:	#DayofGiving
July 23-29:	Annual Meeting Activities

Strategies:

- Develop and distribute targeted communications to the general membership and strategic subgroups (e.g., SAA past presidents, SAA Fellows, past donors). Consider a special focus on nonmembers, especially individual members of regional/state societies.
- Each Board member to reach out by phone or email to 10-20 personal contacts to ask them to make a gift during the Annual Appeal.

Tasks and Time Line:

August 2016

- Appoint Annual Appeal Committee, with a charge to 1) manage the traditional Annual Appeal, 2) target constituencies and individuals, and 3) plan/implement the spring appeal. (SAAF Board)

October 2016

- Create mailing lists for Annual Appeal. (Staff)
- Submit copy to *Archival Outlook* for Foundation's annual report in November/December issue. (Annual Appeal Committee)
- Draft Annual Appeal letters for Board review and suggestions. (Annual Appeal Committee)
- Approve Annual Appeal letters. (SAAF Board)
- Incorporate #GivingTuesday into end-of-year appeal. (Annual Appeal Committee, Development Committee, Staff)

November 2016

- Send Annual Appeal letters/communications. (Staff)
- Personalize website for Annual Appeal. (Annual Appeal Committee, Staff)
- At November 2016 annual meeting, review prospects for personal contact by Board members. (SAAF Board)

November–December 2016

- Personal calls. (SAAF Board)

January 2017

- Complete and mail Annual Appeal thank you letters. (SAAF Board, Staff)
- Publish list of Calendar Year 2016 donors in January/February issue of *Archival Outlook*. (Staff)

April 2017

- In conjunction with MayDay (May 1), promote donations to National Disaster Recovery Fund for Archives. (Annual Appeal Committee, Staff).
- Or, plan a day of giving via social media or a direct mail for June. (Annual Appeal Committee, Staff).

May–June 2017

- Implement #DayofGiving on June 20. (Staff)
- Call target prospects. (SAAF Board)

July 2017

- Implement plans for Annual Meeting activities. (Annual Appeal Committee, SAAF Board, Staff)

ACTIVITY 2: Stewardship

At the **November 2016** Board meeting, discuss stewardship possibilities for the fiscal year and the 2017 Annual Meeting.

ACTIVITY 3: Promote the Diversity of the Profession

GOAL: Increase giving to the Mosaic Fund by 10%, or \$3,152.

Tasks:

- Prepare promotional materials for advertising fundraising for Mosaic. (SAAF Board, Staff)
- Hire a consultant to look at past donors and define their capacity to give. (\$10,000) (Staff)
- Consider how the broader Mosaic Program might be sustained when the Mosaic II grant expires in 2019. (SAAF Board, Staff)

ACTIVITY 4: Extend the Successful Work of the NDRFA

GOAL: Increase giving to the NDRFA Fund by 50%, or \$3,512.

Tasks:

- Encourage the SAA Preservation Section to continue its efforts to champion the Fund. (See Development Plan for complete list of tasks.) (Assignment TBD)
- Continue to acknowledge the section's past contributions and role in development of the fund in all development communications. (Staff)
- Encourage the Society of Southwest Archivists to continue its efforts to champion the Fund. (See Development Plan for complete list of tasks.) (Assignment TBD)
- Continue to acknowledge the SSA's role as co-founding organization and past contributions in development of the fund in all development communications. (Staff)
- Contact individuals who played significant roles in the aftermath of Hurricanes Katrina and Rita (e.g., Richard Pearce-Moses, David Carmicheal, Gregor Trinkaus-Randall, Julia Marks Young) to obtain testimonials for use in development communications, and possibly seek matching pledges. (Assignment TBD)
- Contact past recipients of NDRFA grants to check in, seek testimonials regarding their recovery. (Assignment TBD)

ACTIVITY 5: Look to Regional Archival Associations Consortium**Tasks:**

- See Development Plan for complete list of tasks.
- Brainstorm about how the Foundation might partner with RAAC for the benefit of its constituencies, both in disaster recovery and in the larger Foundation arena. (SAAF Board, Staff)
- Inventory who on the SAAF Board is active in these associations and might serve as a liaison. (SAAF Board, Staff)

ACTIVITY 6: Enhance the Culture of Giving for SAA Members, Leadership, and Staff

GOAL: Increase giving to the Strategic Growth Fund by 10%, or \$1,610.

GOAL: Develop both a capacity within the Foundation and a culture more generally within SAA that embraces and supports fundraising activities to enhance the work of the archives community.

Projected funds needed for FY 2017: \$5,000.

Specific activities include providing a workshop for practicing archivists at the 2017 Annual Meeting. The \$5,000 will cover honoraria, travel, and other costs. It is hoped that this workshop can become self-supporting.

ACTIVITY 7: Join Colleagues in Creating a Legacy through Planned Giving

Task: Provide compelling text regarding planned giving for publication on the Foundation website.