

**Society of American Archivists Foundation  
Board of Directors Meeting  
November 4-5, 2018  
Chicago, Illinois**

**2017–2019 Development Plan Update  
(Prepared by Margery Sly, Chair, Development Committee)**

**INTRODUCTION**

**Background**

The SAA Foundation is the nation’s leading source of nonprofit funding dedicated solely to the interests of archives and archivists. Its mission is to provide resources to enhance the work of the archival community. To that end, the SAA Foundation will support:

- Research and reporting about the profession, its practice, and its practitioners;
- Development of professional growth opportunities;
- Recognition of archivists via scholarships, travel assistance, and awards;
- Programs to enhance the performance of repositories; and
- Efforts to persuade influential external organizations to create or promote archives.

In addition, the SAA Foundation will seek to strengthen itself by enhancing its accountability, development, and governance. These areas of support were developed and approved in 2014.

The SAA Foundation, in conjunction with the Society of American Archivists, makes a number of awards that recognize excellence in archival work and assists those entering and practicing in the profession.

**Overall Goal of the Foundation’s Development Efforts**

The overall goal of the Foundation’s development efforts is to foster a culture of giving tied to the most innovative and challenging initiatives of archivists. The Foundation aims to draw archivists, SAA leaders, and staff into a vision for the profession with a long horizon of accomplishment. Projects mentioned in this plan do not preclude the selection, by donors, of projects that interest them and that they wish to fund.

## THE DEVELOPMENT PLAN

The Development Committee has identified activities for generating income that will fund an ambitious future for the profession.

Following is a summary, by year, of donors and overall amounts given.

<b>Fiscal Year</b>	<b>Donors</b>	<b>Amount Given OVERALL</b>
2018	497	\$68,836
2017	843	\$66,651
2016	364	\$62,713
2015	304	\$41,741
2014	210	\$55,680
2013	189	\$34,960

**Fund Balance            \$ 1,425,124**

### ACTIVITY 1: CONTINUE ANNUAL APPEALS

#### **Annual Appeal FY 2019 (November 2018)**

Priority: Strategic Growth Fund

FY 2018: \$23,254

#### **Giving Tuesday (Tuesday, November 27, 2018)**

Priority: Strategic Growth Fund

FY 2018: (Combined with Annual Appeal)

#### **May Day (May 1, 2019)**

Priority: NDRFA

FY 2017: May 1, 2017 = 29 gifts/\$1,193 (Not done in May 2018.)

#### **Day of Giving (Monday, September 9, 2019)**

Priority: Mosaic Scholarships

FY 2018: June 28, 2018 = 65 gifts / \$11,336

FY 2017: June 20, 2017 = 61 gifts / \$5,412

### **Proposed Time Line for 2018-2019**

#### ***August-September 2018***

- Thank you event at Annual Meeting. [Not done.]
- Speaking opportunities at Annual Meeting (Section meetings, Leadership Orientation, New

- Member/First Timer Coffee Break) [Done.]
- Develop traveling exhibit content.
  - Draft and send letter to planned gift prospects.

### ***October 2018***

- Select priority/focus for Annual Appeal. (Development Committee)
- Create mailing lists for Annual Appeal. (Staff)
- Draft of Annual Appeal letters to Board for review and suggestions. (Development Committee)

### ***November 2018***

- Annual Appeal letters approved. (SAAF Board)
- Incorporate #GivingTuesday into end-of-year appeal.
- Send Annual Appeal letters/communications. (Staff)
- Submit copy to *Archival Outlook* for Foundation's annual report in November/December issue. (Development Committee)
- Personalize website for Annual Appeal. (Annual Appeal Committee, Staff)
- **At November 2018 annual meeting, review prospects for personal contact by Board members and divide all letters among Board members for addition of personal notes.**

### ***November and Early December 2018***

- Personal follow-up calls. (SAAF Board)

### ***January 2019***

- Annual Appeal thank you letters completed and mailed. (SAAF Board, Staff)

### ***April 2019***

- Initiate spring appeal in conjunction with May Day. Work in conjunction with SSA and NDRFA. (Development Committee, Staff)

### ***September 2019***

- Back-to-School campaign for Mosaic Scholarship Fund, September 9. (Development Committee, Staff)

## **ACTIVITY 2: STEWARDSHIP / OUTREACH**

Stewardship is the management of the Foundation's resources and of its relations with both the actual donors who contribute resources to the Foundation and prospective donors who are cultivated to enlarge both the donor base and the resources available for investment. Stewardship activities include development of specific giving opportunities, tracking the expenditure of gifts to ensure they are used in accordance with donor intent, recognition of donors in a variety of ways often keyed to the level of gifts received, and preparation and

distribution of regular reports to donors on the impact of their contributions to the Foundation's mission.

It is equally important to 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.

Initially the SAA Foundation's major stewardship activities should be directed to outreach to the profession—increasing awareness of the Foundation's existence, mission, and plans for the immediate and longer-term future.

**Goals:**

- Create traveling exhibit for Spring 2019 regional meetings.
- Place advertisements in *Archival Outlook* (and regional newsletters?).
- Hold a thank you event at Annual Meeting.
- Have Board members attend Section meetings and speak briefly about the Foundation and its work, and express appreciation for their support.
- Have a Board member speak briefly at the Leadership Orientation.
- Send targeted messages to new members, or those between 1 and 5 years of membership.

### **ACTIVITY 3: SOLICIT FUNDS FOR THE MOSAIC SCHOLARSHIP FUND**

SAA has adopted as a core value and central mission the creation of a diverse profession and an inclusive historical record. The Mosaic Scholarship Fund is the primary way in which the Foundation promotes diversity in the American archives profession. Each Mosaic Scholarship is funded at \$5,000.

**Goals:**

- Back-to-School Day focus (September 9, 2019).
- Identify other sources of funds and apply/solicit.

### **ACTIVITY 4: SOLICIT FUNDS FOR THE NATIONAL DISASTER RECOVERY FUND FOR ARCHIVES**

Originally established by the Society of Southwest Archivists and SAA to address archival repositories' stabilization and recovery needs, support has been broadened to provide grants for recovery of archival collections from major disasters, regardless of region or repository type. SSA, SAA's Preservation Section, and other groups have been instrumental in raising money for this Fund.

**Goals:**

- Increase outreach advertising: regionals, other?
- Increase amount of awards?

<b>Fiscal Year</b>	<b>Donors</b>	<b>Amount Given NDRFA</b>
2018	188	\$13,764
2017	169	\$7,113
2016	112	\$7,024
2015	51	\$2,719
2014	68	\$5,306
2013	92	\$6,966

**Fund Balance**

**\$72,523**

### **ACTIVITY 5: DEVELOP A PLANNED GIVING PROGRAM**

A very accessible giving vehicle for SAA members is planned giving through a will or a bequest, in which the donor commits to give a share of her or his estate/insurance proceeds/account. This activity should encourage archivists to leave a legacy beyond the important contributions of their professional work and their individual donations.

**Goals:**

- Provide compelling text regarding planned giving for publication on the Foundation website.
- Identify cohort (Fellows, Past Presidents, etc.) who should be encouraged to remember SAA in their wills.