

**Society of American Archivists Foundation
Board of Directors
November 11, 2020
Virtual Meeting**

**Request for Proposal for Development Consultant (Draft)
(Prepared by Executive Director Nancy Beaumont)**

BACKGROUND

The Foundation Board of Directors and Development Committee have discussed the need to work with a development consultant to advance the Foundation’s fundraising efforts. The following draft request for proposal (RFP) is provided for Board feedback in anticipation of fielding it in November 2020. The Board-approved FY21 budget includes an expense of \$7,500 for a development consultant, but the Board agreed to revisit this expense allocation based on responses to the RFP.

FOR DISCUSSION

DRAFT

**Request for Proposal
Association Foundation Development Consultant**

Organizational Profile

The [Society of American Archivists](#) is a 501(c)(6) national professional association that “empowers archivists to achieve professional excellence and foster innovation to ensure the identification, preservation, understanding, and use of records of enduring value.” SAA is a vital community that promotes the value and diversity of archives and archivists and serves as the preeminent resource for the profession.

Founded in 1936, SAA currently comprises 5,700 individual and institutional members. (At its peak in November 2014, membership totaled 6,233.) The organization provides a wide range of services to its members and is guided by a [Strategic Plan](#) developed and approved by SAA’s governing Council.

The [Society of American Archivists Foundation](#), was incorporated as a 501(c)(3) organization in June 2011. It “raises money to provide resources to enhance the work of the archival community.” By administering various restricted and unrestricted funds, the SAA Foundation supports:

- 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.

The sole corporate member of the Foundation is SAA. Class A members of the Board comprise the SAA Executive Committee and the immediate past president. Class B members of the Board are nominated by the Foundation Board of Directors and elected by the SAA Council. SAA staff provide support to the Foundation; there are no dedicated Foundation staff.

Since 2011, the Foundation has conducted annual appeals, days of giving, and other development efforts that have yielded the following:

Fiscal Year (July 1 to June 30)	Total Donors	Total Donations
2013	189	\$ 34,960
2014	214	\$ 60,866
2015	292	\$ 54,910
2016	413	\$ 72,648
2017	548	\$ 76,300
2018	480	\$ 96,441
2019	418	\$ 75,651
2020	910*	\$164,946*

*On April 15, 2020, the Foundation approved formation of the [Archival Workers Emergency Fund](#) to provide support to archival workers who faced job loss or other precarity as a result of the pandemic. As of June 30, 2020, 718 gifts were made to AWEF totaling \$98,043.

Summary of SAA Foundation Assets

As of June 30, 2019, net assets of the SAA Foundation totaled \$1,581,083. Of this total:

- \$1,111,871 was without donor restriction.
- \$266,297 was without donor restriction / Council designated.
- \$146,029 was with donor restriction for a particular purpose.
- \$112,492 was with (permanent) donor restriction.

The Foundation Board’s strategy has been to optimize the assets classified in the “without donor restriction” category, as this allows the SAAF (and SAA) to be most flexible and responsive to emerging program funding priorities.

Request for Proposal

The SAA Foundation Board seeks proposals from foundation development consultants to:

- Conduct an audit of current SAA Foundation development efforts, including a review of previous fundraising approaches and results. (No more than 20% of total effort.)
- Explore the extent to which archivists and archival organizations are likely to give to the SAA Foundation, taking into account the needs and perspectives of multiple generations of archivists. (Approximately 30% of total effort.)

- Propose short- and mid-term plans to increase and enhance the Foundation’s development efforts, including via periodic generation-specific appeals, a planned giving program, and solicitation of funding from external agencies/organizations. (Approximately 50% of total effort.)

The deadline for receipt of proposals is Thursday, December 31, 2020.

Send your proposal—or any questions about the Foundation or the proposal process—to SAA Foundation Executive Director Nancy Beaumont at nbeaumont@archivists.org.