




SAA Foundation Strategic Plan (2022-2025)

GOAL 1: ADVANCING THE PROFESSION				
Lead/Collaborators	Timeline for Completion	Build resilient archival communities within and beyond SAA.		Notes
Board	FY	✘	0 Attend/have presence at regional, allied conferences, board meetings, and related spaces to share SAA Foundation programs and foster dialogue.	("roadshow") Funding for SAA Foundation Board members to attend?
Board/Grants Review Committee	FY	⚠	66 Designate grant funds for capacity-building in community archives.	<p>These SAA Foundation funds could be seed money to attract wider giving for this purpose.</p> <p>Partner with regionals for specific initiatives - mentorship, etc. Advertise within local communities for applications.</p> <p>CAPES Project (via New Jersey Historical Commission) - mentorship/support program already in place. Similar models in SHRABs.</p>
Grants Review Committee/Dev Comm	FY23-FY25	⚠	66 Dedicate research grants funds to projects that forward initiatives in the SAA Work Plan on DEIA.	Mosaic Scholarship
GRC	FY25	✘	0 Work more closely with CORDA/Research Forum to fund and promote research grants which support research in the profession, and to disseminate results.	

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Lead/Collaborators	Timeline for Completion	Support the full diversity of archivists, archives, and communities.		Idea
	FY23/FY24		66 Apply for grant(s) to expand support for community archives projects.	Leon Levy Foundation (Bob Clark has connection) This is a new grant program from NEH, a real kitchen sink in terms of its granting goals: https://www.neh.gov/program/cultural-and-community-resilience Consider grants to support Primary Source Curriculum resources/programs
	FY		66 Grow the Mosaic Scholarship Fund sustainably to increase the number of scholarships and/or dollar amount awarded each year.	
SAA Staff (collab)	FY		Sponsorship support for Annual Meeting Awards to lessen barriers for those interested in attending/engaging at the conference and ensure broad representation.	
SAA Staff (collab)	FY		Continue support for Annual Meeting Awards to lessen barriers for those interested in attending/engaging at the conference and ensure broad representation.	
Board	FY		66 Expand opportunities for promoting award and grant recipients to celebrate and recognize excellence within the profession.	Check about the current standing of the Awards fund - in need of targeted growth?

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Lead/Collaborators	Timeline for Completion	Foster collaborative relationships and leverage resources to be nimble to our ever-changing environment.		Idea
previous	FY		Partner with CORDA to optimize Research Roadmap in favor of projects that benefit the greater archival community.	The Roadmap is wide-ranging and we can help prioritize projects, and perhaps apply SAA Foundation funds to most utilitarian projects. Need to create a strong working partnership. A*CENSUS II data here
	FY 2		Open dialogue with preeminent grant makers to seek out collaborative projects.	NHPRC, Mellon, Delmas, et al., value strategic partnerships that have big impacts.
DC	FY24		Foster partnerships to expand and broaden reach to archivists beyond SAA members/current audience.	All SAA Foundation programs are open to all archivists, not just SAA members. [Related to communication?]
	FY23-FY24		Develop plan and fund initiatives to address position precarity.	Partner with SAA, other allied orgs? First step: Evaluate A*CENSUS II data.
	FY		Targeted call for grant proposals focused on climate change and/or resiliency.	
	FY25		Grow a strong corpus for the NDRFA to ensure long-term sustainability of the fund in the face of increasing natural/climate disasters threatening archives.	Consider fund for institutions that may face security threats - ransomware, security breaches, etc.

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GOAL 2: GROWING RESOURCES / FUNDS DEVELOPMENT

Lead/Collaborators	Timeline for Completion	Clarify and enhance SAA Foundation's branding and identity.		Idea
FDM/Development Committee/Communication & Marketing Staff/Board	FY23-FY24	✘	33 Increase visibility and profile of the SAA Foundation among the greater profession.	1. maximizing communication channels, including development of SAA Foundation's own social media presence, regular column in Archival Outlook, our own section of the website homepage. 2. a new logo and unique color scheme that is SAA Foundation specific. Consider the use of branding/design consultant for this. 3. Find a right balance so that we do not lean too far out from SAA, as we really are listing key SAA support in some of our tactics
Development Committee	FY23-FY25	⚠	66 Develop yearly marketing/fundraising themes	"inspirational" rather than "transactional" messaging.
Development Committee/Grants Review Committee	FY23-25	⚠	66 explore annual opportunities for obtaining funding through grants.	
Lead/Collaborators	Timeline for Completion	Diversify and expand SAA Foundation's donor community and funding streams.		Idea
FDM/Board	FY24/FY25	✘	0 Simplify and expand methods for giving to the SAA Foundation.	E.g., easy mobile donation, through link in bios on SAA Foundation social media, acceptance of PayPal, \$CashApp
	FY25	✘	0 Collaborate with various SAA stakeholders on developing targeted development campaigns.	(ex. including Sections, Fellows, former Council members.)

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Lead/Collaborators	Timeline for Completion	Develop and foster careful and considerate stewardship of SAA Foundation's potential and existing donors.		Notes
	FY25	 0	Develop a stewardship matrix to guide our work and to clarify methods of communication and levels of interaction based on amount given, past giving, potential for future giving.	1. Pre- and post-donor stewardship. 2. Consider giving donors the option at the time of gift to select their preferred method of communication for stewardship (email, phone call, text). 3. Set expectations for all SAA Foundation Board members to provide consistent stewardship with current and potential donors. 4. Explore a software-as-a-service approach to managing relationships with donors.
	FY25	 0	Develop sustainable ongoing pre- and post-donor stewardship initiatives to foster lifelong relationships.	

GOAL 3: STRENGTHENING GOVERNANCE & INFRASTRUCTURE

Lead/Collaborators	Timeline for Completion	Enhance support infrastructure for the SAA Foundation.		Idea
Development Committee	FY23	 100	Hire development manager.	
Governance Working Group	FY 24	 66	Review and clarify current gift acceptance policies.	
Development Committee	FY22	 100	Secure development consultant to enhance appeal messaging.	

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Lead/Collaborators	Timeline for Completion	Enhance expectations, expertise, and opportunities of Board members and SAA Foundation volunteers to strengthen and diversify the SAA Foundation.		Idea
Governance Working Group	FY24	⚠	66 Review SAA Foundation Board structure, including committees, considering representation, skill sets, term limits, donor/funder assignments.	Focus on the Board Structure
Governance Working Group	FY24 ve to goal three)	✘	0 Launch Young Professionals Advisory Committee.	Let's discuss the YPAC as a possibility to reach other targeted audiences, such as retirees, Fellows, new professionals, and other groups. Broader "donor relations" group.
Governance Working Group	FY23-FY24	⚠	66 Establish and expand non-Board member volunteer opportunities on SAA Foundation committees.	Established or expanded for other committees
Lead/Collaborators	Timeline for Completion	Build infrastructure to develop and expand fundraising/giving opportunities.		Idea
Development Committee	FY24-FY25	✘	0 Develop an established Planned Giving Program.	Consider offering conference session on Estate Planning and other giving opportunities
Development Committee	FY24-FY25	✘	0 Develop a corporate giving program.	
Development Committee/Grant Review Committee	FY24	✘	0 Review grants landscape to identify relevant funding opportunities that could advance the work of SAA Foundation.	include the strategy - Review grants landscape to identify relevant funding opportunities that could advance the work of SAA Foundation 2. .subset of members from both committees to lead the charge