

**SAA Foundation
Board of Directors Meeting
November 21-22, 2024
Hybrid Meeting (Chicago, IL)**

**Staff Q1 Report: Operations
(Prepared by: Astoria Edwards, Assistant Director, Foundation)**

Operations Update:

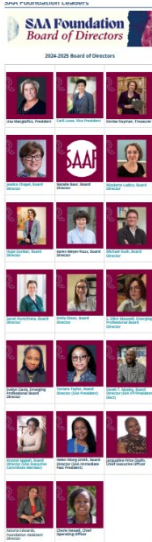
Microsoft SharePoint Implementation

This quarter, SharePoint sites were launched for key Foundation committees, including Grant Review, Development, Governance, and Annual Meeting Review. These sites are designed to streamline document sharing, enhance collaborative reviews, and enable easy document creation and editing within each committee.

The Grant Review Committee initially piloted the SharePoint site last fiscal year, offering valuable insights into collaborative workflows. Based on this feedback, we refined the site parameters and adjusted access controls to provide secure, user-friendly access to files, enhancing document management efficiency.

The primary objective of these SharePoint sites is to create a seamless, collaborative environment for committee members to manage and contribute to documentation efficiently. These sites are expected to boost productivity, improve document tracking, and offer a secure platform for ongoing committee activities.

Foundation Visibility Initiatives



To increase the Foundation’s visibility, we are implementing a two-year initiative. This past year, we rebranded the Strategic Growth Fund as the Catalyst Fund, alongside the Catalyst Grant Program. New graphics for both have been created and will be showcased on the website and in upcoming announcements to support the rebranding effort.

This year also saw the launch of a new Board of Directors page, displaying headshots and bios of both current and past board members (<https://www2.archivists.org/groups/saa-foundation-board-of-directors/saa-foundation-leaders>). Additional website updates are underway to improve navigation and enhance access to information on SAA Foundation initiatives and programs. In Q2-Q3, a redesign of the Foundation’s LinkedIn page is also planned to further elevate our digital presence.



Contributions Overview:

The contributions for FY23, FY24, and FY25 show fluctuating trends across various funds and programs. Each fiscal year presents a different pattern in total contributions and donor engagement, reflecting diverse donor interest and varying contribution amounts. Below is a breakdown by quarter, identifying significant trends and highlights.

Total Contributions and Donor Count:

- FY23: \$66,424 with 402 donors
- FY24: \$39,818 with 388 donors
- FY25: \$24,210 with 234 donors

FY23 recorded the highest total contributions and number of donors. FY24 saw a decline in contributions but retained a comparable number of donors to FY23, indicating smaller average donation amounts. FY25 has shown a further decline in both contributions and donor count compared to the previous years.

Monthly Breakdown:

- July: Contributions were significantly high in FY24 (\$7,319) due to the National Disaster Recovery Fund for Archives and Mosaic Scholarship. The Catalyst Fund also contributed more than in previous years.
- August: FY23 recorded exceptionally high contributions of \$7,573, led primarily by the National Disaster Recovery Fund for Archives (\$5,259). FY25 saw a notable increase compared to FY24, with contributions totaling \$10,297, led by the Mosaic Scholarship and the National Disaster Recovery Fund for Archives.
- September: FY25 achieved the highest contribution in this month at \$9,766, largely due to a substantial increase in the Catalyst Fund donations.
- October: Contributions were consistent across FY23, FY24, and FY25, with slight increases noted in FY25, especially in the Harold T. Pinkett Student of Color Award and National Disaster Recovery Fund for Archives.

Fund Specific Highlights:

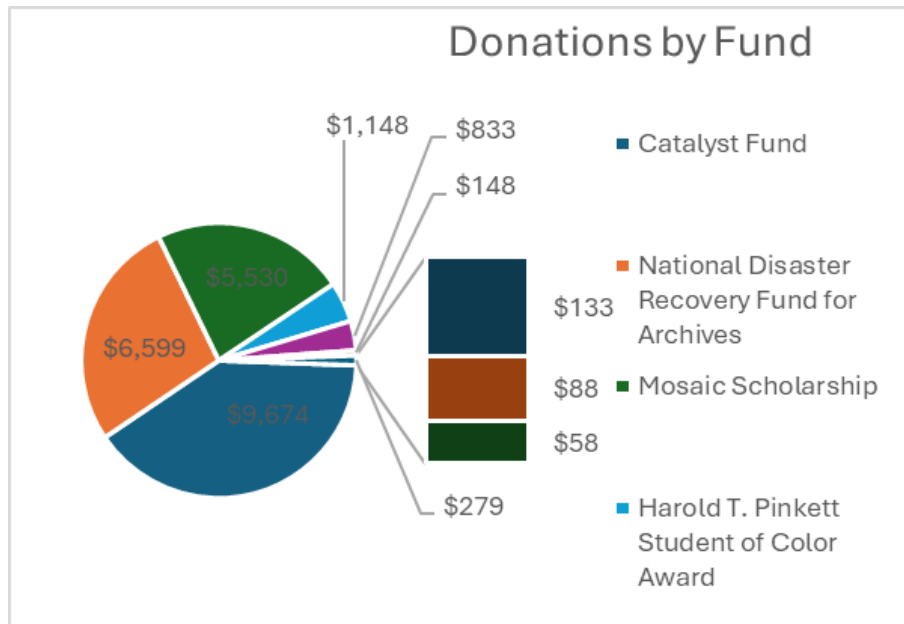
- National Disaster Recovery Fund for Archives: Continues to be one of the most supported funds, with notable increases during August each year.
- Catalyst Fund: Showed a large increase in contributions in FY25, specifically in September.
- Harold T. Pinkett Student of Color Award: FY25 saw a resurgence in contributions to this award in October.
- Mosaic Scholarship: Consistently receives support but saw a particularly high contribution spike in August of FY25, indicating success of Professional Headshot fundraising event.

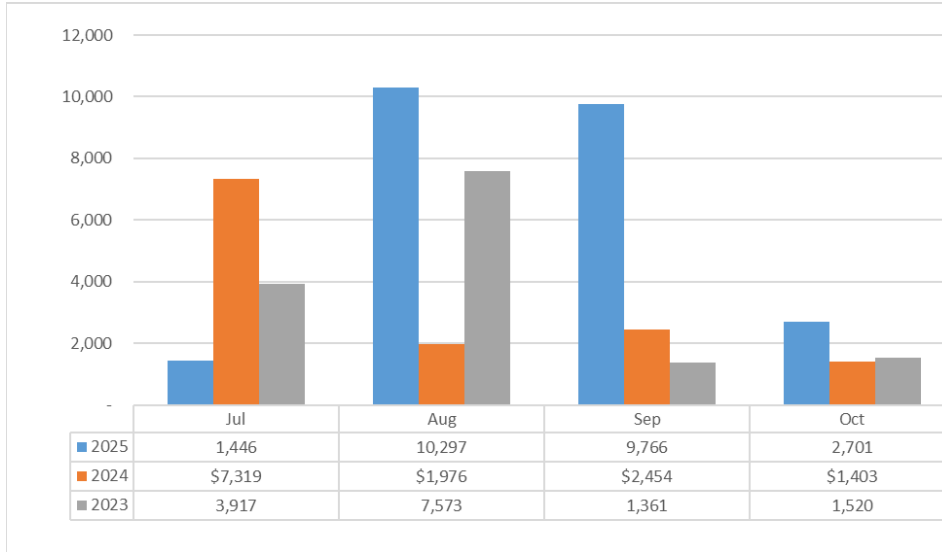
Quarterly Comparison Summary:

- FY23 demonstrated high overall contributions, particularly in August, with strong support across various funds.

- FY24 experienced a dip in contributions compared to FY23, though it retained a similar donor base.
- FY25 shows mixed performance with a lower overall total compared to FY23 and FY24 but a few notable spikes in key funds (e.g., Catalyst Fund in September, Mosaic Scholarship in August).

Donations Amount By Fund (FY25)		
Fund	Gift Total	Gift Total (%)
Catalyst Fund	\$ 9,674	40%
National Disaster Recovery Fund for Archives	\$ 6,599	27%
Mosaic Scholarship	\$ 5,530	23%
Harold T. Pinkett Student of Color Award	\$ 1,148	5%
F. Gerald and Elsie Ham Scholarship	\$ 833	3%
Donald Peterson Student Scholarship Award	\$ 148	1%
Margaret Cross Norton Fund	\$ 133	1%
Philip Hamer & Elizabeth Hamer-Kegan Award	\$ 88	0%
Linda J. Henry Fund	\$ 58	0%
Grand Total	\$24,210	100%





	2023			2024			2025		
	Amount	# of Donors	% of FY Total	Amount	# of Donors	% of FY Total	Amount	# of Donors	% of FY Total
Jan	3,415	28	5.14%	\$ 2,095	26	5%			0.00%
Feb	1,100	20	1.66%	\$ 1,397	22	4%			0.00%
Mar	1,498	28	2.26%	\$ 728	18	2%			0.00%
Apr	1,925	27	2.90%	\$ 1,765	32	4%			0.00%
May	2,640	32	3.97%	\$ 4,843	44	12%			0.00%
Jun	8,159	34	12.28%	\$ 1,725	26	4%			0.00%
Jul	3,917	26	5.90%	\$ 7,319	98	18%	1,446	24	5.97%
Aug	7,573	111	11.40%	\$ 1,976	37	5%	10,297	164	42.53%
Sep	1,361	23	2.05%	\$ 2,454	21	6%	9,766	22	40.34%
Oct	1,520	31	2.29%	\$ 1,403	28	4%	2,701	27	11.16%
Nov	23,500	43	35.38%	\$ 4,833	37	12%			0.00%
Dec	9,816	56	14.78%	\$ 9,280	41	23%			0.00%
Grand Total	\$66,424	402	100.00%	\$39,818	388	100%	24,210	234	100.00%

Donation Amount by Class/Fund (FY23-FY25)				
Sum of Amount				
Row Labels	FY23	FY24	FY25	Grand Total
With Donor Restrictions				
Donald Peterson Student Scholarship Award	455	250	148	853
F. Gerald and Elsie Ham Scholarship	1,961	1,790	833	4,584
Harold T. Pinkett Student of Color Award	5,810	1,844	1,148	8,802
Mosaic Scholarship	17,652	5,432	5,530	28,614
National Disaster Recovery Fund for Archives	10,649	10,591	6,599	27,839
Philip Hamer & Elizabeth Hamer-Kegan Award	635	265	88	988
Without Donor Restrictions				
Catalyst Fund	15,149	17,243	9,674	42,066
Linda J. Henry Fund	988	2,043	58	3,089
Margaret Cross Norton Fund	13,125	360	133	13,618
Grand Total	\$66,424	\$39,818	\$24,210	\$ 130,452

Comparison of Total Donations FY23 - FY25

	FY23		FY24		2025		Total (\$)	Total Donors
	(\$)	Donors	(\$)	Donors	(\$)	Donors		
Catalyst Fund	\$ 15,149	87	\$ 17,243	100	9,674	18	\$ 42,066	148
Donald Peterson Student Scholarship Award	\$ 455	13	\$ 250	11	148	8	\$ 853	30
F. Gerald and Elsie Ham Scholarship	\$ 1,961	35	\$ 1,790	33	833	13	\$ 4,584	60
Harold T. Pinkett Student of Color Award	\$ 5,810	76	\$ 1,844	57	1,148	22	\$ 8,802	115
Linda J. Henry Fund	\$ 988	15	\$ 2,043	15	58	3	\$ 3,089	21
Margaret Cross Norton Fund	\$ 13,125	19	\$ 360	11	133	5	\$ 13,618	26
Mosaic Scholarship	\$ 17,652	131	\$ 5,432	99	5,530	128	\$ 28,614	291
National Disaster Recovery Fund for Archives	\$ 10,649	190	\$ 10,591	163	6,599	97	\$ 27,839	375
Philip Hamer & Elizabeth Hamer-Kegan Award	\$ 635	12	\$ 265	9	88	5	\$ 988	22
Grand Total	\$ 66,424	402	\$ 39,818	388	24,210	234	\$130,452	738

Detailed Monthly Trend (FY23, FY24, FY25)

		Fiscal Year					
		FY23		FY24		FY25	
Month	-	Amount	# of Donors	Amount	# of Donors	Amount	# of Donors
Jul		\$ 3,917	26	\$ 7,319	98	\$ 1,446	24
Catalyst Fund		\$ 209	4	\$ 2,139	15	\$ 183	5
Donald Peterson Student Scholarship Award		\$ 25	1	\$ 25	1	\$ 108	5
F. Gerald and Elsie Ham Scholarship		\$ 150	4	\$ 30	2	\$ 108	2
Harold T. Pinkett Student of Color Award		\$ 2,759	10	\$ 85	4	\$ 108	5
Linda J. Henry Fund		\$ 175	2			\$ 8	1
Margaret Cross Norton Fund		\$ 50	2	\$ 25	1	\$ 83	3
Mosaic Scholarship		\$ 394	16	\$ 425	11	\$ 608	13
National Disaster Recovery Fund for Archives		\$ 155	7	\$ 4,590	73	\$ 208	7
Philip Hamer & Elizabeth Hamer-Kegan Award		\$ 25	1			\$ 33	2
Aug		\$ 7,573	111	\$ 1,976	37	\$ 10,297	164
Catalyst Fund		\$ 198	7	\$ 508	11	\$ 1,918	7
Donald Peterson Student Scholarship Award		\$ 25	1	\$ 10	1	\$ 10	1
F. Gerald and Elsie Ham Scholarship		\$ 175	7	\$ 160	4		
Harold T. Pinkett Student of Color Award		\$ 215	9	\$ 208	9	\$ 260	8
Linda J. Henry Fund		\$ 25	1	\$ 150	2	\$ 25	1
Margaret Cross Norton Fund		\$ 125	5	\$ 60	3	\$ 25	1
Mosaic Scholarship		\$ 1,551	12	\$ 260	8	\$ 3,491	106
National Disaster Recovery Fund for Archives		\$ 5,259	87	\$ 595	11	\$ 4,543	66
Philip Hamer & Elizabeth Hamer-Kegan Award		\$ 25	1	\$ 25	1	\$ 25	1
Sep		\$ 1,361	23	\$ 2,454	21	\$ 9,766	22
Catalyst Fund		\$ 188	4	\$ 153	1	\$ 7,525	4
Donald Peterson Student Scholarship Award				\$ 25	1	\$ 5	1
F. Gerald and Elsie Ham Scholarship		\$ 100	1	\$ 80	4	\$ 655	8
Harold T. Pinkett Student of Color Award		\$ 115	5	\$ 185	7	\$ 55	2
Linda J. Henry Fund		\$ 100	1	\$ 25	1	\$ 25	1
Margaret Cross Norton Fund		\$ 25	1			\$ 25	1
Mosaic Scholarship		\$ 425	8	\$ 1,761	10	\$ 1,206	4
National Disaster Recovery Fund for Archives		\$ 333	8	\$ 225	2	\$ 265	7
Philip Hamer & Elizabeth Hamer-Kegan Award		\$ 75	3			\$ 5	1
Oct		\$ 1,520	31	\$ 1,403	28	\$ 2,701	27
Catalyst Fund		\$ 225	6	\$ 525	2	\$ 48	2
Donald Peterson Student Scholarship Award		\$ 25	1	\$ 10	1	\$ 25	1
F. Gerald and Elsie Ham Scholarship		\$ 160	4	\$ 110	4	\$ 70	3
Harold T. Pinkett Student of Color Award		\$ 250	7	\$ 125	5	\$ 725	7
Linda J. Henry Fund		\$ 25	1				
Margaret Cross Norton Fund				\$ 50	2		
Mosaic Scholarship		\$ 460	13	\$ 175	7	\$ 225	6
National Disaster Recovery Fund for Archives		\$ 375	13	\$ 358	13	\$ 1,583	17
Philip Hamer & Elizabeth Hamer-Kegan Award				\$ 50	2	\$ 25	1
Grand Total		\$ 66,424	402	\$39,818	388	\$24,210	234