SAA Foundation Board Meeting November 20-21, 2025 Chicago, IL 60602

Staff Q1: Operations Report (Prepared by: Astoria Edwards, Governance Director)

The SAA Foundation achieved significant momentum in FY25. With total donations reaching \$47,096.49, an 18.3% increase over the previous year, and donor participation growing to 647 gifts, the Foundation expanded both its financial capacity and its base of supporters.

Total Donations (Amount)

FY24: \$39,818.01FY25: \$47,096.49

Change: +18.3% (\$7,278.48 increase)

Total Number of Donations

FY24: 549FY25: 647

Change: +17.9% (98 more donations)

Fund-Level Analysis

High Growth Funds (>30%increase)

Donald Peterson Fund: +133.2%

Mosaic Fund: +74.2%

Harold T. Pinkett Fund: +31.5%

Margaret Cross Norton Fund: +31.4%

These high-growth funds attracted 148 new donors and generated \$7,759 in additional revenue, underscoring their appeal and fundraising potential.

Stable Funds (0-10% change)

- National Disaster Recovery Fund: +2.9%
- Phillip Hamer & Elizabeth Hamer-Kegan Fund: +6.8%

These funds demonstrated consistent performance, contributing to the Foundation's financial stability.

Declining Fund (<0% change)

- F. Gerald & Elsie Ham Fund: -31.4%
- Linda J. Henry Fund: -33.4%

These funds experienced a decline, losing 11 donors and \$1,244 in revenue, indicating a need for renewed engagement strategies.

	FY24 Amount	FY25 Amount	Change (\$)	Change	FY24#	FY25#	Change	
Fund				(%)			in#	Notes
Catalyst Fund	\$17,243.01	\$20,388.91	\$3,145.90	18.20%	115	91	-24	Largest fund; fewer gifts but higher total amount.
Donald Peterson Fund	\$250.00	\$582.92	\$332.92	133.20%	11	24	13	Significant growth in participation and total amount.
F. Gerald & Elsie Ham Fund	\$1,790.00	\$1,227.91	(\$562.09)	-31.40%	35	26	-9	Decline in both amount and participation.
Harold T. Pinkett Fund	\$1,844.00	\$2,423.91	\$579.91	31.50%	57	57	0	Stable donor base with higher average gift.
Linda J. Henry Fund	\$2,043.00	\$1,360.91	(\$682.09)	-33.40%	15	13	-2	Decline in both metrics.
Margaret Cross Norton Fund	\$360.00	\$472.91	\$112.91	31.40%	11	16	5	Small but steady growth.
Mosaic Fund	\$5,432.00	\$9,462.11	\$4,030.11	74.20%	100	227	127	Strongest performance—more than doubled gifts and donors.
National Disaster Recovery Fund	\$10,591.00	\$10,896.91	\$305.91	2.90%	196	179	-17	Stable high performer.
Philip Hamer & Elizabeth Hamer- Kegan Fund	\$265.00	\$282.91	\$17.91	6.80%	9	14	5	Small but steady increase.

Donor Participation

Total donor engagement: Increased from 549 to 647 gifts (+98 gifts)

Catalyst Fund:

- Lost 24 donors but gained \$3,146
- Average gift increased from \$150 to \$224 (+49%)

This trend suggests a strategic pivot toward cultivating major donors or securing impactful one-time contributions.

Mosaic Fund:

- Added 127 new donors (127% increase)
- Average gift remained modest but consistent

Indicates a successful broad-based fundraising campaign

Annual Meeting Fundraising Events & Sponsors

During the annual meeting in August, several events successfully supported SAA Foundation initiatives:

Santa Monica Fundraising Event (August 23): Featured a keynote by Dr.
 Michelle Caswell, Professor of Archival Studies at UCLA, on "The Role of

- Archives in Democracies." The event welcomed 20 attendees and raised \$2,250 for the Catalyst Fund.
- Trivia Night (August 25): Raised \$1,690 in support of the Catalyst Fund.
- Mosaic Professional Headshot Event (August 26): Generated \$2,489 for the Mosaic Fund.
- Silent Auction (August 25–26): Brought in \$5,143.09 for the National Disaster Recovery Fund for Archives (NDRFA).

Collectively, these events generated \$11,572.09, directly advancing the Foundation's mission and expanding programmatic impact.

Sponsor

Rockefeller Archives Center (RAC) donated \$5,000 to the SAA Foundation to support the new Impacted Workers Resource Program, which provides one year of SAA membership and access to discounted or free professional resources for affected workers. The funds allowed four individuals to attend the 2025 ARCHIVES*RECORDS either in person or virtually in Anaheim, CA.

RAC's support also enabled the second annual Mosaic Professional Headshot event and the inaugural Catalyst Trivia Night, fostering professional development and strengthening community engagement.

Fiscal Year Trends

	FY24		FY	25	FY	26	Total	
	Amount	# of	Amount	# of	Amount	# of	Amount	# of
		Donations		Donations		Donations		Donations
Catalyst Fund	\$17,243.01	115	\$20,388.91	91	\$8,713.00	69	\$46,344.92	275
Donald Peterson Fund	\$250.00	11	\$582.92	24	\$125.00	4	\$957.92	39
F. Gerald and Elsie Ham Fund	\$1,790.00	35	\$1,227.91	26	\$400.00	13	\$3,417.91	74
Harold T. Pinkett Fund	\$1,844.00	57	\$2,423.91	57	\$975.00	10	\$5,242.91	124
Linda J. Henry Fund	\$2,043.00	15	\$1,360.91	13	\$25.00	1	\$3,428.91	29
Margaret Cross Norton Fund	\$360.00	11	\$472.91	16	\$6,100.00	5	\$6,932.91	32
Mosaic Fund	\$5,432.00	100	\$9,462.11	227	\$4,932.00	116	\$19,826.11	443
National Disaster Recovery Fund for Archives	\$10,591.00	196	\$10,896.91	179	\$6,206.09	95	\$27,694.00	470
Philip Hamer & Elizabeth Hamer-Kegan Fund	\$265.00	9	\$282.91	14	\$25.00	2	\$572.91	25
Total	\$39,818.01	549	\$47,099.40	647	\$27,501.09	315	\$114,418.50	1511

Quarterly Funds Trends

	Catalys	Catalyst Fund		rson Fund	F. Gerald and Elsie Ham Fund	
		# of		# of		# of
	Amount	Donations	Amount	Donation	Amount	Donations
Q1 FY2024	\$2,800.00	27	\$60.00	3	\$270.00	10
Q2 FY2024	\$11,142.99	47	\$10.00	1	\$835.00	8
Q3 FY2024	\$1,450.02	20	\$30.00	2	\$400.00	7
Q4 FY2024	\$1,850.00	21	\$150.00	5	\$285.00	10
Q1 FY2025	\$9,625.91	17	\$122.91	7	\$762.91	10
Q2 FY2025	\$7,343.00	46	\$50.00	3	\$145.00	6
Q3 FY2025	\$1,715.00	19	\$235.01	7	\$220.00	6
Q4 FY2025	\$1,705.00	9	\$175.00	7	\$100.00	4
Q1 FY2026	\$8,338.00	66	\$100.00	3	\$375.00	12
Q2 FY2026	\$375.00	3	\$25.00	1	\$25.00	1
Total	\$46,344.92	275	\$957.92	39	\$3,417.91	74

	Harold T. Pi	nkett Fund	Linda J. Her	nry Fund	Margaret Cros	s Norton Fund
				# of		
		# of		Donation		# of
	Amount	Donations	Amount	S	Amount	Donations
Q1 FY2024	\$478.00	20	\$175.00	3	\$85.00	4
Q2 FY2024	\$580.00	14	\$500.00	4	\$150.00	3
Q3 FY2024	\$436.00	10	\$250.00	3	\$50.00	1
Q4 FY2024	\$350.00	13	\$1,118.00	5	\$75.00	3
Q1 FY2025	\$422.91	15	\$57.91	3	\$132.91	5
Q2 FY2025	\$1,095.00	14	\$0.00	0	\$150.00	3
Q3 FY2025	\$536.00	16	\$160.00	4	\$140.00	6
Q4 FY2025	\$370.00	12	\$1,143.00	6	\$50.00	2
Q1 FY2026	\$950.00	9	\$25.00	1	\$6,100.00	5
Q2 FY2026	\$25.00	1	\$0.00	0	\$0.00	0
Total	\$5,242.91	124	\$3,428.91	29	\$6,932.91	32

	Mosaic	Mosaic Fund		Disaster	Philip Hamer	& Elizabeth	To	tal
				# of				
		# of		Donation		# of		# of
	Amount	Donations	Amount	S	Amount	Donations	Amount	Donations
Q1 FY2024	\$2,446.00	29	\$5,410.00	105	\$25.00	1	\$11,749.00	202
Q2 FY2024	\$550.00	19	\$1,623.00	22	\$125.00	4	\$15,515.99	122
Q3 FY2024	\$941.00	26	\$573.00	20	\$90.00	3	\$4,220.02	92
Q4 FY2024	\$1,495.00	26	\$2,985.00	49	\$25.00	1	\$8,333.00	133
Q1 FY2025	\$5,305.11	131	\$5,015.91	87	\$62.91	4	\$21,509.39	279
Q2 FY2025	\$620.00	18	\$2,543.00	28	\$75.00	3	\$12,021.00	121
Q3 FY2025	\$851.00	28	\$1,128.00	30	\$70.00	4	\$5,055.01	120
Q4 FY2025	\$2,686.00	50	\$2,210.00	34	\$75.00	3	\$8,514.00	127
Q1 FY2026	\$4,857.00	113	\$6,131.09	92	\$25.00	2	\$26,901.09	303
Q2 FY2026	\$75.00	3	\$75.00	3	\$0.00	0	\$600.00	12
Total	\$19,826.11	443	\$27,694.00	470	\$572.91	25	\$114,418.50	1511

Month	July						Subtotal	
Fiscal Year	Q1 FY2026		Q1 FY2025		Q1 FY2024			
	Donation	# of	Donation	# of	Donation	# of	Donation	# of
Funds	Amount	Donations	Amount	Donations	Amount	Donations	Amount	Donations
Catalyst Fund	\$5,100.00	3	\$182.91	5	\$2,139.00	15	\$7,421.91	23
Donald Peterson Fund	\$100.00	3	\$107.91	5	\$25.00	1	\$232.91	9
F. Gerald and Elsie Ham Fund	\$225.00	5	\$107.91	2	\$30.00	2	\$362.91	9
Harold T. Pinkett Fund	\$800.00	4	\$107.91	5	\$85.00	4	\$992.91	13
Linda J. Henry Fund	\$25.00	1	\$7.91	1	\$0.00	0	\$32.91	2
Margaret Cross Norton Fund	\$50.00	2	\$82.91	3	\$25.00	1	\$157.91	6
Mosaic Fund	\$300.00	9	\$607.91	13	\$425.00	11	\$1,332.91	33
National Disaster Recovery Fund for Archives	\$693.00	15	\$207.91	7	\$4,590.00	92	\$5,490.91	114
Philip Hamer & Elizabeth Hamer- Kegan Fund	\$0.00	0	\$32.91	2	\$0.00	0	\$32.91	2
Total	\$7,293.00	42	\$1,446.19	43	\$7,319.00	126	\$16,058.19	211

Month	August						Subtotal	
Fiscal Year			Q1 FY2025		Q1 FY2024			
	Donation	# of	Donation	# of	Donation	# of	Donation	# of
Funds	Amount	Donations	Amount	Donations	Amount	Donations	Amount	Donations
Catalyst Fund	\$2,705.00	59	\$1,918.00	8	\$508.00	11	\$5,131.00	78
Donald Peterson Fund	\$0.00	0	\$10.00	1	\$10.00	1	\$20.00	2
F. Gerald and Elsie Ham Fund	\$100.00	5	\$0.00	0	\$160.00	4	\$260.00	9
Harold T. Pinkett Fund	\$50.00	2	\$260.00	8	\$208.00	9	\$518.00	19
Linda J. Henry Fund	\$0.00	0	\$25.00	1	\$150.00	2	\$175.00	3
Margaret Cross Norton Fund	\$0.00	0	\$25.00	1	\$60.00	3	\$85.00	4
Mosaic Fund	\$2,976.00	90	\$3,491.20	114	\$260.00	8	\$6,727.20	212
National Disaster Recovery Fund for Archives	\$5,168.09	69	\$4,543.00	73	\$595.00	11	\$10,306.09	153
Philip Hamer & Elizabeth Hamer- Kegan Fund	\$0.00	1	\$25.00	1	\$25.00	1	\$50.00	3
Total	\$10,999.09		·		·		\$23,272.29	

Month	September						Subtotal	
Fiscal Year	Q1 FY2026		Q1 FY2025		Q1 FY2024			
	Donation	# of						
Funds	Amount	Donations	Amount	Donations	Amount	Donations	Amount	Donations
Catalyst Fund	\$533.00	4	\$7,525.00	4	\$153.00	1	\$8,211.00	9
Donald Peterson Fund	\$0.00	0	\$5.00	1	\$25.00	1	\$30.00	2
F. Gerald and Elsie Ham Fund	\$50.00	2	\$655.00	8	\$80.00	4	\$785.00	14
Harold T. Pinkett Fund	\$100.00	3	\$55.00	2	\$185.00	7	\$340.00	12
Linda J. Henry Fund	\$0.00	0	\$25.00	1	\$25.00	1	\$50.00	2
Margaret Cross Norton Fund	\$6,050.00	3	\$25.00	1	\$0.00	0	\$6,075.00	4
Mosaic Fund	\$1,581.00	14	\$1,206.00	4	\$1,761.00	10	\$4,548.00	28
National Disaster Recovery Fund for Archives	\$270.00	8	\$265.00	7	\$225.00	2	\$760.00	17
Philip Hamer & Elizabeth Hamer- Kegan Fund	\$25.00	1	\$5.00	1	\$0.00	0	\$30.00	2
Total	\$8,609.00		\$9,766.00		\$2,454.00			

Month	October						Subtotal	
Fiscal Year	Q2 FY2026		Q2 FY2025		Q2 FY2024			
	Donation	# of						
Funds	Amount	Donations	Amount	Donations	Amount	Donations	Amount	Donations
Catalyst Fund	\$375.00	3	\$48.00	2	\$525.00	2	\$948.00	7
Donald Peterson Fund	\$25.00	1	\$25.00	1	\$10.00	1	\$60.00	3
F. Gerald and Elsie Ham Fund	\$25.00	1	\$70.00	3	\$110.00	4	\$205.00	8
Harold T. Pinkett Fund	\$100.00	3	\$725.00	7	\$125.00	5	\$950.00	15
Linda J. Henry Fund	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00	0
Margaret Cross Norton Fund	\$25.00	1	\$0.00	0	\$50.00	2	\$75.00	3
Mosaic Fund	\$125.00	5	\$225.00	6	\$175.00	7	\$525.00	18
National Disaster Recovery Fund for Archives	\$350.00	7	\$1,583.00	17	\$358.00	13	\$2,291.00	37
Philip Hamer & Elizabeth Hamer- Kegan Fund	\$0.00	0	\$25.00	1	\$50.00	2	\$75.00	3
Total	\$1,025.00	21	\$2,701.00	37	\$1,403.00	36	\$5,129.00	94

Month	November				Subtotal		
Fiscal Year	Q2 FY2025		Q2 FY2024				
Funds	Donation Amount	# of Donations	Donation Amount	# of Donations	Donation Amount	# of Donations	
Catalyst Fund	\$450.00						
Donald Peterson Fund	\$25.00				\$25.00		
F. Gerald and Elsie Ham Fund	\$25.00	1	\$575.00	3	\$600.00	4	
Harold T. Pinkett Fund	\$300.00	3	\$380.00	6	\$680.00	9	
Linda J. Henry Fund	\$0.00	0	\$0.00	0	\$0.00	0	
Margaret Cross Norton Fund	\$150.00	3	\$100.00	1	\$250.00	4	
Mosaic Fund	\$210.00	7	\$100.00	4	\$310.00	11	
National Disaster Recovery Fund for Archives	\$75.00	3	\$40.00	2	\$115.00	5	
Philip Hamer & Elizabeth Hamer-							
Kegan Fund	\$25.00		\$0.00		\$25.00		
Total	\$1,260.00	26	\$4,832.99	40	\$6,092.99	66	

Month	December				Subtotal	
Fiscal Year	Q2 FY2025		Q2 FY2024			
Funds	Donation Amount	# of Donations	Donation Amount	# of Donations	Donation Amount	# of Donations
Catalyst Fund	\$6,845.00	38	\$6,980.00	21	\$13,825.00	59
Donald Peterson Fund	\$0.00	0	\$0.00	0	\$0.00	0
F. Gerald and Elsie Ham Fund	\$50.00	2	\$150.00	1	\$200.00	3
Harold T. Pinkett Fund	\$70.00	4	\$75.00	3	\$145.00	7
Linda J. Henry Fund	\$0.00	0	\$500.00	4	\$500.00	4
Margaret Cross Norton Fund	\$0.00	0	\$0.00	0	\$0.00	0
Mosaic Fund	\$185.00	5	\$275.00	8	\$460.00	13
National Disaster Recovery Fund for Archives	\$885.00	8	\$1,225.00	7	\$2,110.00	15
Philip Hamer & Elizabeth Hamer- Kegan Fund	\$25.00	1	\$75.00	2	\$100.00	3
Total	\$8,060.00		\$9,280.00			

Month	January				Subtotal	
Fiscal Year	Q3 FY2025		Q3 FY2024			
	Donation	# of	Donation	# of	Donation	# of
Funds	Amount	Donations	Amount	Donations	Amount	Donations
Catalyst Fund	\$540.00	6	\$935.00	8	\$1,475.00	14
Donald Peterson Fund	\$185.01	5	\$30.00	2	\$215.01	7
F. Gerald and Elsie Ham Fund	\$70.00	3	\$300.00	3	\$370.00	6
Harold T. Pinkett Fund	\$185.00	7	\$100.00	4	\$285.00	11
Linda J. Henry Fund	\$110.00	2	\$50.00	2	\$160.00	4
Margaret Cross Norton Fund	\$10.00	1	\$0.00	0	\$10.00	1
Mosaic Fund	\$410.00	14	\$335.00	11	\$745.00	25
National Disaster Recovery Fund for Archives	\$420.00	14	\$295.00	9	\$715.00	23
Philip Hamer & Elizabeth Hamer- Kegan Fund	\$45.00	3	\$50.00	1	\$95.00	4
Total	\$1,975.01	55	\$2,095.00		·	95

Month February					Subtotal	
Fiscal Year	Q3 FY2025		Q3 FY2024			
Funds	Donation Amount	# of Donations	Donation Amount	# of Donations	Donation Amount	# of Donations
Catalyst Fund	\$1,110.00	10	\$450.02	9	\$1,560.02	19
Donald Peterson Fund	\$25.00	1	\$0.00	0	\$25.00	1
F. Gerald and Elsie Ham Fund	\$150.00	3	\$75.00	3	\$225.00	6
Harold T. Pinkett Fund	\$226.00	4	\$176.00	2	\$402.00	6
Linda J. Henry Fund	\$50.00	2	\$200.00	1	\$250.00	3
Margaret Cross Norton Fund	\$50.00				\$100.00	
Mosaic Fund	\$276.00	7	\$301.00	7	\$577.00	14
National Disaster Recovery Fund for Archives	\$500.00	6	\$120.00	4	\$620.00	10
Philip Hamer & Elizabeth Hamer- Kegan Fund	\$25.00	1	\$25.00	1	\$50.00	2
Total	\$2,412.00		·		·	

Month	March				Subtotal	
Fiscal Year	Q3 FY2025		Q3 FY2024			
	Donation	# of	Donation	# of	Donation	# of
Funds	Amount	Donations	Amount	Donations	Amount	Donations
Catalyst Fund	\$65.00	3	\$65.00	3	\$130.00	6
Donald Peterson Fund	\$25.00	1	\$0.00	0	\$25.00	1
F. Gerald and Elsie Ham Fund	\$0.00	0	\$25.00	1	\$25.00	1
Harold T. Pinkett Fund	\$125.00	5	\$160.00	4	\$285.00	9
Linda J. Henry Fund	\$0.00	0	\$0.00	0	\$0.00	0
Margaret Cross Norton Fund	\$80.00	3	\$0.00	0	\$80.00	3
Mosaic Fund	\$165.00	7	\$305.00	8	\$470.00	15
National Disaster Recovery Fund for Archives	\$208.00	10	\$158.00	7	\$366.00	17
Philip Hamer & Elizabeth Hamer- Kegan Fund	\$0.00	0	\$15.00	1	\$15.00	1
Total	\$668.00		\$728.00		·	

Month	April				Subtotal	
Fiscal Year	Q4 FY2025		Q4 FY2024			
Funds	Donation Amount	# of Donations	Donation Amount	# of Donations	Donation Amount	# of Donations
Catalyst Fund	\$1,000.00	1	\$200.00	6	\$1,200.00	7
Donald Peterson Fund	\$75.00	3	\$50.00	2	\$125.00	5
F. Gerald and Elsie Ham Fund	\$50.00	2	\$75.00	2	\$125.00	4
Harold T. Pinkett Fund	\$75.00	3	\$125.00	4	\$200.00	7
Linda J. Henry Fund	\$1,050.00	3	\$50.00	2	\$1,100.00	5
Margaret Cross Norton Fund	\$25.00	1	\$50.00	2	\$75.00	3
Mosaic Fund	\$150.00	5	\$320.00	11	\$470.00	16
National Disaster Recovery Fund for Archives	\$325.00	7	\$870.00	14	\$1,195.00	21
Philip Hamer & Elizabeth Hamer- Kegan Fund	\$25.00	1	\$25.00	1	\$50.00	2
Total	\$2,775.00		·		\$4,540.00	

Month	May			Subtotal		
Fiscal Year	Q4 FY2025		Q4 FY2024			
Funds	Donation Amount	# of Donations	Donation Amount	# of Donations	Donation Amount	# of Donations
Catalyst Fund	\$650.00	6	\$625.00	6	\$1,275.00	12
Donald Peterson Fund	\$50.00	2	\$75.00	2	\$125.00	4
F. Gerald and Elsie Ham Fund	\$50.00	2	\$110.00	4	\$160.00	6
Harold T. Pinkett Fund	\$195.00	5	\$100.00	4	\$295.00	9
Linda J. Henry Fund	\$93.00	3	\$1,068.00	3	\$1,161.00	6
Margaret Cross Norton Fund	\$0.00	0	\$0.00	0	\$0.00	0
Mosaic Fund	\$1,970.00	34	\$1,025.00	9	\$2,995.00	43
National Disaster Recovery Fund for Archives	\$1,485.00	22	\$1,840.00	28	\$3,325.00	50
Philip Hamer & Elizabeth Hamer-	ФГО ОО		#0.00	0	фго oo	0
Kegan Fund Total	\$50.00 \$4,543.00		\$0.00 \$4,843.00		\$50.00 \$9,386.00	
TOLAT	Φ4,543.00	76	φ 4 ,043.00	30	φ9,300.00	132

Month June					Subtotal	
Fiscal Year	Q4 FY2025		Q4 FY2024			
Funds	Donation Amount	# of Donations	Donation Amount	# of Donations	Donation Amount	# of Donations
Catalyst Fund	\$55.00	2	\$1,025.00	9	\$1,080.00	11
Donald Peterson Fund	\$50.00	2	\$25.00	1	\$75.00	3
F. Gerald and Elsie Ham Fund	\$0.00	0	\$100.00	4	\$100.00	4
Harold T. Pinkett Fund	\$100.00	4	\$125.00	5	\$225.00	9
Linda J. Henry Fund	\$0.00	0	\$0.00	0	\$0.00	0
Margaret Cross Norton Fund	\$25.00	1	\$25.00	1	\$50.00	2
Mosaic Fund	\$566.00	11	\$150.00	6	\$716.00	17
National Disaster Recovery Fund for Archives	\$400.00	5	\$275.00	7	\$675.00	12
Philip Hamer & Elizabeth Hamer- Kegan Fund	\$0.00	0	\$0.00	0	\$0.00	0
Total	\$1,196.00					