

























SAA Foundation Strategic Plan (2025-2027)

Legend
Black - Initiative Not Started
Yellow - Inprogress
Green - Completed

Goals	Lead/Collaborators	Timeline	Initiatives	Status
GOAL 1: Share financial resources to benefit archival practitioners and the collections for which they care. 	Grant Review Committee/CORDA	FY27	Strengthening collaboration with the SAA CORDA committee and aligning research funding priorities	 10
GOAL 1: Share financial resources to benefit archival practitioners and the collections for which they care. 	Board/Grants Review Committee	FY25 - FY27	Designate grant funds for capacity-building in community archives.	 80
GOAL 1: Share financial resources to benefit archival practitioners and the collections for which they care. 		FY26	Support cooperative projects that enhance shared access to archival materials	 0
GOAL 1: Share financial resources to benefit archival practitioners and the collections for which they care. 	NDRFA Review Committee Board	FY26-FY27	Expand the NDRFA emergency relief fund (scope, fund)[FY26]; 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. [FY27]	 0
GOAL 1: Share financial resources to benefit archival practitioners and the collections for which they care. 	Grant Review Committee	FY26-FY27	Build a landing page to compile grants, social media, and promote collaboration between the development and grant review committees	 0
GOAL 1: Share financial resources to benefit archival practitioners and the collections for which they care. 	Grants Review Committee/Dev Comm	FY27	Dedicate research grants funds to projects that forward initiatives in the SAA Work Plan on DEIA.	 60







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GOAL 1: Share financial resources to benefit archival practitioners and the collections for which they care. 	Board	FY27	Apply for grant(s) to expand support for community archives projects.	 0
GOAL 1: Share financial resources to benefit archival practitioners and the collections for which they care. 	Board/Staff	FY27	Open dialogue with preeminent grant makers to seek out collaborative projects.	 50
GOAL 1: Share financial resources to benefit archival practitioners and the collections for which they care. 	Grant Review Committee	FY27	Targeted call for grant proposals focused on climate change and/or resiliency.	 0
GOAL 1: Share financial resources to benefit archival practitioners and the collections for which they care. 	Development Committee	FY27 - FY28	Foster partnerships to expand and broaden reach to archivists beyond SAA members/current audience.	 0
GOAL 2: Expand financial resources to ensure their sustainability, diversify partnerships, and fully fund our programs. 	Grant Review Committee	FY26	Review grants landscape and identify 1 funding opportunity that could advance the work of SAA.	 0
GOAL 2: Expand financial resources to ensure their sustainability, diversify partnerships, and fully fund our programs. 	Board	FY26	Establish a concrete donor growth target and charge each board member with identifying up to two potential donors to support reaching it.	 0







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GOAL 2: Expand financial resources to ensure their sustainability, diversify partnerships, and fully fund our programs. ☒	Development Committee	FY26	Develop a donor recognition and retention strategy	 0
GOAL 2: Expand financial resources to ensure their sustainability, diversify partnerships, and fully fund our programs. ☒	Development Committee	FY27	Promote legacy and planned giving	 0
GOAL 2: Expand financial resources to ensure their sustainability, diversify partnerships, and fully fund our programs. ☒	Development Committee	FY26	Build recurring fundraising events around specific funds Catalyst Fund & Mosaic Scholarship Fund, (NDRFA) National Disaster Relief Fund for Archives	 80
GOAL 2: Expand financial resources to ensure their sustainability, diversify partnerships, and fully fund our programs. ☒	Development Committee	FY26 - FY27	Peer-to-peer fundraising campaigns (Catalyst Fund & Mosaic Scholarship Fund)	 30
GOAL 2: Expand financial resources to ensure their sustainability, diversify partnerships, and fully fund our programs. ☒	Board	FY26 - FY27	Secure long-term funding through sponsorship and affiliation	 0
GOAL 2: Expand financial resources to ensure their sustainability, diversify partnerships, and fully fund our programs. ☒	Development Committee	FY26 - FY27	Create an integrated stewardship system that includes a donor matrix to guide communication and engagement levels, along with sustainable pre and post donor stewardship practices that cultivate lifelong relationships.	 33





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GOAL 2: Expand financial resources to ensure their sustainability, diversify partnerships, and fully fund our programs. ☐	Board	FY27	Expand financial resources, via external grants that support the priorities of the Foundation to expand the grant program (Mellon Foundation, etc.)	 0
GOAL 3: Steward human and technological resources to promote a nimble, responsive, and engaged culture of philanthropy. ☐	Development Committee	FY26-FY27	Develop matching gift & crowdfunding support: provide matching funds for community-driven fundraising efforts.	 10
GOAL 3: Steward human and technological resources to promote a nimble, responsive, and engaged culture of philanthropy. ☐	Staff	FY26	Create frictionless opportunities to receive donations.	 50
GOAL 3: Steward human and technological resources to promote a nimble, responsive, and engaged culture of philanthropy. ☐	Development Committee	FY27	Develop targeted appeal based on professional demographics (first time donation, anniversary, etc.).	 0
GOAL 3: Steward human and technological resources to promote a nimble, responsive, and engaged culture of philanthropy. ☐	Foundation Leaders Governance Committee	FY26	Enhanced orientation for Board of Directors.	 40
GOAL 3: Steward human and technological resources to promote a nimble, responsive, and engaged culture of philanthropy. ☐	Foundation Leaders	FY26	Stewardship Training for the Board of Directors (making the ask).	 100

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GOAL 3: Steward human and technological resources to promote a nimble, responsive, and engaged culture of philanthropy. ☐	Development Committee	FY26-FY27	Research ways to expand planned and other giving programs (donor-advised funds)	 0
GOAL 3: Steward human and technological resources to promote a nimble, responsive, and engaged culture of philanthropy. ☐	Staff	FY27-FY28	Develop and implement verification systems and supporting infrastructure to ensure compliance with state and federal fundraising regulations.	 0
GOAL 3: Steward human and technological resources to promote a nimble, responsive, and engaged culture of philanthropy. ☐	Development Committee Gift Acceptance	FY28-FY29	Explore and develop a corporate giving program.	 0
GOAL 3: Steward human and technological resources to promote a nimble, responsive, and engaged culture of philanthropy. ☐	Grant Review Committee Development Committee	FY27 - FY28	Steward human and technological resources to systematically review the grants landscape and surface strategic funding opportunities that advance the SAA Foundation's philanthropic work.	 0