The Association of Fundraising Professionals – Montana Chapter
Annual Meeting and Educational Summit

From Acquisition to Legacy—Engaging the Donor Throughout the Donor Lifecycle
Bozeman, MT
Oct. 26 & 27, 2023

Event Description

The Montana Chapter of the Association of Fundraising Professionals proudly presents the 2023 Annual Meeting and Educational Summit, “From Acquisition to Legacy—Engaging the Donor Throughout the Donor Lifecycle”.

The donor lifecycle describes the way nonprofit organizations engage with and view their donors from the start of their relationship (when they first learn about your organization) to when they give and beyond. From acquiring donors, to donor retention and mid-level donor programs, attendees will travel along the donor’s journey through the donor lifecycle, moving the donor through a sequence of processes and practices involved in establishing and renewing the connection of donors and their values with your organization and its mission.

Full participation in the AFP-Montana Summit on “Engaging the Donor Throughout the Donor Lifecycle” is applicable for 6 points in Category 1.B – Education of the CFRE International application for initial certification and/or recertification.

Program

THURSDAY, OCT. 26

12:30 PM – 1:00 PM  Registration & Check In

1:00 PM – 3:00 PM  Keynote – Engaging the Generations in Philanthropy .................................................. Dr. Sarah Nathan  
Eli Lilly School of Philanthropy

Research as demonstrated that giving preferences and patterns vary among the generations. Thus, what works for baby boomers in philanthropy may not work for millennials. At the same time, Generation Z is quickly approaching adulthood. What do we know about these young people who are our donors of tomorrow? This module will challenge assumptions to help you overcome organizational barriers to successfully engage donors across their life cycle, including latest behaviors and trends.

3:00 PM – 3:10 PM  Break

3:10 PM – 4:10 PM  Donor Acquisition 101................................................................. Kristi Farver Oaks  
Executive Vice President of Development, Yellowstone Boys & Girls Ranch Foundation

You may have heard the comparison before that donor acquisition is like dating. A prospect needs to get to know you before they’re ready to give. But how do you “date” a donor? Donor acquisition is one of the most important stages in the donor journey. Who you engage as potential donors and how and when you approach them will set the stage for your relationship. This session will explore different strategies for donor acquisition, from marketing and promotional campaigns, to acquiring email addresses to building a funnel to turn those new leads into donors.

4:15 PM – 5:00 PM  Cocktails/No Host Bar

5:00 PM – 7:30 PM  Dinner, AFP-MT Annual Meeting and Presentation of AFP MT Annual Awards

AFP MT Annual Awards.................................................. Emcee’d by Andrea Lambert and Kristi Farver Oaks
The purpose of the AFP Annual Awards is to recognize the great contributions of philanthropy in the state of Montana—and those people active in the philanthropic community—to the enrichment of our communities.

**Outstanding Fundraising Professional** - The Award for Outstanding Fundraising Professional honors an outstanding individual fundraising professional who works for a nonprofit, charitable organization.

**Outstanding Non-Profit** – The Award for Outstanding Non-Profit recognizes the outstanding accomplishments of nonprofit organization in the state and that staff and volunteers dedicated to the business of doing good in the state and whose work is driving a lasting impact in the state of Montana.

**Outstanding Young Professional** - The Award for Outstanding Young Professional recognizes fundraisers under the age of 31 who display excellence in raising funds, inspiring donors, managing campaigns and dedication to the charitable sector.

**Outstanding Volunteer** - The Award for Outstanding Volunteer Fundraiser honors an individual or family that demonstrates outstanding skills in coordinating and motivating groups of donors and volunteers for fundraising projects for the benefit of charitable institutions.

**Outstanding Business** - The Award for Outstanding Business honors a corporation or business that demonstrates outstanding commitment through financial support and through encouragement and motivation of others to take leadership roles toward philanthropy and community involvement.

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**FRIDAY, OCT. 27**

7:30 AM – 8:00 AM
**Welcome and Breakfast** ................................................................. Emcee

8:00 AM – 9:00 AM
**Building a Strong Foundation for Mid-Level Donor Program** ........................................... Emily Frazier
Executive Director, Helena Area Community Foundation

Are you looking to improve donor retention? Do you have a direct mail and major gifts programs, but lack a clear plan for the donors in between and need a balanced way to do more with this group? Creating a mid-level donor program with a focus on donor retention might be the right option for you. Mid-level giving is a donor journey and strategy for your nonprofit’s mid-tier donors. By drawing this important donor group in more closely, you can identify who has the capacity to make a major gift. In this session we’ll explore how to retain and upgrade your donors; how to form a lasting relationship with your donors; and how you might better engage with your mid-level donors and access any money left on the table by your most dedicated donors.

9:00 AM – 9:10 AM
**Break**

9:10 AM – 10:10 AM
**Major Gifts – Elevating Donors to Grow Your Impact** .................................................... Chris Glick
Vice President of Development, MSU Alumni Foundation

In this session, you will learn how to effectively tell the story of your institution, how to inspire your donors and build your credibility to secure major gifts. Participants will gain an understanding of the philosophy and strategies implemented in major gift development including prospect identification, how to initially engage a potential major gift donor, the process of cultivation and moves management, effective proposal writing, making a successful ask and on-going donor stewardship. Participants will practice fundamental major gift development skills and developing their own prospect strategy and engaging in role playing activity to simulate interaction with prospects and donors.

10:10 AM – 10:20 AM
**Break**
Legacy Giving .......................................................................................................................... Alison Schultz
Senior Director of Planned Giving, University of Montana Foundation

Legacy giving has a reputation for being complex and fraught with technical tax issues, which may scare off nonprofits from getting started with a planned giving program. Fortunately, when approached with the right strategy, legacy giving is far from scary and can even become one of your nonprofit’s most reliable revenue sources of both current and future support. As the greatest wealth transfer in history is underway, now is the time for nonprofits to position themselves to work with donors on their legacy gift. In this session you’ll be immersed in discussion about legacy donors, their motivations and practical consideration regarding assets and timing, learning to close larger gifts than you may have thought possible.

Foundation as Donors—How to build successful grantee-funder relationship .................. Amberly Pahut
Dir. Community Responsibility & Executive Director of the First Interstate BancSystem Foundation

“You never get a second chance to make a good first impression.” Will Rogers. Are you taking the best first steps to make a good first impression with Foundations? Are you building a lasting grantee-funder relationship or are you wasting time and effort—for you and the grant maker? In this session you will learn about the best practices including how to better research and uncover grantmaking Foundations and tailor your funding project to better suit their passion. Participants will gain instruction on how to build relationships with the funder by using appropriate talking points, following grant maker “rules,” and even use personal and social media networks to get the Foundation’s attention. The presenter will offer strategy on how to approach funders that do not accept applications and how you may be able to approach a possible partnership with Foundations that appear inaccessible.

Closing remarks and Evaluations
KRISTI FARVER OAKS is Executive Vice President of Development at the Yellowstone Boys and Girls Ranch Foundation. She is a graduate of Concordia College in Moorhead, MN, and joined Yellowstone Foundation in 2019.

A northeast Montana native, Kristi was with the American Cancer Society for over 20 years, starting in the field in eastern Montana and then serving as the state director for eight years before finishing her time with ACS as Managing Director of the Great West Division, overseeing income staff in a twelve-state region.

As EVPD at Yellowstone Foundation, Kristi assists Yellowstone’s friends with both annual and major gifts in addition to networking with the larger community to match individuals, businesses, foundations, and corporations with suitable Ranch projects.

EMILY FRAZIER, CFRE, MA, is a Helena native and a nonprofit nerd. She holds a master’s degree in Philanthropy and Development from Saint Mary’s University of Minnesota, is a Certified Fund Raising and loves connecting people to the causes they care about. Emily has worked in the nonprofit sector for over 15 years and joined the Helena Area Community Foundation in 2019. Emily is a 2021 graduate of Leadership Montana and was selected as one of Helena’s 20 under 40 in 2021. Emily serves her community as a CASA volunteer, and her hobbies include cooking, playing board games, and carving candles as an apprentice chandler. She is thrilled to be living and working in her hometown, for her hometown! She lives with her husband, Eric, and her dog Hershel.

CHRIS GLICK joined the MSU Alumni Foundation in the role of Vice President of Development in August of 2022. Previously, Chris worked for the University of California, Davis where he served as the Assistant Dean for Development & Alumni Engagement for the College of Agricultural & Environmental Sciences. In that role, Chris was responsible for overseeing the college’s advancement efforts to raise $500M as part of the university’s Expect Greater campaign. Chris led an effort with the central development office to secure a $50M gift to support a new agricultural innovation building. Prior to UC Davis, Chris worked in major gift fundraising and led development offices at UC Berkeley, the Fund for Johns Hopkins Medicine, and the University of Illinois at Champaign-Urbana. Chris has raised over $100M throughout his development career and has been involved in multiple successful fundraising campaigns of over $1B.

Chris earned a Bachelor of Arts degree in Economics from Loras College in Dubuque, Iowa, and a Master of Urban Planning degree from the University of Illinois at Urbana-Champaign. Chris served six years in the United States Marine Corps while attending undergraduate and graduate school before being honorably discharged. Before working in higher education fundraising, Chris worked as an urban planner in both private and public roles in the Chicago metropolitan area providing land use, economic development and comprehensive planning services to municipalities and governments. Chris spends his free time outdoors hiking, backpacking, and climbing which included a recent summit of Mount Baker in Washington this past summer.
SARAH K. NATHAN, Ph.D. is an exuberant philanthropy professional and avid volunteer. In January 2021 she began her appointment as Executive Director of Northfield Shares, the community foundation serving Rice and Dakota counties in Southern Minnesota.

Dr. Nathan served five years as the Associate Director of The Fund Raising School where she managed all aspects of the curriculum designed for fundraising practitioners. From ensuring courses were updated with the most recent research to assisting practitioner faculty be successful educators, her work ensured participants had a positive and productive learning experience. As part of the innovative and collaborative TFRS team, she designed several new specialty courses including a number of new virtual learning experiences offered since the pandemic’s onset. As a course designer, she was always attuned to the most recent scholarly research and industry best practices to ensure that courses were designed for active and applied learning. In short, her creative design work translated research for a practitioner audience.

Dr. Nathan is a frequent speaker on the topic of the fundraising profession. Currently, she is co-editing the 5th edition of Achieving Excellence in Fundraising, to be published in early 2022. As an adjunct faculty member of Philanthropic Studies, she co-designed and taught an innovative undergraduate course entitled “Celebrity Philanthropy,” and developed the School’s online graduate course, “Donor Motivations and Behaviors for Major and Planned Giving.” Previously, she was assistant professor of nonprofit management and philanthropy at Bay Path University where she taught and advised online graduate students in the Masters of Nonprofit Management and Strategic Fundraising degree programs.

She began her philanthropy career as a 19-year-old student, calling alumni at her undergraduate alma mater, Concordia College in Moorhead, MN, where she later became Associate Director of the Annual Fund. Today, she continues to serve the College as an enthusiastic alumni volunteer. When living in Indiana, she served her local community as a volunteer and board member of the Johnson County Community Foundation, where she helped to establish the county’s first day of giving. Dr. Nathan is an avid Girl Scout and spends countless hours joyfully leading a troop of 2nd graders. Dr. Nathan holds a MA and PhD in philanthropic studies from the Indiana University Lilly Family School of Philanthropy.

AMBERLY PAHUT is a Montana native and a graduate of Western Montana College. She earned her MBA in 2007 with a specialty in nonprofit management from Walden University. For 20 years, Amberly led many philanthropic initiatives and projects in the higher education and health care arenas. In early 2022, Amberly joined First Interstate Bank as the Director of Community Responsibility and Executive Director of the First Interstate BancSystem Foundation.

Amberly has received a great deal of satisfaction in helping donors fulfill their passions and interests through their giving. In 2011, Amberly graduated from Leadership Montana. In 2015, she earned the Certified Fundraising Executive designation and has received recertification twice since. In addition to her work, she has served in leadership positions on the Board of Directors for the Association of Fundraising Professionals Montana Chapter, Montana Healthcare Communications and Development Association, Billings Clinic Broadwater, Big Brothers Big Sisters, and more. In November of 2019, she completed her Certified Specialist in Planned Giving through California State University Long Beach. In 2022, Amberly was recognized as one of the top 50 women leaders of the Mountain Region by The Women We Admire. Amberly is thrilled to bring her experience and passion for values-based philanthropy to First Interstate Bank. In her free time, she enjoys traveling with her husband, Jared, and has visited every state.
ALISON SCHULTZ is the Senior Director of Planned Giving for the University of Montana Foundation. Prior to joining the UM Foundation team in 2014, Alison worked as Development Associate and Grant Writer for the Tucson Museum of Art. Alison then spent three years as a legal assistant for a small law firm specializing in probate and estate planning in Durango, Colorado before moving to Missoula.

At the UM Foundation, Alison works with alumni and friends of the University, and their advisors, in developing gift plans that achieve their financial and philanthropic goals. Alison has completed the Plus Delta Discipline of Frontline Fundraising program and is a member of the National Association of Charitable Gift Planners and the American Council on Gift Annuities.

Alison and her husband Andy enjoy raising their two boys, Weston and Max, in the beautiful outdoors of Montana.