



2025 Annual Meeting and Educational Summit *Fundraising Forward: Innovate, Inspire, Impact*

Oct. 23 & 24, 2025, Heritage Inn, Great Falls, MT

Event Description:

The 2025 AFP Montana Annual Education Summit unites fundraisers, nonprofit leaders, and community changemakers from across the state for two days of learning, connection, and inspiration. This year's theme, Fundraising Forward: Innovate, Inspire, Impact, focuses on future-ready strategies and the adaptability needed in today's evolving philanthropic landscape. Through dynamic keynotes, interactive sessions, and valuable networking, attendees will gain fresh ideas and practical tools to advance their missions. *Full participation in the 2025 AFP Montana Summit is applicable for 9 points in Category 1.B – Education of the CFRE International application for initial certification and/or recertification.*

Program

THURSDAY, OCT. 23

8:00 AM – 8:45 AM **REGISTRATION & CHECK IN/BREAKFAST**

8:45 AM - 9:00 AM **WELCOME**

9:00 AM - 10:30 AM **KEYNOTE: FUND DEVELOPMENT IS A CONTACT SPORT!**

Kari Anderson, Incite Consulting

In the world of fund development, success is not about sitting behind a desk waiting for donations to roll in. It's about building real relationships, navigating challenging conversations, and actively engaging with donors and stakeholders—just like in a contact sport. Whether you're a seasoned fundraiser or new to the field, this keynote will leave you inspired and ready to take your fundraising efforts to the next level.

10:30 AM - 10:45 AM **BREAK**

10:45 AM - 12:00 PM **CHANNEL CHAMPIONS: REAL STORIES, REAL RESULTS FROM THE TRENCHES**

Kristi Farver-Oaks, Chief Development Officer, Yellowstone Boys & Girls Ranch Foundation

Sandi Filipowicz, Executive Director, Great Falls YWCA

Andrea Lambert, Assistant Vice President of the Annual Fund, MSU Alumni Foundation

Maria Reed, Development Director, Habitat for Humanity Billings

A panel of experienced professionals will share actionable best practices and success stories across today's most effective Annual Giving channels, including direct mail, email, text, events, social media, and crowdfunding. Hear from three dynamic fundraising professionals from diverse organizations as they reveal the strategies behind their campaigns, offer insight



into what's working now, and how to optimize multi-channel engagement year-round. The session will include an open Q&A, giving attendees the chance to dive deeper and gain practical tips tailored to their own fundraising programs and organizations.

12:00 PM - 1:15 PM **LUNCH - ANNUAL MEETING**

1:15 PM - 2:30 PM **ROOTED IN COMMUNITY: STRATEGIES FOR MEANINGFUL NONPROFIT PARTNERSHIPS**

Sarah Cawley, Community Engagement Coordinator, Great Falls Public Library
Jim Bennett, Gift & Estate Planning Director, Montana Community Foundation

Local community foundations are more than grantmakers—they are conveners, connectors, and champions for place-based impact. Yet many small and mid-sized nonprofits aren't sure how to start or deepen relationships with vital partners. In this practical, funder-perspective session, we'll explore what makes a strong nonprofit-community foundation partnership, share real-world lessons learned, and offer actionable strategies to build trust, align missions, and grow impact together. Attendees will learn how to move beyond transactional funding requests to cultivate authentic, long-term relationships rooted in shared community goals. Whether you're just getting to know your local foundation or looking to strengthen an existing partnership, this session will equip you with insights to approach collaboration with clarity and confidence. Join us to explore how working with your community foundation—not just applying to it—can help your organization thrive.

2:30 PM - 2:45 PM **BREAK**

2:45 PM - 4:00 PM **INNOVATE, INSPIRE, & IMPACT WITH A BOLD & BRILLIANT BOARD**
Rhonda McCarty, CEO, Special Olympics Montana

We all know the value of a bold and brilliant Board of Directors, and this collaborative work session is designed to model board development strategies of interest to you. Participants will learn specific strategies to support the science and art of board development.

4:30 PM - 6:00 PM **HAPPY HOUR - COCKTAILS & APPS at the Hotel**

FRIDAY, OCT. 24

7:30 AM - 8:00 AM **BREAKFAST**

8:00 AM - 9:15 AM **THE FUTURE OF FUNDRAISING: THE SKILLS, TOOLS, AND MINDSET YOU NEED NOW**

Allison Strekal, Chief Development Officer, Mountain Home Montana



The fundraising landscape is shifting faster than ever. Donors expect personalization, transparency, and authentic connection, while fundraisers are being asked to do more with fewer resources. What does it take to not only keep up, but thrive? In this session, we'll explore the skills, tools, and mindsets that will define the future of fundraising. From embracing data and storytelling to leveraging new technologies like AI (without the overwhelm), you'll walk away with practical strategies, fresh ideas, and a future-ready toolkit to elevate your work today and prepare for what's next.

9:15 AM - 9:30 AM **BREAK**

9:30 AM - 10:45 AM **INNOVATION IN PLANNED GIVING: MEET THE DONORS AND THEIR PROFESSIONALS**

Moderated by Sara Hofer, Chief Planned Giving Officer, Yellowstone Boys and Girls Ranch Foundation

This dynamic panel discussion will share creative strategies and real-world stories that are reshaping the future of philanthropic planning. Panelists will highlight emerging trends, tools, and donor engagement techniques that are expanding what's possible in legacy giving. From transformative donor experiences to inventive gift designs, this session will spark new ideas for your own program. Whether you're building momentum or looking for a breakthrough, you'll leave energized and equipped with actionable insights to move your planned giving program forward.

10:45 AM - 11:00 AM **BREAK**

11:00 AM - 12:15 PM **STEWARDSHIP: STRENGTHENING TRUST AND IMPACT**

Kyle Lantz, Vice President of Development, Yellowstone Boys & Girls Club Ranch Foundation
Jim Fitzgerald, Development Director, Yellowstone Boys & Girls Club Ranch Foundation

This session will highlight the critical role of donor stewardship in building lasting relationships and sustaining mission-driven impact. Designed for nonprofit professionals of all levels, it will offer practical tools, real-world examples, and proven strategies to go beyond basic thank-you messages and foster deeper donor engagement through personalized communication, impact storytelling, and meaningful connection. Whether you're cultivating first-time donors or sustaining long-term champions, this session will provide actionable insights to elevate your stewardship approach and help build long-term success.

12:15 PM - 12:30 PM **CLOSING/WRAP UP**