



## **May Board Meeting**

**May 5, 2026 Minutes**

**Zoom**

**Present:** Traci Weller, Allison Strekal, Kyle Lantz, Maria Reed, Kristi Farver-Oaks, Eugene Muhammad,

Jessica Kannegiesser

**Absent:** Tagen Vine, Sara Hofer, Abigail Uhrich

**I. Call to Order** – The meeting was called to order at 2:00 PM

**II. Consent Agenda** – Skipped both the April minutes review due to Sara’s absence and the April financials due to Tagen’s absence. No update on the reserve fund or bank signatures.

### **III. Strategic Focus of the Month - Boards and Committees**

- a. Traci went over the new format for board meetings, in which we will tackle one pillar of our new strategic plan each month. This month’s is the “Boards and Committees” pillar. Discussion around the question: “As we think about the future of AFP Montana, what would make someone want to join, and stay engaged with, our board or committees, and how can we better communicate or demonstrate that value in our recruitment efforts?”
  - i. The main objections to joining that we hear are time and money, can we counter that by adding value?
  - ii. Important to have meaningful engagement and find out what people are interested in to make sure we have a good fit for them.
  - iii. Highlight the opportunities for professional growth (if this is important for someone, the AFP MT board can offer that).
  - iv. Our programming reflects the current needs of fundraising pros.
  - v. Can we leverage our relationship with Art Taylor/AFP Global in some way?
  - vi. Position members of the board as experts/leaders in this field in Montana.
  - vii. Clarify what the time commitment on the board actually is
  - viii. Identify what people need and how we can be a true resource for them
  - ix. Engaging locally with needs of people.
- b. Discussion around who in our network might fit this criteria
  - i. **Action item for everyone - spend some time reflecting on this and bring any names you think of to the next meeting (or start outreach to them).**

### **IV. Board Pipeline and Engagement**

- a. Traci offered a scholarship to Sonja Bahr at the Bozeman Public Library - she is going to lead our pilot "Connect and Reflect" program. This program is designed to bring development pros together around a single question, rather than open networking. First event is at the Bozeman Library on Wednesday, May 20 at 3:30 pm.
- b. Other board possibilities: McKenna Quick, Tyler Amundsen, Levi Knight.
- c. Discussion around gaps on committees - would like more help on sponsorship, recognition, and communications committees.
- d. ICON follow up:
  - i. The Montana meet up at ICON was well-attended, people enjoyed themselves. To follow up:
    1. Allison: Carrie Coan, Kira Huck, Beth Wheeler, Nikki Strizich
    2. Traci: McKenna, Laura
    3. Kyle: Terry, Jen G.

## V. Committee Reports

- a. Awards & Recognition – New member scholarship open until June 30.
- b. Summit – Working on programming; the four-hour DAF education session is the main education component. FIB has donated the space for the conference; working on getting the initial Save the Date posted. Goal is 100 people.
- c. Sponsorship – Yellowstone Club Foundation gave us a \$2500 sponsorship. Kyle has asked out to the Billings Clinic Foundation, and has a lead with Blackbaud after ICON.
- d. Professional Development – Next Lunch & Learn will be held on May 21st and is a panel of young professionals. June Lunch and Learn is on June 11 - the speaker is Scott Rosenkrans, a nationally recognized speaker on AI.
- e. Membership – Maria reported there are currently 86 members. We still have 9 more membership scholarships that we can award, the deadline for those is November 30. Thinking we will use 4 for targeted committee/board members, and then give 5 away at the Summit.
- f. Communications – Traci gave an update - the newsletter is going out on the 1st each month, Allison is handling the socials, and Jessica has taken on the website updates and is working with Global on our new site. We will be one of the first chapters to migrate over to the new platform!

**VI. MNA Partnership** - Allison gave an update on the MNA partnership. They have a new statewide Fundraising Director, Anna Smoot, who will be based out of Bozeman. She is a former AFP member, Allison met her at the MNA Fundraising Summit. She and Shelby are excited to partner together more, and will promote our events if we can provide them the info. Allison will plan on meeting Anna once she is settled in Bozeman!

VII. **Adjourn** - Meeting adjourned at 2:55 pm

**Next meeting: Tuesday, June 2, 2026**