# Operations Manuals: Institutional Memory in Action

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| **Speaker(s)** | Andrew Kapelewski — Western Dakota Tech Foundation<br>Emma Shears — Innovative NonProfit LLC |
| **Session Type** | Hands-on Workshop (75 minutes) |
| **Track(s)** | Grow (3-7 Years) - systems, portfolio growth, specialization<br>Lead (8+ Years/Executives) - strategy, culture, boards, campaigns, planned giving |
| **Content Area(s)** | Strategic Planning<br>Operations, Infrastructure |

## Session Description

Strong fundraising programs depend on more than great relationships—they rely on consistent systems that preserve organizational knowledge and support long-term success. An operations manual serves as institutional memory in action, capturing the processes, standards, and organizational practices that keep work moving forward through staff transitions, growth, and change.

In this interactive session, participants will explore a practical operations manual format designed for nonprofit departments and organizations, with an emphasis on fundraising operations. We'll discuss how an operations manual differs from technical, step-by-step procedure guides and how documenting repeatable processes can improve efficiency, strengthen accountability, reduce onboarding time, and protect mission continuity.

Participants will review a sample table of contents and document templates while learning how to organize policies, workflows, responsibilities, and key operational resources into a sustainable reference tool. Through a hands-on activity, attendees will examine how understanding the "big picture" influences the way operational information is documented and shared across an organization. The session concludes with dedicated time to begin outlining an operations manual tailored to each participant's own department or organization.

Whether you're creating documentation from scratch or improving existing resources, you'll leave with practical ideas, templates, and a framework to build an operations manual that strengthens organizational resilience and supports fundraising success.

# Building an Annual Fund that Gains Donors & Dollars Every Year

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| **Speaker(s)** | Tara Wilcox — Innovative Nonprofit LLC<br>Emma Shears — Innovative NonProfit LLC |
| **Session Type** | Hands-on Workshop (75 minutes) |
| **Track(s)** | Launch (0-3 Years) - core skills and confidence builders |

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| **Content Area(s)** | Annual Giving |

## Session Description

A strong annual fund grows every year, in both income and new donors, and that growth comes from having a clear plan. This interactive workshop will show you how to build one.

We'll start with your donor data. You'll learn how to analyze donors, place them in meaningful segments, and match each segment with the right cultivation, solicitation, and stewardship approach. From there, we'll look at how to move donors through the pipeline.

Growth shouldn't mean burnout, so we'll also cover efficiencies that keep your workload realistic. These include simple systems, prioritization, and tools that help a small team do more without running out of steam.

Throughout the session, you'll take part in hands-on activities and get handouts you can use right away. Fellow nonprofit professionals will also share what's working for their own annual funds. You'll leave with a practical framework and concrete next steps for your annual fund.

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# Beyond Legal Formalities: Let's Be Real

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| **Speaker(s)** | Linda Mathiasen — Okapi Strategy |
| **Session Type** | Hands-on Workshop (75 minutes) |
| **Track(s)** | Lead (8+ Years/Executives) - strategy, culture, boards, campaigns, planned giving |
| **Content Area(s)** | Board Development<br>Ethics |

## Session Description

Board governance sounds like legal duties, policies, and compliance. However, it is so much more. Effective governance is how these responsibilities shape everyday decisions. Through engaging case studies and scenarios where organizations drifted off course, this fast-paced session explores the governance choices that put mission, finances, reputation, and sustainability at risk. Participants will leave with empowering governance practices they can apply immediately to become more engaged, strategic, and effective board leaders.

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# Workforce Planning Strategies for Nonprofit Sustainability

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| **Speaker(s)** | Tresha Moreland — HR C-Suite, LLC<br>Emma Shears — Innovative NonProfit LLC |
| **Session Type** | Seminar/Lecture (60 minutes + 15 minute Q&A) |
| **Track(s)** | All-Audience Skills - communications, DEI, ethics, data/AI, rural philanthropy |
| **Content Area(s)** | Strategic Planning |

## Session Description

Nonprofits across South Dakota are facing a workforce crisis hiding in plain sight. Burnout is accelerating, top talent is leaving for higher-paying sectors, and organizations are struggling to recruit for mission-driven roles amid one of the nation's tightest labor markets. Yet most nonprofits have no formal workforce plan, no strategy for how they will find, develop, and retain the people their mission depends on.

This session introduces fundraising and nonprofit leaders to the fundamentals of strategic workforce planning and explores how philanthropy can be leveraged as a powerful tool for building sustainable workforce capacity.

Participants will learn how to assess their organization’s workforce risks, identify talent gaps that threaten mission delivery, and develop practical strategies for using donor resources, grant funding, and community partnerships to address those gaps.

Drawing on original South Dakota labor market research and 30 years of workforce strategy experience, this session translates complex workforce planning concepts into accessible, actionable frameworks that nonprofit leaders at any level can begin applying immediately. Real-world experience from South Dakota organizations illustrates how intentional workforce investment – funded through philanthropy- creates organizational resilience and long-term mission sustainability.

# Bob the Database Builder: How ChatGPT Helped Clean Up Our Donor Data Mess

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| **Speaker(s)** | Julie Moore — Avera Foundation |
| **Session Type** | Express Talk (25 minutes + 20 minutes facilitated discussion) |
| **Track(s)** | Launch (0-3 Years) - core skills and confidence builders<br>Grow (3-7 Years) - systems, portfolio growth, specialization |

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| **Content Area(s)** | Pipeline Development<br>Portfolio Management<br>Small Shop<br>Tech in Fundraising<br>Database management |

## Session Description

Last year, Julie Moore made the case for why database hygiene matters. This year, she returns with the next chapter: what happens when you actually start cleaning things up — and bring along a handy ChatGPT buddy named Bob.

In this practical and lighthearted session, Julie will share how she has continued improving donor data quality at the Avera Foundation by using smarter workflows, consistent cleanup strategies, and AI-supported analysis. One major project included reviewing more than 170,000 email records to identify potentially bad addresses and create a more efficient path toward cleaner, more reliable donor information.

Attendees will hear real-world lessons from the operational side of fundraising, including how clean data supports stronger donor communication, better segmentation, improved reporting, and greater confidence in fundraising strategy. Julie will also share how AI tools like ChatGPT can help streamline time-consuming cleanup projects while still requiring human judgment, institutional knowledge, and a healthy dose of common sense.

This session is ideal for fundraisers, database managers, operations staff, and anyone who has ever looked at a donor record and thought, “Well, that can’t be right.”

# Cut Through the Static: Dialing in Your Multi-Channel Annual Fund

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| **Speaker(s)** | Kellie Yackley — South Dakota Dental Association<br>Julie Moore — Avera Foundation |
| **Session Type** | Seminar/Lecture (60 minutes + 15 minute Q&A) |
| **Track(s)** | Grow (3-7 Years) - systems, portfolio growth, specialization |
| **Content Area(s)** | Annual Giving<br>Stewardship<br>Technology<br>Strategic Planning |

## Session Description

An annual fund is more than a year-end appeal or a single direct mail piece. The most successful annual giving programs create meaningful donor connections throughout the year by meeting supporters where they are and giving them multiple opportunities to engage and give.

In this session, participants will explore how to build a cohesive, donor-centered annual fund strategy that integrates direct mail, email, digital outreach, social media, stewardship, and personal engagement into a unified fundraising approach. We'll discuss how different communication channels work together, how to create compelling donor journeys, and how to use data to inform outreach while avoiding donor fatigue.

Whether you're looking to strengthen an existing annual fund program or build one from the ground up, you'll leave with practical strategies for creating a coordinated, year-round approach that cuts through the noise, deepens donor relationships, and drives sustainable philanthropic support.

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# Does This Smell Right? Ethical Ethel's Sniff Test for Fundraising Ethics

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| **Speaker(s)** | Kellie Yackley — South Dakota Dental Association |
| **Session Type** | Express Talk (25 minutes + 20 minutes facilitated discussion)<br>Flexible - Wherever Needed in the Schedule |
| **Track(s)** | All-Audience Skills - communications, DEI, ethics, data/AI, rural philanthropy |
| **Content Area(s)** | Donor Relations<br>Ethics<br>Small Shop<br>Tech in Fundraising |

## Session Description

Fundraising ethics are rarely tested in obvious moments. More often, they show up in the gray areas — when a campaign message sounds just a little too polished, a donor story feels a little too convenient, a board member applies pressure, technology moves faster than policy, or a generous gift comes with complicated strings attached.

In this 25-minute express session, Ethical Ethel brings humor, heart, and practical wisdom to real-life fundraising dilemmas. Through short, relatable "Dear Auntie Ethel" scenarios, participants will explore common ethical tensions in donor communications, storytelling, board engagement, emerging technology, and gift acceptance.

At the center of the session is Ethical Ethel's Sniff Test — a simple, memorable framework fundraisers can use when something does not smell quite right. Attendees will leave with practical questions to ask, language to use in difficult conversations, and renewed confidence to protect donor trust, organizational integrity, and the mission they serve.

This session is designed for fundraisers at all levels who want to navigate ethical gray areas with clarity, courage, and a little bit of Ethel-style common sense.

# Building Your First Major Gift Portfolio: Who to Include and How to Set Realistic Goals

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| **Speaker(s)** | Molly Sutton — Avera Foundation |
| **Session Type** | Seminar/Lecture (60 minutes + 15 minute Q&A) |
| **Track(s)** | Launch (0-3 Years) - core skills and confidence builders |
| **Content Area(s)** | Major Gifts<br>Pipeline Development<br>Portfolio Management<br>Small Shop |

## Session Description

For many fundraising professionals, the expectation to “manage a portfolio” comes without clear guidance on where to begin. Who belongs in a portfolio? How many donors is realistic? How should goals reflect true capacity rather than guesswork?

This session demystifies the process of building a major gift portfolio from the ground up, with a focus on clarity, practicality, and sustainability. Participants will learn how to identify qualified donors using key indicators such as capacity, inclination, and connection, as well as how to distinguish between prospects, active donors, and those who should be removed from consideration.

The session will explore how to determine an appropriate portfolio size and why “more” is not better when building a manageable caseload. Attendees will also be introduced to simple donor tiering strategies to guide prioritization and time allocation.

Finally, participants will learn how to set realistic revenue and activity goals based on donor stage and portfolio composition, helping to avoid common pitfalls such as overbuilding portfolios or inflating projections.

Participants will leave with a clear framework to begin building and prioritizing their own portfolios, whether starting from scratch or refining an existing list.

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# In Service of Your Donor: How Fundraisers Can Partner with Estate Attorneys, Trust Officers, and Financial Planners to Inspire Legacy Gifts

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| **Speaker(s)** | Alexa Stulken — Black Hills Trust Company<br>Jon Johnson — JJ Advisor Services<br>Janet Kahler — JJ Advisor Services |

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| | McLean Thompson Kerver — Lynn Jackson Attorneys<br>Tamie Hopp — Black Hills Works Foundation |
| **Session Type** | Panel (45 minutes) |
| **Track(s)** | Lead (8+ Years/Executives) - strategy, culture, boards, campaigns, planned giving |
| **Content Area(s)** | Donor Relations<br>Major Gifts<br>Pipeline Development |

## Session Description

Legacy gifts are among the most meaningful commitments a donor can make. Yet for many fundraisers, planned giving can feel like stepping into someone else's professional territory. Donors rely on financial planners to map strategy, estate attorneys to draft documents, and trust officers to manage assets. Along the way, each of these professionals has the opportunity to encourage charitable legacies.

So where does the fundraiser fit in?

This panel brings all four perspectives into one room: an estate attorney, a trust officer, a financial planner, and a legacy donor who has lived the experience firsthand. Together, they'll pull back the curtain on how charitable giving decisions actually get made — and how fundraisers can be a meaningful, welcomed presence in that process.

Panelists will discuss how they counsel clients on planned giving vehicles, what questions donors are truly asking, and what barriers keep promising conversations from becoming documented commitments. The legacy donor will offer an unfiltered look at what moved them from interest to action and how their relationship with a fundraiser shaped that journey.

More than a primer on gift vehicles, this session focuses on building the professional relationships and donor conversations that make legacy gifts possible. Attendees will leave with a clearer understanding of how to steward planned giving prospects, how to speak the language of professional advisors, and how to position themselves as trusted partners in their donors' estate planning journeys.

# One Story, Two Variations: A Simple Framework for Fundraising Messages

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| **Speaker(s)** | Amy Pokela — AMPO |
| **Session Type** | Express Talk (25 minutes + 20 minutes facilitated discussion) |

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| **Track(s)** | Launch (0-3 Years) - core skills and confidence builders<br>Grow (3-7 Years) - systems, portfolio growth, specialization<br>All-Audience Skills - communications, DEI, ethics, data/AI, rural philanthropy |
| **Content Area(s)** | Annual Giving<br>Donor Relations<br>Small Shop<br>Fundraising Storytelling |

## Session Description

Fundraisers are often told to find more stories. More client stories. More donor stories. More program stories. More proof. But more stories do not always create stronger fundraising. Without message discipline, storytelling can become scattered, exhausting, and disconnected from strategy.

This express talk introduces a simple storytelling framework fundraisers can use to bring clarity and consistency to donor communication: one core story with two strategic variations. Participants will learn how to connect the community problem, the organization's solution, and the donor's role in a way that works across appeals, stewardship, board talking points, donor meetings, and campaign messaging.

The session will help fundraisers move beyond one-off storytelling and begin building a message system that supports annual giving, donor trust, and long-term engagement. After a brief teaching segment, participants will discuss where their current messaging feels scattered and how a clearer story structure could strengthen donor communication.

This session is useful for new fundraisers, small shops, communications staff, executive directors, and experienced fundraisers who want a simpler, more strategic way to talk about impact and need.

# More Than a Number: Building Fundraising Goals Donors Can Understand

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| **Speaker(s)** | Amy Pokela — AMPO |
| **Session Type** | Hands-on Workshop (75 minutes) |
| **Track(s)** | Grow (3-7 Years) - systems, portfolio growth, specialization<br>Lead (8+ Years/Executives) - strategy, culture, boards, campaigns, planned giving |
| **Content Area(s)** | Annual Giving<br>Donor Relations<br>Small Shop<br>Strategic Planning<br>Annual Needs Fundraising |

## Session Description

Many fundraisers are handed an annual goal without a clear explanation of what that number means, what portion belongs to donor-supported revenue, or how it connects to the organization's strategic direction. The result is familiar: appeals feel generic, donor conversations feel disconnected, and fundraising activity becomes reactive.

This hands-on workshop helps participants look at the budget and strategic plan through a fundraising lens. Participants will learn how to identify the annual need, separate donor-supported revenue from other funding streams, and translate that need into clear case language donors can understand.

Using a practical framework, participants will examine how budget priorities, program needs, strategic goals, and donor motivation connect. They will leave with a starting structure for an annual case for support, a clearer way to talk about fundraising goals, and a simple tool for aligning fundraising activity with real organizational need.

This session is especially useful for small shops, growing development teams, executive directors, and fundraisers who want their annual giving work to feel more strategic, more grounded, and more connected to mission.

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# A Lifetime of Giving:  Expanding Impact through a Legacy Society

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| **Speaker(s)** | Beth Massa — South Dakota Community Foundation |
| **Session Type** | Seminar/Lecture (60 minutes + 15 minute Q&A) |
| **Track(s)** | Launch (0-3 Years) - core skills and confidence builders<br>Grow (3-7 Years) - systems, portfolio growth, specialization<br>Lead (8+ Years/Executives) - strategy, culture, boards, campaigns, planned giving<br>All-Audience Skills - communications, DEI, ethics, data/AI, rural philanthropy |
| **Content Area(s)** | Donor Relations<br>Major Gifts |

## Session Description

I was tasked by SDCF President/CEO Stephanie Judson, to revitalize our Legacy Society. After extensive research and consulting with experts in the field, our new Legacy Society was launched and gained momentum, and is a source of pride for us. Many of our donors were pleasantly surprised when they found themselves "inducted" into one of its tiers, as they weren't aware of the magnitude and impact of their gifts. This society serves as both a recognition and thank you to those donors who have committed to supporting the South Dakota Community Foundation throughout their lifetime and beyond.
During my presentation, I will cover the definition and significance of Legacy/Recognition programs. I'll also share our unique approach, the "Key Club" which recognizes professional advisors, a powerful referral source, who facilitate estate and/or lifetime gifts to the Foundation. We will discuss
challenges faced and what lies ahead in estate planning communication and benefits. I'll share success stories from

our Legacy Society, highlighting
various tiers and their impact on donor relationships. In conclusion, I'll highlight our recognition gifts and open the floor for questions, comments, and
time of sharing with participants who have undertaken a similar task in their organization. Our Legacy Society holds a special place in my heart and its
transformation is a powerful voice for the South Dakota Community Foundation. If given the opportunity to present at the Fall Conference, I will tailor to the conference theme.

# ABC & 123: How Major Gifts Can Work for Me

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| **Speaker(s)** | Jason Lemke, MSEd, CFRE — The Link Community Triage Center |
| **Session Type** | Hands-on Workshop (75 minutes) |
| **Track(s)** | Beginner (1-3 Years in Profession)<br>Intermediate (4-8 Years in Profession)<br>Advanced (8 or More Years in Profession) |
| **Content Area(s)** | Major Gifts<br>Small Shop |

## Session Description

This session will break the core components of building and/or growing a major gifts program down into some simple 3-step processes, which will become the foundation upon which participants will be able to build a customized program that fits their organization's needs, resources, and capacity.

Participants will engage with simple processes and tools they can apply to:

- defining major giving within their organization
- identifying major gift prospects
- engaging board members and program staff in the process
- asking the right discovery questions
- speaking a major gift ask (including an interactive practice session)
- structuring simple steps to super stewardship

# Teach It Once: Building AI Tools That Actually Save You Time

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| **Speaker(s)** | Jacob West — DelegateIQ |
| **Session Type** | Hands-on Workshop (75 minutes) |

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| **Track(s)** | All-Audiences |
| **Content Area(s)** | Technology in Fundraising<br>Productivity<br>Operations |

## Session Description

Most professionals have experimented with artificial intelligence, only to end up with generic content that requires extensive editing before it can be used. The result is often frustration, inconsistent results, and the sense that AI creates more work than it saves.

This hands-on workshop takes a different approach. Rather than focusing on prompts alone, attendees will learn how to build an AI-powered workflow designed around a real task they perform regularly. During the session, Jacob West will demonstrate the live creation of a custom AI tool, showing how knowledge, processes, and organizational context can be captured once and reused repeatedly to produce higher-quality outcomes.

Participants will see how a well-designed AI solution can move beyond generating ideas and begin producing finished work products that support communication, planning, reporting, donor engagement, and other day-to-day responsibilities. The workshop will also explore practical strategies for identifying high-value use cases, improving consistency, and scaling individual productivity without increasing workload.

Designed for professionals with little or no technical background, this extended workshop provides a practical framework attendees can immediately apply in their own organizations. Participants will leave with a clearer understanding of how to move from occasional AI experimentation to building repeatable systems that save time and improve results.

# Playing with Dynamite: How Hollywood Cuts Through Chaos and Explodes Intuition

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| **Speaker(s)** | Sean Covel - Author |
| **Session Type** | Keynote |
| **Track(s)** | All-Audiences |
| **Content Area(s)** | Leadership<br>Strategic Planning<br>Personal Development |

## Session Description

In today's environment, organizations face constant distractions, competing priorities, and increasing pressure to achieve results with limited time and resources. Yet some of the most complex projects in the world, including major motion pictures, are delivered successfully through a surprisingly simple combination of focus, accountability, and shared purpose.

In this engaging and highly interactive keynote, Sean Covel takes audiences behind the scenes of Hollywood to reveal the systems that allow hundreds of individuals with different skills, personalities, and perspectives to work together toward a common goal. Through stories from the movie industry and lessons learned while producing *Napoleon Dynamite*, attendees will discover how successful teams create clarity amid chaos, maintain momentum under pressure, and transform individual talent into collective achievement.

Using memorable examples, audience participation, and practical takeaways, Sean demonstrates how organizations in any sector can adopt the same principles to improve communication, strengthen alignment, and execute with greater confidence. Participants will leave inspired, energized, and equipped with strategies they can apply immediately to their teams, boards, and organizations.