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# Automation That Outlives You

*Designing, Documenting, and Managing Work  
for Long-Term Success*

June 2026  
Hallie Guiseppe, Alvernia University  
Shelby Lewis, Summer Search  
Amanda Mogridge, Friends of Acadia

 bbdevdays



## Hallie Guiseppe

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## Favorite Childhood Movie





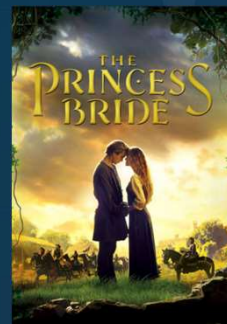
## Amanda Mogridge

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*Development Operations Manager  
Friends of Acadia*

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## Favorite Childhood Movie



SUMMER  
SEARCH



## Shelby Lewis

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## Favorite Childhood Movie



# Agenda

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1. Introductions
2. Demonstration
3. The Questions We Asked Ourselves
4. Questions

# The Problem

*What problem were you trying to solve?*

# Solution & Adoption

*What solution did you select and how did you drive adoption and bring others along?*



# Project Management with Microsoft Solutions

The screenshot shows a OneNote page titled "Opportunity Linked Gift Audit" with a purple header. The page content includes:

- Title:** Opportunity Linked Gift Audit
- Date/Time:** Thursday, August 28, 2025 4:03 PM
- Description:** Weekdays at 4:00pm. This flow checks each opportunity in an Active Grant stat Commitment status to confirm the linked gifts equal the amount reflected as fu an opportunity that has linked gifts that don't match it sends an email notificati Operations team so we can correct the record.
- Flow Link:** [Microsoft Power Automate](#)
- RENXT List Link:** [PA Active Opportunity Funded Data Audit](#)
- Variable User Role for notification:** Gift Entry
- Outline:**
  - Variables:
    - o [Opportunity\\_Summary](#) (Array)
    - o [TotalSum](#) (Float)
    - o [Environment\\_ID](#) (string)
    - o [AssignedUsers](#) (string)
  - Variable Action Assignment Scope
  - Scope
    - o List opportunities
    - o For each opportunity
      - Set [TotalSum](#) Variable to Null
      - Get an opportunity
      - Compose funded amount
      - Format funded amount

The screenshot shows a Microsoft Teams channel named "Power Automate Flows". The channel is organized into three main sections:

- Operations Process:** Includes a "Report" task for "AEM Pivots" with a description: "received resources from Rebecca to start work on this in FY2026. linked below is the folder with the QueryResults\_to\_SharePoint and...".
- Data Audits:** Includes a "Data Audit" task for "Constituent Code Audit" with a description: "This task has been automated to update lookup ids when possible and add manual review actions when the flow can't determine a...".
- Grant Management:** Includes a "Report" task for "Grant Audit Report" with a description: "The Grants team does a summary report for finance at the end of each fiscal year. We should be able to automate the creation of this...".

Each task card shows a status indicator (e.g., "6/30"), a progress bar, and a "Share" icon.



## Video Demonstration



Teams



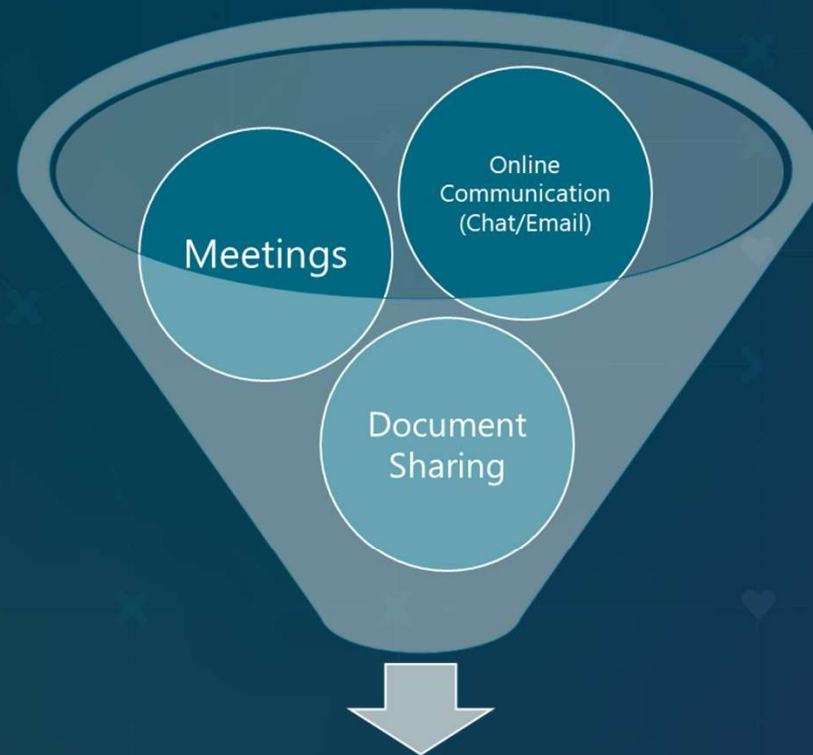
Planner



OneNote



## Streamlined Project Management



 **monday.com**

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## Video Demonstration



# Flow Inventory

The screenshot shows the 'Power Automate Flow Details' interface for the 'Dev Ops Team'. The 'Flows On' filter is selected, showing a list of 62 flows. The table below lists several flows with their display names, descriptions, states, creation times, and trigger types.

Flow Display Name	Description	Flow State	Flow Created Time	Trigger Type
Staff Fundraisers as SharePoint List (updates Action Import Template)	Uses Query API for daily update to SharePoint list of internal staff Fundraisers. Updates Action import template with current fundraiser list.	Started	June 17, 2025	Recurrence
Unmark Primary and Update Type on Inactive Emails	Looks for emails that are primary and marked inactive. Unmarks Primary checkbox and updates the type to Inactive. Runs weekly on Saturdays.	Started	April 22, 2025	Recurrence
PD: Actions for Unmanaged Qual Prospects	Runs query FYXX Actions for Unmanaged Qual Prospects and produces email report (sent to Rachel). Runs monthly on the 1st.	Started	August 20, 2024	Recurrence
DROP BOX: Action import (NEW Import Station)	Imports Action template from Import Station.	Started	October 30, 2025	OpenApiConnection
DROP BOX: Notepad import XLXS	Points to new file structure in Dev Ops Team SharePoint: /Import Drop Box NEW Import Station/Import Drop Box Imports notepad template from Import Station.	Started	August 11, 2025	OpenApiConnection
DROP BOX: Prospect Ratings import XLXS	Points to new file structure in Dev Ops Team SharePoint: /Import Drop Box NEW Import Station/Import Drop Box Imports Prospect Ratings template from Import Station.	Started	January 05	OpenApiConnection
Events: Participants that need to be added	Alerts team to event donors who need to be added as participants as well as event donations that need to be linked. Runs nightly at 9:00 PM.	Started	March 04	Recurrence

Count 62

- Flow repopulates SharePoint list nightly
- Multiple views allow for segmentation
- Brings forward the flow description
- Details and sorting that are unavailable within Power Automate

Demo session: Know Your Flows  
- Wednesday, 1pm ET/10am PT

# Automation Notifications

The screenshot shows a Microsoft Teams channel interface. At the top, the channel name is 'Automation notifications' with a pink 'DO' icon. Below the name are tabs for 'Conversation', 'Shared', and 'Notes'. The right side of the header includes icons for 'Meet now', search, and other functions. The main content area displays three workflow messages:

- Workflow 1:** 'Wednesday 6:04 PM' - 'DROP BOX: New Opportunity import (TEST) has failed.'
- Workflow 2:** 'Wednesday 8:19 PM' - 'Alteryx Constituent Data has completed successfully (82564 records written).'
- Workflow 3:** 'Today' - '10:53 AM' - 'DROP BOX: Notepad import XLXS has completed successfully (from Notepad Import Template (5)).', 'DROP BOX: Prospect Ratings import XLXS has completed successfully.', and '110 of 110 imported from Ratings (Prospect Development) Template (5).'

At the bottom, there is a text input field with the placeholder 'Message in Automation notifications' and a set of icons for editing, emojis, attachments, and other actions.

- Teams channel to alert other people to flow activity
- Notify of important updates as well as flow failures

# Strategic Alignment

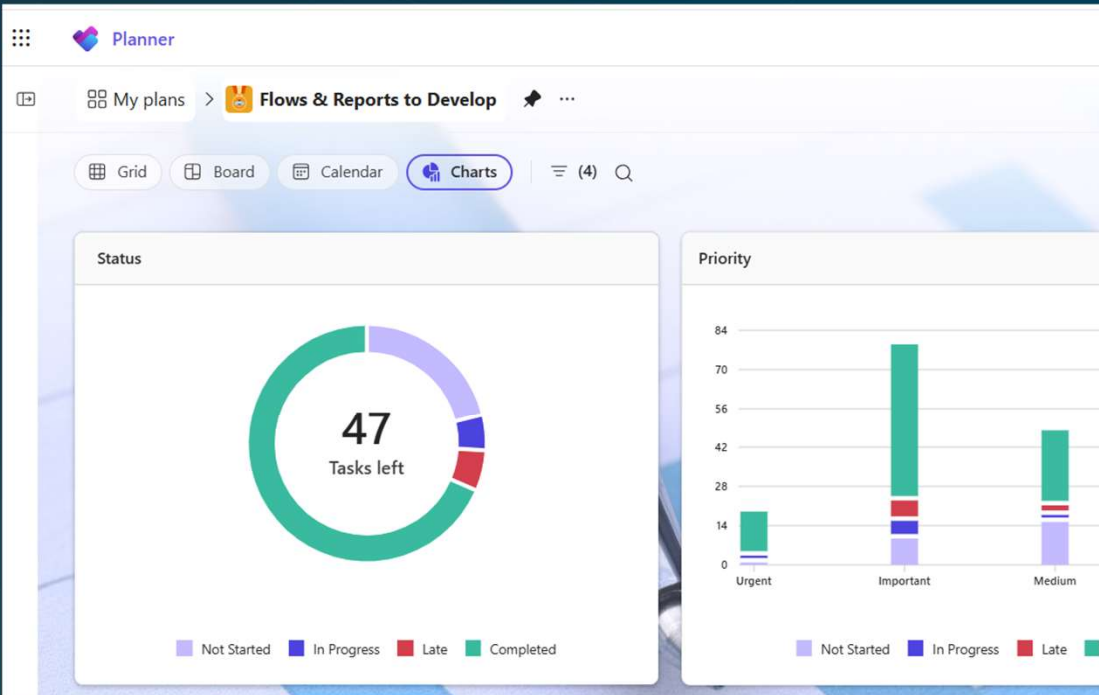
*How does this work support your broader strategy?*

# Measuring Progress

*How do you measure progress and maintain visibility?*



# Progress using Microsoft Planer

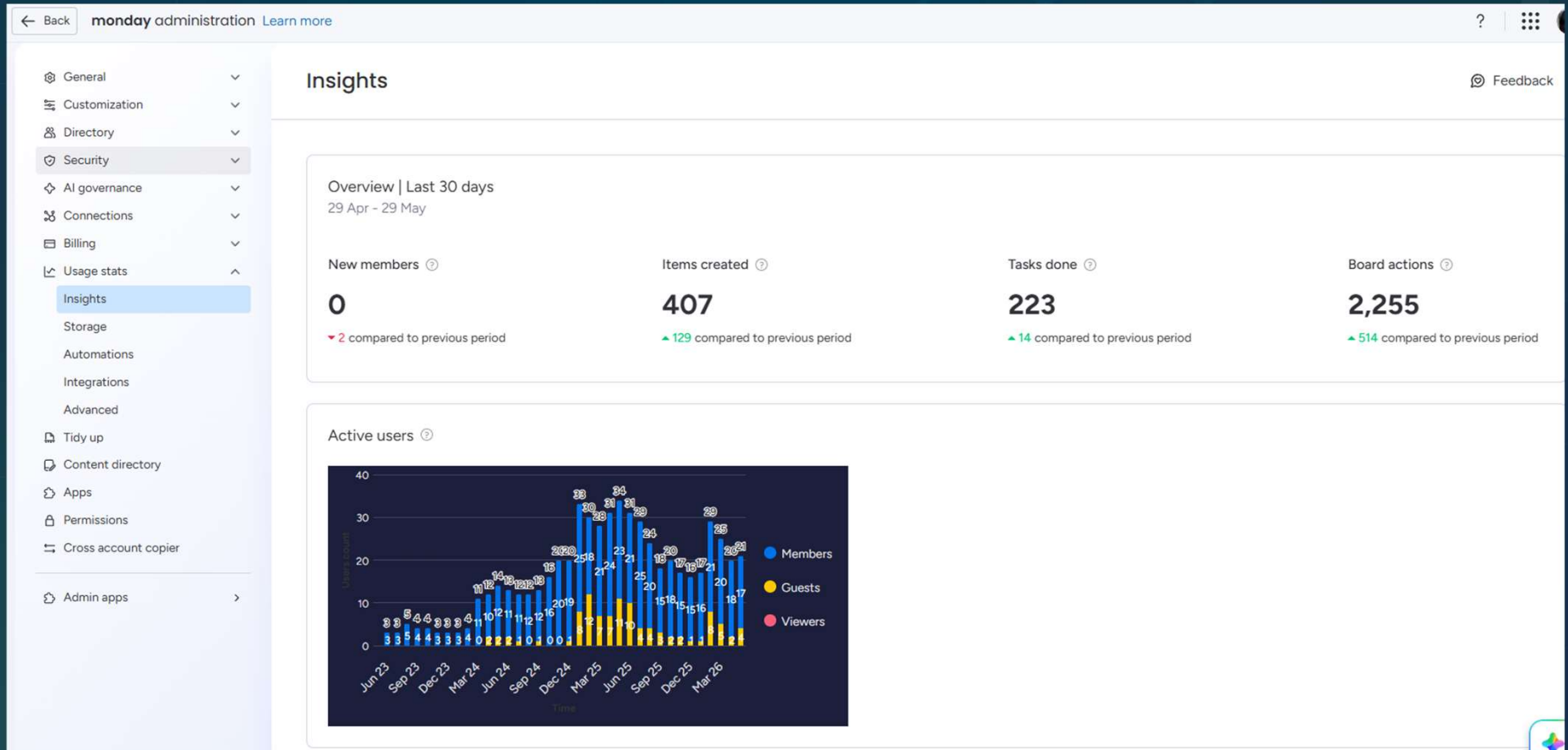


The Excel PivotTable displays the following data:

Row Labels	Count of Tasks
Error	17
Idea	15
Enhancement	14
Data Audit	11
Report	7
Report;Power BI	7
Maintenance	5
Notification	3
Set Up	3
Error;Enhancement	2
Process	2
Import;Enhancement	2
Planning	2
26/27 Goal;Report	1
Communications	1
Process;Data Audit	1
Import	1
Import;26/27 Goal	1
<b>Grand Total</b>	<b>152</b>



# Example of Usage Insights Dashboard Measuring Adoption and Tool Use





# Example of Measuring Project Progress

CCS Data/Prospect Management Plan Multi-level

AI suggestions New Integrate Automate Agents Invite / 2 ...

Main table ... Build Vibe view +

New item ... Search Person Filter ... Sort Hide Group by ...

Give feedback ^

## CCS Data/Prospect Management Plan

<input type="checkbox"/>	Item		Section	Data Source	Timeline	Meeting Date	Status	Duration	Target Pace	Responsible
<input type="checkbox"/>	Review households for disqualification		Section A	Disqualification (Tab 2)	Apr 29 - May 13	May 2	Working on it	2 weeks		
<input type="checkbox"/>	Review ouseholds for further research		Section A	Further Research (Tab 7)	May 6 - 20		Done	2 weeks		
<input type="checkbox"/>	Review low-capacity assigned households		Section A	Potential Disqual (Tab 9)	May 13 - 27		Done	2 weeks		
<input type="checkbox"/>	Evaluate Tier 1 + \$10K+ prospects		Section B	Top Unassigned (Tab 4)	May 1 - Jun 15		Working on it	6 weeks	50/week	
<input type="checkbox"/>	Evaluate Tier 2 prospects		Section B	Top Unassigned (Tab 4)	Jun 16 - Jul 7			3 weeks	50/week	
<input type="checkbox"/>	Evaluate 108 re-engagement prospects		Section C	Re-Engagement (Tab 3)	Jun 1 - Jul 1			4 weeks		
<input type="checkbox"/>	Identify top for prioritization		Section C	Re-Engagement (Tab 3)	Jul 1 - 10			1.5 weeks		
<input type="checkbox"/>	Review legacy prospects		Section D	Legacy Giving (Tab 5)	Jul 1 - Aug 15			6 weeks		
<input type="checkbox"/>	Prioritize overlapping prospects		Section D	Legacy Giving (Tab 5)	Jul 10 - Aug 15			5 weeks		
<input type="checkbox"/>	Export assigned portfolios		Pipeline	All sections complete	Aug 15 - 25			1.5 weeks		
<input type="checkbox"/>	Define ask amount & strategy		Pipeline	Internal	Aug 20 - Sep 15			4 weeks		
<input type="checkbox"/>	Draft FY26-27 cultivation plan		Pipeline	Internal	Sep 15 - Oct 31			6 weeks		

+ Add item

# Designing for Scale

*How did you design for scale and sustainability?*



# Scaling with Microsoft Planner

The screenshot displays the Microsoft Planner interface for a plan named "Flows & Reports to Develop". The interface is organized into a Kanban board with five columns: "Operations Process", "Data Audits", "Grant Management", "Finance", and "Events". Each column contains several task cards with details such as task names, descriptions, due dates, and assignees.

- Operations Process:**
  - Task: "AEM Pivots" (Report, Power BI). Description: "received resources from Rebecca to start work on this in FY2026. linked below is the folder with the QueryResults\_to\_SharePoint and...". Due date: 6/30.
  - Task: "Automate Consent updates" (Enhancement). Description: "Let's see if we can automate the consent updates that come in from the Microsoft form attached below. Currently when someone fills out...".
- Data Audits:**
  - Task: "Constituent Code Audit" (Data Audit). Description: "This task has been automated to update lookup ids when possible and add manual review actions when the flow can't determine a...". Due date: 6/5.
  - Task: "Unsubscribed Notification" (Enhancement). Description: "The query is outputting any fundraiser ever assigned, not just active ones. I'll start by asking the Flow if they know of a...".
- Grant Management:**
  - Task: "Grant Audit Report" (Report). Description: "The Grants team does a summary report for finance at the end of each fiscal year. We should be able to automate the creation of this...". Due date: 6/30.
  - Task: "Weekly Active Grant notification update" (Notification). Description: "Laurel requested to have the Weekly Active Grant notification email turned off until we can get...".
- Finance:**
  - Task: "Pledge Status report with enhancements" (Report). Description: "Objective is to create a flow that pulls the information from the Cash Flow report and add the Distribution information to the...". Due date: 6/15.
  - Task: "Automate Cash Flow report" (Report). Description: "Objective: To create a flow that pulls the information from the Cash...".
- Events:**
  - Task: "Event Registrations add guest as relationship" (Idea).
  - Task: "Event Participant List Request" (Report). Description: "figure out how to get participant fees to export in email correctly. I will put this flow on hold until the Event information is available in...". Due date: 10/30.



# Example of Weekly Agenda integrating into regular processes helps promote sustainability

The screenshot displays a Monday.com workspace interface. On the left, a sidebar shows a list of workspace agents under the heading '2026 Dev Team Weekly Meeting'. The main content area is titled '2026 Dev Team Weekly Meeting' and shows a calendar view for the week of May 12, 2026. The agenda items are:

- Item
- Item
- Welcome- Please add yourself as an attendee
- Annual Meeting Assignments
- Planned giving updates 2
- RENXT databaseview to webview transition - poll for progress tracking
- JPH Luncheon Soft Opening
- Strategic Planning Update
- CCS Next Steps
- Dev Comm Report
- Benefit Updates
- + Add item

Below this, the agenda for the previous week (May 29, 2026) is partially visible, starting with 'Welcome- Please add yourself as an attendee'.

On the right, a discussion titled 'Annual Meeting Assignments' is shown. It includes a post from May 5 with the text 'Annual Meeting Awards.xlsx' and a link to a Monday.com board: <https://friendsofacadia-company.monday.com/boards/9646154303>. The post has been edited and includes 'Like' and 'Reply' options.



## Easily Duplicate Boards Sustainability

Duplicate "bbdevdays RENXT Transition Dat..."

New board name

Duplicate of bbdevdays RENXT Transition Databaseview to Web...

Choose what to duplicate

Board structure only

Board structure & items

Board structure, items & updates

Duplicate

# Questions?



Keep the conversation going in the Blackbaud community.

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Thank you

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