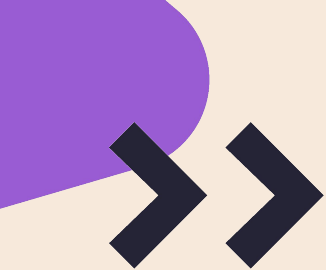




# 10 Ways AI Will Change Advancement





THE UNIVERSITY OF  
CHICAGO

 **evertrue**



**Armin Afsahi**

VP for Alumni Relations &  
Development

[aafsahi@uchicago.edu](mailto:aafsahi@uchicago.edu)  
[@keyarmin](https://twitter.com/keyarmin)

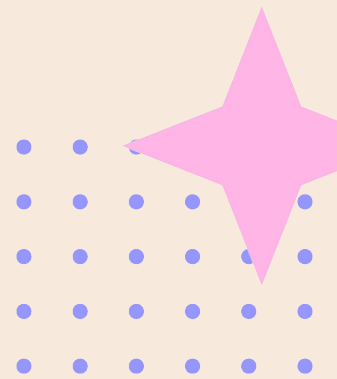
**Brent Grinna**

Founder & CEO

[brent@evertrue.com](mailto:brent@evertrue.com)  
[@brentgrinna](https://twitter.com/brentgrinna)

THE UNIVERSITY OF  
CHICAGO

 **evertrue**



11:30



Why should I co-present with Brent Grinna  
at CASE Advancement Summit 2023?

11:30



Co-presenting with Brent Grinna at the CASE Advancement Summit 2023 can offer several benefits and opportunities. Here are a few reasons why you should consider co-presenting with him:

Expertise and Experience: Brent Grinna is known for **his expertise** and experience in the field of advancement and fundraising. He has likely achieved significant success in his career, and co-presenting with him **allows you to leverage his knowledge and insights**. It can provide you with the opportunity to learn from his experiences and gain valuable insights into best practices in the field.



**Credibility and Reputation:** Co-presenting with a recognized industry expert like Brent Grinna can enhance your own credibility and reputation. It showcases your association with an established professional and positions you as a knowledgeable and respected individual in your field.

**Networking Opportunities:** The CASE Advancement Summit is a premier event in the advancement and fundraising community. Co-presenting with Brent Grinna allows you to network with other industry professionals attending the summit. Networking at such events can open doors to new opportunities, partnerships, and collaborations.

**Increased Visibility:** Co-presenting at a prestigious event like the CASE Advancement Summit offers increased visibility for you and your work. It provides a platform to showcase your expertise and thought leadership in front of a targeted audience.

**Knowledge Sharing and Learning:** Collaborating with Brent Grinna for a co-presentation allows for the exchange of knowledge and ideas. It enables you to share your unique perspectives, experiences, and insights with the audience. Additionally, the collaborative process itself can be a valuable learning experience, as you can gain new perspectives, refine your presentation skills, and benefit from Brent Grinna's input.

11:30



Remember, co-presenting is a collaborative effort, and it's essential to ensure that you align with Brent Grinna's expertise and approach.

You should also consider the goals and themes of the CASE Advancement Summit and how your co-presentation will contribute to the overall event objectives.

11:30



why should I **NOT** co-present with Brent  
Grinna at CASE Advancement Summit 2023?

11:30



While co-presenting with Brent Grinna at the CASE Advancement Summit 2023 can offer **numerous benefits**, there may be reasons why it may **not be the right fit for you**. Here are a few considerations:



11:30



**Divergent Expertise:** If your areas of expertise or professional focus significantly differ from Brent Grinna's, co-presenting may not provide the best platform for showcasing your own unique skills and knowledge.

**Conflicting Perspectives:** If you have fundamental differences in your approaches, strategies, or perspectives on a particular topic, co-presenting with Brent Grinna may result in conflicting messages during the presentation.

**Limited Speaking Opportunities:** Co-presenting often involves sharing the stage and dividing the speaking time. Co-presenting may limit your ability to showcase your ideas.

**Competing Objectives:** If your primary purpose is to network with specific individuals, focus on a different topic, or highlight different aspects of your work, co-presenting may not serve those objectives as effectively.

**Availability and Commitment:** Co-presenting requires a significant commitment of time and effort to coordinate and align your content and delivery.

11:30



Ultimately, the decision of whether or not to co-present with Brent Grinna should be based on a careful evaluation of your own goals, expertise, and the alignment with the summit's objectives.

It's important to consider the potential benefits and drawbacks to make an informed decision that best serves your professional interests.

3:28pm



We're working on a capital campaign for first-generation access at the University of Chicago.

Can you please help me identify existing assigned major gift prospects who are most likely to be interested in supporting a first-gen specific campaign?

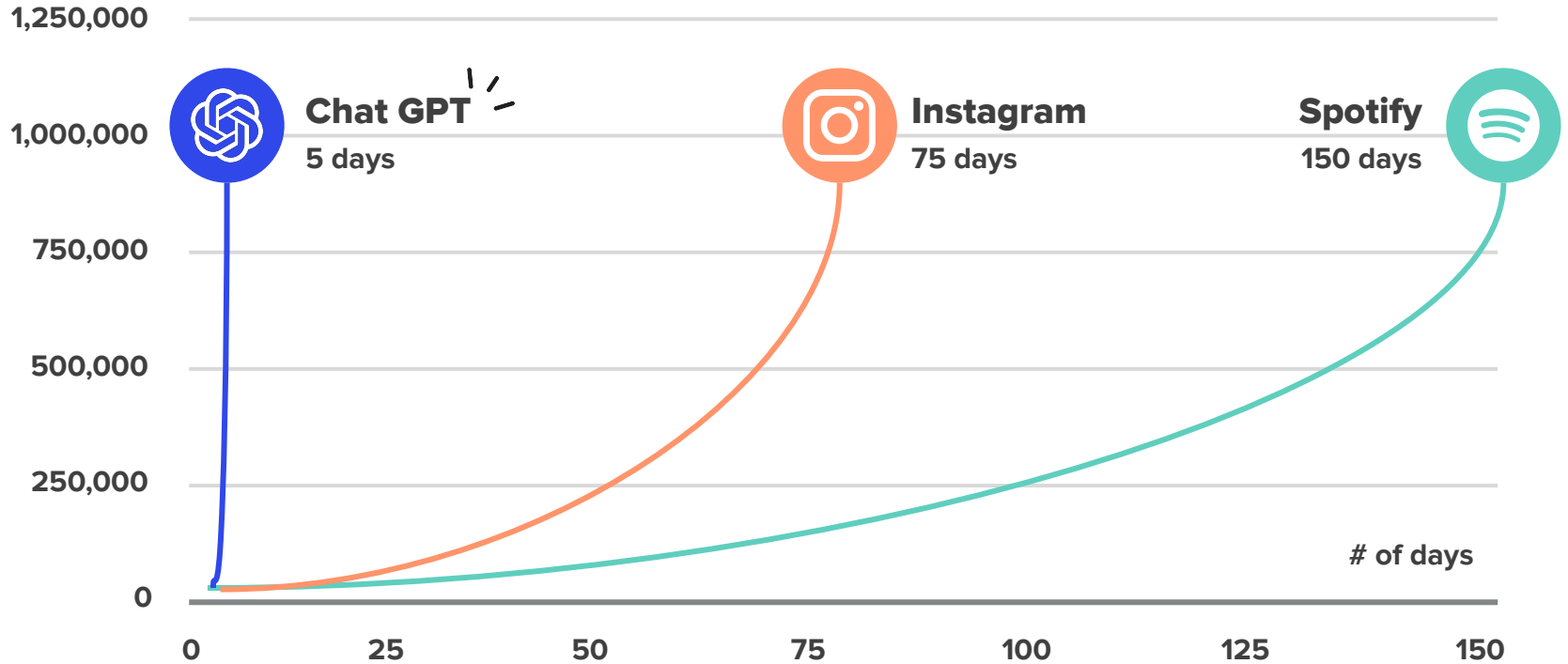
And please sort these donors by historical giving, wealth, and engagement.

3:28pm



As an AI language model, I don't have access to specific donor databases or real-time information about individuals.

# AI is experiencing unparalleled growth



\*Sources: Google, Subredditstats, Media reports

# Poll: My level of proficiency with ChatGPT is...

1. Never used it
2. I've tried it once or twice
3. I use it weekly
4. I use it daily
5. I should host the next webinar

# The New York Times

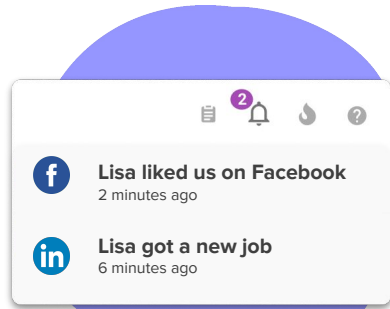
**“It’s like collaborating with  
an alien.”**

**“What used to take me  
around a half-hour to write  
now takes one minute.”**

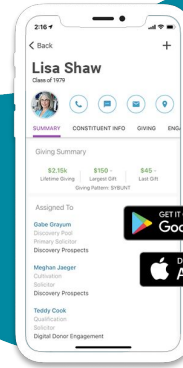
**“Everything is becoming  
much easier.”**

**“It’s enormous fun.”**

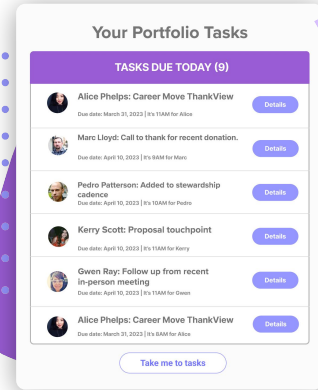
# This is the next big platform shift for fundraising.



**Social Media & Big Data**  
More insights on every constituent



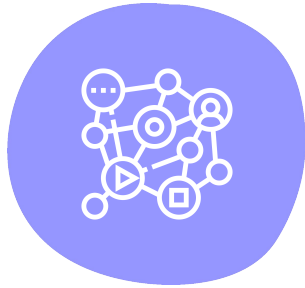
**Mobile Technology**  
In the hands of fundraisers



**Artificial Intelligence**  
Automation and prescriptive outreach.

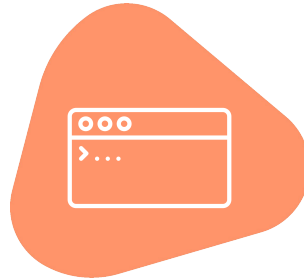


# Generative AI uses machine learning algorithms to create new and original content



## Forming a Database

A neural network, consisting of various files like images, text, data, sounds, etc. forms the basis of artificial intelligence.



## Inputting a Prompt

The user provides the AI with a description or sample of the desired content. Prompts can be words, numbers or photos.



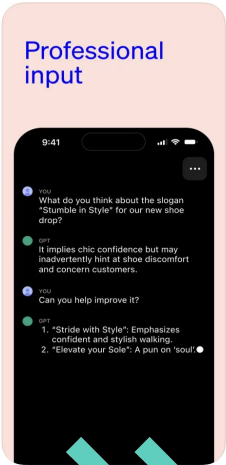
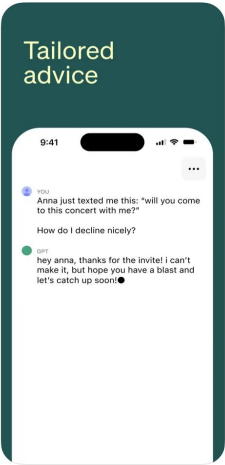
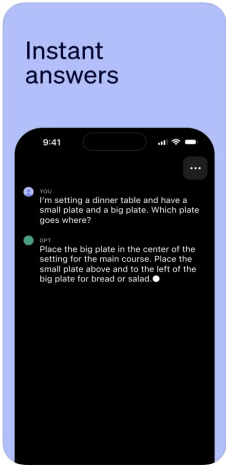
## Generating Content

And the AI uses its neural network to generate new examples that are similar to the ones it has trained from.

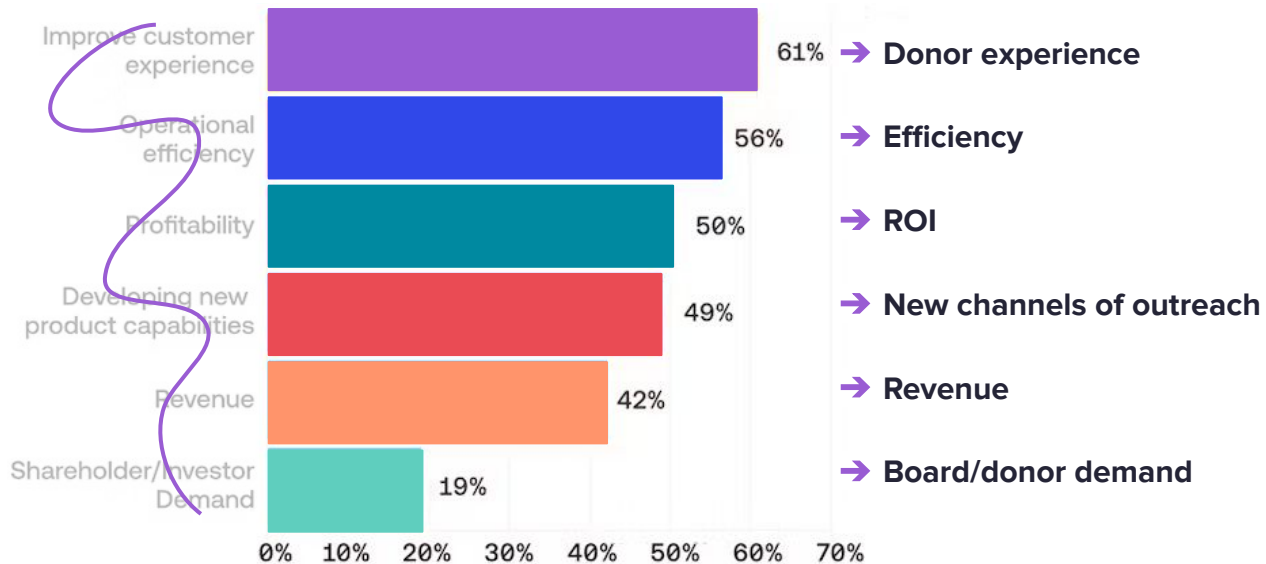
# If you do nothing else...

- ✓ Try ChatGPT
- ✓ Download the app
- ✓ Test it out with one donor outreach next week

ChatGPT: get instant answers, find creative inspiration, and learn something new. ●



# Why is your organization adopting AI?



<https://scale.com/ai-readiness-report>

# Advancement should be ready for AI... because we helped create it



UC San Diego



**W**  
UNIVERSITY of  
WASHINGTON



**Berkeley**  
UNIVERSITY OF CALIFORNIA



**Carnegie  
Mellon  
University**

# Advancement has an unfair advantage: DATA.

## What companies know:

- Name
- Email address
- Transaction data

## What Brown and UCSD know about us:

- Name
- Email address
- Parents, spouse, kids
- Hometown, high school, extracurricular activities
- Philanthropic interests and volunteerism
- Career path and job title
- Net worth / capacity
- Engagement with events, email, and FB
- Academic journey: dissertations, theses, etc

1:00



Write a thank you note to Brent Grinna using 50 words or less.

1:00



Dear Brent Grinna,

Thank you for your unwavering support and guidance. Your leadership has been instrumental in our success, and we are grateful for your vision and dedication. Your commitment to excellence has inspired us all. Thank you for being an exceptional mentor and role model.

Sincerely,  
[Your Name]

1:00



I'm James Perry, the head coach of the Brown football team. An alumnus from the class of 2004 just donated \$500 to the program. It's the 20th year in a row that Brent has given to our program. Brent grew up in Iowa and was captain of our team in 2003. He is the founder and CEO of a company called EverTrue. His wife is named Katie and he has three boys. Can you write me a thank-you letter for Brent in 50 words or less?



1:00



Dear Brent,

Thank you for 20 years of unwavering support and a generous donation of \$500 to the Brown football team. Your dedication as a former captain, along with your success at EverTrue, inspires us. Our gratitude extends to Katie and your boys.

Together, we strive for excellence.

Sincerely,

James Perry, Head Coach, Brown Football Team



**AI unlocks...  
Personalization.  
At scale.**



# At CASE Summit, here's what was top-of-mind



How can we harness AI to make sense of unstructured data?



How can AI improve the quality of performance reviews?



How can AI help stewardship automation across all funds?



Can you create a ChatGPT cheat sheet for Advancement?

We have that!





# 10 ways AI will change Advancement



**Here's what you  
can do now...**

# 1. AI simplifies hyper-personalization

## University of South Carolina

- 392 dean's letters
- From 20+ units
- Written in the voice/tone of that dean
- Customized to past donor behavior
- In half a day



## Constituents

Search by name or remote ID

### RECENTLY VIEWED



Virginia Os...  
Boston, MA

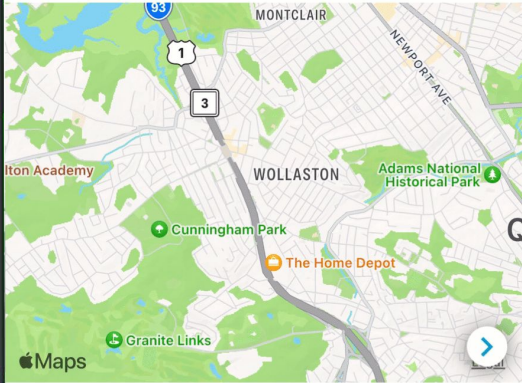


Lisa Shaw  
Palo Alto, CA



Miguel Grif...  
Somerville, MA

### MAP & FILTER



## 2.

# AI prospect profiles create on-demand summaries before first touchpoint or meeting

"This is exactly what I was hoping for from AI. It's opening up bandwidth for the rest of the team by consolidating information, synthesizing it, and putting in a place where it's easy for everyone to access."

AVP of Prospect Development



### 3.


## AI can draft or edit messages for personalized, 1:1 outreach

“I use ChatGPT every day. Just yesterday, I used it to edit emails I needed to send to 92 incoming parents.”

Stephen Sullivan, Baylor University



# Post in the chat....

What's the best way you're using  
ChatGPT for Advancement ***right now?***  



**Here's what  
will happen soon...**

4.


## It's your data. Ask it questions.

**Engagement** insights, **career** and **wealth** information, **giving** history, and predictive **scoring**...

Soon AI will propel fundraisers to take action on all of that information with the right prospect, at the right time, via the right channel.




**Filter criteria**

High net-worth 

**Enter your parameters**

Can you please help me identify existing assigned major gift prospects who are most likely to be interested in supporting a first-gen specific campaign?

**Find Prospects**



## 5. Suggest gift amounts and detect areas of interest.

Oregon State is using AI to suggest gift amounts and also recommending “other funds you might like”

Think Amazon for tracking donor interests.

Gift

\$25    \$50    \$100

\$250    \$500    \$1,000

Amount (USD) \*    Frequency

\$ 0.00    USD    Once

149 active recurring plans

17 have ended

23 cancelled

Median Gift Amount \$50

Total recurring gift \$65,440.25

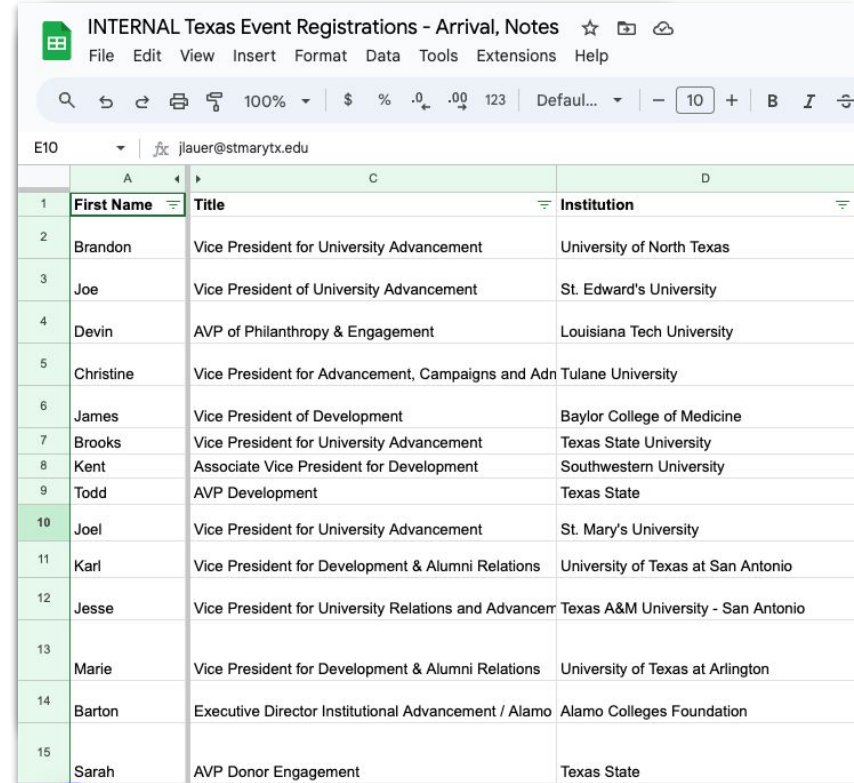
Monthly recurring plan 133 (89.26%)

Yearly recurring plan 16 (10.74%)

Next →

## 6. Handle all of your 1-to-1 correspondence after an event, game, volunteer summit, or giving day.

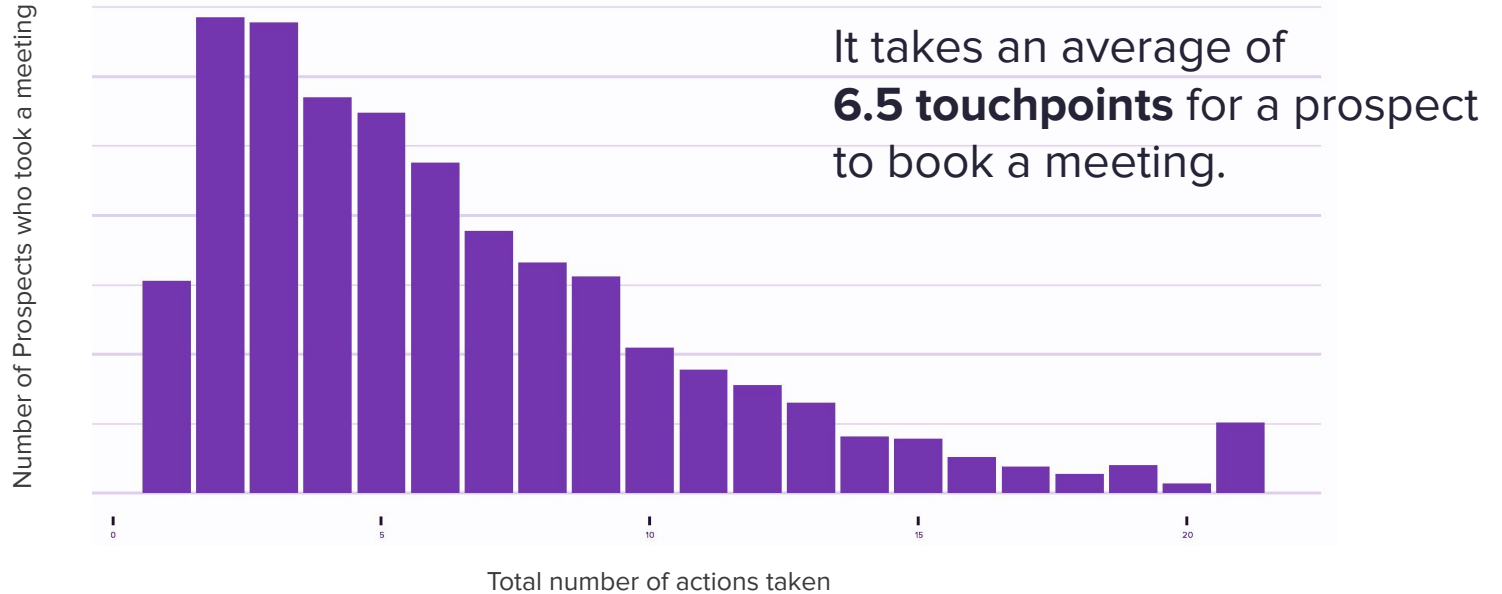
I use ChatGPT to do personalized follow-up after CASE conferences, this week's VP summit, and maybe even after this webinar.



	A	C	D
1	First Name	Title	Institution
2	Brandon	Vice President for University Advancement	University of North Texas
3	Joe	Vice President of University Advancement	St. Edward's University
4	Devin	AVP of Philanthropy & Engagement	Louisiana Tech University
5	Christine	Vice President for Advancement, Campaigns and Adm	Tulane University
6	James	Vice President of Development	Baylor College of Medicine
7	Brooks	Vice President for University Advancement	Texas State University
8	Kent	Associate Vice President for Development	Southwestern University
9	Todd	AVP Development	Texas State
10	Joel	Vice President for University Advancement	St. Mary's University
11	Karl	Vice President for Development & Alumni Relations	University of Texas at San Antonio
12	Jesse	Vice President for University Relations and Advancem	Texas A&M University - San Antonio
13	Marie	Vice President for Development & Alumni Relations	University of Texas at Arlington
14	Barton	Executive Director Institutional Advancement / Alamo	Alamo Colleges Foundation
15	Sarah	AVP Donor Engagement	Texas State

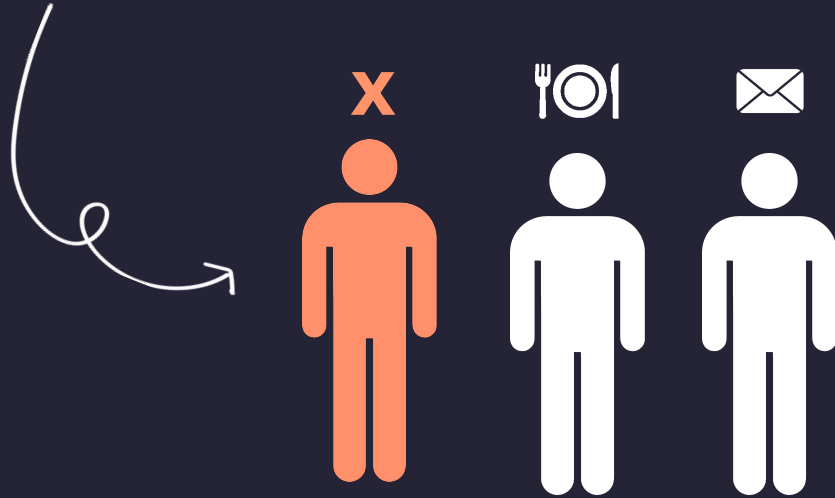
**Here's what  
will happen sooner  
than you think...**

## 7. AI could ensure every assigned prospect has a strategic touchpoint plan



# We have an activity crisis atop the pyramid

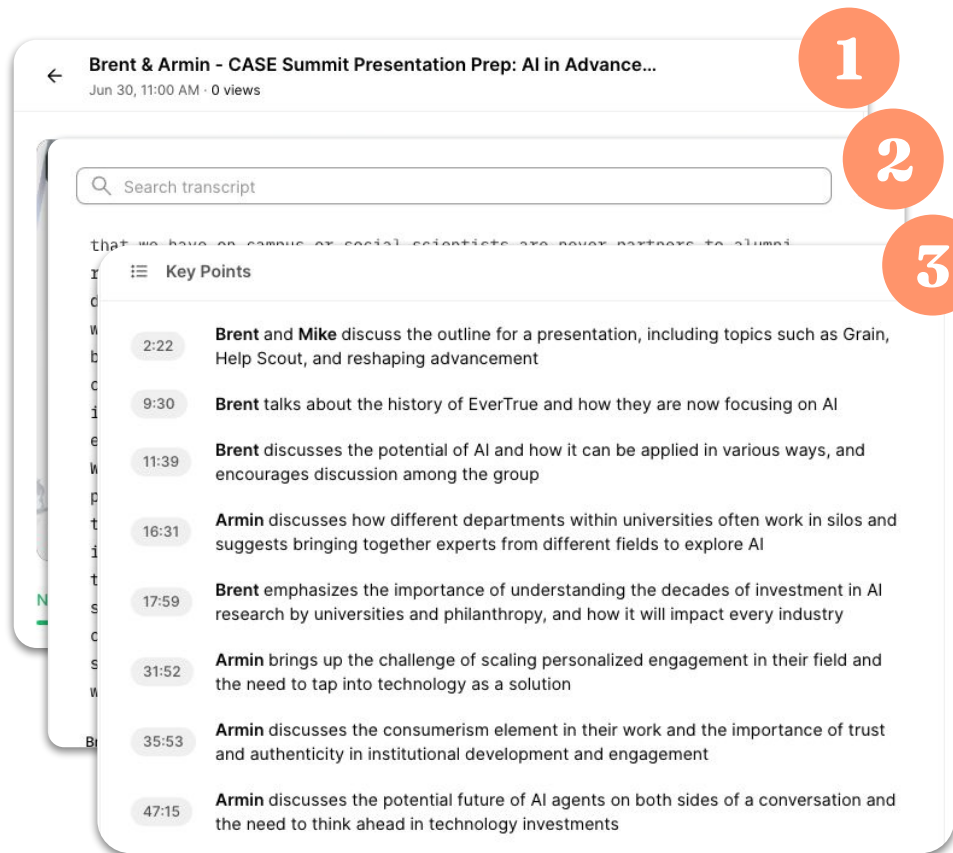
1 of every 3 assigned prospects had zero interactions in the last year.





## 8. AI could log contact reports and suggest next steps

This is Grain.com, but there are many tools out there that record calls, transcribe conversations, and create highlights... and eventually **prescribe or complete** next steps.



The screenshot shows a transcript interface for a meeting titled "Brent & Armin - CASE Summit Presentation Prep: AI in Advance...". The interface includes a search bar, a "Key Points" section, and a list of highlights with timestamps. Three orange circles with numbers 1, 2, and 3 are overlaid on the right side of the interface, pointing to the title, search bar, and key points section respectively.

1

2

3

Brent & Armin - CASE Summit Presentation Prep: AI in Advance...  
Jun 30, 11:00 AM · 0 views

Search transcript

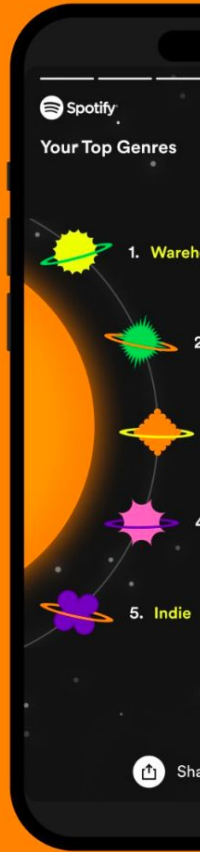
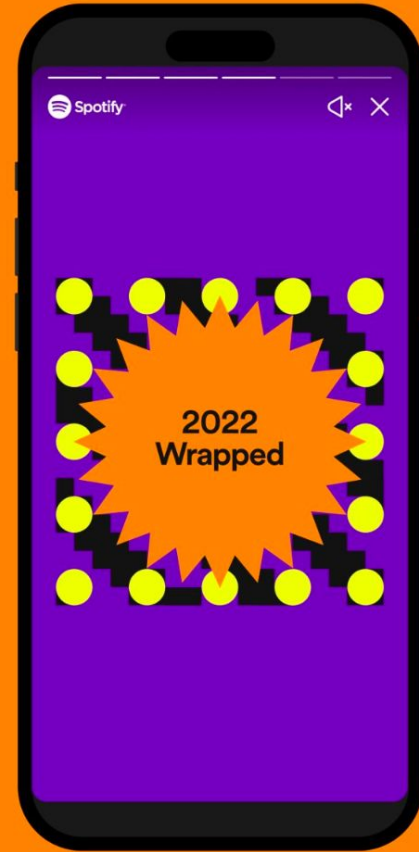
Key Points

- 2:22 Brent and Mike discuss the outline for a presentation, including topics such as Grain, Help Scout, and reshaping advancement
- 9:30 Brent talks about the history of EverTrue and how they are now focusing on AI
- 11:39 Brent discusses the potential of AI and how it can be applied in various ways, and encourages discussion among the group
- 16:31 Armin discusses how different departments within universities often work in silos and suggests bringing together experts from different fields to explore AI
- 17:59 Brent emphasizes the importance of understanding the decades of investment in AI research by universities and philanthropy, and how it will impact every industry
- 31:52 Armin brings up the challenge of scaling personalized engagement in their field and the need to tap into technology as a solution
- 35:53 Armin discusses the consumerism element in their work and the importance of trust and authenticity in institutional development and engagement
- 47:15 Armin discusses the potential future of AI agents on both sides of a conversation and the need to think ahead in technology investments

## 9. Customize stewardship connecting donation to impact

“We know based on all the research that you have to tell someone how you spent their money before you go out and ask for the next gift... AI will unlock pockets of donors and massively scale personalization in stewardship and annual giving.”

**Melissa Cox, University of Michigan**



**10.**  
**Make our work  
even more  
competitive.**



*“Nimble non-profits (and donors) are going to embrace this technology because they have no choice. We in advancement have a history of lagging instead of leading on these trends.”*

Armin Afsahi,  
University of Chicago



**It's all rainbows  
and unicorns... right?**



# AI addresses risks associated with AI



1. **Balancing Automation and Personalization:** Find the sweet spot between using AI tools for efficiency and maintaining personalized donor relationships
2. **Ethical Donor Management:** Navigate AI usage ethically, respecting donor privacy and preferences while leveraging technology to enhance fundraising strategies.
3. **Data-Driven Decision Making:** Develop skills to interpret AI insights, make informed decisions, and use predictive analytics effectively in identifying potential major gift prospects.
4. **Training and Skill Development:** Acquire knowledge and skills to leverage AI tools, interpret AI-generated insights, and integrate them into their existing fundraising practices.
5. **Trust and Stewardship:** Face the challenge of maintaining donor trust while utilizing AI, addressing concerns about data usage and ensuring authenticity in AI-generated interactions

# My Action Plan

1. Leverage **on-campus experts**
2. Foster a culture of **trying new things**
3. Encourage **policies that support AI**  
(because every app on your phone and desktop is being rewritten for AI now)
4. **Have your team lead** the way... who on your staff is already using AI and how is it going?

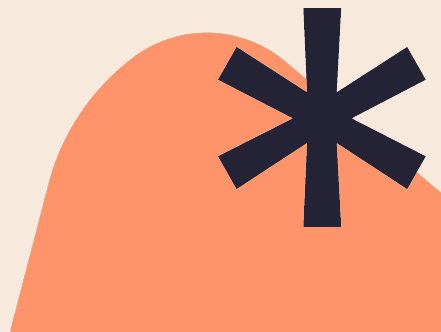
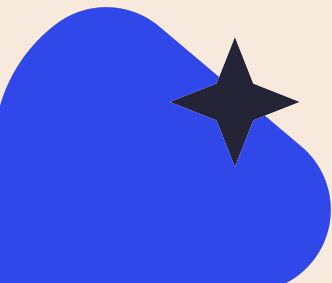


**In two words...**

**I'm excited about AI / I'm nervous about AI**



# **This is the future of fundraising**

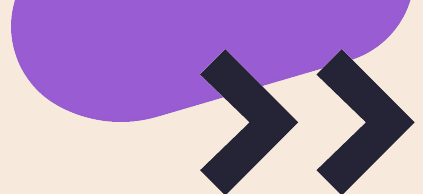




# **Poll: Do you want to learn more about using AI in your role?**



- ✓ Yes! I am interested in learning more.
- ✓ No - I'm not interested

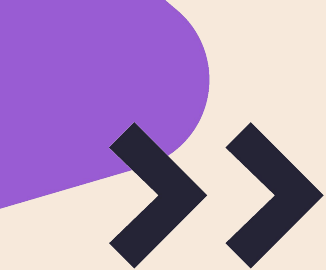


# Join us as we unveil the future of fundraising.

9/19/23 @ 1PM EST

Hit “yes” in the poll to be automatically registered!





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 **evertrue**



**Armin Afsahi**

VP for Alumni Relations &  
Development

[aafsahi@uchicago.edu](mailto:aafsahi@uchicago.edu)

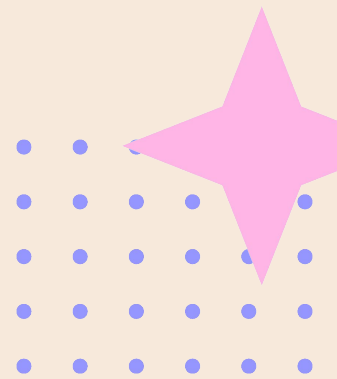
**Brent Grinna**

Founder & CEO

[brent@evertrue.com](mailto:brent@evertrue.com)

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# Your Go-To Guide on AI in Fundraising



[evertrue.com/blog](https://evertrue.com/blog)