

UVA ADVANCEMENT

WEEK OF LEARNING

SCALING NEW HEIGHTS

JANUARY 16 – 19, 2024

**AI Task Force
Results & Recommendations**

PRESENTED BY:

*Shelby Bowen, Ashley Gresh, Chris Mercincavage,
Joe Montante, Sarah Robinson, & Bradley Scheftner*

WELCOME

ARTIFICIAL INTELLIGENCE TASK FORCE

Aim: Understand the opportunities and challenges presented by Artificial Intelligence (AI) tools on University Advancement work

Result: Delivered to leadership a comprehensive report, policy & practice framework, and education & training recommendation

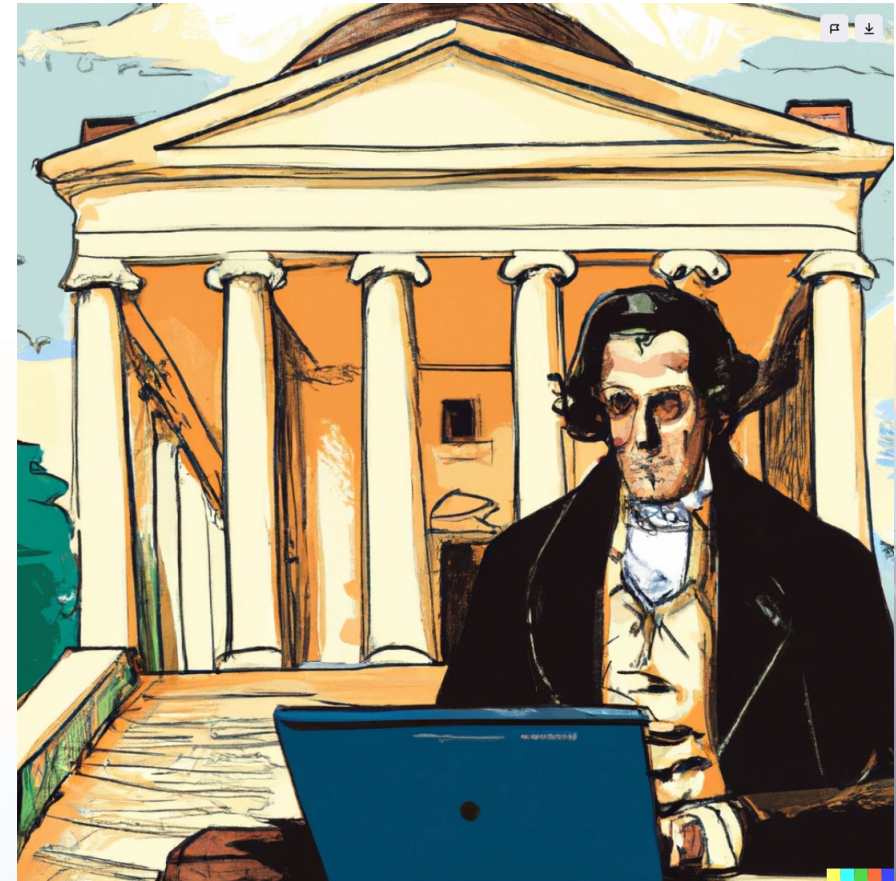


Image generated on OpenAI's DALL-E 2 with the prompt: "Thomas Jefferson working on a laptop with the University of Virginia Rotunda in the background, cartoon art"

THE AI TASKFORCE

Advancement Community Benchmarking

- **Allie Gibson**—Senior Associate Director for Engagement Communications, UA-Engagement
- **Richard Long**—Director of Development, Health System
- **Annelise Lucas**—Associate Director for Donor Experience, UA-Engagement *
- **Joe Montante**—Director of Virtual Philanthropy, UA-Annual Giving Δ°
- **Sasha Monty**—Director of Donor Relations, UA-Engagement
- **Emily Tate**—Special Assistant to the Vice President, Advancement Office

External Benchmarking

- **Ann Lawrence Grasty**—Senior Director for Annual Giving, UA-Annual Giving
- **Ashley Gresh**—Senior Associate Director for Digital Engagement, UA-Engagement *Δ°
- **Anna Hodges**—Director for Data & Decision Support, UA-Operations *
- **Anil Malviya**—Business Intelligence Analyst, UA-Operations
- **Mike May**—Senior Director, Finance Δ
- **Travis Searcy**—Senior Creative Director, UA-Advancement Communications

Training & Education

- **Shelby Bowen** ^Δ°

* University Advancement Technology Steering Committee | • Frontline Tech Advisory Group
Δ Working Group leader | ° Report deliverable lead

Policy & Practice

- **Hudson Clare**—Senior Associate Director for Development, Health System •
- **Dane Ferre**—Philanthropic Advisor, UA-Gift Planning
- **Ryan Jackson**—Associate Director for Advancement Data & Analytics, McIntire *
- **Praveen Kunchala**—Business Intelligence Systems Engineer, UA-Operations
- **Chris Mercincavage**—Assistant Director for Advancement Operations, UA-Operations °
- **Sarah Robinson**—Assistant Director of Pipeline Analytics, UA-Operations Δ°
- **Isaac Stephenraj**—Senior Director for Advancement Operations, Darden *

Vendors & Technology

- **Shelby Bowen**—Senior Associate Director and Technology Coach, Technology Training
- **Adam Fentress**—Managing Director of Development, UA-Priorities •
- **Bryant Powell**—Systems Engineer for Design & Development, UA-Operations •
- **Bradley Scheftner**—Assistant Director for Next Generation Philanthropy, UA-Annual Giving Δ°
- **Deke Shrum**—Senior CRM Project Leaders, UA-Operations *Δ
- **Elizabeth Turrisi**—Chief Technology Officer, Alumni Association *

AGENDA

- I. Project Overview**
- II. AI in Fundraising**
- III. AI Task Force Findings**
- IV. Surveying the AI Landscape**
- V. Best Practices & Key Takeaways**
- VI. Q&A**

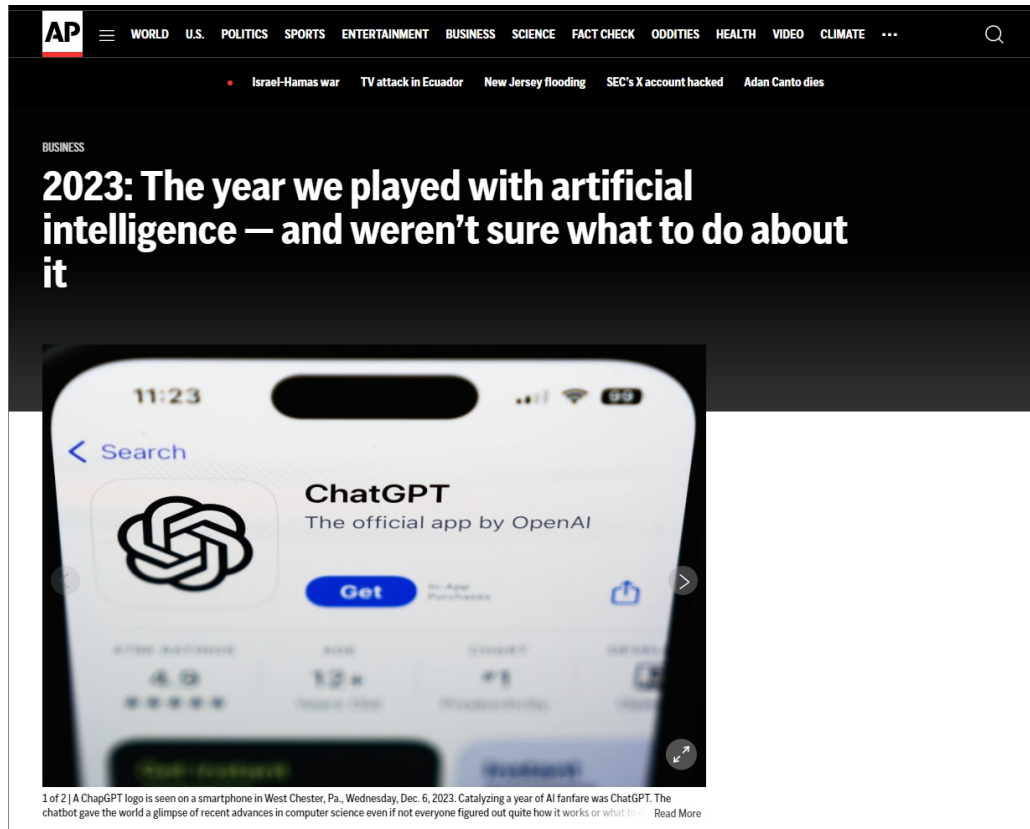
Project Overview



WEEK OF LEARNING 2024

THE NEED

AN AI TAKEOVER



The image shows a snippet of an AP News article. At the top, the AP logo is on the left, and navigation links for 'WORLD', 'U.S.', 'POLITICS', 'SPORTS', 'ENTERTAINMENT', 'BUSINESS', 'SCIENCE', 'FACT CHECK', 'ODDITIES', 'HEALTH', 'VIDEO', and 'CLIMATE' are on the right. Below the navigation, there are several news items: 'Israel-Hamas war', 'TV attack in Ecuador', 'New Jersey flooding', 'SEC's X account hacked', and 'Adan Canto dies'. The main article is under the 'BUSINESS' category and has the headline '2023: The year we played with artificial intelligence — and weren't sure what to do about it'. Below the headline is a photograph of a smartphone screen displaying the ChatGPT app. The app icon is a white knot-like logo on a dark background. The text on the screen says 'ChatGPT The official app by OpenAI' and 'Get' in a blue button. Below the app card, there are ratings: '4.9' stars and '12+' for age. At the bottom of the image, there is a small caption: '1 of 2 | A ChatGPT logo is seen on a smartphone in West Chester, Pa., Wednesday, Dec. 6, 2023. Catalyzing a year of AI fanfare was ChatGPT. The chatbot gave the world a glimpse of recent advances in computer science even if not everyone figured out quite how it works or what to do. Read More'.



Home News Sport Business Innovation Culture Travel Earth Video Live

'Most of our friends use AI in schoolwork'

30th October 2023, 10:32 EDT

Share

sky news

AI increasingly used by students to do their school work and many teachers can't tell

The survey of 500 secondary school teachers revealed that 41% believe there needs to be better regulation of AI with 31% wanting the government to step in to police its use.

THE NEED

UVA FACULTY SEEK A RESPONSE AND NEW OPPORTUNITIES

Generative AI has Arrived. What Does this Mean for Teaching and Learning at UVA?

Report of the Generative AI in Teaching and Learning Task Force

Natasha Heny and Andrew Pennock, co-chairs

June 2023

42% of UVA student survey respondents reported using AI for coursework in some fashion by mid-spring 2023

- *"Starting this fall, student learning will take place in a world where AI is **undetectable, ubiquitous, and transformative**".*
- *"Given generative AI's capabilities and availability, faculty can and must evaluate which learning goals, learning designs, and assessments remain effective, which need to evolve, and which should be abandoned. To do so requires significant faculty effort and administrative support. **But to not engage in this work is to risk that students learn far less than they did last year and to leave the potential gains of this technology unrealized.**"*
- *Full report available at: <https://provost.virginia.edu/subsite/genai/task-force-report>*

THE UNIVERSITY ADVANCEMENT SOLUTION

UATSC ESTABLISHES THE AI TASK FORCE

- The AI Task Force was established in August 2023 by the University Advancement Technology Steering Committee's (UATSC) Data Governance Sub-committee (Co-chairs: Laura Phillips, University Advancement and Isaac Stephenraj, Darden School Foundation).
- Our **charge was to understand the opportunities and challenges presented by AI tools for our work** and to respond with a final report, draft Advancement policy on the use of AI tools, and a draft training and education plan before year's end.

25

colleagues from
15 areas across Grounds

40

UVA staff/faculty
interviewed

50+

peer institutions
contacted

AI in Fundraising



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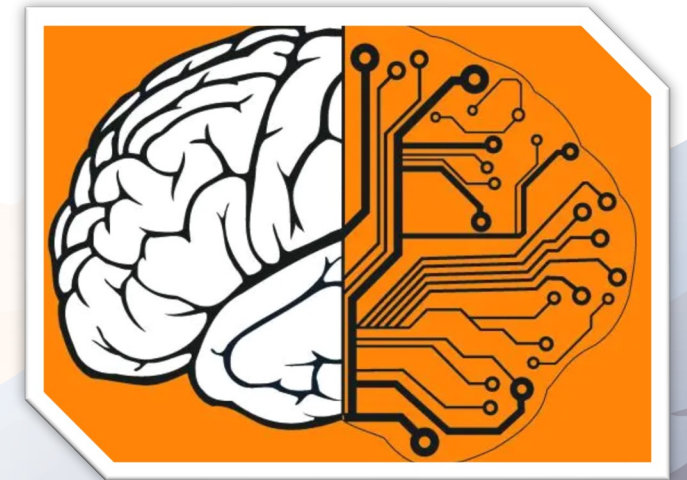
WHAT IS “AI”?

HIGH-LEVEL OVERVIEW

Artificial Intelligence or "AI" is the machine software that simulates human intelligence processes

Essential to know:

- Model types: Machine Learning (predictive analytics), Large Language Models (LLMs), Generative AI
- The technology is already infused into our daily activities and routines (ex: virtual assistants, recommendation systems, etc.)
- Models are only as good and effective as the data provided to them...meaning result/output bias and error is possible



WHAT AI CAN *GIVE* FUNDRAISING

THE POWER TO...



MESSAGE

- Generate and automate external *and* internal communications
- Customize and personalize mass outreaches



IDENTIFY

- Locate top prospects via high-powered searches across several domains
- Find and understand donor preferences and affiliations



ENGAGE

- Create and track donor journeys to grow and enhance pipelines
- Reach audiences through multiple channels at one-click



ANALYZE

- Examine and visualize data with quick, live reporting on donor and staff impact
- Build dynamic code to streamline and amplify processes

...AT A FASTER AND MORE EFFICIENT RATE

AI Task Force Findings



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BENCHMARKING

INTERNAL PEER OUTREACH OVERVIEW

- **25** COLLEAGUES from **15** DEPARTMENTS

Frontline Fundraisers + BI Experts +
Prospect Management / Research
Analysts + Operations Team Members +
Creatives (Writers + Designers) +
Program / Project Managers



- **55** Survey **RESPONSES** from **12** AREAS

BENCHMARKING

INTERNAL PEER FINDINGS

- Respondents have **varied experience levels** → AI usage is **not consistent** across teams
- Most are experimenting with general AI functionality:
 - Basic idea **generation**
 - Work-product **consolidation**
 - Email **drafting**

ChatGPT + Google Bard + Dall-E 2 +
Mid-Journey + Adobe Firefly
Grammarly + Canva + SalesLoft + Wix



ChatGPT



BARD AI

Adobe
Firefly



DALL-E



Midjourney



Canva



grammarly

Salesloft.

WIX

BENCHMARKING

EXTERNAL PEER OUTREACH OVERVIEW

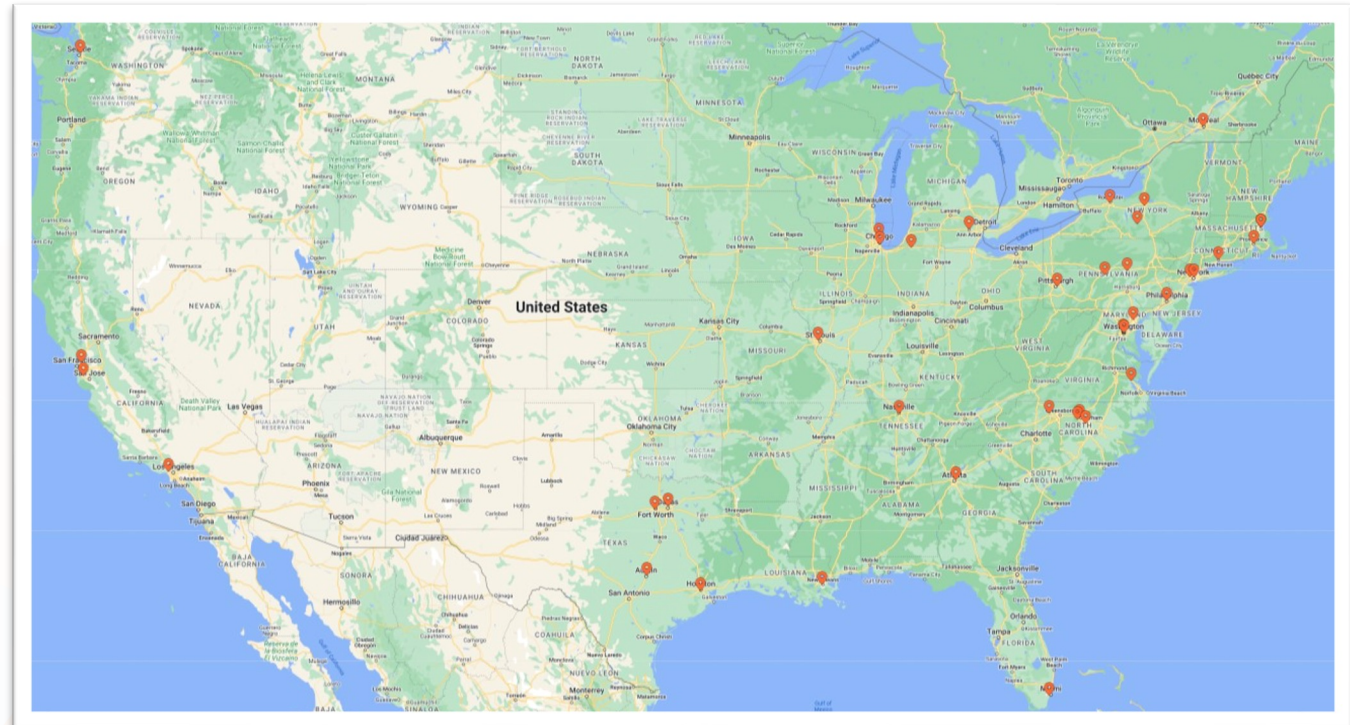
- **45+ PEERS** from **50+ INSTITUTIONS**

Annual Giving Directors Consortium Group

+

Additional Peer Institutions

- Nearly **60% RESPONSE RATE***
*(peer interview + survey)



BENCHMARKING

EXTERNAL PEER FINDINGS

- Most peers are in the **early stages** of *thinking* about AI integration
 - Technology + vendor adoption
 - Policy development
 - Addressing security
 - Creating usage guidelines
- **80%** believe work will **benefit** from AI integration
- **>70%** **don't feel confident** that departments have resources in place

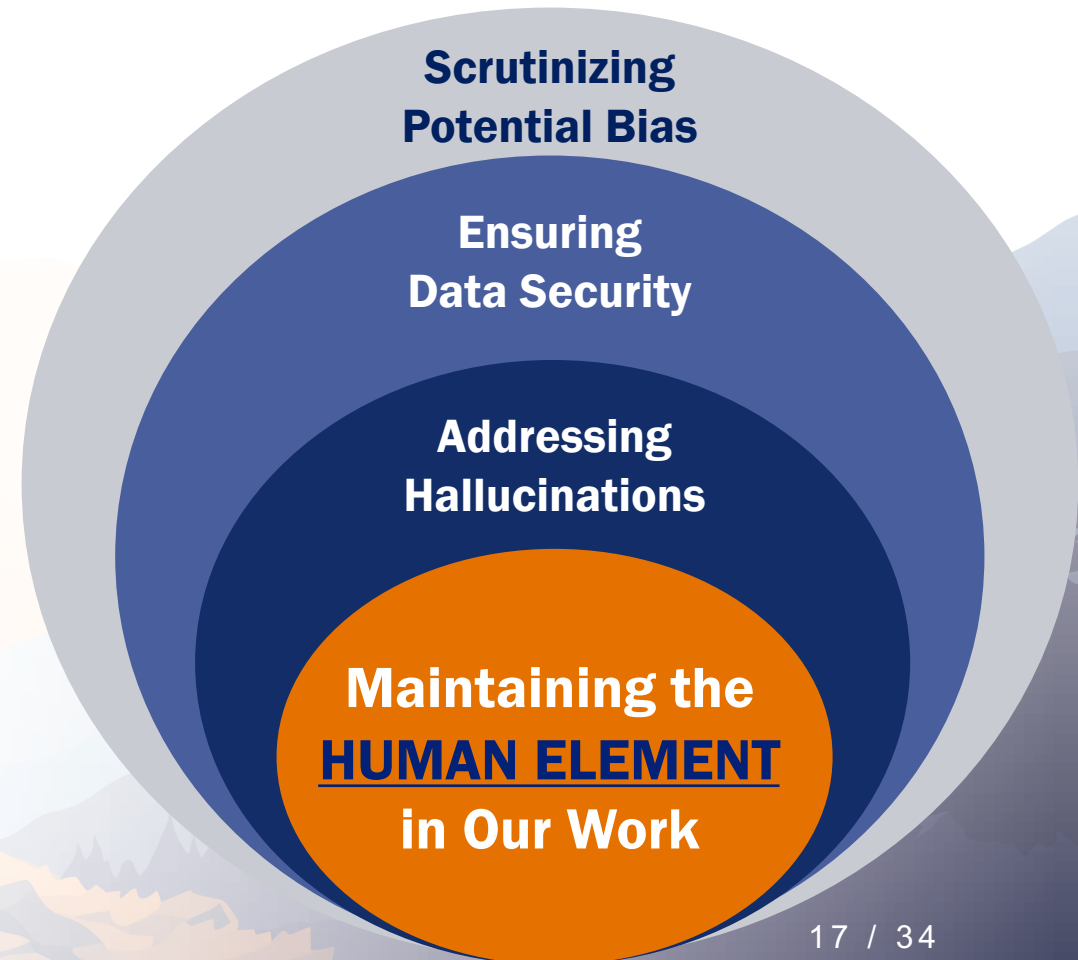


BENCHMARKING

WHERE INTERNAL + EXTERNAL OVERLAP

- **Stewardship** and **personalization** are top priorities
- Using AI as a **personal assistant**
 - Streamline daily tasks and project management
- Prioritizing the **ethics** of AI in Advancement

University Advancement is ahead of the curve in AI adoption and integration



VENDORS & TECHNOLOGY

STRATEGIC CONSIDERATIONS FOR AI ADOPTION

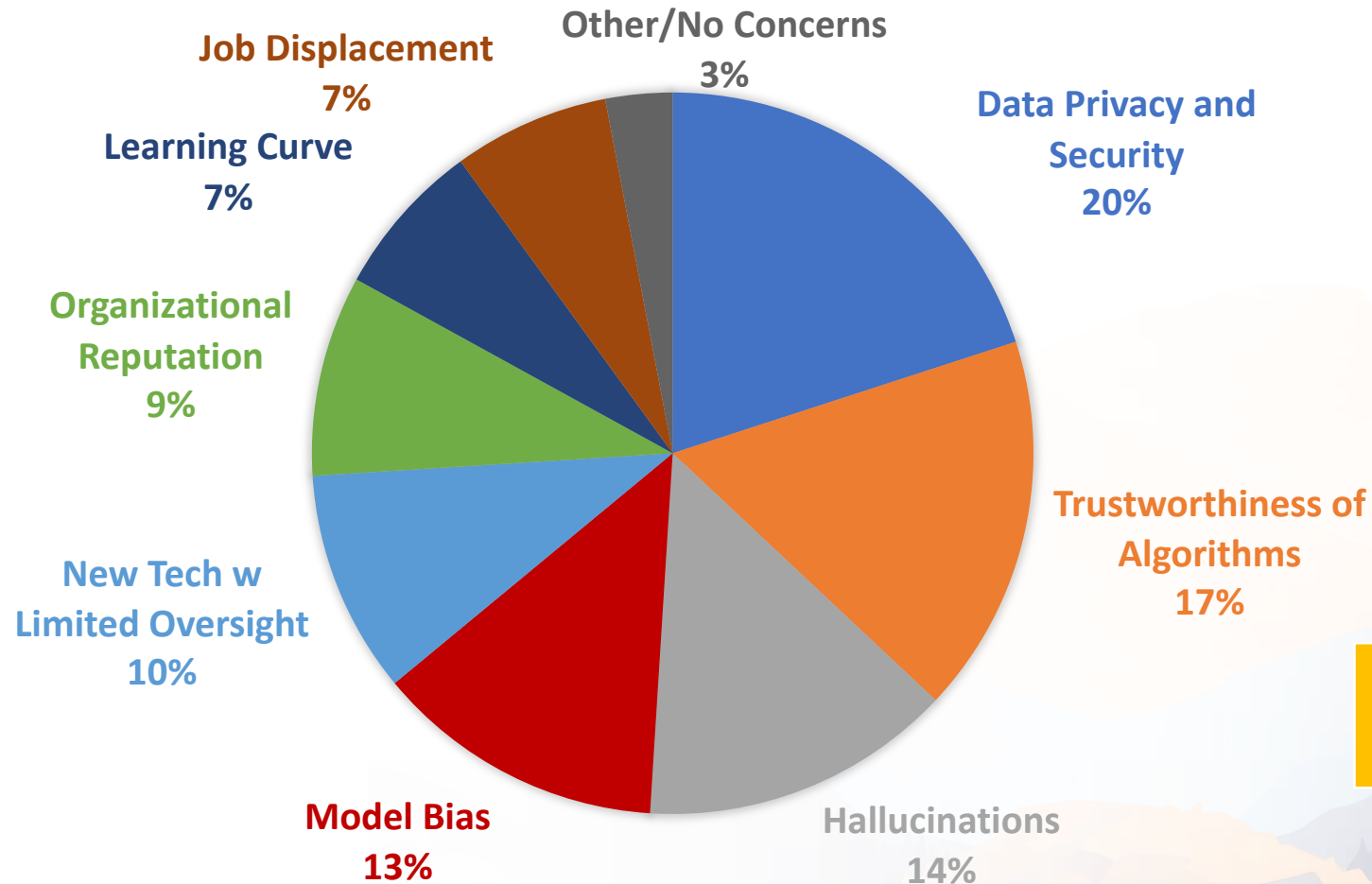
Assumption: Almost all future vendor platforms are set to introduce AI solutions.

- **The Flood Gates Have Opened**
 - A significant influx of AI updates across platforms
 - Rapid evolution, with implications for strategy
- **Changing Roadmaps**
 - Platforms adapting roadmaps to incorporate AI
- **Cautious Evaluation of New Options**
 - Emphasize the need for a thorough examination of all new AI options*
- **Guiding Principle**
 - Ensure a detailed review before granting additional permissions

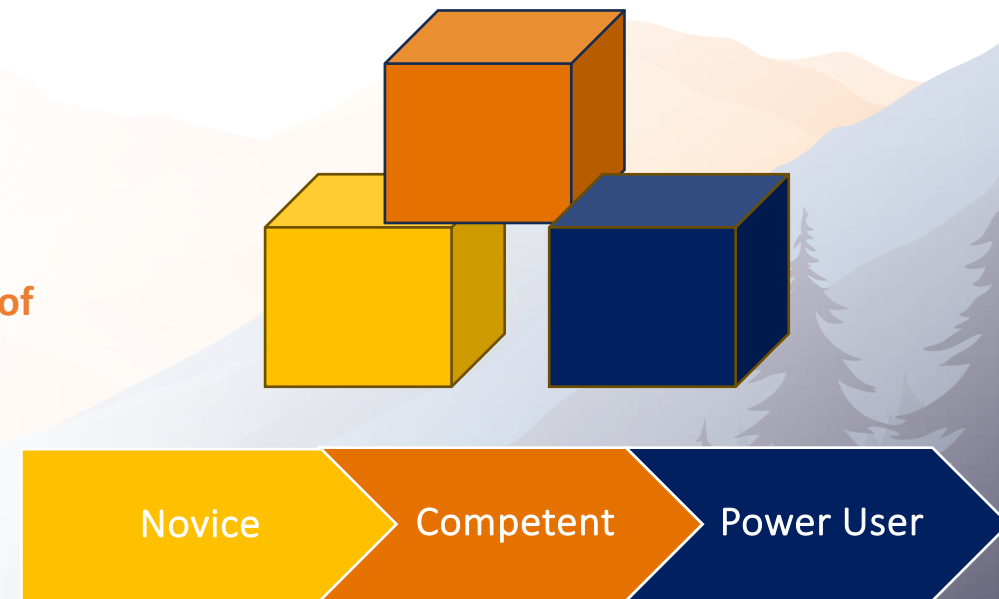
* **Caution:** Some "new" add-ins may lack true innovation, merely rebranded.

EDUCATION & TRAINING

CHALLENGES WITH AI ADOPTION



Recommend a Modular Approach



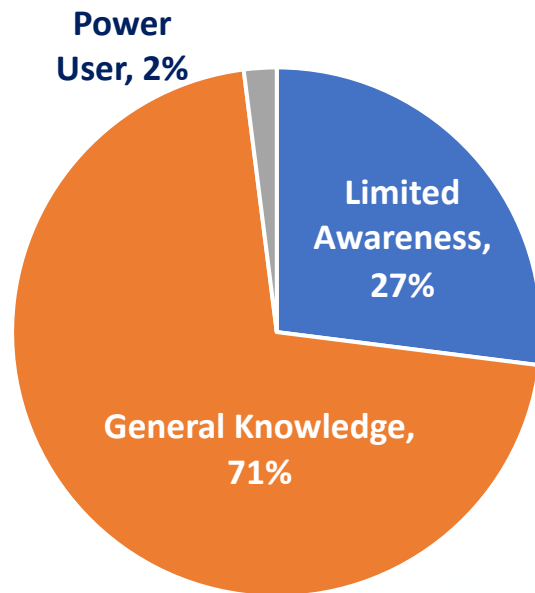
Surveying the AI Landscape



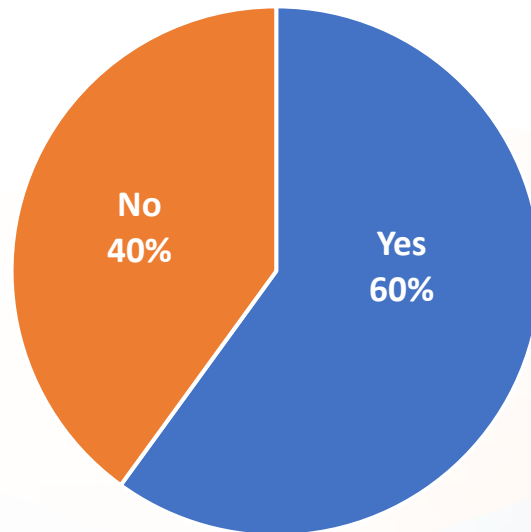
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VERIFYING INSIGHTS

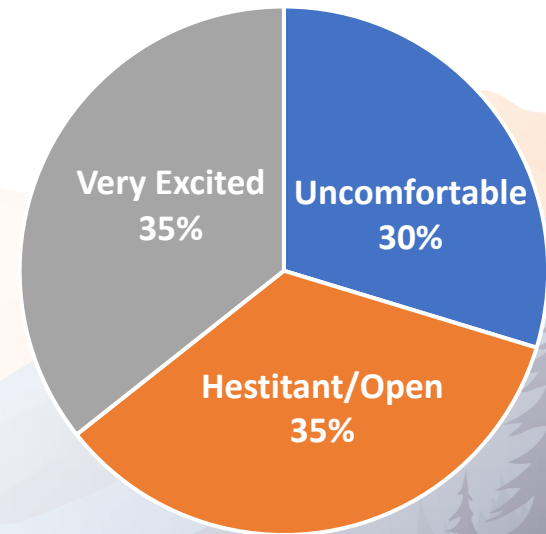
NOVEMBER 2023 SURVEY RESULTS



What is your experience level with AI technology?



Have you used Chat GPT?



Comfort level with integrating AI technology into UA work?

Instructions

Go to

www.menti.com

Enter the code

7412 1728

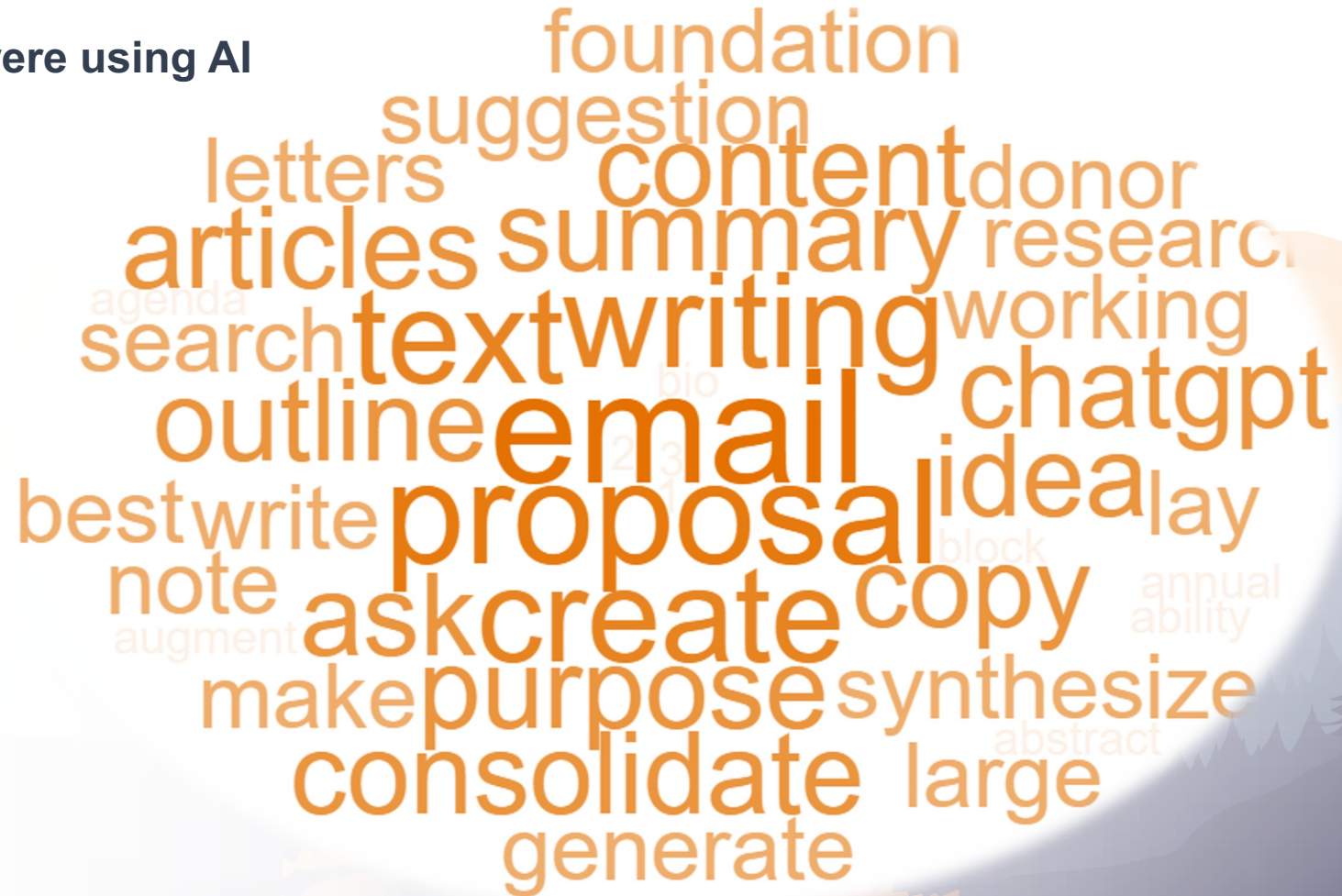


Or use QR code



VALIDATING IMPACT

Here's how respondents were using AI in November...



Best Practices & Key Takeaways



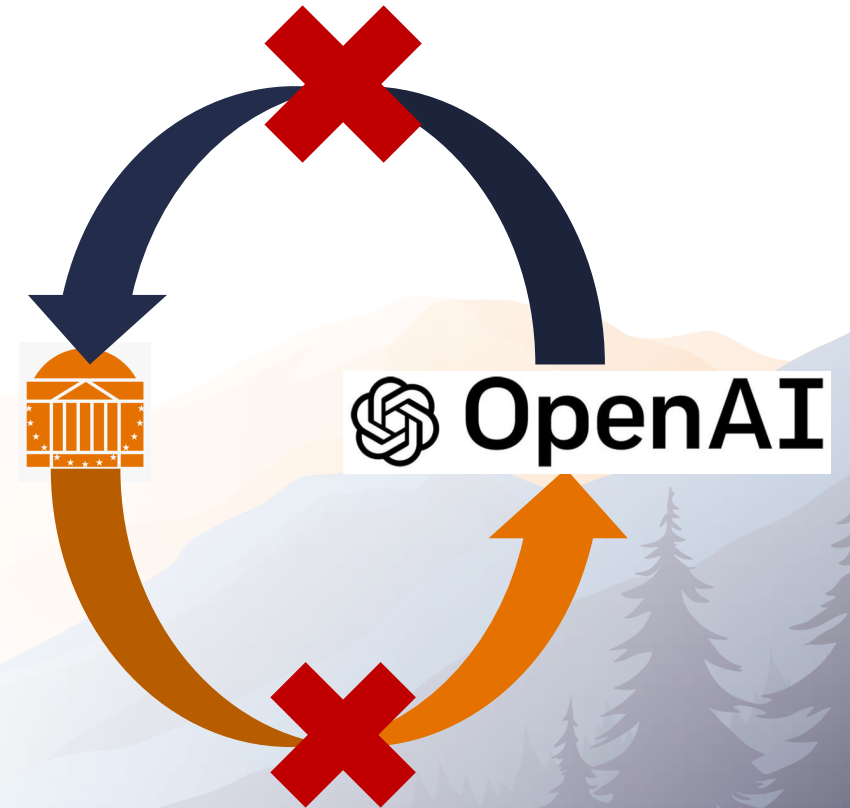
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BEST PRACTICES

INFORMATION SECURITY

Do not put any UVA data or confidential information into ChatGPT.

- Open-source artificial intelligence programs use imputed information to train their model.
- Protection from information going out.
- Protection from bad information (or worse) coming in.
- In the future...



BEST PRACTICES

UVA DATA

All UVA Data.

- Highly sensitive data: Social Security numbers, driver's license, credit card information.
 - **Medical information**
- Sensitive data: University ID numbers, non-public information.
 - **Student information**
 - **Donor information**
- Internal use data: Salary information, contracts, emails, etc.

BEST PRACTICES

CONFIDENTIAL INFORMATION

For the purposes of this Agreement, “**Confidential Information**” shall consist of:

- Personally identifiable information, in any form, about faculty, employees, students, patients, donors and potential donors to the University of Virginia or the University Associated Organizations;
- Information about the University's internal planning;
- Information about giving or approach strategies;
- Methods of analyzing University needs and selecting potential donors;
- Personal health information, in compliance with the HIPAA Privacy Rule; and
- Data exempt from the public release provisions of the Virginia Freedom of Information Act.

BEST PRACTICES

WHAT TO DO

- **Content ideation**
 - Developing communication templates (email, posts on social, presentations)
 - Crafting event descriptions and summaries
- **Information consolidation**
 - Thesaurus, dictionary, or editor
 - Summarize articles or papers (public information)
- **Continue to practice**
- **Ask questions**
- **When in doubt, don't**

KEY TAKEAWAYS

AI TASK FORCE RECOMMENDATIONS

- Potential to impact four domains of our work:
 - Messaging
 - Identification
 - Engagement
 - BI / Analytics
- **ADVANTAGES**: increased internal capacity via streamlined processes empowers staff to redirect and enhance efforts toward more strategic and meaningful activities
- **RISKS**: reliability of first-wave models and data mismanagement

KEY TAKEAWAYS CONTINUED

AI TASK FORCE RECOMMENDATIONS

- Data security and user accountability are **KEY** to successful integration
- Personalize and customize whenever and wherever possible
 - AI tool development
 - User experience(s)
 - Outputs
- Proactive education is critical to developing ethical and responsible users



NEXT STEPS

THE TASK FORCE IS WITH YOU

- Any AI adoptions will work **for you**, not the other way around
- Final protocol decisions
 - UVA Admin Task Force
 - University Advancement Technology Steering Committee
 - UVA ITS department
 - The Commonwealth of Virginia
- **Continue to...**
 - **Safely experiment and familiarize yourself with ChatGPT and other model types**
 - **Share best practices and ask questions**
 - **Keep your ears (and hearts) open for updates**



**Questions?
Thoughts?**

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AI RESOURCES

GENERAL INFORMATION

- [The History of Artificial Intelligence: Harvard](#)
- [Chatting About Chat GPT: CASE](#)
- [Report: Coping With Artificial Intelligence Will Take Some Real Work](#)
- [UVA Faculty Report on Generative AI in Teaching and Learning](#)



FundraisingAI

DATA SECURITY AND USER ACCOUNTABILITY

- [Commonwealth of Virginia Directive No. 5](#)
- [IRM-002 \(Acceptable Use Policy\)](#) and [IRM-012 \(Privacy and confidentiality of University Information\)](#)
- [University Data Protection Standards](#)
- [Fact Sheet: President Biden Issues Executive Order on Safe, Secure, and Trustworthy Artificial Intelligence](#)

IMPACT ON FUNDRAISING

- [Artificial Intelligence and the Future of Generosity \(Video\)](#)
- [What Are Fundraisers Saying About the Impact of AI?](#)
- [How Nonprofits Can Avoid AI Ethical and Legal Pitfalls](#)
- [How Artificial Intelligence is Transforming Fundraising](#)



THANK YOU

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