Navigating the Wild West of AI

Practical Tools and Strategies for Fundraising Professionals

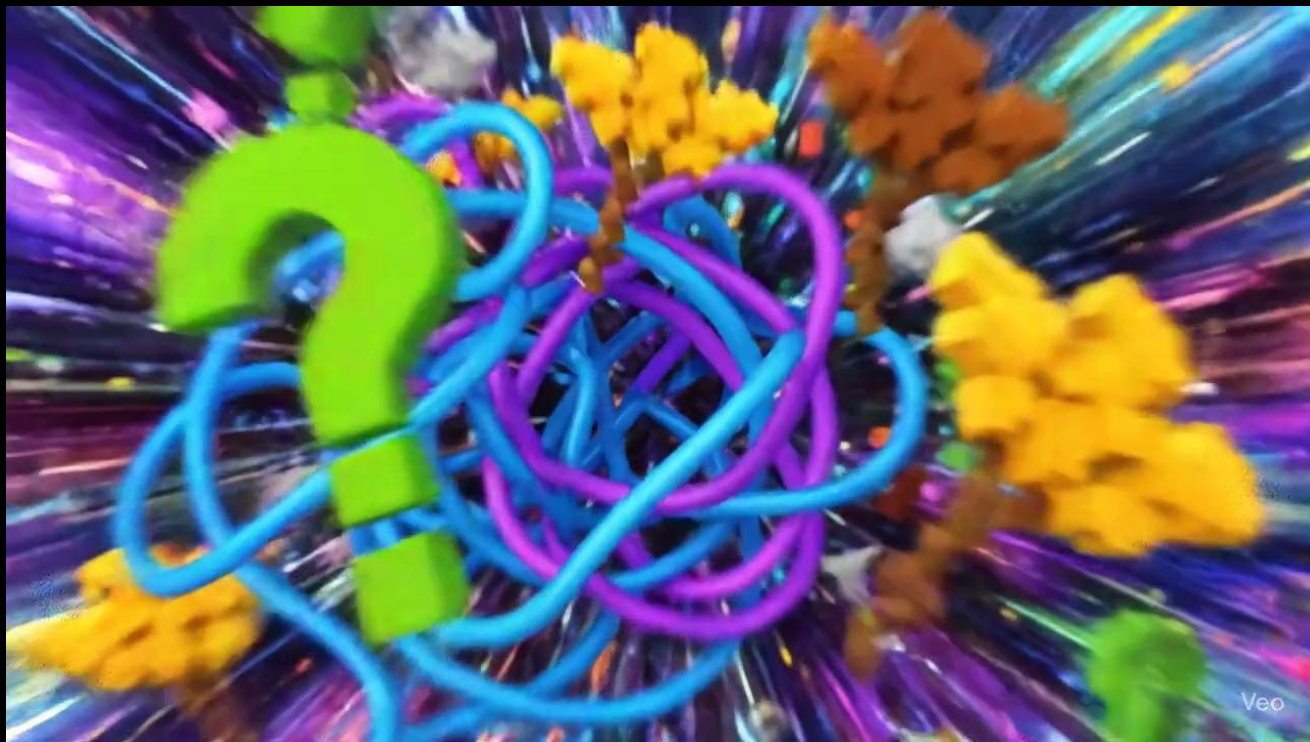**Mick Greco**
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Session Agenda

1. AI Overview

2. Best Practices

3. How We're Using AI

4. Discussion

AI Overview

The Lexicon

AI	Artificial Intelligence	The field of computer science focused on building systems that can do things like reasoning, problem-solving, and learning.
ML	Machine Learning	A way for computers to learn from data and improve over time, instead of being given step-by-step instructions.
LLM	Large Language Model	An AI system trained on massive amounts of text to understand and generate human-like language.
Gen AI	Generative AI	A type of AI that can create new content — like emails, images, or summaries — based on what it has learned.

A Brief History of AI
January 2024 to July 2025

January 2024		July 2025
Limited/dated access to the web	→	Live web access
Mostly chatbots	→	Advanced functionality & workplace integration
30% ChatGPT hallucination rate	→	1.5% ChatGPT hallucination rate

The **Next** 18 Months

Agentic AI systems that take initiative, make decisions, and complete multi-step tasks are right around the corner...

Best Practices

Human Oversight is Essential

Always review AI outputs for tone, accuracy, and donor sensitivity.

Use AI to assist, not replace, human relationship-building.

Protect Donor Privacy

Do not input personal donor data into AI tools without proper anonymization.

Comply with data protection laws (e.g., GDPR, HIPAA if relevant).

Avoid Bias & Discrimination

Be aware of potential AI bias in donor profiling or segmentation.

Validate that AI recommendations promote fairness and inclusion.

Use AI to Enhance, Not Manipulate

AI can help draft appeals or suggest strategies, but avoid emotional manipulation.

Keep messaging respectful and aligned with organizational values.

How We're Using AI

Prospect Outreach & Donor Stewardship

Use AI for customized outreach & to draft personalized thank-you emails

- Draft warm thank-you or check-in emails
- Tailored to donor history & interests
- Saves time, preserves warmth

- Always review & edit before sending

Team Access to Research & Insights

perplexity

- **Cited responses**
- **Deep research**
- **Interactive Q&A**

NotebookLM

- **Controlled content**
- **Central knowledge base**
- **Unique outputs**

Portfolio Analysis: Donor Ranking

Use AI to rank donors by engagement

- Inputs: giving, attendance, zip code
- Outputs: High/Medium/Low tiers with actions

- Prioritize efforts with confidence

Profile Prep: Biography Generation

Use AI to generate donor bios quickly

- Input: class year, job, giving history
- Output: clean, professional profiles

- Great for briefings & meetings

Discussion

Resources

Santa Clara University Markkula Center for Applied Ethics

    [Institute for Technology, Ethics, and Culture (ITEC)](#)

    [Generative AI Ethics Perspectives](#)

[Fordham University AI Vision Committee (Office of the Provost](#))

Fordham University - [Policy on AI](#)

Santa Clara University - [Generative AI Guidelines](#) | [Risks and Limitations of Generative AI](#)