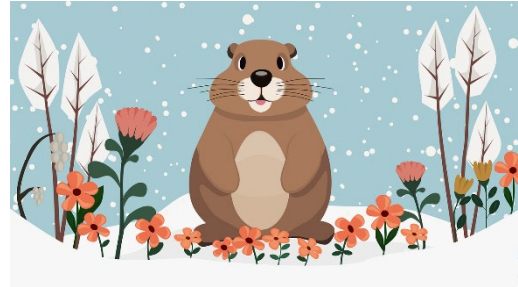


Six More Weeks of Manual Cleanups or an Early Shift to AI Automation?

Exploring Trends from Summit

With January already at a close, Groundhog Day is on the way. As we wait for Punxsutawney Phil to emerge from his burrow, let's check out what else might be emerging this year. In aasp, we're fortunate to have many community members who are on top of the latest topics and trends. A number of these experts presented at Summit in September, and shared ideas on the future of Advancement Services and how we can avoid falling behind. Read ahead for a few key takeaways you can apply in your own shop.



Moving from theoretical AI to practical AI

First, it's no surprise that AI continues to attract much attention, but it's no longer as simply a nebulous buzzword. Our industry is trending toward the discovery and sharing of practical AI use cases, and deeper understanding of how to effectively use AI tools to create meaningful impact and save time.

The session Examining the Future of Advancement, presented by Mark Walcott and Shomari White, offered great examples of this shift. Attendees learned that practices like hand typing notes are already becoming dated (AI can summarize Zoom calls for you), and for the future workforce still in school, tasks like these will be seen as inefficient if done manually. We might not be to AI managed reconciliations yet, but the younger generation is growing up with more automation, doesn't see AI as theoretical, and will expect it in the organizations they join.

Today's students are taught to act as project managers when using Generative AI, a practice we should also consider. In this framework, the focus is on creative problem-solving, synthesis, and innovation, and prompt engineering and iteration become the keys to success. We must learn to provide proper context, such as tone, style, audience, and other relevant background information to guide AI to give the best responses, and often the first answer won't be the final answer.

While more complex, this is not unlike early interactions with Google's search engine. There are more and less effective ways of "talking" to Google, and people had to learn to focus on key search terms, not type full sentences, and make effective use of quotation marks to create phrases. Only then would Google return the most relevant results.

Effectively Connecting with Leadership

While communicating with technology is one emerging trend, a second trend surfaced around communicating with advancement leadership. Soft skills are as important as our technical skills, and perspective taking is a big part of that. Summit's second day plenary panel made this point by way of analogy.

The session moderator, Wayne Combs, opened by inviting the audience to imagine a teenager eagerly anticipating their prom and approaching a busy parent for the necessary cash, clothing,

limo, and resources to make an unforgettable night. In this scenario, the prom is important to the teenager, but it may not be a priority for the parent. Similarly, the requests and recommendations we present to leadership are likely important to us, but they are often not top-of-mind priorities for leadership. This situation can result in surprise and disappointment when we are focused only on our own perspective.

The panel discussion that followed provided recommendations for bridging these communication gaps, with a common thread of ROI. Leadership is going to care about impact and dollars. If we can tell our story in those terms, success is more likely. We must look for areas of alignment and ways to make a project win-win for everyone.

Extending the original parent-teenager analogy, panelist Eric Valdescaro shared an anecdote about buying his son a new computer. The son wanted a nicer, more expensive gaming computer, while Eric preferred a more budget-friendly model. However, the son successfully reasoned that the gaming computer would be a good long-term investment. The less expensive computer would not last as long and would quickly need to be replaced. He could also use it for multiple purposes and bring it with him to college, supporting his education, an outcome important to them both.

Caltech's Pledge Management Dashboard served as an Advancement specific example of a win-win project. Recognized by the 2025 Aspire Awards, the dashboard facilitates accurate pledge related accounting for the Advancement Information team, while helping frontline fundraisers follow-up with donors at risk of lapsing on pledge payments. By not leaving money on the table and empowering multiple teams, the project also has leadership's buy-in.

Knowing Your People

A third emerging trend to surface at Summit is the importance of valuing, understanding, and engaging staff. Whether exploring AI or advocating for department needs, it's people who make the incredible work in Advancement Services possible. If you question whether an emphasis on employee culture is new, presenter Shomari White made a strong case in the session Examining the Future of Advancement. Early on he polled the room, asking how many attendees work in organizations where there is a strong relationship with Talent Management. Very few hands raised, suggesting these collaborations are not well established in many nonprofits.

Shomari went on to underline that staff are an important part of the organization's competitive advantage. No one else has your specific team of people. We spend a lot of time getting to know donors and other external constituents, but looking internally is also vital to success. Formal assessments like DISC and StrengthsFinder have long been leveraged by the for-profit sector to better understand talent, and the non-profit sector is beginning to take note. Segmentation methods like the 9-box talent grid help identify the best fit for team members' skills, while also aiding in succession planning by identifying future leaders.

Semantics matter, and word choice is another simple, yet effective tool for elevating staff and positive perceptions around our roles. During the plenary, an attendee asked the panel how she could help advocate for higher pay for her gift processors. In addition to cross-training in technical skills and thoughtfully written job descriptions, the panel suggested title changes that better reflect

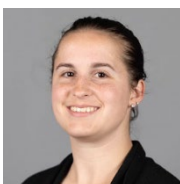
the complexity of the work. Modern titles include terms like “analyst” or “gift accounting” and are inclusive of tasks beyond data entry, incorporating critical thinking and analysis skills.

Similarly, in the session, Advancement Services: The Next Generation, presenters Mark Longo, Omar Manlapaz, Lisa Farella, and Nathan Fay shared their team’s journey from “Advancement Services” to “Data and Business Intelligence” (DBI). The latter name better emphasizes both internally and to others in development that the team is not a reactive back-end service, but rather strategic partners in revenue generation. Further, the DBI team focuses on the guiding principles of mindset, skillset, and toolset as an investment in people.

Whether Punxsutawney Phil predicts more weeks of winter or an early spring, industry predictions suggest that AI, interactions with leadership, and strategic talent management all offer exciting opportunities in the evolution of Advancement Services this year. They are by no means the only emerging trends we’ll see, but are excellent areas to begin exploring possibilities. Empower yourself to take concrete steps that will improve your team’s position in one or more of these areas. And if you’re already on that journey, consider [sharing your experience](#) at aasp’s 2026 Summit!



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