

NOVEMBER 2025

AI as a Partner in Advancement: Building on 75 Years of Timeless Truths

When Gonser Gerber was founded in 1950, the field now known as *advancement* was still in its infancy, and it was called *development*. Few organizations had formal fundraising programs or staff dedicated solely to cultivating philanthropy. Gonser Gerber helped pioneer the very concept of development as an embedded, professional function within nonprofit organizations...one that links leadership, mission, vision, strategic planning, and donor relationships in pursuit of organizational progress.

Over time, our firm's concept of development — an integrated enterprise encompassing communication, engagement, volunteerism, philanthropy, data, and stewardship — has come to be known more commonly as advancement. Though the language has changed and new tools have emerged, the essence of the work remains constant: people giving to people, inspired by a well-articulated mission and a compelling vision for the future.

As we mark this milestone year, we find ourselves again at a moment of meaningful change. Artificial intelligence (AI) is beginning to influence how organizations engage, communicate, and make decisions. It introduces both new efficiencies and new questions. Just as in 1950, the opportunity before us is to embrace new approaches thoughtfully and to integrate innovation in ways that strengthen relationships, clarify mission, and amplify generosity.

There's a saying often invoked in our work: "*The true meaning of life is to plant trees under whose shade you do not expect to sit.*" Another reminds us, "*The best time to plant a tree was 20 years ago; the next best time is today.*" Both capture the essence of advancement — the willingness to sow generosity today so that others may benefit tomorrow.

The metaphor of a tree is fitting for this moment. The roots represent what is timeless: relationships built on trust, leadership that inspires, stories that connect, and missions that matter. They draw nourishment from history, values, and community, providing stability even as

circumstances change. The trunk symbolizes organizational strength: the vision, structure, and culture that carry those enduring principles upward. And the branches? They reflect how technology, data, and digital tools now extend our reach, helping us engage new audiences and cultivate fresh expressions of generosity. Our profession thrives when it honors its deep roots while encouraging new growth, recognizing that healthy trees depend on both.

The reflections that follow explore how AI might help us extend our reach and enhance advancement work today and, in the years ahead, and how you, as an advancement leader, can begin integrating AI into your organization.

Transitioning From "Nice to Have" to Core Tool

Just a few years ago, AI in advancement was viewed as a novelty — an intriguing topic for conference sessions or technology demonstrations. Today, it's becoming a standard feature in donor databases, communication workflows, and prospect-research systems. AI tools can summarize donor histories, draft messages, and analyze giving patterns in ways that once required hours of manual effort. What began as curiosity is quickly evolving toward expectation.

Organizations that will benefit most are those that treat AI not as a passing trend but as a strategic partner. An instrument to align time, resources, and effort more directly with mission. When used wisely, AI frees advancement professionals to focus on what has always mattered most: listening, connecting, and building genuine relationships. As technology handles more of the routine, the human elements of our work rise in importance. Where could AI help your program do these things even better? Begin by identifying small ways to integrate it into donor outreach, cultivation, and/or stewardship. Then observe, adapt, and learn.

Accelerating Insight through Supercharged Analytics

Analytics have been part of advancement work for decades. Development offices routinely analyze giving histories, event participation, and donor demographics to prioritize outreach and guide cultivation. What's changing now is the scale and speed with which this can be

done. AI takes what used to require days of manual sorting, exporting, and analysis and turns it into an ongoing, adaptive process that is larger in scope, faster to update, and easier to repeat.

AI-driven analytics can evaluate thousands of variables at once, from wealth indicators and engagement behavior to communication responsiveness and peer connections and reveal correlations that traditional methods could never uncover. These insights don't just make the work faster; they make it smarter. They help advancement professionals see emerging trends, test new strategies, and pivot more confidently based on real-time feedback.

Yet as powerful as these tools are, they remain just that...tools. Data can point to where opportunities may exist, but it cannot create the relationships and inspiration that turn potential into generosity. The human work of listening, interpreting, and connecting still drives success.

The real promise of AI lies in how it expands the capacity for data-informed action. It allows advancement teams to conduct deeper analysis more often, refine strategies with greater precision, and focus time on relationships most likely to move mission forward.

For leaders, the opportunity now is to turn insight into practice. Identify one or two questions your current data struggles to answer, such as *How can we better understand the connection between engagement and giving over time?* or *How can we uncover potential advocates or ambassadors we're currently overlooking?* Then explore how AI-driven tools might bring those answers into sharper focus. Use what you learn to guide conversation and strategy. Each small step in this direction strengthens your team's ability to make decisions that are both data informed and mission centered.

Enhancing the Work of Gift Officers

The most meaningful impact of AI in advancement may be its ability to elevate the work of gift officers – the people at the center of building and sustaining relationships. Rather than replacing human interaction, AI has the potential to strengthen it, allowing fundraisers to

spend more time doing what only they can do: connecting the right people to the organization's mission.

AI-powered systems will increasingly serve as supportive partners to gift officers. They can help fundraisers see patterns in donor engagement, surface timely insights, and organize information in ways that make outreach more thoughtful and strategic. Meeting preparation that once required hours of research can now be condensed into minutes. AI can summarize recent interactions, highlight giving history, and note personal details or preferences so that each conversation begins with context and ends with deeper connection.

After a visit, generative tools can assist with drafting personalized follow-up messages, call summaries, or stewardship notes aligned with the donor's interests and the organization's priorities. Rather than replacing authentic communication, these tools help ensure it happens in a timely and meaningful way.

Over time, the automation made possible by AI will create a more strategic rhythm for frontline fundraisers. Administrative duties that once filled calendars, such as scheduling, data entry, and record keeping, will increasingly happen behind the scenes and be managed by systems designed to support a focus on relationships.

This moment invites you to reflect on how your organization supports the work of its gift officers. Consider how AI might serve not as a decision-maker, but as a trusted tool that gives your team more time to focus on the people and conversations that matter most. Look for ways to ease administrative burden, align roles and goals around meaningful relationship building, and equip your staff to interpret AI insights through a human lens. The aim is not simply to move faster, but to work with greater intention, ensuring that every interaction, every visit, and every decision is guided by enhanced data insights and genuine human connection.

Extending the Reach of Development Teams

As AI enhances the individual work of gift officers, it will likely reshape how development teams organize and extend their collective reach. While fundraising will always depend on people and relationships, what's changing is how teams are structured to use technology to strengthen those relationships at greater scale.

Among the most visible examples of this evolution are Virtual Engagement Officer (VEO) programs – AI-assisted systems designed to conduct outreach and maintain consistent, meaningful contact with a broad base of constituents who might otherwise remain unengaged. These programs are currently being piloted by several organizations to evaluate their role in engagement and giving. Early results are mixed but instructive. While some organizations have seen modest increases in annual participative giving, the greater potential of the model may lie in its ability to automate consistent outreach and identify individuals who are ready for deeper engagement with a gift officer.

A VEO isn't a robot fundraiser; it's a digital extension of the development team. While still an emerging tool, early uses suggest VEOs may have the potential to combine predictive analytics, personalized messaging, and automated follow-up in ways that help organizations reach a broader audience than human staff alone can. If this potential continues to be realized, VEOs could become a complementary partner – nurturing breadth – while human gift officers focus on building depth.

Beyond VEOs, new hybrid roles are likely to emerge for advancement professionals. Digital gift officers (human fundraisers who engage prospects through digital channels), AI integration specialists, and data storytellers might very well be chief among them. These positions won't displace traditional fundraisers; they'll extend the reach of development teams and expand what fundraisers can achieve.

While your team explores new ways to broaden outreach, consider how digital tools might complement, not compete with, the personal work of fundraising. VEOs and other emerging models are showing early signs of helping maintain consistent contact with a wider audience while keeping authentic relationships at the center.

Think about how you might design an integrated approach where technology nurtures awareness and connection, and your people deepen commitment and generosity. The question isn't how to automate rela-

tionships, but how to use AI to create more meaningful pathways toward them.

Meeting Donors Where They Are Heading

Donors today live in a personalized, instant world. They receive tailored recommendations, targeted messages, and real-time updates in nearly every other part of their lives. It's only natural that these expectations will continue to shape how they experience philanthropy in the years ahead.

AI is making it possible for advancement teams to meet those expectations with greater depth and precision. As tools mature, they'll enable communications that feel uniquely personal, reflecting each donor's interests, giving history, and relationship with the organization. Instead of static messages sent to large groups, the future of donor engagement will be dynamic, adaptive, and even more data informed.

Some of this personalization is already happening. Many organizations now use video platforms to send pre-recorded, personalized messages to individual donors or affinity groups – a practice once considered innovative that may soon become standard.

Generative AI will also help advancement teams take stewardship to a new level of proactivity. Rather than waiting for a donor to lapse, intelligent systems will flag early signs of disengagement – changes in giving behavior, communication response, or event attendance – and prompt staff to reconnect before a relationship cools. In time, AI could even pull live impact data directly from organizational or program systems, generating personalized updates like: *"The program you helped launch just hit a new milestone – over 1,000 volunteer hours logged this year. Here's a brief thank-you message from one of the volunteers."*

Even as these capabilities expand, authenticity must remain the anchor. Donors will always respond best to sincerity and humanity. AI should never replace that. Rather, it should extend it.

Donor expectations are shifting quickly, and your role is to ensure your organization keeps pace without losing authenticity. Consider how you might personalize



communication in ways that reflect each donor's relationship with your mission, while keeping your tone human and sincere. Explore how AI could help you listen more effectively, tracking patterns of interest or early signs of disengagement, so your outreach feels timely and attentive. The opportunity isn't simply to send more messages; it's to make every message feel like it was written for one.

Expanding Capacity for Storytelling

Storytelling has always been the heartbeat of advancement. It's how donors see the mission come alive and how they connect generosity to lives changed. AI can help scale that storytelling, producing individualized content faster and more efficiently while still allowing the message to feel deeply personal.

AI tools can draft personalized stewardship letters, segment messages for different audiences, or highlight impact tied to a donor's interests. They can even create images or short video clips to support outreach. But the real impact remains in human hands. AI can generate language; people generate meaning.

Advancement communicators who use AI well will treat it as a creative partner. It will help them spend more time refining ideas and less time formatting drafts. In the years ahead, forward-thinking teams will begin developing content libraries of key phrases, impact statements, and testimonials that can train or inform AI tools, making message creation faster and more adaptive while still preserving authenticity and voice.

Storytelling has always been one of your most powerful tools for inspiring generosity. Think about how you might use AI to expand that capacity and help your team tell more stories, more often, without losing authenticity. Begin building a library of messages, testimonials, and examples that reflect your organization's voice and values, and use those to train emerging AI tools in a way that reinforces your identity.

Emphasizing Human Leadership in a Digital Age

The story of advancement has always been a story of leadership. When generosity grows, it's usually because someone had the courage to cast a vision, invite others into it, and stay steady through uncertainty. Strong

leadership will be just as essential in the years ahead. In fact, the arrival of AI will only make it more important. As technology begins to take on more of the routine work, leadership will matter even more. The ability to listen carefully. To read the moment. To make decisions guided by both data and judgment. AI can process information faster than any of us, but it cannot sense tone in a meeting, hear the hesitation in a donor's voice, or recognize when a colleague needs encouragement.

In this new landscape, the task for leaders will be to give their teams permission to explore new tools while keeping the work anchored in mission and values. The best leaders will ask different kinds of questions, ones that help everyone slow down and think: *Does this make our work more personal or less? Are we clearer or more complicated because of it? Does this help us see people more fully, or reduce them to numbers on a screen?*

Today, and even more so in the future, advancement programs that thrive will do so because someone led with that kind of discernment. As automation grows, so will the need for perspective. As AI generates more information, so will the need for leaders who can interpret what it means, and what it doesn't.

The next leadership task is not to predict every change, but to prepare people for change. And to build a culture where teams pause to ask not just *what* they can do with AI, but *why* they should. Human leadership will remain the most vital technology in any organization.

Looking Ahead: The Next 75 Years

As Gonser Gerber celebrates 75 years as advancement and leadership consultants, we are deeply grateful for the opportunity to walk alongside those who dedicate their lives to inspiring generosity and strengthening mission-driven organizations.

The future of our profession will rest on the same enduring strengths that have always guided it – authentic relationships, inspiring leadership, and a clear sense of mission. From all of us at Gonser Gerber, thank you for your dedication to your missions and for allowing us to serve alongside you since 1950. Together, we look forward – confident that the best tools, used with purpose and integrity, will always serve the timeless work of connecting people to purpose.