

# CASE Insights<sup>SM</sup> on Artificial Intelligence in Advancement

*in partnership with*

**GIVECAMPUS**

**MARCH 2024**

COUNCIL FOR ADVANCEMENT  
AND SUPPORT OF EDUCATION



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We also give a special thanks to our partners at GiveCampus, whose support made this survey possible.

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## ABOUT CASE

CASE—the Council for Advancement and Support of Education—is a global, not-for-profit membership association with a vision to advance education to transform lives and society.

CASE is the professional home for advancement professionals, inspiring, challenging, and equipping them to act effectively and with integrity to champion the success of their institutions. CASE defines the competencies and standards for the profession of advancement, leading and championing their dissemination and application for more than 97,000 advancement professionals at 3,100 member institutions in 80 countries. Broad and growing communities of professionals gather under the global CASE umbrella. Currently, these professionals include individuals working in alumni relations, development and advancement services, communications, fundraising, government relations, and marketing. These professionals are at all stages of their careers and may be working at schools, colleges, universities, cultural institutions, or other not-for-profit organizations.

Through CASE Insights<sup>SM</sup>, CASE is the world leader in providing data, standards, and research to help institutions and advancement professionals make data-informed decisions and achieve their goals.

Headquartered in Washington, D.C., CASE works across all continents from its regional offices in London, Singapore, and Mexico City to achieve a seamless experience for all of its stakeholders, particularly its members, volunteers, and staff.



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## ABOUT GIVECAMPUS

GiveCampus is the world's premier fundraising platform for nonprofit educational institutions. Trusted by more than 1,300 colleges, universities, and K–12 schools, our mission is to advance the quality, the affordability, and the accessibility of education. We provide software, services, and expertise that help schools raise more money, from more people, at a fraction of the cost of other fundraising methods. For more information, please visit [go.givecampus.com](https://go.givecampus.com).

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## FOREWORD

GiveCampus is proud to partner once again with CASE Insights<sup>SM</sup> on a survey of advancement professionals. In November 2023, we asked our communities to weigh in on how and to what extent they are integrating Artificial Intelligence (AI) into their work. Advancement professionals generously shared their insights, which we're pleased to present in the pages that follow along with detailed findings and key takeaways.

In recent years, the world has witnessed a steady and staggering rise in accessible AI solutions that promise to enhance productivity across industries. These emerging technologies represent a paradigm shift with vast implications for the way many of us approach our work—including advancement teams.

Our product group got a taste of this growing appetite for all things AI at our annual GiveCampus Partners Conference in January of last year, when a session on AI in fundraising drew a standing-room-only crowd. We took that as a signal from advancement professionals that AI was not only on their radar, but at their fingertips just a click away.

Since then, we have been actively gathering insights from partner schools about how they perceive AI and have marveled at how curiosity quickly led to experimentation and ultimately, active usage. Interestingly enough, the feedback that we've been getting from schools mirrors the very findings of this survey—that nearly 70% of respondents report that they and/or their advancement team currently use AI.

Despite an impressive adoption curve, the surge in usage came primarily from the ground up, with 82.9% of adoption being driven by individuals. This is not surprising as higher ups in advancement are still trying to figure out how to help their teams and institutions navigate AI. They're not alone. It's a challenge shared by responsible leaders across industries and by our own executive team at GiveCampus.

As our product and engineering teams work to integrate powerful technologies like AI into the GiveCampus platform, we adhere to a set of core principles that we codified early on—namely to prioritize humanity, humility, and security. These principles inform our decision-making and our product roadmap.

As such, we've made it our goal to deeply understand what types of problems AI is best positioned to solve for advancement professionals today and what must be true for you to get the most value from the technology. What we've learned from speaking to many of you, and from the findings of surveys like this one, is that you see the greatest gains when:

1. The power of AI is baked into your existing workflows.
2. AI models are trained to elicit nuanced, industry-specific responses.

With this in mind we've leveraged AI to streamline tedious tasks such as contact report generation, email drafting, data synthesis, and more. We've spent hundreds of hours on prompt refinement, harnessing the wealth of fundraising expertise on our team to generate output that's distinctly human and unique to the field of advancement. And we've relied heavily on the feedback of the schools with whom we partner.

We invite you to join us in shaping the future of philanthropy through AI. Your insights and engagement are crucial as we navigate this transformative technology while staying committed to advancing the greater good.

**Jenn Schilling**  
Head of Product  
GiveCampus

## INTRODUCTION

How, and to what extent, are advancement professionals integrating artificial intelligence (AI) into their work? What do they view as the primary opportunities presented by this new technology, and what are their concerns regarding its use? To answer these questions, the Council for Advancement and Support of Education (CASE) and GiveCampus partnered on a pulse survey for advancement professionals at educational nonprofit organizations, K–12 schools, colleges, and universities across the globe. This is the second survey in a new series that gathers insights on topical and timely issues from individuals working in advancement, with the aim of supplementing data collected in our annual benchmarking surveys. The pulse survey was open to participants from November 27, 2023, through December 10, 2023.

The survey gathered general information about each respondent, including the geographic region where the respondent's institution is located, primary focus of the respondent's role, level in role, type of institution, and size of advancement program. The survey asked respondents to describe their own personal approach to AI, as well as their team's approach, their stakeholders' (e.g., alumni, donors) perceptions of AI, the ethical considerations and security concerns guiding their use of AI, and the impact of AI on their advancement team and its work.

Invitations to participate were sent to individuals from all global CASE member institutions and were broadly shared with advancement professionals on social media by both GiveCampus and CASE. Based on these invitations, 211 individuals participated in the survey.

This report provides a summary of the findings compiled from those responses and presents key takeaways designed to help today's advancement professionals evaluate and optimize their use of AI.

## UNDERSTANDING AND INTERPRETING THE RESULTS

A number of survey questions were asked only of respondents who are already using AI. As a result, not all of the 211 individuals who participated in the survey answered every question. Furthermore, because the number of respondents in a given response category may be limited, response categories are occasionally combined or omitted. The number of respondents to a particular question is indicated below each graph in the report. Details throughout the report may not add up to the provided totals due to rounding.

### SURVEY RESPONDENTS

Survey respondents are primarily at institutions of higher education in the United States, the United Kingdom, and Europe. They occupy a variety of advancement roles, but roles in technology and data management or analytics are not common.

- **Geographic Region:** Advancement professionals from all CASE regions except Africa and Central America responded to the survey. Most respondents (63.5%) are from the United States, followed by the United Kingdom and Europe (25.1%).
- **Organization Type:** Almost three out of four respondents (73.5%) work at some type of institution of higher education. The remaining respondents work at independent or international schools (16.6%) or university foundations (10.0%).
- **Professional Role:** Fundraising is the most common primary role of respondents (28.0%), followed by advancement or development services (19.4%), alumni engagement (17.1%), and communications (14.7%). Comparatively few respondents have a primary role related to technology (2.4%) or data management and analytics (1.9%). Almost half (46.9%) of

respondents work in a management role. The remaining respondents self-identify as staff (34.6%) or executive leadership (18.5%).

- **Advancement Program Size:** The size of respondents' advancement programs is quite varied. More than one-third of respondents (38.9%) work at institutions with comparatively small advancement units of 20 or fewer staff members, and 14.2% of respondents are at very large advancement programs with more than 200 staff members.

Any substantive differences among respondents by any of these personal or institutional characteristics are noted where relevant.

## KEY FINDINGS

### RESPONDENTS' APPROACH TO AI

- Two out of three respondents described their advancement teams as cautious or resistant with regard to new technologies. Despite this, only 10.0% of respondents reported that they have been advised or instructed not to use AI in their professional role.
- Respondents are almost evenly split between those who characterize themselves as eager adopters of new technologies and those who view themselves as cautious or resistant with respect to new technologies.
- Consistent with respondents' characterization that their teams are cautious about adopting new technologies, only 4.7% of respondents reported that their advancement team has a formal initiative in place for the adoption of AI, and only 13.3% have received formal AI training or resources.
- A minority of respondents acknowledged an organizational interest in AI, with only 23.7% saying that senior leadership has advocated for the adoption of AI.

### RESPONDENTS' USE OF AI

- Overall, 69.7% of respondents reported that they and/or their advancement team currently use AI.
- Advancement professionals are primarily using AI to personalize outreach to stakeholders and to facilitate other types of writing tasks, from proposals and marketing copy to email messages. Respondents were much less likely to report using AI to perform data analysis or to support strategic decision-making.
- Consistent with the way AI is currently used by respondents, respondents were most likely to state that AI has had an extensive or moderate impact on efficiency (39.5%) and productivity (35.4%).

### FACTORS INFLUENCING AI ADOPTION

- The survey asked about several factors that may influence organizational adoption of AI, including trust in AI output, stakeholder perceptions, ethical and security concerns, and peer adoption. In each case, survey results help explain the cautious approach to AI that respondents described.
- Few respondents trust AI output completely, and those who have begun to use it are less likely than those who do not use it to state that they do not trust AI at all.
- Approximately two-thirds (66.8%) of respondents are unsure about how key stakeholders such as donors and alumni perceive the use of AI in communications and interactions. However, 20.9% of all respondents believe stakeholders have a negative perception of AI.
- Regardless of current AI use, the majority of respondents are either unaware of or unsure if institutional guidelines exist to help them make sound ethical decisions about the use of AI.
- Similarly, most respondents who currently use AI reported that they either are unsure about security measures for the AI tools they use (42.9%) or that there are no security measures in place (33.3%).
- Keeping up with peers does not appear to be motivating institutional adoption of AI. Only about one-third of organizations already using AI consider their implementation to be lagging behind the use of AI at similar institutions.

## DETAILED FINDINGS

### RESPONDENTS' APPROACH TO AI

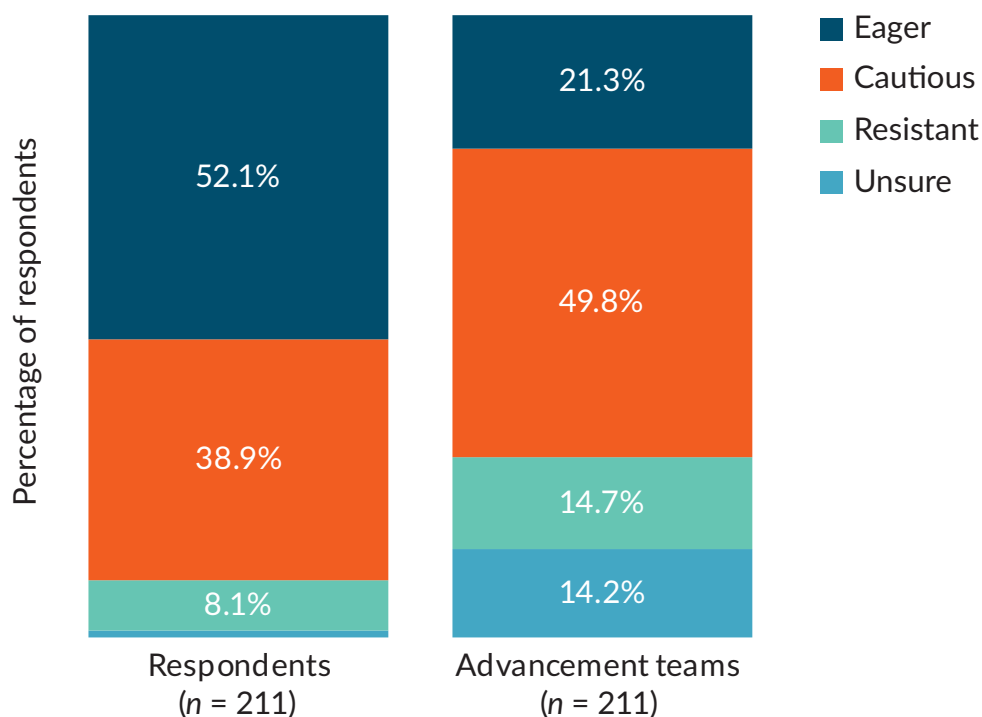
Despite interest among individuals, the organizational approach within respondents' advancement units appears to be cautious and somewhat laissez-faire. In most cases, senior leadership is not actively promoting the use of AI, but leaders also are not prohibiting it. Only 10.0% of respondents reported that they have been advised or instructed not to use AI in their professional role.

There is an interesting contrast between how respondents described their own approach to adopting new technologies and their team's approach. The majority of respondents characterized themselves as eager adopters of new technologies and their teams as cautious or resistant. At the same time, more than one-third (38.9%) of respondents

view themselves as cautious with respect to new technologies, and another 8.1% are resistant, so this survey does not reflect only the views of technology enthusiasts and early adopters.

Consistent with respondents' characterization that their teams are cautious about adopting new technologies, only 4.7% of respondents reported that their advancement team has a formal initiative in place for the adoption of AI, and only 13.3% had received formal AI training or resources. In 82.9% of respondents' advancement teams, use of AI is driven by individuals. Similarly, the largest group of respondents (39.3%) did not identify anyone who is advocating for the adoption of AI within their team. A minority of respondents acknowledged

**Figure 1**  
Comparing Respondents' and Their Advancement Teams' Approaches to Adopting New Technologies





an organizational interest in AI, with only 23.7% of respondents saying that senior leadership has advocated for the adoption of AI. It appears that,

in many of these instances, management interest in AI has not yet resulted in a formal program of adoption or staff training.

### ***What's the first thing that comes to mind when you hear the words "artificial intelligence"?***

Respondents were asked to answer this question in their own words. One-quarter (25.2%) wrote that ChatGPT was their "top of mind" response. Another 16.4% used neutral words such as "tool" or "computer." Many responses were positive, referencing increased efficiency (18.8%) or viewing AI as an opportunity (10.9%). More than one-quarter of respondents (27.7%) made negative comments: Some consider AI a fad or gimmick; some raised concerns about ethics, quality, and privacy; and others expressed fear that AI could cost jobs or even lead to the type of dystopian future portrayed in science fiction books and films. The following quotes illustrate the range of reactions:

*"Higher knowledge, learning and teaching capacity. Will change how humans work and think. It will superpower human abilities."*

*"Having a smart co-pilot to support the work that needs to be done."*

*"I think about change and what it might mean. Trying to look for positives when it initially seems scary."*

*"I'm reminded that I need to continue to learn more about how to wield it to make my work as efficient as possible. Even if it turns out to be my enemy in a marketing context, it's smart to 'know your enemy.'"*

*"Cheating. Getting out of the work of writing."*

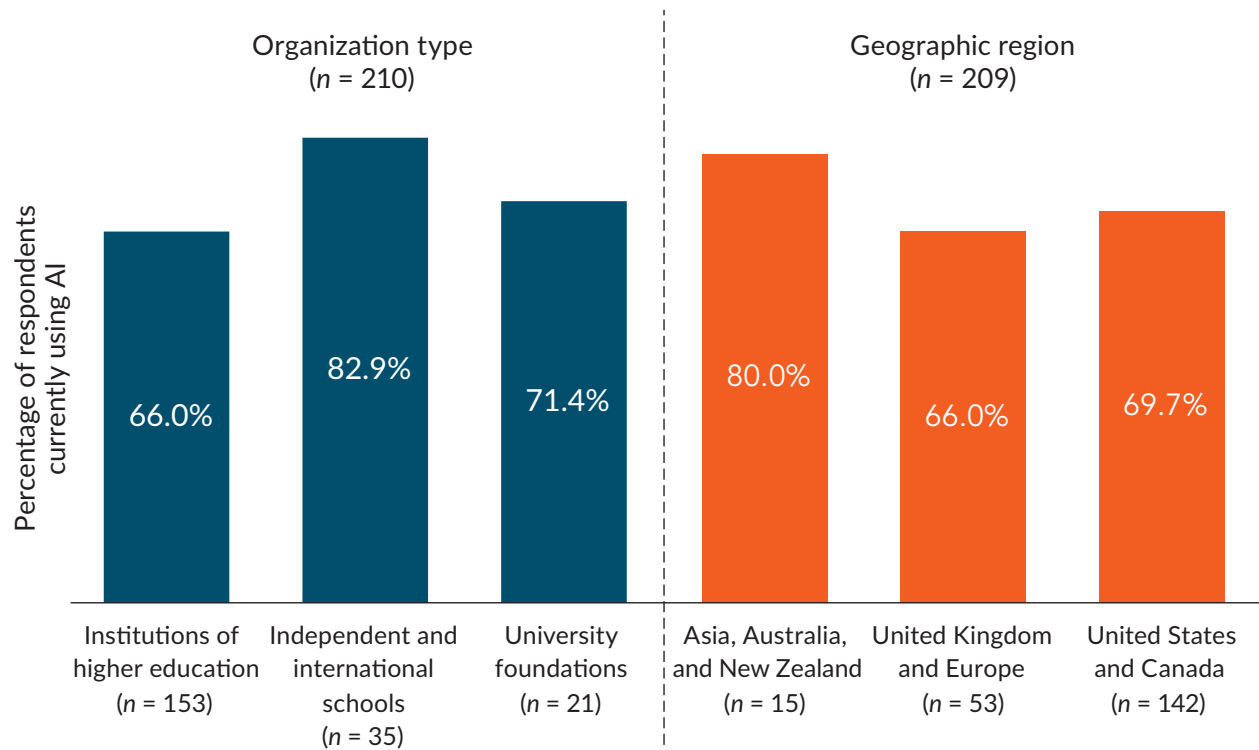
*"Robots simulating humans and replacing humans in processes. Machines that think like humans."*

### RESPONDENTS' USE OF AI

Overall, 69.7% of respondents reported that they and/or their advancement team currently use AI. Use of AI varies by region, institution type, and advancement team size. Use is highest at independent and international schools and in Asia, Australia, and New Zealand. The number of

respondents in these categories is not large, so these results should be interpreted with caution. Nonetheless, it is interesting that—among this survey's respondents—schools have adopted AI more frequently than institutions of higher education.

**Figure 2**  
Current Use of AI, by Organization Type and Geographic Region

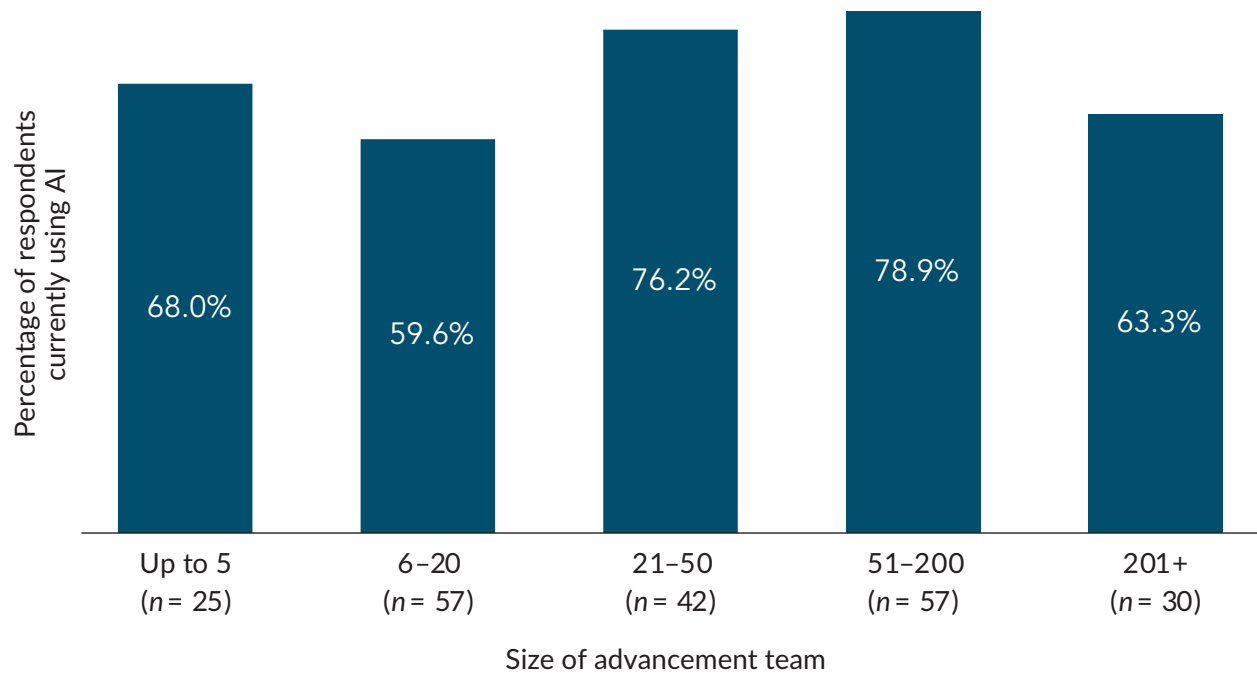


Midsize advancement teams (ranging from 21 to 200 staff members) are the most likely to use AI. It is understandable that smaller teams with fewer resources would come later to new technologies, but it is surprising that the largest advancement

teams are among the least likely to use this new technology. One possible reason is that these programs are hesitant to adopt AI until they can fully study it and create a formal program to govern its use.

**Figure 3**  
Current Use of AI, by Size of Advancement Team

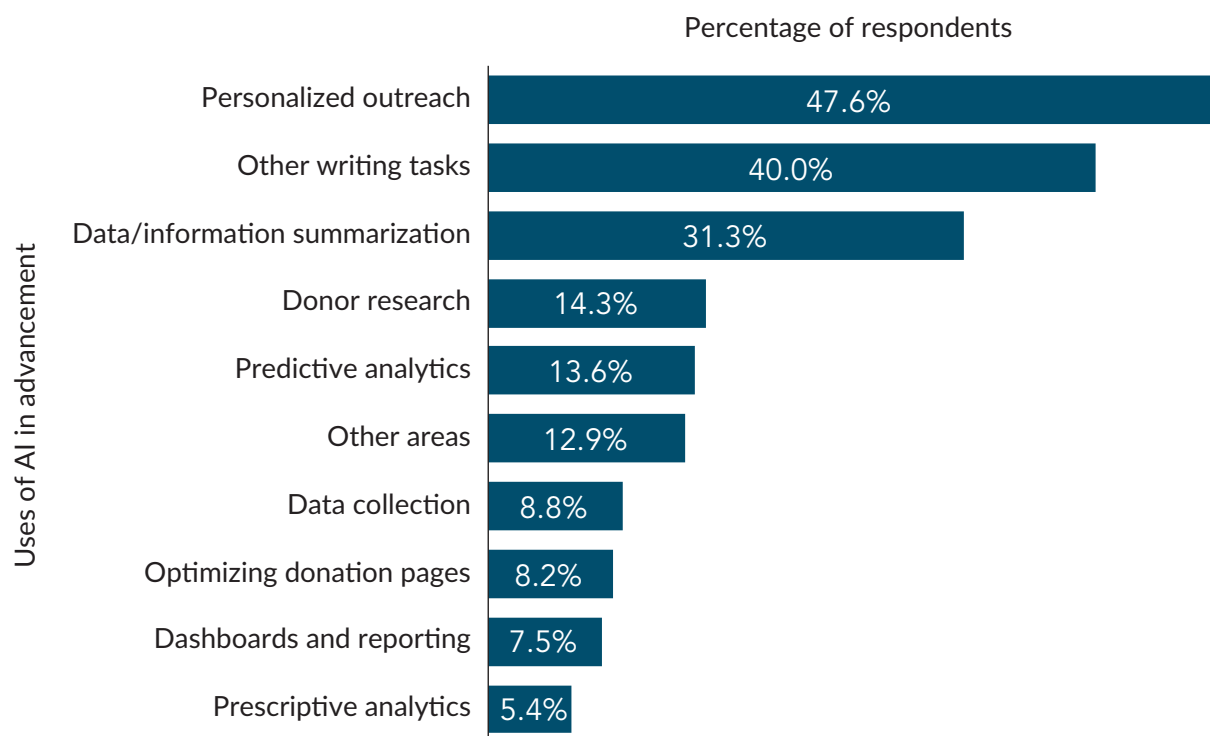
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AI is primarily used to support various types of communication and, much less frequently, to perform data analysis. Advancement professionals most commonly use AI to personalize outreach to stakeholders and facilitate other types of writing tasks, from proposals and marketing copy to email

messages. Responses to this question suggest that most respondents are at the beginning stages of exploring AI's utility. Half of respondents using AI selected only one of the six response options for AI uses, and another 29.3% selected two of the options.

**Figure 4**  
Current Use of AI

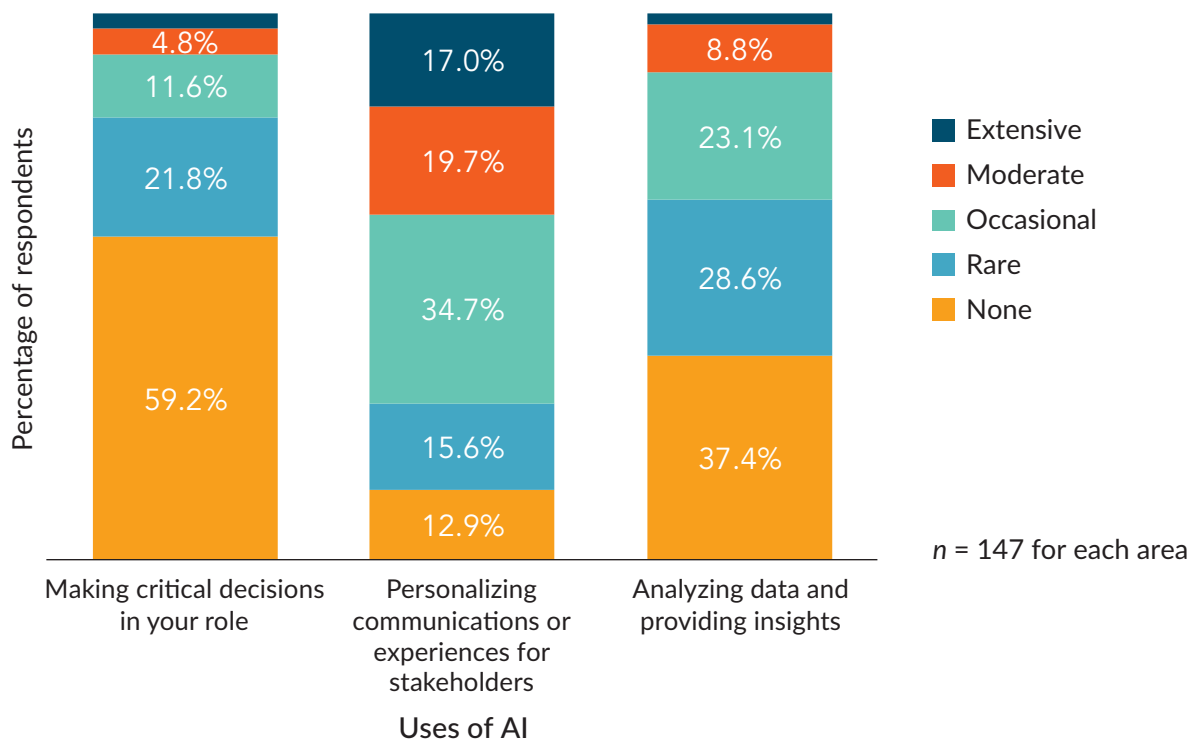


n = 147 for each area

When asked about the frequency of AI use, 36.7% of respondents reported that they use AI moderately or extensively to personalize communications or experiences for stakeholders, compared with 10.8% who make extensive or moderate use of AI for data analysis and 7.5%

who use it extensively or moderately to make critical decisions. Most respondents (59.2%) never use AI to support decision-making, and a large number (37.4%) never use it for analyzing data and providing insights.

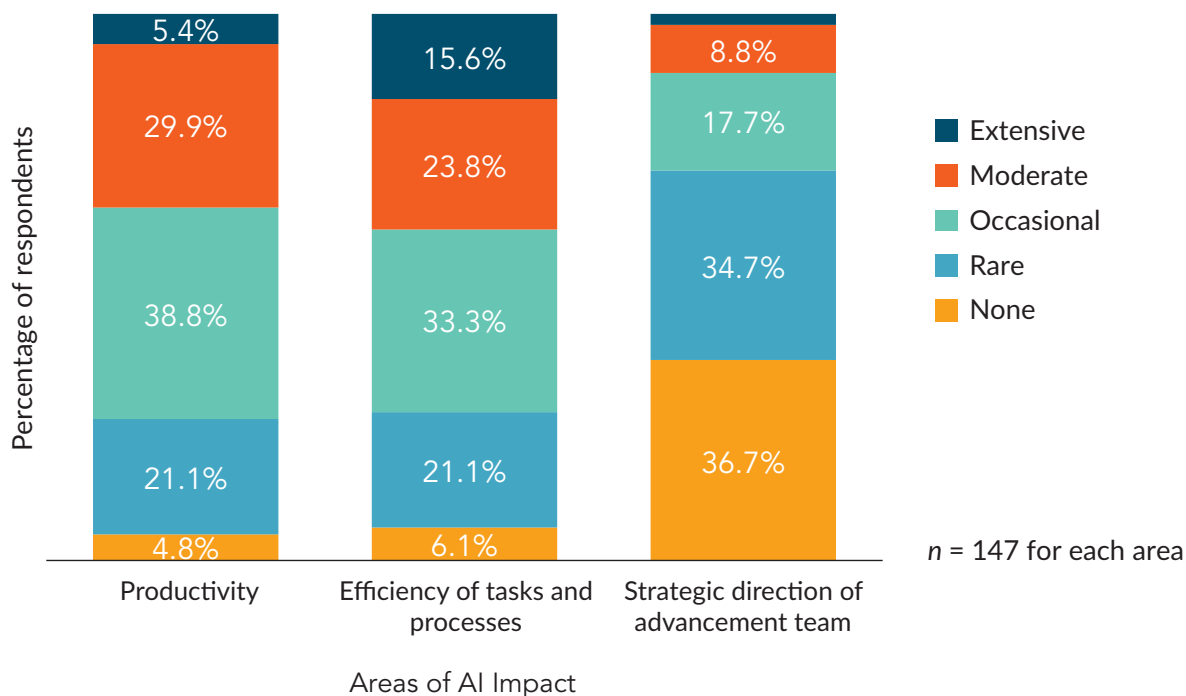
**Figure 5**  
**Frequency of AI Use for Decision-Making, Communication, and Data Analysis**



Consistent with the way AI is currently used by respondents, respondents reported that it has had at least an extensive or moderate impact on efficiency (39.4%) and productivity (39.4%) and productivity (35.3%). Respondents

were far less likely to claim that AI has affected the strategic direction of their advancement team, with 71.4% stating that it rarely or never had an impact.

**Figure 6**  
Impact of AI on Productivity, Efficiency, and Strategic Direction of Advancement Team



Respondents currently using AI were asked how important it is that AI is integrated with current systems and workflows. Most respondents (65.3%) stated that integration is somewhat or very important, but it is more revealing that 34.7% of respondents are not concerned about integration. Given that current use of AI is primarily to

streamline writing tasks, it makes sense that a minority of users are unconcerned about system integration. This view may change if the use of AI in advancement broadens to include more data analysis, decision-making support, and other functions.

***What is the biggest challenge you face when implementing or using AI in your role?***

When respondents using AI were asked this open-ended question, the most common responses had to do with the need for more information and training, a lack of buy-in from colleagues and senior leadership, the need for institutional policies or direction, and concerns about the accuracy and tone of AI output. The following quotes illustrate these challenges:

*“Lack of information or resources to understand the potential tools available in many areas. Lack of time to take a step back and devote some time to thinking about how AI may be beneficial in our work.”*

*“There is no clear direction from the institution, so I am hampered in how I can fully learn about and use AI.”*

*“Need to be trained; need to know better prompts; need to know how to use for analytics.”*

*“Skepticism of other users within our office and concerns regarding security and data protection.”*

*“It’s the trust issue. It makes stuff up. So we have to check it carefully. It can also be quite ‘American’ in its use of language, even when we ask it to write for a UK audience.”*

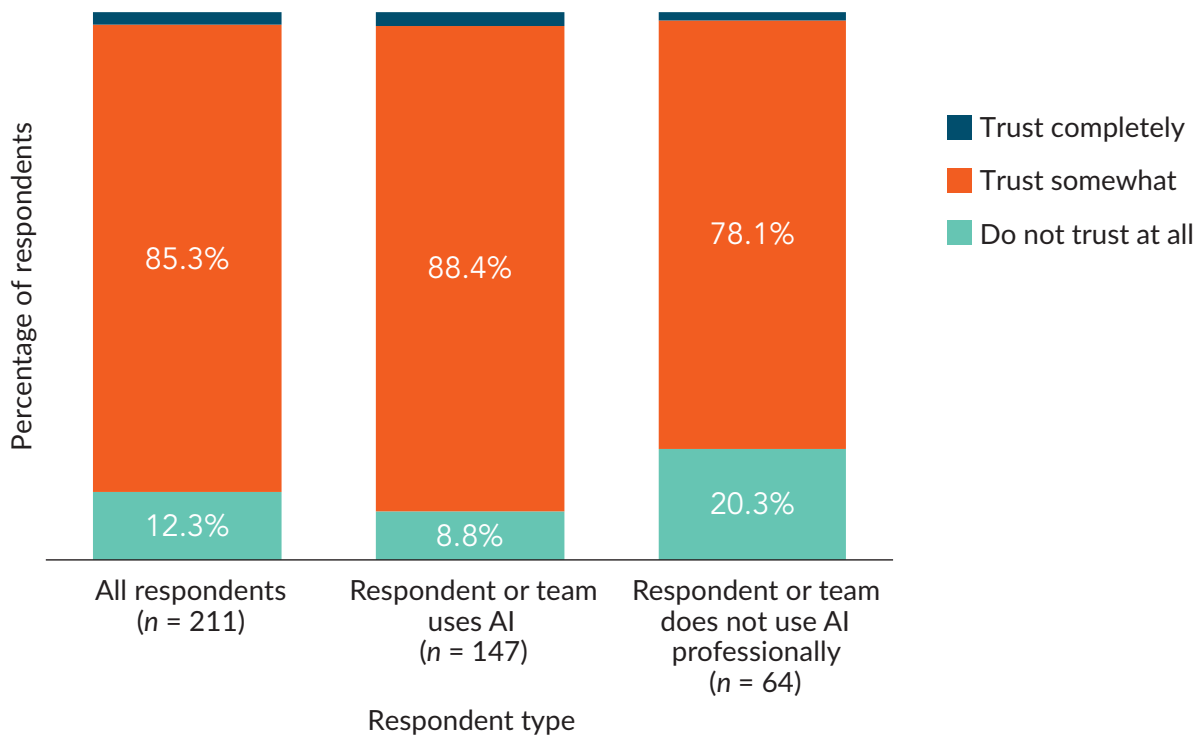
### FACTORS INFLUENCING AI ADOPTION

The survey asked about several factors that may influence adoption of AI, including trust in AI output, stakeholder perceptions, ethical and security concerns, and peer adoption.

Trust in the technology appears to be a factor affecting the adoption of AI in advancement. Regardless of whether they use the technology, only

about 2.4% of respondents trust it completely. Those who have begun to use AI in their own work or in their advancement team were less likely than those who do not use it professionally to state that they do not trust it at all. Most respondents, regardless of whether or not they currently use AI, trust it somewhat.

**Figure 7**  
Trust in AI, by Current Use

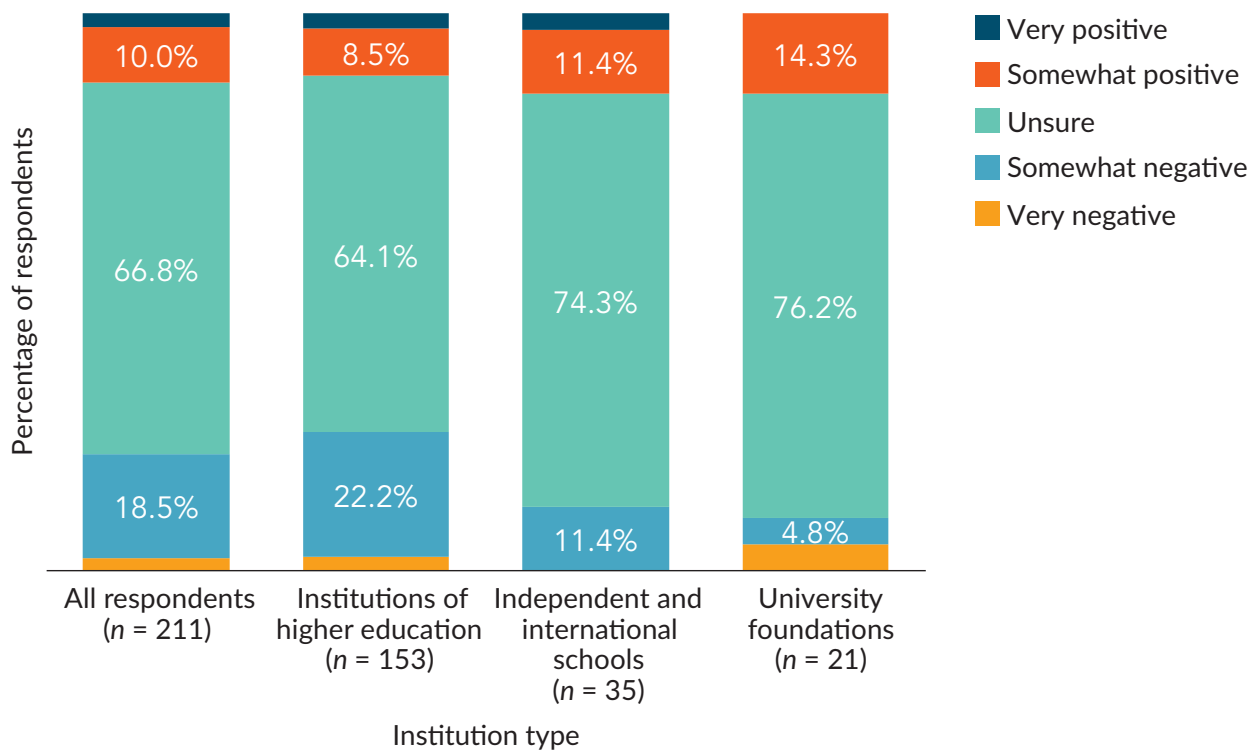




In addition to the trust of advancement professionals, acceptance by key stakeholders such as alumni and donors is also important to the adoption of AI. Notably, the majority of respondents are unsure about how key stakeholders perceive the use of AI in communications and interactions; 20.9% of all respondents believe

stakeholders have a somewhat negative or very negative perception of AI. Respondents from institutions of higher education were somewhat less likely than those from schools or foundations to be unsure about stakeholder perceptions, but they were also more likely to believe that stakeholders have negative perceptions of AI.

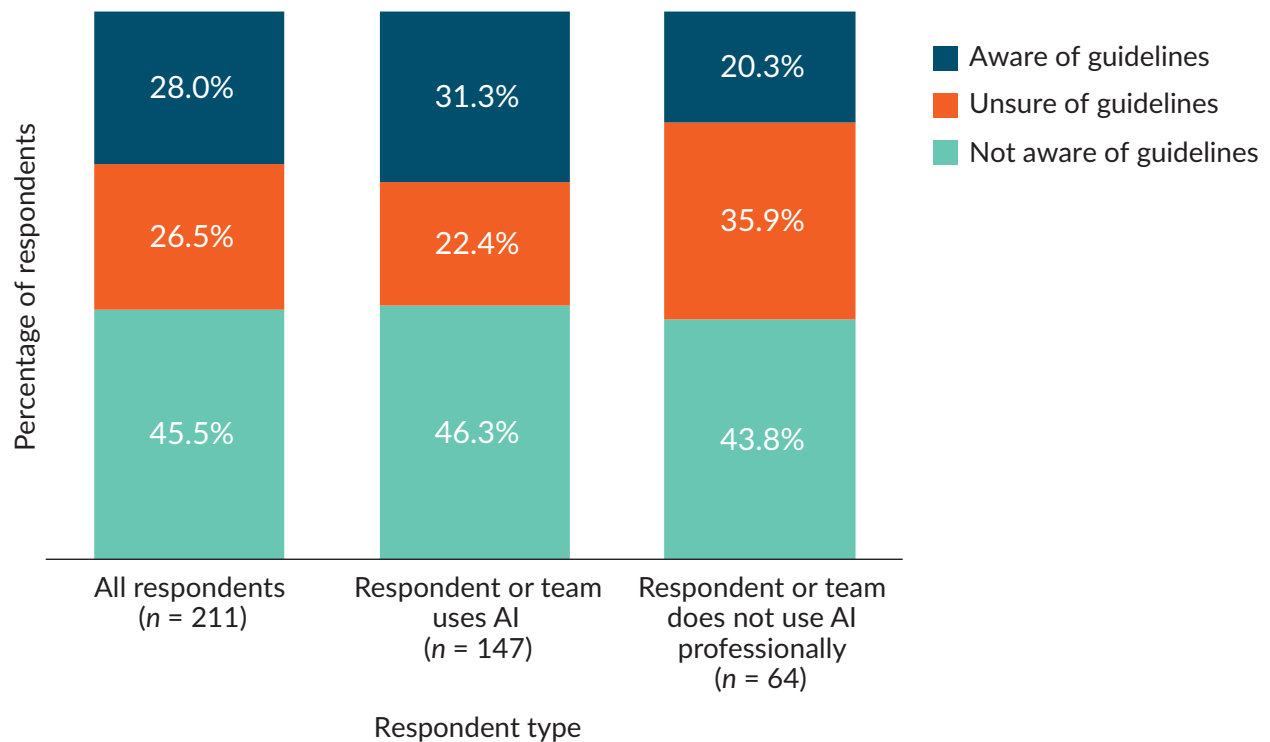
**Figure 8**  
Understanding of How Stakeholders Perceive AI, by Institution Type



Lack of clear guidance regarding the ethical use of AI may also impede widespread adoption. The survey asked respondents whether they are aware of any ethical guidelines for AI use provided by their institution and how often ethical considerations influenced their team’s decisions related to AI implementation. Those using AI and those not using it were nearly equally likely to report that they are not aware of any guidelines provided by their institution. As one would expect, those using

AI were somewhat more likely to report being aware of institutional guidelines, but regardless of current AI use, the majority of respondents are either unaware of or unsure if guidelines exist to help them make sound ethical decisions about the use of AI. It is important to note that this survey could not ascertain whether or not the respondents’ institutions have actually produced AI guidance; it is nonetheless telling that even if such guidance exists, most respondents do not know about it.

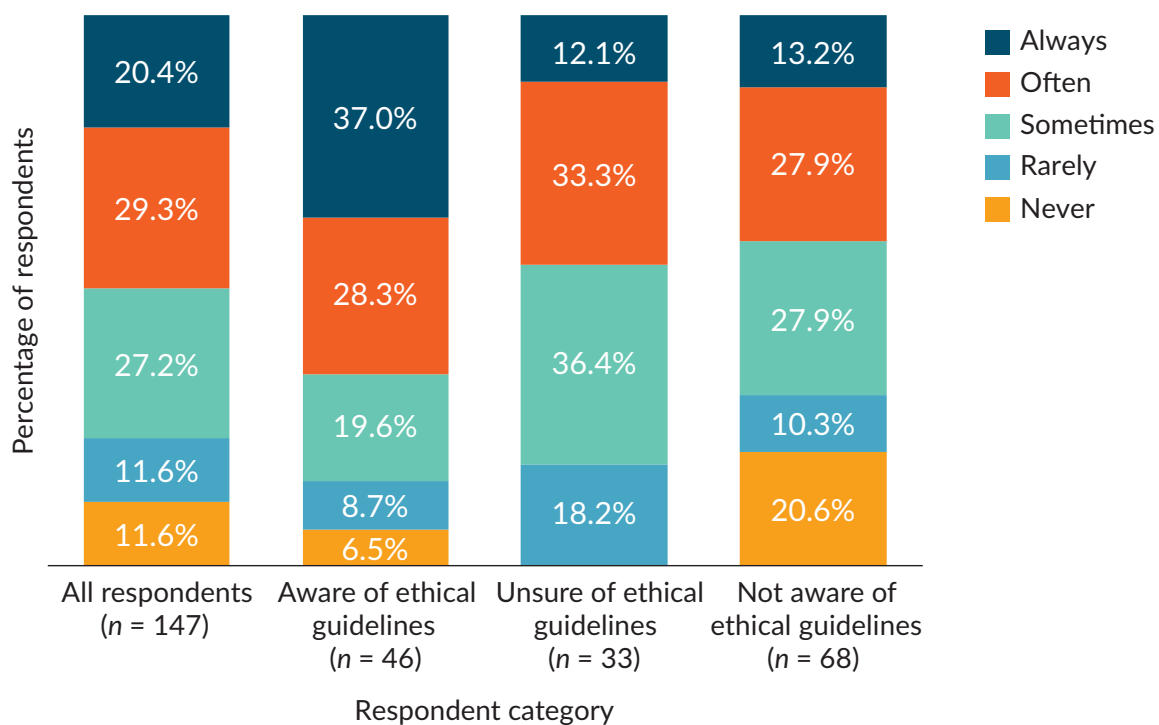
**Figure 9**  
Awareness of Ethical Guidelines for AI Use, by Current Use



Among those currently using AI, 49.7% always or often take ethical considerations into account when making decisions about AI use, but 23.1%—or almost one in four—rarely or never consider ethics. Institutional guidance does appear to impact respondent behavior: 65.3% of those who are aware

of institutional guidelines reported that they always or often factor ethical considerations into decisions about AI use, compared with 41.1% of those who are unaware of institutional guidelines and 45.4% of those who are unsure.

**Figure 10**  
**Frequency of Ethical Considerations, by Awareness of Institutional Guidelines**

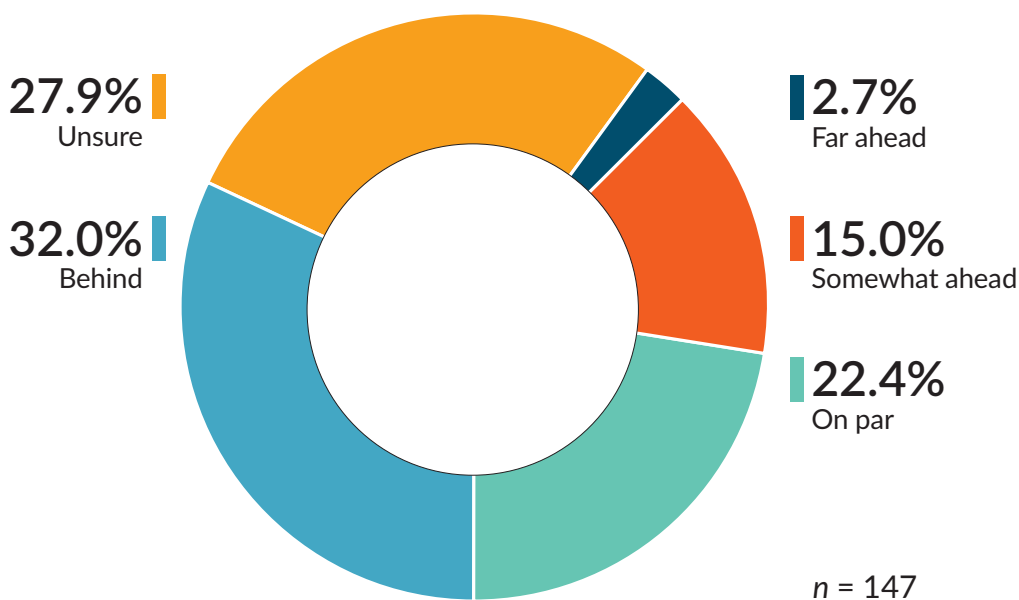


In addition to ethics, security may be a concern. Most respondents who currently use AI reported that they either are unsure about security measures for the AI tools they use (42.9%) or that there are no security measures in place (33.3%).

When AI use is limited, the fact that most respondents are either unaware of or unsure about ethical guidelines or security measures and a large minority rarely or never consider ethics may not be major concerns for leadership. When coupled with worries about the perceptions of key stakeholders, however, a lack of clear ethical and security guardrails may cause advancement leaders to take a wait-and-see approach to the systematic implementation of AI.

Given the competitive nature of higher education and private schools, advancement leaders may be more likely to overcome their concerns about AI if they believe that failure to use it would leave their institution behind or put it at a disadvantage. However, only about one-third of the institutions already using AI consider their implementation of the technology to be lagging behind the use of AI at similar institutions. Of course, the 30.3% of respondents who reported that they and their teams are not using AI are, by definition, “behind” those using it, but this has not yet compelled them to begin implementation.

**Figure 11**  
**Respondents’ Views About Their Advancement Teams’ Use of AI as Compared with Similar Institutions**



It remains to be seen when, or whether, competitive pressures will cause advancement leaders to adopt this emergent technology more broadly. The factors described by respondents—trust, stakeholder

acceptance, ethics, and security—will likely play a role in the extent and pace of AI adoption, as well as the expansion of the AI tools available to advancement professionals.

***In your opinion, what is the most exciting potential application of AI in the advancement profession in the next decade?***

The final factor that will influence the adoption of AI is excitement in the field. The survey concluded by asking all respondents—whether or not they are currently using AI—to identify exciting potential applications in the advancement profession. More than 70% of respondents chose to answer this optional question.

Even in response to this question, some respondents expressed caution and concern about the use of AI in advancement, but there was considerable excitement expressed as well. Respondents were most likely to mention improving efficiency and advancements in data analytics, especially with regard to fundraising. Creating content and personalizing communication with stakeholders also were cited frequently. The following quotes are indicative of the themes of responses to this question:

*“Being able to target the right constituent with the right message at the right time.”*

*“Time saving, allowing engagement officers to focus on IRL [in real life] relationships vs. futzing with the busy work of writing yet another email invitation, researching venues, etc.”*

*“The opportunity to provide unique and personalized constituent experiences, the opportunity to find insights and trends and rapidly adapt strategies to respond to market changes.”*

*“Improving productivity and focusing our talent on what matters most: meeting donors.”*

*“Reduce the amount of time spent crafting outreach messages for individual donors; more detailed and precise insight into the donors with the highest potential for giving.”*

*“I think in the analysis of giving trends and how those donors have come to be, as well as analysis on what are effective strategies for all parts of the donor cycle, from discovery through to stewardship and retention.”*

These comments—combined with the information collected on how AI is currently used—suggest that advancement professionals have just scratched the surface of how AI can be employed. While they will proceed with caution, many respondents believe this new technology has the potential to be of significant value to the field.

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Headquartered in Washington, D.C., CASE works across all continents from its regional offices in London, Singapore, and Mexico City to achieve a seamless experience for all its stakeholders, particularly its members, volunteers, and staff.

