

Leveraging AI to Streamline Advancement:

Practical Tools for Every Track

Austin O'Neill
Senior Director of Development
MSU Alumni Foundation
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Agricultural Alumni Association



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My Background

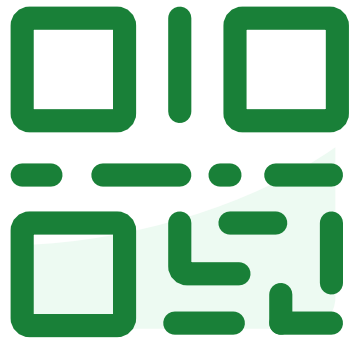
- Regional, Remote Fundraiser in Oregon
- Senior Director of Development, Montana State University Alumni Foundation
- Speaker, “Beginner’s Guide to Using AI in Planned and Major Giving.
- Individual Awards Chair, NAADA Board



Audience Role

- Questions are great - ask!
- Practice is welcomed – feel free to open your computer/use your phone.
- Participation is needed!
- Please fill out your survey – helps the board and the education committee make decisions for next year





**Join at slido.com
#3314520**

Survey Questions:

1. Raise your hand if you have used AI for work?
2. Raise your hand if you have used AI outside of work?





What AI Tools have you used?



What NAADA Track do you mostly align with?



What are you hoping to learn in today's AI focused session?

Agenda

- Facts, Fiction, Disclaimers
- Putting it into Practice
 - The “Usual”*
 - Follow-up*
 - Annual Planning*
 - Constituent Preparation*
 - Document Creation
 - Note Taking
 - Contact Reports
 - Roadblock Removal
- Optimizing
- Common Mistakes to Avoid
- Final Comments & Advice

**Examples to work through together*

Takeaways

- Understand how AI can streamline common advancement tasks (across multiple tracks).
- Learn practical techniques for using AI to improve common tasks.
- Explore AI applications for time-consuming or mentally-exhaustive tasks.
- Leave with a ready-to-use AI prompts to help you start using AI today!

AI Facts, Fiction, and Disclaimers

AI Disclaimers

- Always refer to your companies' IT policies.
- Never use confidential data in open-source AI.
- Be wary of perpetuating biases through AI.
- AI can be WRONG.
- AI is a tool, it doesn't replace ANY interaction, judgment, etc.

AI Fiction

- All AI, incl. Machine Learning, Generative AI, and Large language models are the same.
- AI is too new.
- AI is taking our jobs.
- AI is inherently bias free
- AI can be creative like humans, maybe better!

AI Facts

- It is a growing field that is evolving and expanding.
- AI still needs human interaction.



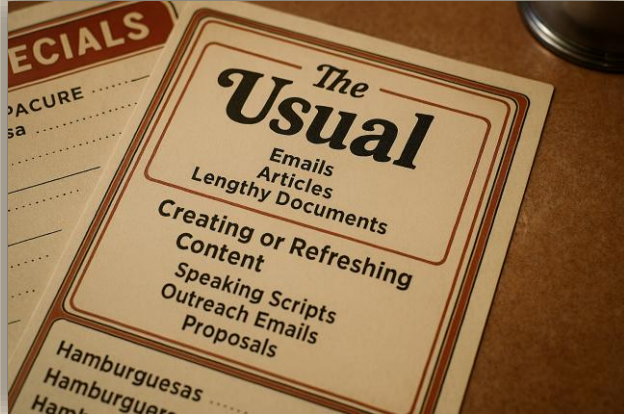
How to use AI

Think of prompting as giving clear instructions to a very capable but literal assistant

In your instructions include the following:

- Role
- Objective
- Context
 - Tone
 - Audience
- Format
- Rules or Constraints
- Preferences
- Examples

The “Usual”*



Summarizing Information

- Emails
- Articles
- Lengthy Documents

Creating or refreshing Content

- Speaking Scripts
- Emails
- Programs

The “Usual”*— Email Example



Let's write an email"

- Option 1: You pick!
- Option 2: You're writing an email to your supervisor and their supervisor, requesting an increase to the NAADA membership to cover all the new hires that have been onboarded.



Results?

- Did it sound like you?
- Did it accomplish what you needed it too?
- What surprised you?



Meeting Follow-up*

- Direct Report
- Academic Leader
- Internal Team
- External constituents



Meeting Follow-up

- If available, find some meeting notes from a recent meeting

(if using public/consumer AI, avoid confidential information)



Annual Planning*



Budgets



Travel
Schedules



Event(s)



Workload and
Capacity



Other



Travel Planning*

The larger the project → the more intense the prompt.



Travel Planning*

Mad Lib Style

- Role:
 - Role Location
- Objective:
 - Fiscal Year, Metrics
- Context:
 - Annual Plan, etc.
- Format:
 - Table, Written Plan
- Rules/Constraints:
 - Budget, Travel Days, etc.
- Preferences:
 - No travel in December, etc.
- Examples:

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Results...

- Is it ready to be turned in if asked?
- Is the output on the right path?
- What else do we need before turning this in or using it?
- How can we improve it?



Constituent Preparation*

- External Communication
- Internal Communication
- Repeated Practice Attempts



Constituent Preparation* Mad Lib Style

- External Communication
- Internal Communication
- Repeated Practice Attempts

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Other Examples

Document Creation

- Proposals
- Informative Reviews
- Speaking Bio
- Call Script

Note-Taking

- Hands-Free
- Workflow
- Contact Reports

Roadblock Removal

- Brainstorm Sessions
- Research Solutions

Optimization

- Practice!
- Allowing Memory to be used
- Building Agents (Co-Pilot)
- Using Knowledge Sources
- Building Workflows (Claude)



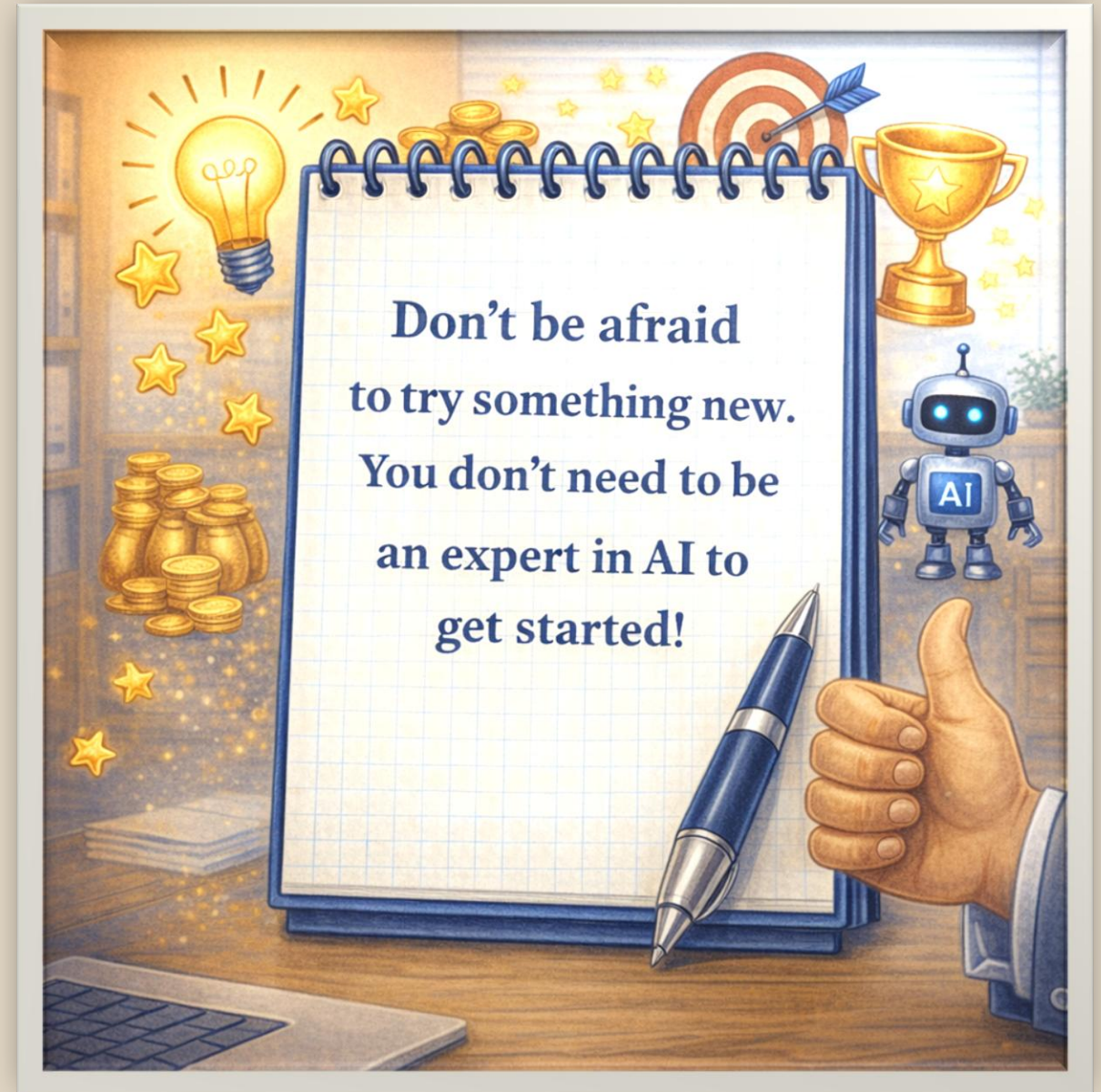
Common Mistakes to Avoid

- Avoid your work looking like AI
 - The “M” Dash
 - Unfamiliar Vocabulary
- Review & Revise
- Improve your prompt (again, again, and again).
- Fact-check
- AI is not the solution, rather a tool to find the solution.
- As appropriate, disclose the use of AI



Final Comments & Advice

- You get out what you put in.
- Review, Revise, Review, & Submit.
- It cannot replace what you do, but someone who knows how to use AI can and will.



Questions?





Please take one minute
to complete our session
evaluation and
committee interest form



Sources

- <https://bipartisanpolicy.org/explainer/ai-facts-and-myths/>