The Advancement Journey

How Higher Education Fundraising Teams Are Navigating the Age of AI — and What the Path Forward Looks Like

EXECUTIVE SUMMARY

Most advancement offices are still doing a surprising amount of manual work. Despite significant investments in CRM platforms, email systems, wealth screening tools, and digital channels, the gaps between those systems are bridged largely by hand — with real costs in staff time, data quality, and donor experience.

This paper describes a five-stage journey — **Fragmented, Structured, Intelligent, Activated, Empowered** — that maps where advancement offices typically stand today and what the path forward looks like from each starting point.

A self-assessment guide is included to help teams place themselves on the journey and identify where the highest-value improvements lie. Syntasa and Google are available for a follow-up conversation or a co-facilitated working session.

1 Fragmented	2 Structured	3 Intelligent	4 Activated	5 Empowered

PART ONE

Where Things Stand Today

Walk into almost any advancement office in the country and you'll find a team working harder than ever — and quietly wondering whether the tools they depend on are keeping pace. The ambition is there. The donor data is there. What's often missing is the connective tissue that turns raw information into meaningful, timely outreach.

Most advancement operations are organized around a handful of distinct functions: major gifts, annual giving, planned giving, prospect research, alumni relations, corporate and foundation relations, and advancement services. Each, in its own way, has developed workarounds for the same fundamental problem — data that lives in too many places to be truly useful.

The major gifts officer prepares for a donor visit by pulling relationship history from the CRM, running a separate wealth screening search, scanning recent news, and synthesizing it all into talking points — usually in a document that lives on their laptop and nowhere else. The annual giving team exports a list, cleans it in a spreadsheet, cross-references opt-out records, and manually verifies consent before a single message goes out.

None of this is the result of carelessness. It is the entirely rational response to a landscape of systems that were never designed to talk to each other.

"The data exists. The insight doesn't — because the data is in six different places, and pulling it together falls to whoever has time that week."

The System-Hopping Tax

The cumulative cost, in time and data quality, of manually bridging gaps that technology hasn't closed is paid daily, by nearly every person on nearly every advancement team in the country. The prospect brief that took three days to compile reflects the donor's situation as it was three days ago. The campaign list that took a week to clean was accurate when the export ran, not when the email lands. A donor who was highly engaged last month may have gone quiet. A prospect who just committed a major gift elsewhere is still showing as high priority.

AI Has Arrived — and With It, a Fair Question

The promise is real: AI can close the data gaps, automate the manual steps, personalize outreach at a scale no human team could manage. But for many advancement professionals, the conversation about AI triggers an anxiety that rarely gets named directly. If AI can draft the donor appeal, research the prospect, build the segment, and schedule the outreach — what exactly is the advancement professional's role?

The short answer: the advancement professionals who will thrive are the ones who use AI to do what only humans can do better — build genuine relationships, exercise nuanced judgment, understand institutional context, and bring empathy to conversations about legacy and generosity. AI handles the data assembly and the first draft. The advancement professional handles the relationship. That division of labor is not a threat to the profession. It is, for most teams, a long-overdue relief.

PART TWO

What Great Looks Like

It's worth pausing, before talking about journeys and starting points, to describe the destination clearly — not in terms of technology or data architecture, but in terms of what the work actually feels like when the infrastructure is working the way it should.

Sarah

Major Gifts Officer

From assembling information to using it

Sarah opens a single view of a longtime alumna and finds everything already assembled — giving history, wealth indicators, recent website visits, event attendance, email engagement, and a summary of every interaction over the past three years. She can see the alumna recently visited the engineering school's campaign page. The system has flagged renewed engagement and suggests a gift range based on capacity and recent behavior. Sarah spends her preparation time thinking about the conversation — not assembling the information. She arrives as someone who genuinely knows this donor.

Marcus

Annual Giving Manager

From running campaigns to running strategy

Marcus defines the audience and the goal, and the operational steps — list generation, consent verification, personalization, scheduling — happen without his team touching a spreadsheet. Each donor receives a message calibrated to what the institution actually knows about them. Consent status is checked automatically at the moment of send. His team has time to think, to test, to learn from results and apply those lessons before momentum is lost.

Priya

Prospect Research Analyst

From building profiles to shaping strategy

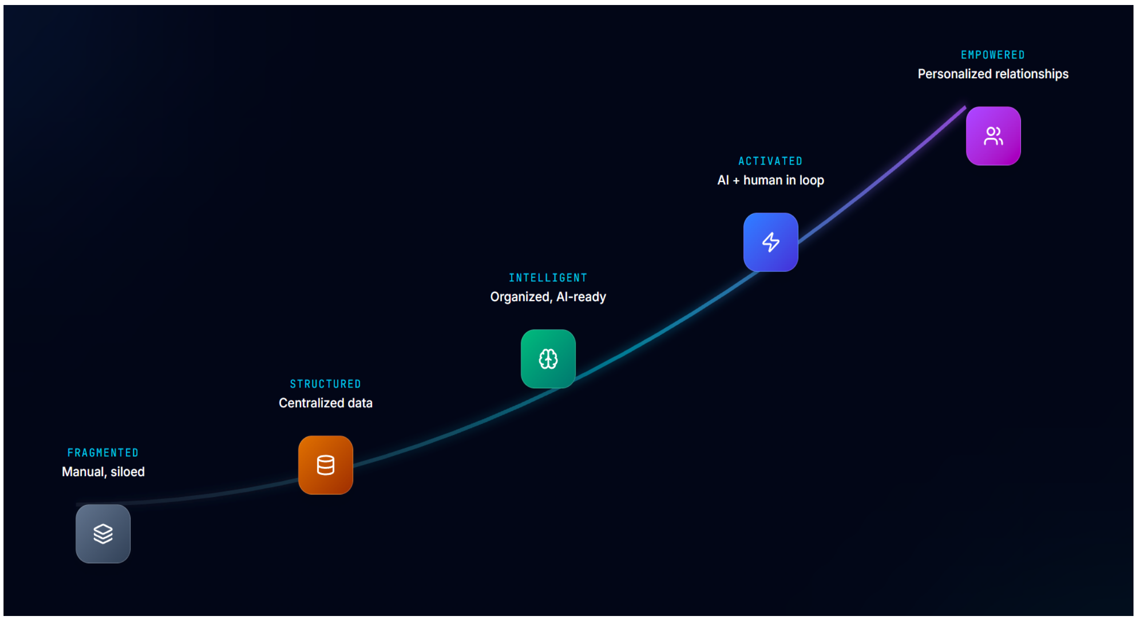
When a gift officer flags a new prospect, a baseline profile is generated automatically — giving history, wealth indicators, biographical information, digital engagement. Priya's job becomes what it was always meant to be: interpreting information, identifying the right entry point for a relationship, surfacing connections the data alone wouldn't reveal, and advising gift officers on strategy.

"The goal isn't to automate advancement. It's to give advancement professionals the information and the time to do the part of their job that can't be automated."

PART THREE

The Journey: Where You Are and What Comes Next

No two advancement offices arrive at the same place by the same path. Some have invested heavily in CRM infrastructure but never connected it to their digital channels. Some have moved data to the cloud but haven't yet put it to work. Understanding your starting point honestly is what makes the journey forward practical rather than theoretical.



The five stages of the advancement journey — from fragmented data to empowered, AI-enabled relationships.

Stage 1

FRAGMENTED

Manual, siloed

Data and process are disconnected. Donor information lives across multiple systems that don't speak to each other. Bringing it together for a campaign or a visit means manual exports, spreadsheet reconciliation, and significant staff time. Campaigns go out to broadly defined segments. Consent scrubbing is manual. Prospect profiles age quickly. The first step forward isn't buying new technology — it's understanding clearly what data exists, where it lives, and what it would take to bring it together.

Stage 2

STRUCTURED

Centralized data

The institution has taken the first major step: data from multiple source systems is flowing into a central location. A data lake or cloud data warehouse exists. But centralization and organization are not the same thing. Many institutions arrive here and discover they have a larger and more expensive collection of silos. Records are duplicated. Fields are inconsistent across sources. The data is together physically, but has not yet been made coherent.

Stage 3

INTELLIGENT

Organized, AI-ready

This stage separates institutions that have data from institutions that can use it. The centralized data has been organized, cleaned, and made trustworthy. Identity resolution has happened — the same donor is reliably recognized across every source system. Data quality standards are in place. Consent and communication preferences are accurate, current, and automatically applied. AI models are only as reliable as the data they're trained on — doing Stage 3 well is what makes everything downstream possible and sustainable.

Stage 4

ACTIVATED

AI + human in loop

AI is doing real work in production — and the advancement team is working alongside it. Predictive models identify donors who are ready to be approached, at what gift level, and through which channel. Campaign lists are built, consent-verified, and segmented automatically. The system proposes; the advancement professional reviews, refines, and decides. Teams at this stage typically see meaningful improvements in campaign performance, donor engagement, and staff capacity relatively quickly.

Stage 5

EMPOWERED

Personalized relationships

The infrastructure has receded into the background. Data flows, models run, campaigns execute, and results feed back into the system — continuously and largely automatically. The advancement team is doing the work that advancement has always been about: building genuine relationships with donors, connecting their passions to the institution's mission, and stewarding gifts in ways that inspire continued generosity. This is not a future state — it is where institutions that have made the journey operate today.

ENABLING THE JOURNEY

Where DonorAI Fits

DonorAI is an AI-powered engagement platform co-developed by Syntasa and Google, built specifically to help advancement teams move along this journey — from wherever they are starting. It connects donor data from CRMs, websites, email platforms, and ad systems into a unified profile. It applies Google's generative AI to produce personalized outreach at the individual level. It predicts donor behavior, identifies giving likelihood, and suggests optimal gift amounts.

Importantly, DonorAI is not a rip-and-replace. It is designed to work alongside the systems advancement teams already use — Blackbaud, Salesforce, Google Analytics — adding the intelligence and automation layer those systems were not built to provide.

Syntasa brings	Google Cloud brings	Together they deliver
Unified donor data layer Pre-built higher ed data models Advancement-specific AI agents	Generative AI (Gemini) BigQuery analytics Secure, scalable infrastructure	Personalized outreach at scale Real-time donor intelligence Automated consent management

APPENDIX

The Advancement Self-Assessment Guide

The questions below are designed to help advancement teams reflect honestly on where they are today across four core functional areas. There are no right or wrong answers — and no score. This guide works best when completed collaboratively, ideally with representation from advancement leadership, operations, and technology.

Team 1: Major Gifts

How gift officers access donor intelligence, prepare for conversations, and manage portfolios.

1. When a gift officer prepares for a donor visit or call, how many systems do they typically consult? How long does that preparation take, and how current is the information by the time they use it?

2. Does your team have a single, unified view of each major donor — combining giving history, wealth indicators, digital engagement, event attendance, and relationship notes — or is that picture assembled manually each time?

3. How does your team currently identify new prospects for major gift consideration? Is that process systematic and data-driven, or does it rely primarily on officer relationships and referrals?

4. When a donor's circumstances change — a new business role, a life event, a shift in engagement — how quickly does that information reach the gift officer managing the relationship?

Team 2: Annual Giving

How campaigns are built, personalized, executed, and measured — and how much manual work sits between idea and send.

1. Walk through the steps your team takes from deciding to run a campaign to the moment the first message goes out. How many systems are touched, how many manual steps are involved, and how long does the process take?

2. How does your team currently manage donor consent and communication preferences? Is that information current and automatically applied at the point of send, or is it reconciled manually?

3. How personalized is your outreach today? Are donors receiving messages tailored to their individual interests and engagement history, or are they segmented into broad groups?

4. How long after a campaign concludes does your team have a clear picture of what worked — and how directly do those lessons feed into the next campaign?

Team 3: Prospect Research

How prospect profiles are built, maintained, and connected to the work of gift officers and annual giving.

1. How are prospect profiles currently built? How many sources does an analyst typically consult, how long does a profile take to produce, and where does the finished profile live relative to the CRM record?

2. How does your team currently keep prospect profiles current? When a prospect's circumstances change, what triggers a profile update — and how reliably does that update reach the gift officer?

3. If your research team were able to spend significantly less time on information assembly, what would they do with that capacity? What is the highest-value work that currently doesn't get done?

Team 4: Advancement Services & Operations

Data infrastructure, system landscape, and the operational foundation that every other team depends on.

1. How many systems currently hold meaningful donor data — and is there a single place where that data is unified? If a central data environment exists, how complete, clean, and current is the donor picture it provides?

2. How is identity resolution currently handled? When the same donor appears in multiple systems, how reliably are those records matched to a single profile?

3. How are data quality issues currently identified and addressed? Is there an active governance process, or are problems discovered reactively?

4. If your institution were to deploy AI-powered tools tomorrow, how confident would you be that the underlying data is clean, consistent, and trustworthy enough to produce reliable results?

What Comes Next

Once you have worked through these questions, step back and look at your answers as a whole. Where do most of them land on the journey diagram? Are different teams at meaningfully different stages?

Two options are available for teams that want to go further. A follow-up conversation with Syntasa and Google can help you interpret your answers and map them to a practical path forward. For teams that want to go deeper, a co-facilitated half-day working session brings advancement leadership, operations, and technology together around a shared picture of where the institution is today and what the journey forward looks like — in concrete, actionable terms.

The starting point is the same: an honest conversation about where you are. We are ready to have it whenever you are.