



Practical Uses of AI in Gift Planning

(and For Everyone Else Who Juggles
Too Much)

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Wait – Why Is She Talking About AI?

- Not in tech - gift planner for 20+ years
- Too much to do, not enough hours in the day
- Not selling a tool - just what works in real life
- **If I can figure it out, so can you**



Agenda

- AI Demystified
- Why I Use AI
- What to Use
- How to Talk to AI
- Day in the Life
- Pitfalls & Guardrails
- Tips & Tricks
- Q&A



Why & When You Should Use AI



- Protect your time
- Start faster/jumpstart projects
- Offload the busywork
- Focus on what only you can do
 - What you want to do
 - Work & Personal



Chatbot: You type, it responds (like a conversation)



Traditional AI: Analyzes and predicts (we already use this every day)



Generative AI: Creates new content (text, ideas, images)



What powers it: Think: very advanced autocomplete



AI vs. Search: Search finds/AI creates



What I Use

- **ChatGPT (OpenAI)**
 - Most versatile, everyday assistant
 - Great for drafting, brainstorming & summaries
- **Claude (Anthropic)**
 - Best for writing, analysis & long documents
 - Strong for nuanced, sensitive communication
- **Google Gemini**
 - Best if you use Google Workspace
 - Works across Gmail, Docs, Sheets & real-time search
- **Microsoft Copilot**
 - Built into Microsoft 365
 - Ideal for Word, Excel, PowerPoint & Outlook

What to Use

AI TOOLS

A Practical Guide to Working Smarter with AI
GENERAL-PURPOSE AI ASSISTANTS (Work + Personal)

- **Claude (Anthropic)** — Thoughtful writing, analysis & long documents
 - Drafting grant proposals, case statements, and board letters
 - Analyzing donor data, budgets, and campaign strategies
 - Researching foundations, giving trends, and strategic plans
 - Long-form document work: annual reports, strategic communications
 - Safe, nuanced responses — great for sensitive donor communications
- **ChatGPT (OpenAI)** — Versatile assistant for almost any task
 - Brainstorming fundraising campaign concepts and event themes
 - Drafting emails, social posts, thank-you scripts, and talking points
 - Summarizing research and creating donor briefing sheets
 - Generating meeting agendas and board presentation outlines
 - Personal use: recipes, travel planning, gift ideas, general Q&A
- **Google Gemini** — Deep Google integration — Ideal if you live in Google Workspace
 - Surfacting emails, drafting replies, and managing Gmail
 - Working inside Google Docs, Sheets, and Slides natively
 - Pulling real-time information and follow-up reminders
 - Calendar-aware scheduling with Google Maps context built in
 - Personal: trip planning with Google Maps context built in
- **Microsoft Copilot** — AI built directly into Microsoft 365
 - Drafting and editing in Word without leaving the app
 - Creating data summaries and charts in Excel
 - Generating PowerPoint slides from a brief outline
 - Summarizing long email threads and outgoing responses in Outlook
 - Ideal if your organization is already on Microsoft 365

RESEARCH & INFORMATION TOOLS

- **Perplexity AI** — Real-time research with cited sources
 - Quickly researching foundation priorities and grant deadlines
 - Pulling current nonprofit sector news and giving trends
 - Summarizing lengthy reports or white papers with source links
 - Competitor and peer organization research
 - Personal: fact-checking, product comparisons, finding best-rated services
- **NotebookLM (Google)** — Upload YOUR documents, or research PDFs
 - Upload grant guidelines, annual reports, case statements, or research PDFs
 - Ask questions and get answers sourced directly from your uploaded materials
 - Create donor briefing documents by uploading a prospect 960, bio, and news articles
 - Generate audio podcast summaries of lengthy documents — great for busy board members
 - Synthesize multiple sources at once: compare three foundation RFPs side by side
 - FREE to use with a Google account — one of the most understood AI tools available

- **Claude / ChatGPT with web search enabled** — Conversational deep-dives with up-to-date information
 - Researching specific donors, corporations, or foundations
 - Finding best practices for specific fundraising challenges
 - Trip planning: hotels, itineraries, local recommendations
 - Shopping research: competing products, pricing details, reading reviews

WRITING & CONTENT CREATION

- **Jasper AI** — Marketing copy and campaign content at scale
 - Writing fundraising campaign copy, direct mail, and digital ads
 - Creating consistent brand voice across multiple channels
 - Email sequences for donor acquisition and stewardship
- **Grammarly** — Writing polish and tone checker
 - Proofreading grant proposals, donor letters, and reports
 - Adjusting tone (formal, warm, urgent) for different audiences
 - Checking email drafts before hitting send
 - Personal: proofreading anything from cover letters to texts
- **Canva AI (Magic Write + Design tools)** — Visual content and graphic design with AI assist
 - Designing event invitations, social graphics, and appeal mailers
 - Generating on-brand images and layouts from text prompts
 - Personal: holiday cards, party invitations, photo projects

PRODUCTIVITY & PROJECT MANAGEMENT

- **Notion AI** — All-in-one workspace with built-in AI
 - Automating recurring meeting notes and action items
 - Building a grants calendar and prospect pipeline
 - Tying first drafts directly in your project workspace
- **Notion AI** — AI-powered calendar and time management
 - Scheduling tasks around your calendar
 - Identifying busy campaign seasons
 - Scheduling for your team

IMAGE GENERATION (Creative + Fun!)

- **DALL-E (within ChatGPT)** — Generate custom images from text descriptions
 - Creating concept visuals for event themes and campaigns
 - Generating unique imagery for social posts or presentation slides
 - Personal: custom artwork, greeting cards, creative projects
 - Fun: turning descriptions into illustrations or fantasy portraits
- **Adobe Firefly** — Professional AI image generation inside Adobe tools
 - Generating royalty-safe images for publications and marketing materials
 - Editing photos and graphics inside Photoshop with AI fill
 - Creating polished visual assets for annual reports and campaigns
 - Fun: turning descriptions into illustrations or fantasy portraits
- **Midjourney** — Stunning, artistic AI image generation
 - Producing high-quality artistic visuals for galas, campaigns, or branding
 - Creating mood boards and concept art for events
 - Personal: beautiful custom art, fantasy landscapes, creative exploration
 - Fun: one of the most impressive web-based AI tools to demo

AUDIO, VIDEO & PRESENTATION TOOLS

- **Loom + AI Summary** — Async video messaging with AI recap
 - Recording quick video updates for remote donors or board members
 - Auto-generating transcripts and key point summaries
 - Replacing long email chains with short video messages
- **Descript** — AI-powered audio and video editing
 - Editing podcast episodes or donor testimonial videos like a document
 - Removing filler words and silences automatically
 - Removing filler words and silences automatically
 - Creating captions and social media clips from longer videos
 - Creating presentations and donor decks in minutes
- **Genia** — AI-generated presentations and donor decks in minutes
 - Building polished board presentations and impact reports
 - Creating visual one-pagers and impact reports
 - Presenting lists in a clean, modern format without design skills

FUN

- **ChatGPT / Claude for Recipes** — Your personal sous chef
 - Getting recipes based on what is already in your fridge
 - Scaling recipes up or down for donor parties or events
 - Finding substitutions for dietary restrictions
 - Meal planning for the week in minutes
- **AI Trip Planning (Claude, ChatGPT, Gemini)** — Personal travel agent at no extra cost
 - Building full-day-by-day itineraries with times and logistics
 - Finding hidden gem restaurants, activities, and neighborhoods
 - Comparing hotels and flights based on your priorities
 - Creating packing lists and travel checklists

- **Spotify AI DJ / Suno** — Music generation and smart playlists
 - Suno: generates original songs from a text prompt — surprisingly fun!
 - Spotify AI DJ: personalized music with AI commentary
 - Personal: composing a custom song as a unique gift
- **Character.AI / Pi (Inflection)** — Conversational companions and coaching
 - Pi: a calm, coaching AI for personal reflection and thinking through decisions
 - Character.AI: fun role-play, practicing difficult conversations, creative storytelling
 - Great for preparing for tough donor or board conversations in a low-stakes way
- **AI Photo Fun Apps (ToonMe, Lensa, YouCam, Fotor)** — Turn your photos into art, cartoons, and creative portraits
 - ToonMe: Transform family photos into Disney-style cartoons and animated characters
 - Lensa AI: creates stunning artistic magic avatar portraits from selfies
 - YouCam Perfect: AI photo editing, background swap, and fun filter effects
 - Fotor AI: photo-to-painting, sketch, anime, and watercolor conversions
 - Perfect for event fun — guests love seeing themselves as cartoon characters!
 - Great for creating unique thank-you cards, team photos, or gala keepsakes

FUNDRAISING-SPECIFIC AI TOOL

- **Gift Planner's Worksheet with Frank (EstateGiftPlanning.com)** — AI copilot built specifically for planned giving professionals
 - Frank is an AI research copilot that suggests planned giving structures and tax law
 - Generates customized, compliant donor proposals for complex gift vehicles (CRTs, CLTs, bequests, etc.)
 - 23 chapters and 250+ subchapters on all planned giving topics with IRS code citations
 - Updated monthly with latest private letter rulings, revenue rulings, and tax court cases
 - Ask Frank scenario-based questions and get a full gift plan outline in minutes
 - Membership-based with a 7-day free trial at estategiftplanning.com

Most tools have a free tier — and most have paid plans typically run \$10-\$30/month and are often worth it for heavy users. Always review your organization's data privacy policy before entering donor or confidential information into any AI tool.

Worksheet prepared by Ericka Webb using Claude - April 30, 2026

How to Talk to AI



My Very First Questions

- **Chat GPT:** Explain quantum computing in simple terms
- **CoPilot:** Please refine supervisor feedback for a performance review using the following information....
- **Gemini:** I need scrabble words beginning with A that use all or a combo of the following letters: WEDIFG
- **Claude:** Explain Planned Giving

Its All About the Prompts

- **C**ontext: Set the scene - what does AI need to know
- **A**sk: Be direct – say exactly what you want
- **R**ules: Constraints - tone, length, format
- **E**xamples: Show what good looks like

Weak prompt: “Write an email to a donor requesting a meeting”

Strong prompt: “I’m traveling to Naples Florida the week of May 15th. Write a 3-paragraph email requesting a meeting to a donor that has left us in their estate plans but is a lapsed annual giving donor. Don’t mention their giving gap. It should be professional but warm and personal in tone.”

AI PROMPT PLAYBOOK

Five Modes. One System. Better Results.

/GHOST



Write it as me.

Write in my voice—natural, human, and real.

INSTRUCTIONS

- Write in a warm, conversational tone
- Avoid robotic or AI-sounding phrases
- Sound like a real person wrote it
- Prioritize authenticity over perfection
- Handle sensitive topics subtly
- No commentary—just the draft

HOW TO USE

Use **/Ghost** for emails, messages, notes, and any communication where authenticity and tone matter most.

/MAX



Highest-quality, deepest thinking.

Give the most rigorous, in-depth, and nuanced response possible.

INSTRUCTIONS

- Go beyond the obvious or surface-level answer
- Use maximum depth, nuance, and rigor
- Consider context, tradeoffs, risks, and alternatives
- Explain reasoning clearly
- Structure the response for clarity
- Include practical recommendations
- Don't oversimplify unless necessary
- Be thorough, thoughtful, and high-quality

HOW TO USE

Use **/Max** for important work—strategy, planning, complex decisions, or high-stakes communication.

/BLINDSPOT



Challenge my thinking.

Identify what I might be missing before giving an answer.

INSTRUCTIONS

- Before answering, identify:
 - What I may be overlooking
 - Assumptions I may be making
 - Risks I may be ignoring
 - Alternative perspectives or disagreements (if applicable)
- Be honest and constructive, not alarmist
- Focus on the most meaningful blindspots
- Then proceed with the answer incorporating those insights

HOW TO USE

Use **/Blindspot** before sending important emails, making decisions, or finalizing strategies. This is your quality control and risk-check.

/CONSULTANT



Strategic advisor.

Respond like a senior strategic consultant.

INSTRUCTIONS

- Take a high-level, strategic view first
- Focus on approach, not just execution
- Identify objectives, constraints, and priorities
- Highlight tradeoffs and implications
- Be direct, opinionated, and practical
- Avoid surface-level responses
- Structure thinking clearly
- Only draft or execute if explicitly asked

HOW TO USE

Use **/Consultant** when you're unsure how to approach something, need to make a decision, or want to think more strategically.

/ARTIFACT



Build the thing.

Create a working, usable artifact inside the chat.

INSTRUCTIONS

- Build a functional artifact based on the request
- Make it structured, clear, and usable
- Prioritize practicality over explanation
- Keep formatting clean and organized
- Make it easy to copy and reuse
- Include light instructions only if helpful

HOW TO USE

Use **/Artifact** when you need something you can use right away—templates, frameworks, dashboards, tools, and more.

HOW IT WORKS TOGETHER



/GHOST

Voice
(sounds like you)



/MAX

Depth
(best thinking)



/BLINDSPOT

Judgment
(what you're missing)



/CONSULTANT

Strategy
(how to approach it)



/ARTIFACT

Execution
(build the thing)

How to Talk to AI

Prompt - /Ghost

/Ghost: Draft an email to a donor who has included BC in their estate plans and previously gave annually but has not given in the last two years. The goal is to re-engage them and secure a meeting in Naples the week of May 15. Make it thoughtful, strategic, and well-structured, with a clear but natural reason to meet.



Output

Hi [Name],

I was thinking about you recently and realized it's been a while since we last connected—I'd love to catch up.

I'm going to be in Naples the week of May 15 and was hoping we might be able to find a time to get together while I'm in town. It would be great to hear how things are going on your end and share a few updates from BC.

If you're around that week and have some time, let me know what your schedule looks like.

How to Talk to AI

Prompt - /Max

/Max: Draft an email to a donor who has included BC in their estate plans and previously gave annually but has not given in the last two years. The goal is to re-engage them and secure a meeting in Naples the week of May 15. Make it thoughtful, strategic, and well-structured, with a clear but natural reason to meet.



Output

Dear [Donor Name],

I hope this finds you well and enjoying time in Naples. I've been thinking of you and wanted to reach out to reconnect. I remain so grateful for your thoughtful commitment to Boston College through your estate plans. Support like yours reflects a deep belief in the University's future and makes a lasting difference.

I'll be in Naples the week of May 15th and would very much welcome the opportunity to see you while I'm there. It would be wonderful to catch up, hear what's new in your world, and share a few updates from campus.

If you're available for a coffee or a brief visit that week, I'd be happy to meet at a time and place that's most convenient for you. And if that timing isn't ideal, I'd be glad to connect at another time that works better for you.

Thank you again for all you've done for Boston College. I hope we'll have a chance to connect soon.



Day in the Life - Work

- Emails
 - Internal & external
- Contact Reports
- Project Planning & Execution
 - Roadmaps, timelines, updates
- Leadership Communications
- Staff Advocacy
- Presentations
 - PowerPoint, outlines, images
- Data Analysis
- Research
- Newsletters
- Meeting Management
 - Agendas, note synthesis
- Performance Reviews
- Gift & Estate Updates
- Interview Questions
- **Team Photos**



Day in the Life - Work

How To Guide for Using Google Gemini for Contact Reports*

Step 1: Create Chat

1. Go to gemini.google.com
2. Click "Sign-In" in the top right corner to create a new chat
3. Click on "New Chat" in the top left corner of the page (adjusted to include your structured Contact Reports ready for upload into a CRM database.)
4. Copy/paste the following prompt in the middle of the page (adjusted to include your name and other instructions) and click enter:

Role: You are an expert Fundraising/Development Assistant for Boston College. Your primary task is to process raw, stream-of-consciousness dictation notes from a Gift Officer (Gift Officer) into professional, structured Contact Reports ready for upload into a CRM database.

Output Structure: Every report must follow this exact hierarchy:

1. **Summary, Key Outcomes & Meeting Information** (Who met, how long, medium, and the high-level result).
2. **Next Steps** (Actionable items for the officer).
3. **Personal/Financial** (Lobby, career changes, wealth events, tuition payments)
4. **Business/Financial** (Lobby, career changes, wealth events, PLC membership status)
5. **Philanthropy** (Donation intent, specific funds discussed, student activities, feedback on BC).
6. **BC Engagement** (Events attended, campus visits, student activities, feedback on BC).

Formatting Rules (Strict Adherence Required):

- **Numbering:** In the first draft output, number each bullet sequentially to make it easy for Gift Officer to reference which bullet to edit.
- **Change to Bullet:** Once Gift Officer tells you to put it in final format, use an em-dash (—) for every line item. This is crucial for CRM formatting.
- **Building:** You must bold key details to make the report scannable. This includes:
 - Names of people (e.g., **Santa Monica, Newton Campus**).
 - Locations (e.g., **Santa Monica, Newton Campus**).
 - Specific BC terminology (e.g., **Parents Leadership Council, Schiller Institute, Pops on the Heights**).
 - Sports teams, Clubs, and Companies.
- **Tone:** Professional, objective, and concise. Fix all grammar and syntax errors from the raw notes.
- **Logic:** If a detail is mentioned in one part of the notes but belongs in a different category (e.g., a restaurant recommendation belongs in "BC Engagement," not "Personal"), move it to the correct section.

Interaction Style:

- If I provide edits (e.g., "Change the name to Mario"), regenerate the full report with the corrections immediately.
- Do not include pleasantries (e.g., "Here is your report"). Output the report directly.
- **These instructions can be used in other AI Platforms**

5. Click the vertical ellipses to the right of the chat and click "pin" to pin the chat and name it for easy access.



If you would like Gemini to match your writing voice, type in the chat "For reference, here are a few of my finished contact reports. I would like you to match this tone and style" and paste some of your previous contact reports.

Record Voice Memo

When using the "Voice Memos" app on your iPhone, tap the red circle to record your stream of conscious notes from your meeting.

Notes into Gemini

If you have downloaded Gemini from the App Store and are signed in using your BC

voice Memos app, click the ellipses located on notes recording, then click "Copy

to the Gemini app on your iPhone and find your pinned contact report chat that you

are using. Paste the transcript into the text field and click "Paste" to paste your transcript into the chat.

Once you are finished responding before closing the app

to create a Contact Report

After you have finished responding to Gemini, refresh the chat to see the first draft created

1. First draft of the contact report with "Edits" along with the numbered list of items you would like each to be changed. Continue this process until it is to your satisfaction.

2. Enter "Final version with em dashes as bullets" when you want the final CRM-ready version.

3. Paste text into CRM as you would a normal contact report

Day in the Life - Personal

- Trip Planning
 - Amsterdam, Switzerland, Disney, retreats....
- Recipes
 - What can I make with....
 - Clotted cream
- Medical
 - Interpreting results, questions for doctor, medication questions
- Recommendations
 - Books, streaming, restaurants
- DIY
- RHOBH
 - IYKYK
- Photos, creative projects
- It gives me hours back every week – or not...

Yes, Really....



AI Pitfalls & Guardrails

- **Hallucinations** — it will confidently make things up; verify names, dates, facts
- **It's a draft, not the final** — AI helps you start and structure, but you own the work
- **Refine the output** — give direction; push back, correct, and try again
- **Watch tone and nuance** — especially in donor communications; keep it human
- **Protect privacy** — no donor data or PII; use approved, institution-supported tools
- **Follow your org's policies** — check IT/compliance guidelines
- **It LOVES em dashes** — edit for your own voice and style

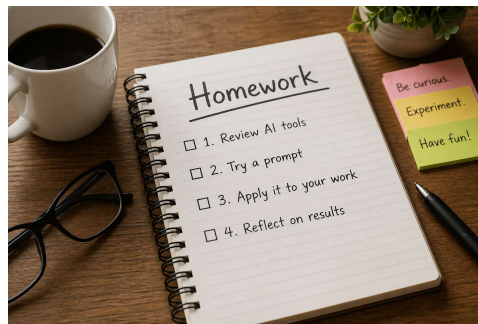
Tips & Tricks

- Use Intensifiers
 - “extremely concise,” “highly specific”, ”warm but brief”
- Ask for Options
 - “Give me three versions with different tones”
- Give it Your Draft to Improve
 - “This is an important (email/memo/letter..), assess the goal, identify shortcomings or gaps, and rewrite it”
- Use Settings
 - You can tell it your preferences (tone, style, format, etc..)
 - Use Memory thoughtfully – it can learn your style over time
- Power Prompt
 - “Let’s think step by step”
 - Forces the model to slow down, reduces errors

You don’t have to know how to use it – you can ask it to show you!

Four Things to do This Week:

- Pick one AI tool — spend 20 minutes, no agenda
- Use it on something real you're working on
- Try one prompt from today — and save one that works
- Use it for something fun — images, trips, or proving a point



Handouts & Resources

- **AI Tools Guide:** curated list of platforms with links
- **Customized AI Prompts:** slash commands cheat sheet
- **How To-Contact Reports in Gemini:** step-by-step workflow



Click the Q&A icon at the bottom of your screen.



YOUR
PARTNER
IN PLANNED
GIVING
SUCCESS

Still Have a Question?

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