

Anyone Can Do More with AI: Simple Tools, Big Impact

June 4, 2026

All in.

Your Presenters



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Officer
Donor Experience**



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AI Tools in every day use

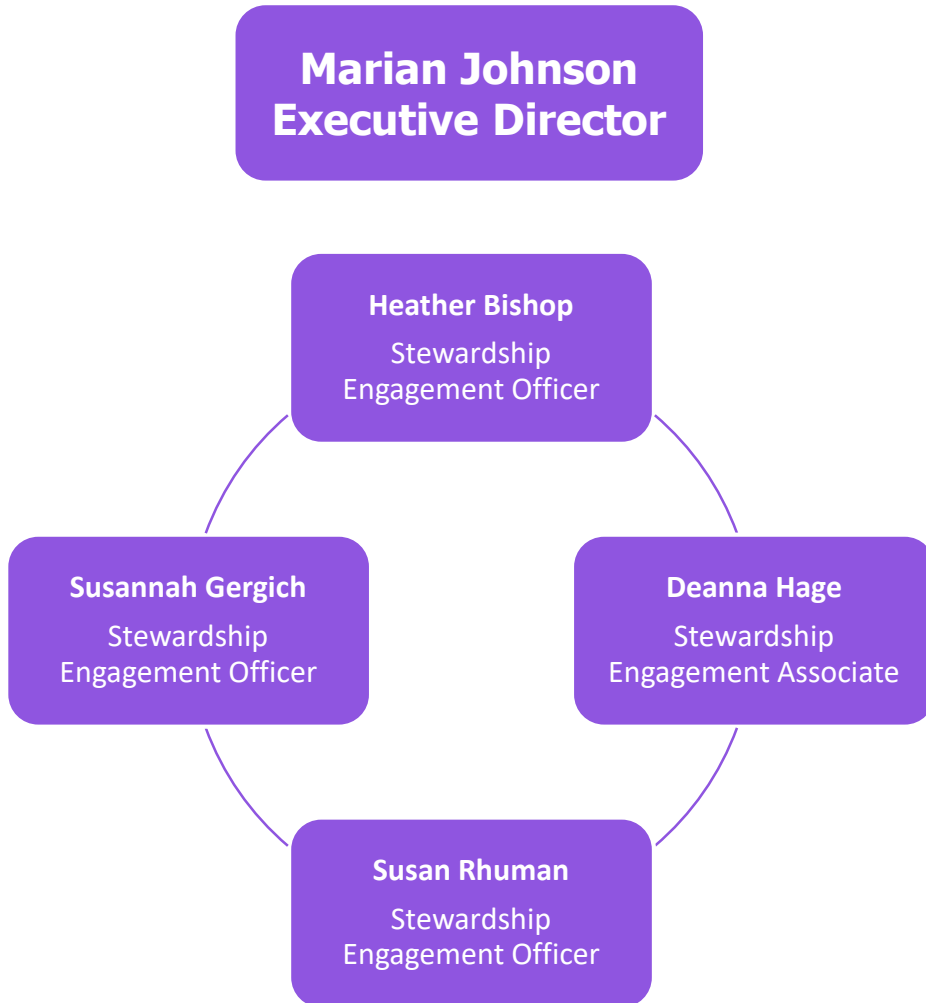


POLL #1

Where are you at with AI?

How would you describe your current use of AI-enhanced tools in your work?

Donor Experience Team



What We Do

- Fundraising thought partners
- Gift and sponsorship agreements
- Fund management and compliance
- Donor stewardship impact and financial reporting
- Naming opportunity policies, valuations, and approvals
- Donor recognition and signage
- Donor acknowledgement

All in.

A grand collaboration for Canada and the world

CAMPAIGN GOALS

\$1billion+

To take learning,
research and impact
to the next level

185,000

Alumni engaged as
donors, volunteers and
champions

1.5 million

Meaningful alumni
interactions worldwide



Presentation Topics



- Identify and Select AI tools
- Automation made easy: AI enhancements in MS Power Automate
- Beyond Automation: Generative AI as a Thought Partner

- **Identify and select AI tools to meet donor relations and stewardship needs**

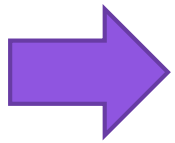


Western

All in.

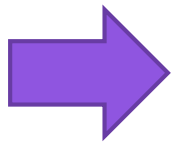
Needs Inform Direction

High administrative load and limited staff resources



Focus on AI tools to improve business process efficiency for immediate impact

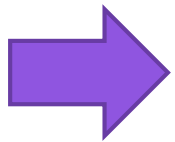
Strong technology support for larger initiatives but less so for niche projects managed by Donor Experience



Tools must be easy for non-technical staff to use

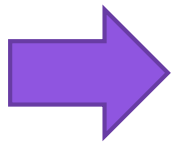
Needs Inform Direction

Limited budget



Use accessible, University licensed AI tools with no or little additional cost

Adhere to University AI framework and data privacy



Use University approved internal AI tools to protect confidential/sensitive data

Identifying Available Tools

Western's licensed, internal tools met our needs and criteria

AI Tools	Embedded AI Tools
Microsoft Co-Pilot	MS Teams, OneDrive MS Office applications MS Outlook MS Power Automate

■ Automation made easy: AI enhancement in MS Power Automate

All in.

How to Begin with Automation

- Approach with curiosity – learning resources are readily available
- Set achievable goals and build on them by starting small - begin with a process or part of a process that is consistent and stable
- Allow time for learning and testing
- Expect to revise and improve



Process Automation Applications



GIFT AGREEMENT

Western Donor

(the "Donor")

and

The University of Western Ontario

(the "University")

I. GIFT

The Donor has agreed to give \$1,000,000 expendable to the University (hereafter referred to as the "Gift"), which will be fulfilled based on the following suggested payment schedule:

\$1,000,000 by 2026-07-15

The Gift may be paid by the Donor or by affiliated entities, which the Donor controls. The Donor will receive an appropriate tax receipt (for individuals) or business receipt (for corporations and foundations) to the paying person/entity. Receipts will be provided based on timing of payments received.

II. PURPOSE

The Gift will be designated to the following fund(s):

Gift Agreements

Agreement Request Worksheet

Constituent Information

Form Request Date: 4/16/2026

Parties: Bob Western

Lookup ID: 8-10325XXX

Deadline:

Requestor: Brittney Cox

Agreements and Approvals Plan

Use the following information to create the AAP and share the plan link with Deanna and Susan

Faculty: Arts & Humanities if multiple faculties populate use Cross Faculty

Plan Name: Agreements and Approvals Plan – Arts Centre

Worksheets



Thank you for Supporting Student Awards

Describe the moment you learned that you would be receiving a scholarship, award or bursary?

Learning that I would be receiving this award was both relieving and grateful. It was encouraging and made me feel recognized for the work I was doing and gave me reassurance at a time when financial support was especially meaningful. Beyond the funding itself, it meant a great deal to know that my efforts and potential were being acknowledged.

How has your award helped you during your time at Western?

One accomplishment I am most proud of during my time at Western has been contributing to a research project with a professor at Western and a broader collaborative group from other universities. This award helped reduce financial pressure and gave me greater capacity to pursue valuable research opportunities and professional growth.

My experience at Western has helped me work toward my academic, research, and career goals by giving me opportunities to develop as both a researcher and future clinician. The award offered support and recognition that was meaningful during my studies. My time at Western has helped me build skills in research, collaboration, and scientific communication that I hope to continue using after graduation. After graduation, I hope to pursue a career that combines clinical practices with ongoing involvement in research at a university

Student Name shares the impact of receiving a student award



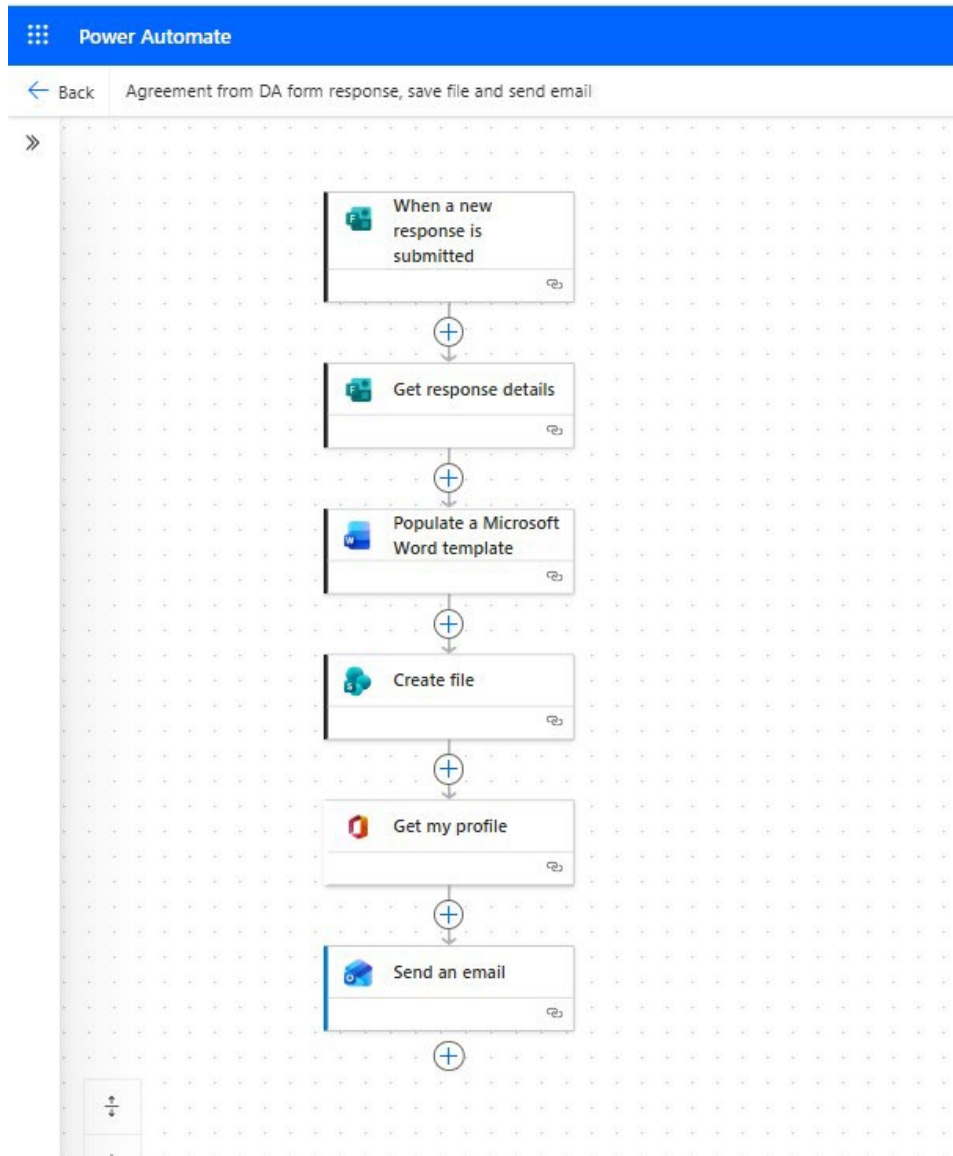
All in.

Student Impact Messages & Reports

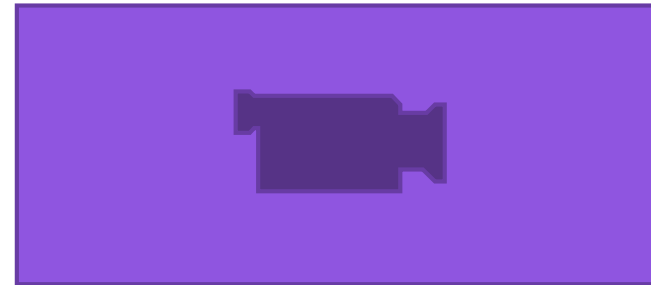
■ Demo: MS Power Automate

All in.

Power Automate Demo Video



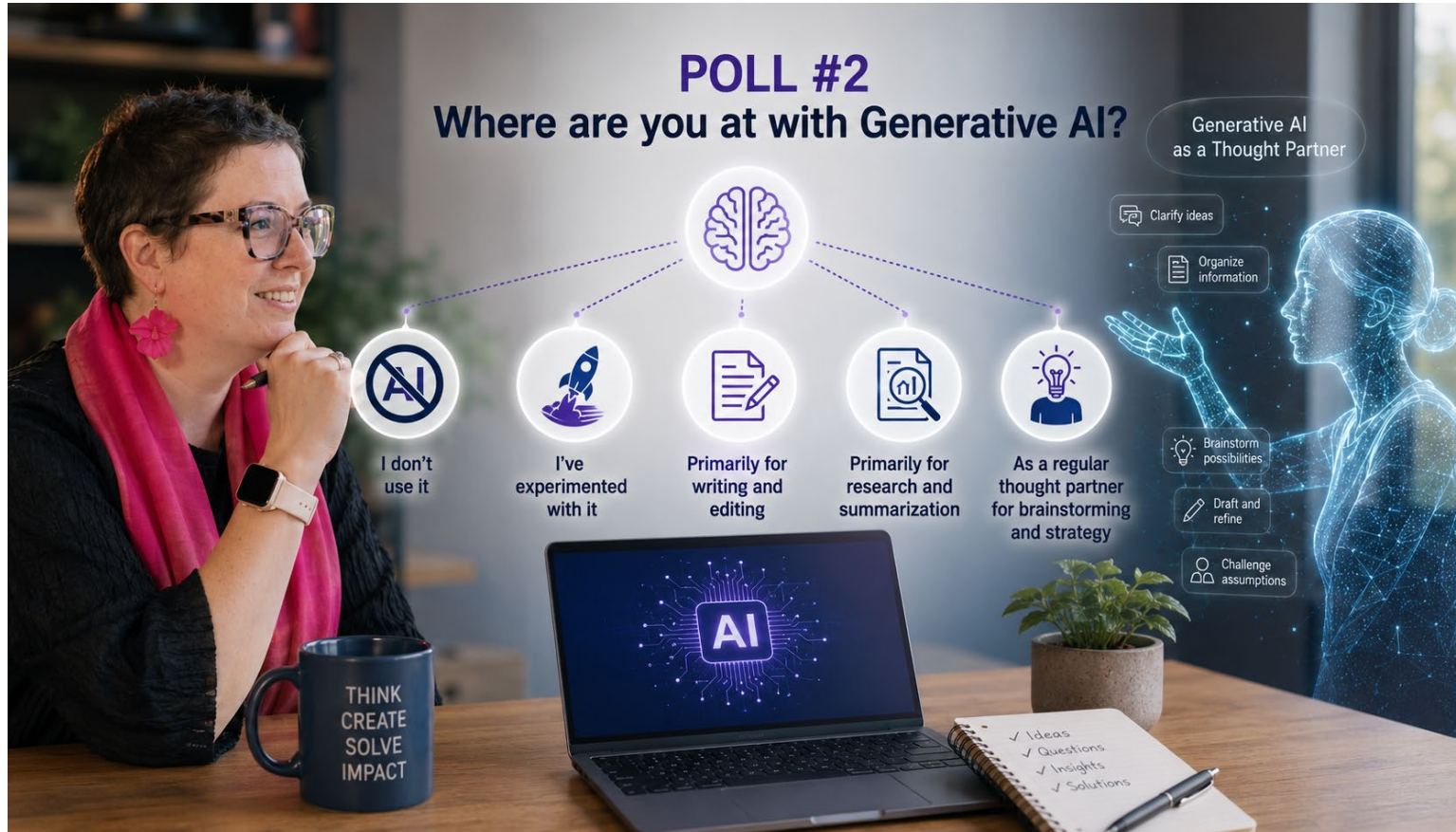
**Click on the icon
below to launch the
demo video**



■ **Beyond Automation: Generative AI as a Thought Partner**

All in.

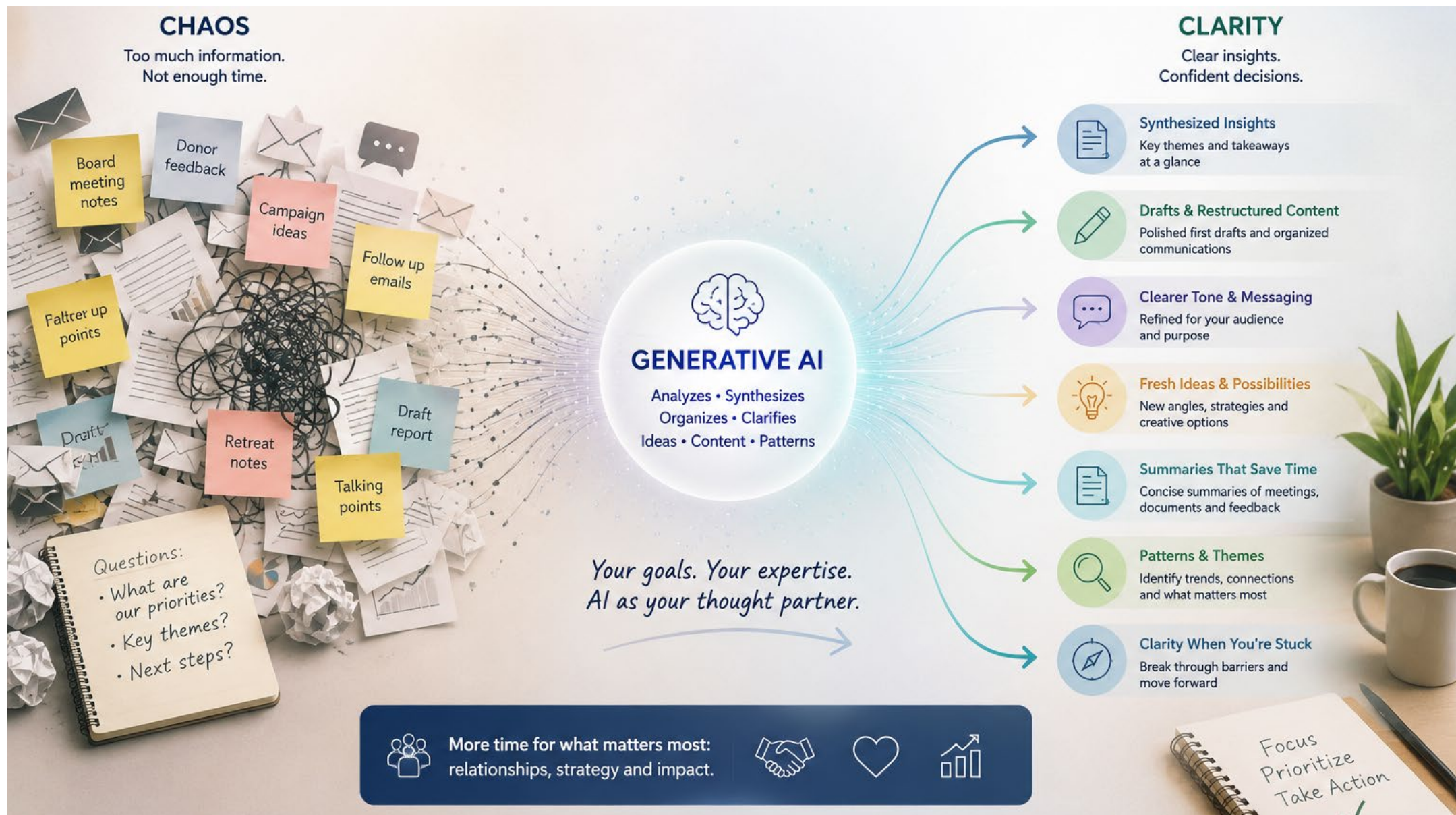
Beyond Automation



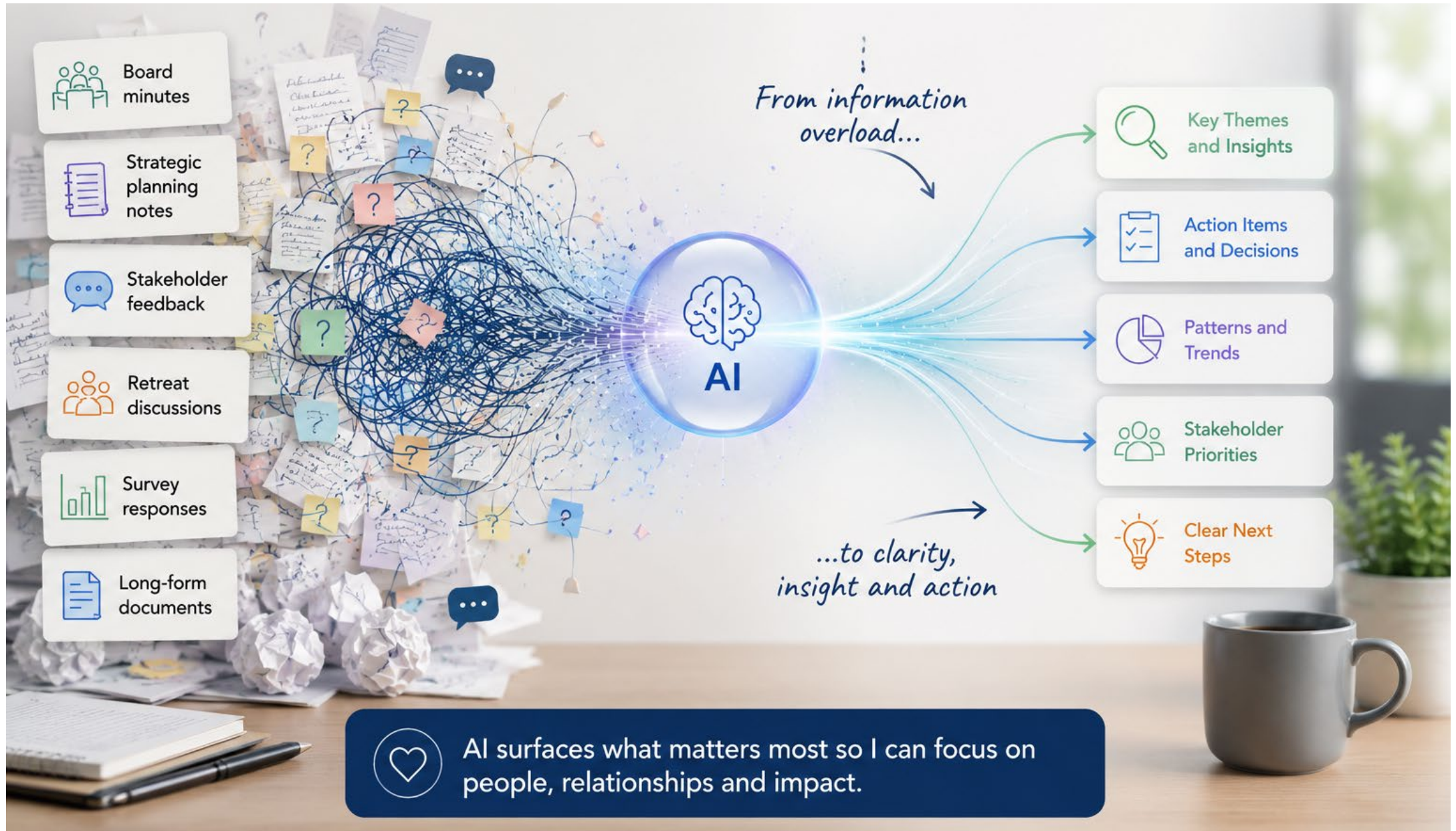
What best describes how you currently use Generative AI?

From Information Overload to Insight

Generative AI helps you think, create and communicate with clarity.



AI helps me find the Signal in the Noise



As an Editor and Writing Partner

Thoughtful content. Clearer impact.

From rough draft...
Scattered thoughts.
Unclear tone. Too much to say.

Thank you for making a difference.

Your support helps students thrive, fuels impactful research, and strengthens our communities.

Together, we create lasting change.

With gratitude,
The Advancement Team

...to clear, compelling communication
Refined tone. Clear message.
Stronger impact.

- Difficult emails
- Leadership messaging
- Strategic plans
- Donor communications
- Board reports
- Tone refinement
- Shortening or restructuring content

Key message:
You make a lasting difference. ♥

Better words.
Stronger relationships.

AI as a Brainstorming Partner

More ideas. Better questions. Stronger strategies.

The image shows a woman with glasses and a beige sweater sitting at a desk, looking at a whiteboard. The whiteboard has several sticky notes and handwritten text. The desk has a notebook, a mug, and some sticky notes. The background is a soft-focus indoor setting.

OUR GOAL:
Deepen relationships
and inspire lasting
impact.

What would
delight our
donors?

How might
we tell
bolder
stories?

Create more
meaningful
touchpoints

What's
next?

Questions
to explore:
• What if...?
• How might we...?
• What would make
this exceptional?

Great ideas
start with
curiosity.

Generate ideas
Explore angles
Challenge assumptions

AI

Examples

- Creative session formats
- Engagement touchpoint ideas
- Fresh perspectives
- Audience specific approaches
- Compelling themes & messaging
- Scenario planning options
- Retreat facilitation ideas
- Naming strategy concepts
- Donor engagement approaches
- Presentation themes
- Session ideas
- Scenario planning

AI helps me think bigger, challenge assumptions, and turn possibilities into meaningful plans.

Better Prompts + Better Results

Clear prompts lead to clearer, more useful AI output.

5 Steps to Better Prompts

- **1 Give context**
Share the background and situation so AI understands the big picture.
- **2 Be specific**
Clearly state what you need. The more details, the better.
- **3 Define audience and tone**
Let AI know who it's for and how it should sound.
- **4 Describe the outcome you want**
Explain the format, length, structure or style you're aiming for.
- **5 Refine and iterate**
Review, adjust, and refine your prompt for even better results.

Prompt Example

Vague Prompt

"Write a donor email."



✉
Hello,
I am writing to ask for your support.
Your donation helps our programs.
Please consider giving.
Thank you,
The Team

Result:

Generic, unclear, and not tailored to your audience or goals.

Strong Prompt

"Draft a warm but concise email to a long-time scholarship donor sharing student impact. The donor values humility and student success. Keep the tone personal rather than institutional."



✉
Dear [Donor Name],
Because of donors like you, students are gaining opportunities that change the course of their lives.
I'd love to share a recent story that shows the impact your support is making...
Thank you for believing in our students and investing in their future.
With gratitude,
The Advancement Team

Result:

Personal, relevant, and aligned with the donor's values and your objective.



Good prompting is a skill—and it gets easier with practice.

Start, refine, and let AI help you create your best work.

*Iterate.
Improve.
Make impact.*

Great prompts lead to meaningful impact.

Clarity creates impact.

Use AI Thoughtfully

Great outcomes come from responsible use. AI is powerful – how we use it matters.



The image shows a workspace with a laptop displaying a 'Responsible AI' graphic, a mug with the text 'AI is a tool. You are the expert.', a notebook listing ethical commitments, and a sticky note about technology amplifying human impact.

Responsible AI
Thoughtful today.
Stronger impact tomorrow.

AI is a tool.
You are the expert.
♡

Our commitment:
✓ Ethical
✓ Responsible
✓ Thoughtful
✓ Human-centered

Technology should amplify human impact, not replace it.

-  **Protect confidential information**
Do not share sensitive, personal, or donor information in AI tools.
-  **Follow institutional policies**
Understand and adhere to your organization's guidelines and acceptable use policies.
-  **Verify outputs and sources**
AI can make mistakes. Check facts, numbers, and attributions before using.
-  **Watch for bias and inaccuracies**
AI reflects patterns in data. Stay aware of bias and seek diverse perspectives.
-  **Maintain human judgment**
You know your context, relationships, and goals best. Use your judgment.
-  **Use AI to support—not replace—your work**
Let AI handle the heavy lifting, so you can focus on relationships, strategy, and impact.

 Thoughtful use builds trust. Trust drives impact. 

Tools to Explore

Different tools. Different strengths. Find what works for you.



Tool	Strength
 ChatGPT	Writing, synthesis, brainstorming
 Copilot	Internal document work
 Claude	Long-form analysis
 Gemini	Google integration
 Grammarly AI	Editing
 NotebookLM	Research/document summaries



Start small. Experiment. See what fits your workflow and amplifies your impact.



More Time for What Matters

AI Will Not Replace Human Relationships

But it may help create more time and space for the human work that matters most.



More connection.
More impact.
That's what matters.



RELATIONSHIPS
BUILT TODAY
IMPACT
TOMORROW



Listen.
Understand
Build Trust
Make a Difference

Technology
creates space.
People create
change.

Gratitude.
Relationships.
Legacy.

AI supports the work *around* relationships, not the relationships themselves.



Learn more
about Western
University



Learn more
about the
All in Campaign

Thank you.

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Susie Rhuman szrhuman@uwo.ca

Resource Links

Western Continuing Studies Course
Maximizing Efficiency: AI for Life and Work

Video
**Power Automate – How to Populate a
Word Template, Pragmatic Works, 2022**

Artificial Intelligence Resource Centre (AIRC)