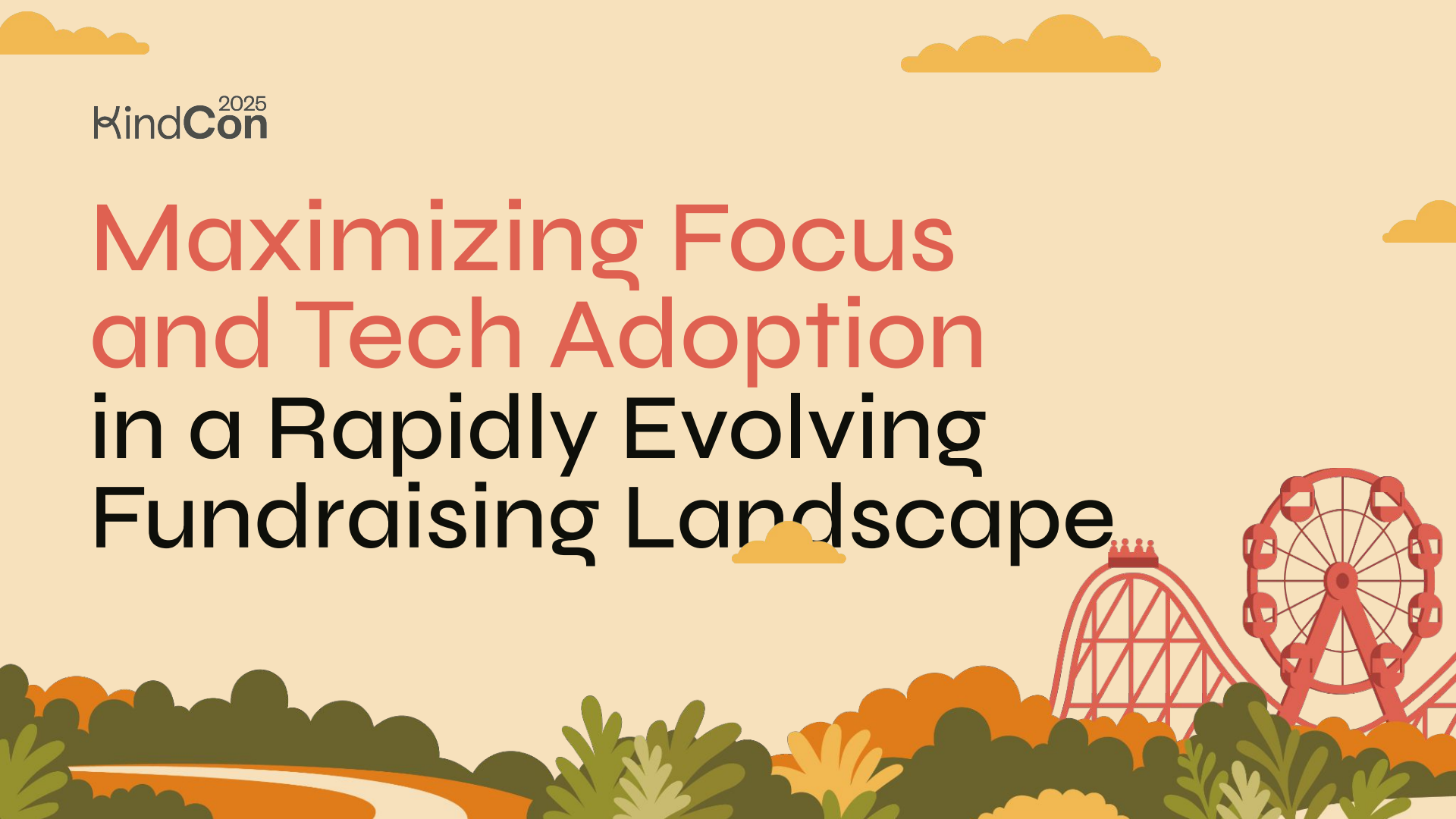


Maximizing Focus and Tech Adoption in a Rapidly Evolving Fundraising Landscape





KindCon²⁰²⁵



Raychel Roy

Associate Vice President of
Advancement Data Services,
University of Colorado



Cherian Koshy

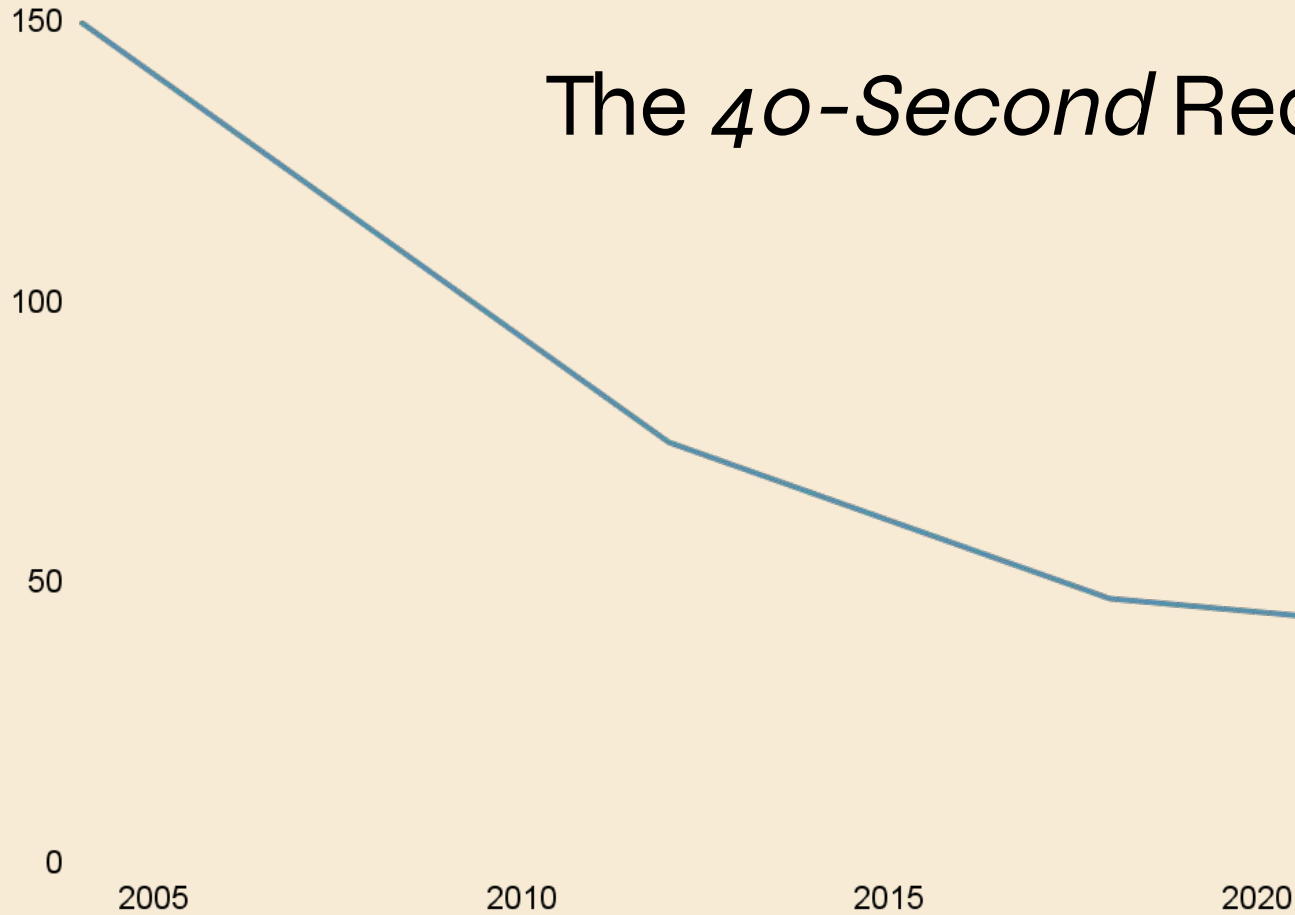
VP, Kindsight



The Evolving Fundraising Landscape



The *40-Second* Reality Check



Reality check: what the research actually says...

Productivity upside is real (task-level): Generative AI raised writing task productivity (faster, higher-quality outputs; effects strongest for lower-baseline performers). [MIT Economics](#)

On-the-job impact (field study): A large customer-support deployment saw ~14% average productivity gains, with newer workers benefiting most; quality effects vary by skill. [MIT Sloan](#)

...but many orgs don't capture value (P&L): A recent MIT Media Lab/Project NANDA report finds ~95% of genAI pilots show no measurable P&L impact—integration and focus are the problems, not model capability. [Virtualization Review](#)

Shiny Object Syndrome





Most nonprofits don't
fail from lack of tech,
they fail from
underutilization





A bloated tech stack
drains adoption,
distracts teams, and
creates duplication

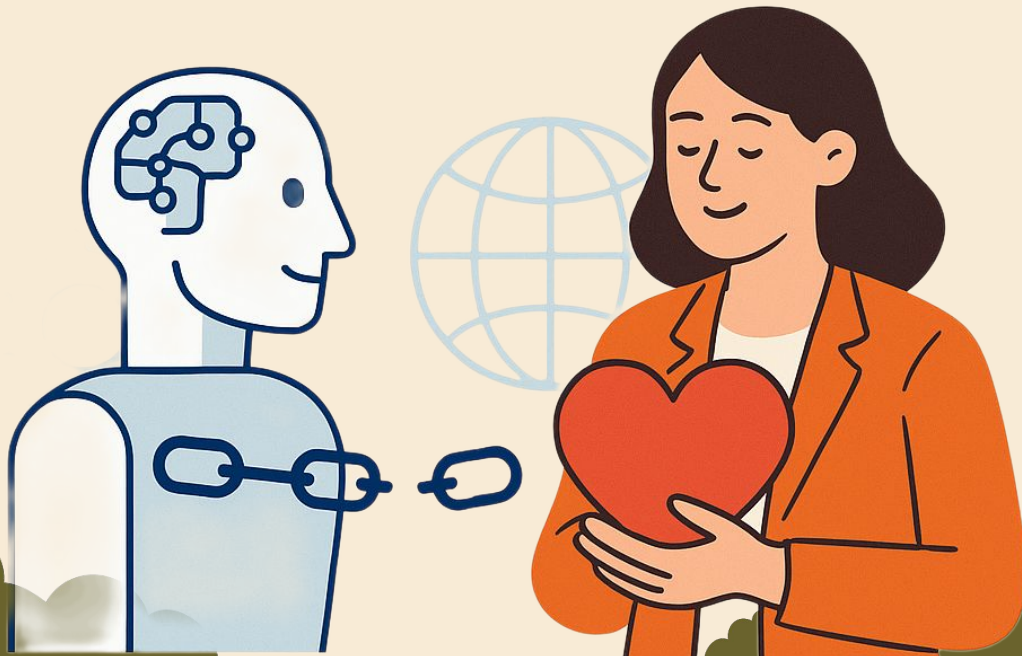




Buying more tools doesn't mean using them well.
Tools only matter if they *change behavior*.



AI is not about replacing fundraisers. It's about freeing fundraisers, removing the friction between human generosity and organizational action.

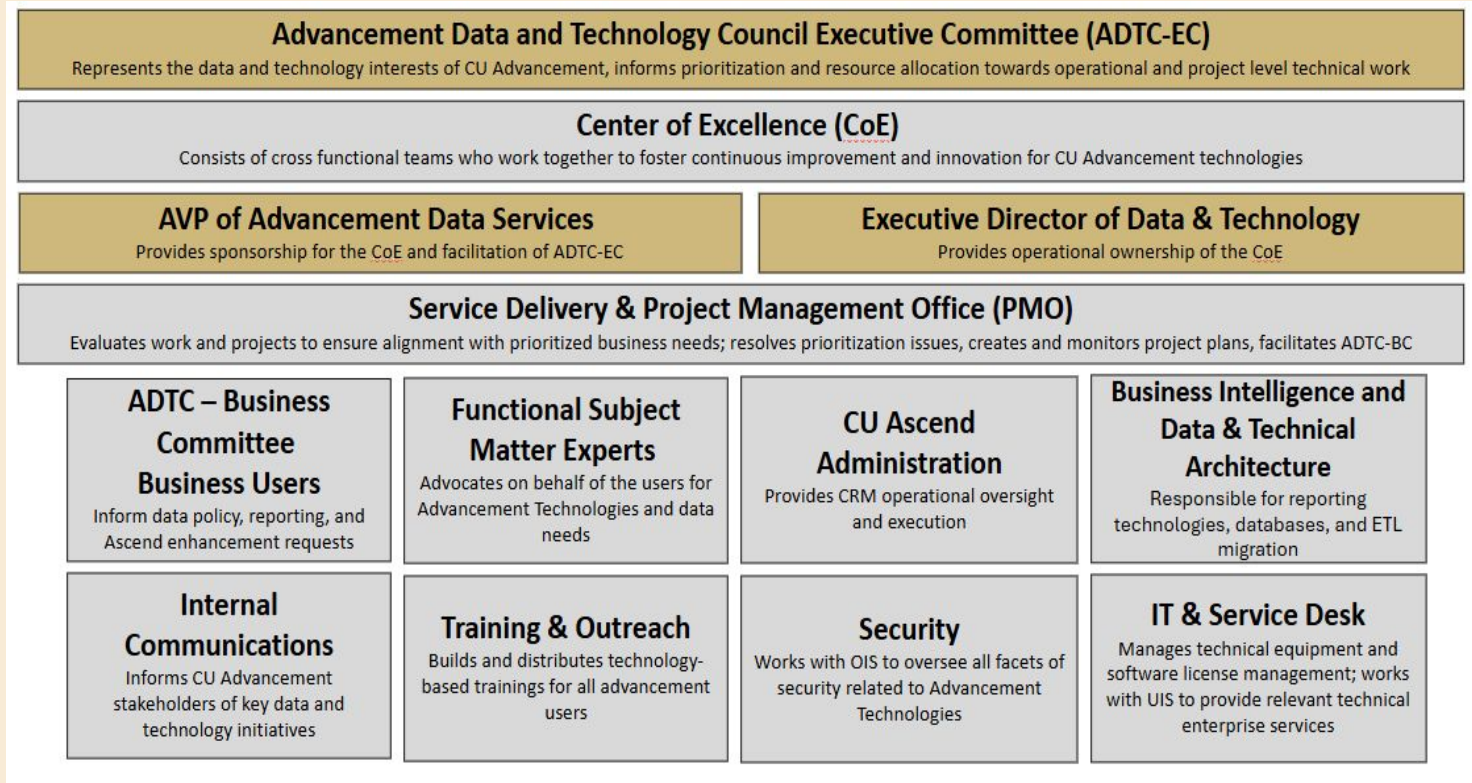




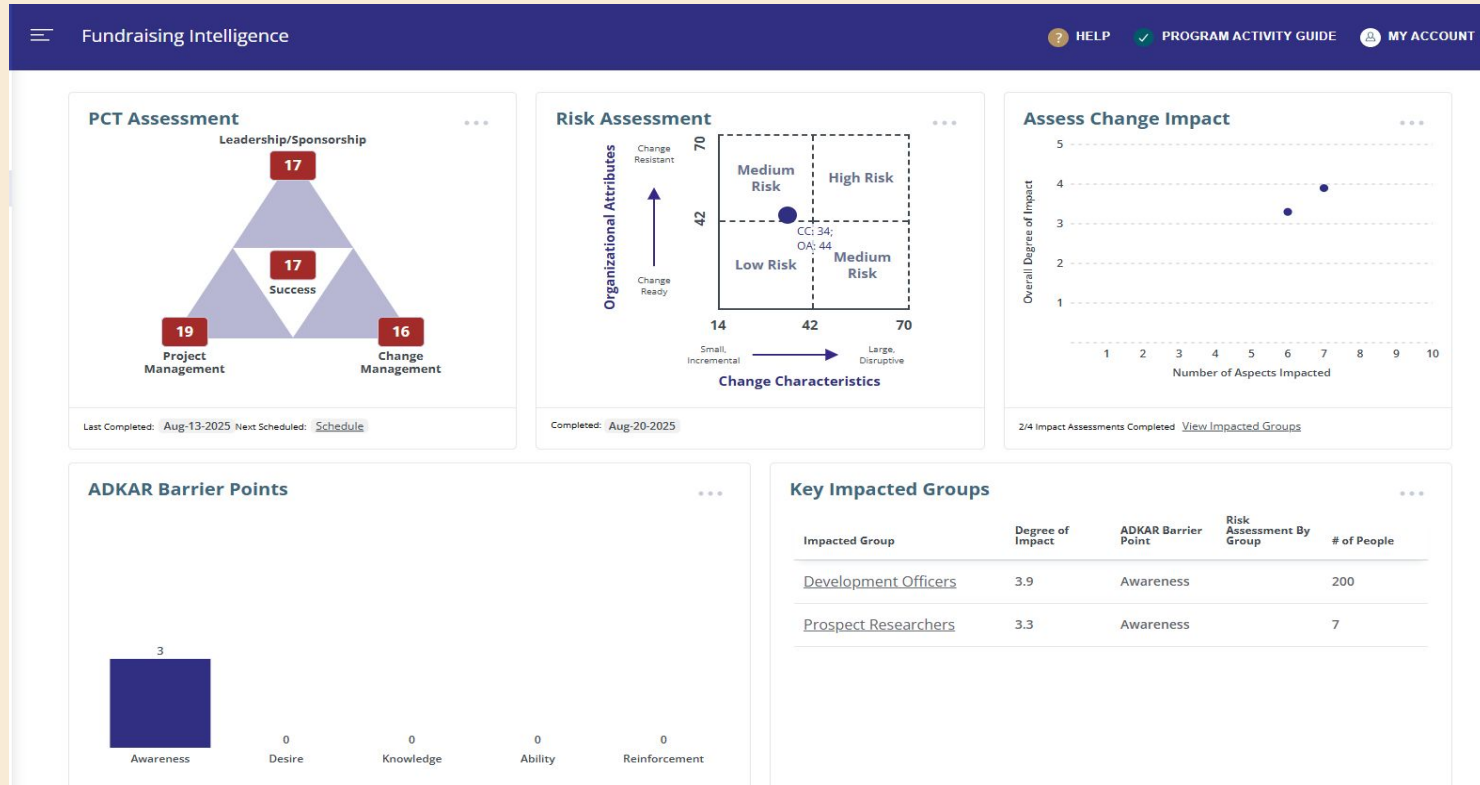
Navigating Complexity and Driving Innovation at Colorado University



CU Advancement Data and Technology Governance Model



Fundraising Intelligence Change Management Dashboard



Technology Assessment Rubric

Most Critical to Evaluate the Strategic Outcomes

Alignment with Strategic Outcomes Assessment [To be completed by Executive Committee]			
Questions	Low	Medium	High
Donor Experience - Does this help to drive lifelong engagement and increased philanthropy through meaningful connections that inspire investment at every level?			
Staff Experience - Does this help deliver a seamless, user-focused experience for greater staff productivity, engagement and satisfaction?			
Data and Technology Stewardship - Does this help uphold ethical data stewardship and security, leveraging DevOps best practices to minimize technical debt, optimize resources and deliver sustainable, compliant technical solutions?			
Effort Assessment [To be completed by System Advancement]			
Questions	Low	Medium	High
What is the estimated level of effort to resolve the request/issue?			
What is the estimated level of change management required?			
Impact Assessment [To be completed by System Advancement]			
Question	Urgent	Somewhat Urgent	Not Urgent
Is this urgent (possible work stoppage), somewhat urgent (still functional), or not urgent (nice to have)?			
Question	Individual	Multiple Teams	All Advancement
Does this benefit or affect an individual/team or multiple teams/all advancement			
Cost Assessment [To be completed by System Advancement]			
Questions	No	Yes	N/A
Is there budget available if needed to fund this initiative?			
Total	0	0	0

Alignment Rating Scale

Low: This request does not align or only minimally aligns with organizational outcome or aspiration. It may conflict with key principles or present significant gaps or conflicts, 0 points

Medium: This request has some alignment with the organizational outcome and aspiration, but its relevance and impact are inconsistent. It may have minor gaps that can be reasonably addressed, 2 points

High: This request aligns well or fully with organizational outcome and aspiration, enhancing our overall mission and strategy, 4 points

Effort Rating Scale

Low = 0 – 8 hours of effort, 4 points

Medium = 9 – 24 hours of effort, 2 points

High = 25+ hours of effort, 0 points

Change Management Rating Scale

Low = Messaging Needed, 4 points

Medium = Messaging and Training Needed, 2 points

High = Full CM Workstream Support Needed, 0 points

Urgency Rating Scale

Urgent = 4

Somewhat Urgent = 2

Not Urgent = 0

Impact Rating Scale

Individual = 1

Multiple Teams = 2

All Advancement = 4

Cost Assessment

No = 0 points

Yes = 2 points

N/A = 4 points

The maximum number of points possible is 32. In general, projects should be prioritized/ranked from highest score to lowest score.

To receive a score of 32, a project would qualify has 'High' for Donor Experience, Staff Experience, and Data and Technology Stewardship, have a low level of effort and low change management needs, be urgent, impact all of Advancement, and have no cost. A lower-ranking project would have 'Low' alignment with Strategic Objectives, high level of effort and change management needs, low urgency, impact only one individual, and requires funding but budget isn't available.

Strategic Outcomes Assessment for Kindsight Fundraising Intelligence

Alignment with Strategic Outcomes Assessment			
Questions	Low	Medium	High
Donor Experience - Does this help to drive lifelong engagement and increased philanthropy through meaningful connections that inspire investment at every level?	Anschutz; UCCS; Denver	System	
Staff Experience - Does this help deliver a seamless, user-focused experience for greater staff productivity, engagement and satisfaction?			Anschutz; System; UCCS; Denver
Data and Technology Stewardship? Does this help uphold ethical data stewardship and security, leveraging DevOps best practices to minimize technical debt, optimize resources and deliver sustainable, compliant technical solutions?		Anschutz	System; UCCS; Denver

Alignment with Strategic Outcomes Assessment			
Questions	Low	Medium	High
Donor Experience - Does this help to drive lifelong engagement and increased philanthropy through meaningful connections that inspire investment at every level?	0		
Staff Experience - Does this help deliver a seamless, user-focused experience for greater staff productivity, engagement and satisfaction?			4
Data and Technology Stewardship? Does this help uphold ethical data stewardship and security, leveraging DevOps best practices to minimize technical debt, optimize resources and deliver sustainable, compliant technical solutions?			4

Enhancements Planning and Prioritization With Governance

ADTC EC FY26 Top 10 lists ▾ Overview Project Health ▾

Main table Gantt Table ... Table Table Table +

New project ▾ 🔍 Search 👤 Person ⚙️ Filter ▾ ⬆️ Sort 🙋 Hide / 2 📁 Group by ...

▾ EC Top Priorities

☐	Project	Ranking	Status ⓘ	Needs Requirements?	Team
☐	Recurring Gifts - Gift Process Development - AG priority (A2, B5, D5, S2, C2)	🔊	New	Meeting Scheduled	CAAT
☐	Gift Agreement/Fund Setup Process enhancements (C1, S3, F)	🔊	New	On Hold	
☐	Mapping the Unique Backend Identifier - AG priority (S1, B4, C7)	🔊	New	Meeting Scheduled	Tech Arch
☐	GiveCampus <> Ascend Data Flows - AG priority (D2, S5, F)	🔊	New	Meeting Scheduled	CAAT
☐	Quick Links Optimizations (A8, D8)	🔊	New	Yes	CAAT
☐	Bulk Assignments updates (S4, B8)	🔊	New	Yes	
☐	DAFs and ability to report on DAFs	🔊	New		
☐	Finish Gift Management Integrations Improvements	🔊 2	New	Yes	CAAT
☐	Householding Logic to Pair Spouses that are not currently being matched	🔊 4	New	Yes	
☐	Indicator in Ascend for volunteers	🔊 6	New	Yes	
☐	Clean up split gifts - currently show various designations but only one depart...	🔊 7	New	Yes	CAAT
☐	Salutations Updates	🔊 9	New	Yes	CAAT
☐	Designation Purpose Coding Proposal (D4, F)	🔊	New		CAAT
☐	Being able to track contact updates from staff	🔊 7	New	Yes	
☐	Contact report request to auto-fill author based on user profile	🔊 4	New	Yes	
☐	Simplify process of adding spouse to a Contact Report	🔊 12	New	Yes	CAAT
☐	MAYBE SOLVED - Enhancing reporting on Referrals (Referrals Process/Cases)	🔊 3	Waiting customer		
☐	[NEW] Triggering Contact Report Entry upon Closing a Task (Anschutz)	🔊	New		

- The Service Delivery team works through various intake channels to synthesize enhancement requests
- The Executive Committee with representation from six advancement entities work together to prioritize a top list of enhancements to Ascend

CU Ascend SharePoint Site

[Log In](#)[Resources](#)[Tech Roadmap](#)[Upgrades](#)[Release Notes](#)[Bugs and Enhancements](#)[AI Hub](#)[FAQ](#)[Edit](#)



Welcome to the CU Ascend site.

Find access requirements, training resources, answers to common questions and more. If you have a question or need help, email advancement.help@cu.edu.

Understanding our technology ecosystem ...

Technology work is organized into three main groups: current and upcoming roadmap projects, enhancements and bugs.

Technology Roadmap

Find details on upcoming projects, platform upgrades and other milestones.

Enhancements

See a list of prioritized and completed enhancements.

Bugs

Learn about current bugs in CU Ascend.

What else is on the site?

Use the navigation bar above or the sections below to find what you need.

Learn how to get access

What you need to do to get access to CU Ascend.

[Access Requirements](#)

See training resources

Watch videos, read user guides and find other useful information.

[Training](#)

Learn about the technology roadmap

Discover what's on the roadmap, how it's managed and who plays a role in it.

[Technology Roadmap](#)

[Release Notes](#)[Bugs and Enhancements](#)[AI Hub](#)[FAQ](#)[Edit](#)

Technology Roadmap

The technology roadmap highlights upcoming projects, platform upgrades and other milestones. You can use the roadmap to track progress, understand timelines and stay informed about upcoming innovations in our technology landscape. [Learn more about the roadmap.](#)

Status key

Complete	In Progress	Paused (see notes)	Not Started	Feasibility Study	Pending (see notes)
Work has been completed.	Work has begun. Estimated start and end dates have been established.	Active work is on hold until dependent work is finished or more info has been gathered.	Technical work has not begun, or feasibility or discovery work has not begun.	Early discovery work to determine required effort and resources is taking place.	This work is pending EC discussion and prioritization.

Want to see a bigger view? [Click "See all" to open the list in a larger window.](#)

Technology Roadmap

Project	Description	Status	Priority	Est. Start Date	Est. End Date
Additional Duplicate Tool Exploration and implementation - Plauti	This project is to implement a product called Plauti, which is a Salesforce tool to find, clear and prevent duplicates in Ascend. The product will bridge the gap until Kinight develops deduplication functionality in the base Ascend platform. https://www.knight.com/solutions/salesforce/leads	Complete	Prioritized	Dec 2024	June 2025
Giving Integrations Reconfiguration	We're upgrading the mass upload spreadsheet used for entering gifts into Ascend. The goal is to streamline the process by running the spreadsheet through RTV2 and Intermis. This will allow consistent information to automatically populate based on the donor's name, eliminating the need to manually look up the donor ID for each entry.	Complete	Prioritized	3/3/2015	7/15/2025
BI Tools Execution - Tableau	The Advanced Analytics Community of Practice has recommended implementing Tableau as an additional business intelligence tool where a select group of users across CU Advancement and CU Foundation can create dashboards and other data visualization needs to support their specific strategies. Working on acquiring licenses.	In Progress	Prioritized	07/15/2025	

Salesforce Archive	Salesforce storage is costly, and we need to explore	In Progress	Prioritized	April 2025	December 2025
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CU Ascend Weekly Recap Emails



[How to log in](#) | [How to get help](#) | [Bugs and enhancements](#)
Need help? Email advancement_help@cu.edu.

CU Advancement and CU Foundation colleagues,

🔥 **One week left!** Complete your [Advancement Data Policy Overview training](#) by Sept. 30.

Here's a quick roundup of key updates from Sept. 16-23.

In this email:

- Duplicate records now being merged in CU Ascend
- Faster prompts in Advancement Intelligence reports
- CU Anschutz campus name change
- CU Ascend release notes from Sept. 3-16
- ADTC September meeting recap
- Production maintenance on Sunday

🔗 **Duplicate records now being merged in CU Ascend**

The Plauti deduplicate merge tool is now live, allowing Data Management to begin merging duplicate constituent and organization records in CU Ascend.

How will duplicates be merged?

There are about 1,800 duplicate pairs in the backlog. Pairs involving managed prospects and major donors (about 300) will be prioritized, with all others being queued for later work. Going forward, new merge requests with managed prospects or major donors will be resolved within approximately three weeks, while other requests will be added to the backlog. Data Management estimates being fully caught up by the end of the fiscal year (June 30).

Want to know more about how duplicate records are merged in CU Ascend? [Read](#)



[How to log in](#) | [How to get help](#) | [Bugs and enhancements](#)
Need help? Email advancement_help@cu.edu.

CU Advancement and CU Foundation colleagues,

Here's a quick roundup of key updates from Aug. 12-19.

In this email:

- A closer look at the FY26 technology roadmap
- FY25 roadmap results: how we got here
- How to stay connected

🔗 **A closer look at the FY26 technology roadmap**

We were excited to officially unveil the FY26 [technology roadmap](#) last week at our All Hands Retreat. For those who missed All Hands or want more details about what's to come, here's a look at the next steps in our multi-year approach to CU's Advancement technology systems and data strategy. These projects build on our momentum to make our tools faster, smarter and more connected.

Marketing Cloud implementation

We're integrating Salesforce Marketing Cloud directly with CU Ascend. This will allow Advancement teams to utilize donor data directly from CU Ascend when building email campaigns and see a variety of email campaign-related data in CU Ascend and other reporting tools. This will also help remove system silos and enable more effective, insight-driven communication.

Tableau server launch

We're expanding self-service analytics with a Tableau server site for the Advanced Analytics Community of Practice. This will put more advanced tools into the hands of power users and leaders, enabling them to build and share more sophisticated insights that support fundraising strategy and decision-making.

Expedited gift processing v2 (xGPv2)

We're upgrading our gift entry platform to be faster, more reliable and easier to use. This second-generation solution will reduce manual effort, resolve long-standing technical debt and improve the experience for gift administration teams systemwide.

Q&A

Thank
you.

Session Title

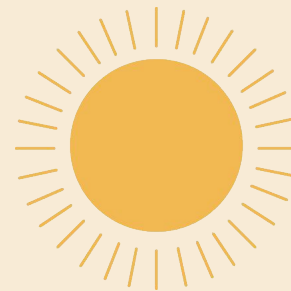
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Welcome



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Agenda

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Item	02	Item	07
Item	03	Item	08
Item	04	Item	09
Item	05	Item	10

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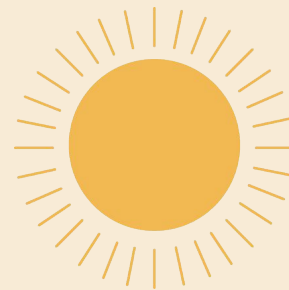
- Item one
- Item two

Subhead

- Item one
- Item two

Three Column Cards

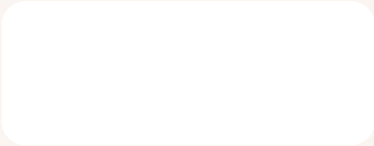




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> 68 pt font is fine for stats

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LOCATION

Text here

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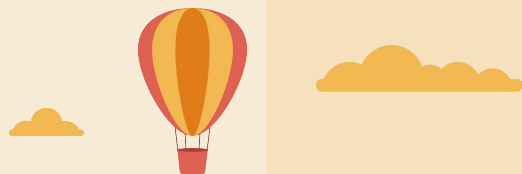


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