

Are You Ready for Agentic AI?

A Human First Readiness Check for Nonprofits

Presented by: Matt Connell, Instructor and Design Specialist, Principal — Blackbaud University

Hosted by: Ray Borkman, Blackbaud

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About this transcript

- The wording is the speakers' own. Nothing has been rewritten, condensed, or restyled.
- Sentence punctuation, paragraph breaks, speaker labels, and section headings were added for readability; the automatic captioning supplied none of these.
- Filler sounds ("uh," "um") and immediate repeated false starts were dropped. Everything else the speakers said is here.
- Proper names and product names were corrected against what appears on the slides: Raiser's Edge NXT, Cortney Moore, Hallie Guiseppe, and the questioners' names as shown on their question cards.
- One partner company name, heard as "Redarc," could not be verified and is left as transcribed.
- Speaker attribution in the closing exchange about comedians and book clubs is inferred from context.
- Timestamps in the image captions refer to the recording.

Opening



Title slide — Matt Connell, Instructor and Design Specialist, Principal, Blackbaud University (0:46)

Matt Connell: Alright. Thank you so much, Ray. Really appreciate you setting this all up, and appreciate everyone joining this webinar and this discussion, so that we can dig into some ideas as to how your organizations can better prepare for agentic AI in your operations.

I'm Matt Connell. I'm an instructor and design specialist, or instructional designer, for Blackbaud University. What that means is that every day I get to speak with nonprofit professionals — probably like the majority of the folks on this discussion — about how you can better use Blackbaud tools to move your best practices and your organization's work forward. And that means that I get the privilege of every day talking with nonprofit professionals about your concerns, about what you're curious about, about where you need to establish better connections and advance your knowledge. So it's my privilege today to get to speak with you all about how you can better prepare for agentic AI in your mission-driven work.

And it's also important to note that I do come to this profession, to this career with Blackbaud, as being a previous fundraiser myself. I was a fundraiser. I was a database administrator. I was a product researcher. And those are all areas where agentic AI, especially inside of a nonprofit operations or a fundraising operations, can really shine and can really find some value for organizations.

So I wanna make sure that you have an opportunity here in this conversation to ask questions. If any come through that I wanna speak to as we're going forward, I'll make sure to call you out. I love curious groups when we are together. I love the ideas that come forward, so I'm curious for your insights as well. But when it comes to our time here, I am hoping that I can give you some tips, some pointers, on how you can better approach, better make change toward an agentic AI being part of your work.

Agenda



Agenda: 1. Understanding Agentic AI 2. Preparedness Checklist 3. Getting Started (2:18)

So in our time here today, it is my focus to help you understand what agentic AI is. When it comes to agentic AI, I'm gonna speak to the broader technology class in general, but I'm also gonna focus a little bit on some of the Blackbaud tools, like the development agent, that are gonna be available to you and may also be already in operations with some of your work.

But then I'm gonna help you get prepared for agentic AI becoming part of your team, becoming part of your work. And that means understanding how your people and your team need to change and grow and learn, what kind of preparations you need to lay down for any kind of data issues that you might happen to have. And, of course, with anything — any kind of change, any kind of new tools being involved — we need to make sure that we have good policies and procedures ready to guide us, to guard our work, and to make sure that we can move forward successfully, smoothly.

What Agentic AI Is



What is Agentic AI? Agents have "Agency" · Guidelines are set · Guardrails are Obeyed (3:31)

So with that said, I wanna focus on what agentic AI is as a concept, as a broader technology class. There are a lot of different versions of, or classes of, AI or artificial intelligence. But the idea with agentic technologies is that these agents have agency. They are able to independently take action based off of a job or set of tasks that they have been given. It is their role. It is their part in this broad space of AI technology, to help take on some of the work that we as humans do and to help us delegate out different tasks.

And with this agency, they can go and do with it. They can go and make sure that they are sending out those different communications, that they are watching over your data and seeing different trends to help you identify areas of curiosity, because that is their role. That is what they are an agent of.

But to do this work, we also need to have good guidelines and guardrails in place for any of these agents, so that we can make sure that the work that they are doing is what we want them to do — so that they're not stepping on any kind of toes, or putting things out of place that we don't wish them to. So with any good agentic agent, there are rules. There are job descriptions. There are guidelines and focuses and ways that you can tell that agent your voice and your needs.

So with Blackbaud's development agent, and some other Blackbaud agents that were just announced yesterday, which I'll speak to a little bit more as we dig in, there are configuration steps where you need to guide this tool to where it is meant to focus, what it is meant to do. And there are ways that you can oversee the actions that it's taking.

What Agentic AI Is Not



What it is not... "Generative" · Fully Independent · Human (or Pretending to be) · Replacing us (5:58)

I also wanna focus on what agentic AI is not. It's not a chatbot. It's not a generative AI tool where you are asking it a question or posing some sort of prompt and it's responding to you. It is taking action based off of the guidelines that you have set for it, based off of the role that it is trained to do, and it is doing so with some level of independence.

And I wanna emphasize that as well: that these tools are not fully independent. With the development agent, there are going to be areas in the system where it will prompt users to review its work, to make sure that this is the right kind of content or the right kind of copy. Or, if it notices that there is something that needs to be addressed or fixed, that it will hold off on that task. It will not just barrel ahead without human oversight, without human coordination and cooperation.

And speaking of that human cooperation: it's not human. It is a technology. It is artificial, as far as its intelligence is concerned. Now, certainly, we as humans do fall into the trap sometimes of personifying

things, tools, and giving them characteristics. But the agents should never pretend to be a full person. Now, with the Blackbaud development agent, you can give it a name — and you should, because it does help with relatability — but it's not going to start pretending to take on human behaviors outside of its specific role.

And because of that, agentic AI is not replacing us. We as humans, with our agency and our abilities and our uniqueness, bring lots of things to the table, lots of capacity to our organizations, that technology of any kind, tools of any kind, cannot. We are the tool makers. We are the curious and creative entities in all of this. So we remain in the lead.

How Agents Can Help



How Agents can Help: Email and SMS Outreach · Donor Identification · Consistent Follow-ups (8:49)

But that said, with this agency, with this level of independence, agents can help your organization, especially with the need for scalability in different areas. With the development agent especially, we have the ability to interact with and reach out to different levels of donors, so that we can have ongoing communication, so that we can take initiative with that communication. The agent can help to identify and prioritize different donors and isolate different trends of donorship. And it can help you make sure to take on the follow-ups and the outreach and the meeting making and the phone calls that you need to do, while making sure to just keep that conversation going, keep that flow moving forward.

That's just the development agent. I will say that I am not here to sell you anything. I am not a salesperson. I am an educator. But I just learned some cool stuff yesterday about Blackbaud and our different agents, and there are four new ones that just got announced. Really fun that that got announced the day before my presentation here, without any time for me to build any slides for y'all about it.

But when it comes to those agents, there is now a data health agent. So if you are struggling with duplicate records or consistency in your contact information, there's an agent that can help you with that. If you are working in admissions, there is now an admissions agent that can help to personalize the admissions journey for the different families that are going through it. There's a digital marketing agent that's gonna help you plan out your campaigns, that'll help you segment your audiences better, that'll help you build and customize content, and help you interact across different channels.

And there's an accounts payable agent. And I never had anything to do with accounts payable in my career, but it does sound like something pretty cool, to help you process your different payments as they're coming in and to help improve your different efficiencies in that area. So for those folks on the finance end, there's agents for you there too. So there's a lot of ways that these agents can help you in your organization with your mission, to move that forward.

What Agents Can't Do



What Agents Can't do: Meet Face to Face · Coordinate Multi-Channel Campaigns · Understand Deep Nuance · Correct Inaccuracies (11:42)

So these agents have the agency to help you build scale. But, like I said, they're not replacing us. We are still people who need to meet with people, who need to talk to people. We need to share the heart of what our mission really is, and to be able to understand the motivations behind our donors from that understanding of human empathy and connection.

We are also gonna need to make sure that all these different agents, as well as our teammates, all work together, and that we're coordinating from the human in-person space with our text messages, with our email campaigns, so that all of those different points of contact, all of that different work that's involved, can come together.

The agents also aren't going to fix inaccuracies in your data. What you feed them, it has to work with. So if you have misspellings, if you have the wrong fields chosen, if you have data that is inconsistent or inaccurate or just unclear, the agent's not able to fix that for you. Now, with the data health agent, that does have tools that can help to identify those different areas and some of those pain points. But your data still needs to be ready for any of this to work, for any of this to be as helpful as it can be.

Pillars to Prepare, and the First Poll



Pillars to Prepare: Team · Data · Policies (13:40)

And that brings me really to our next portion of our discussion, where we can prepare, where your organizations might wanna focus that work and really dig in.

So I wanna go ahead and start this area of our conversation by launching a poll. You may have seen a polls tab just open up in the top right section, along with the documents, along with the Q and A there for you. I'd love to see your responses. I see them already coming through there, and get us thinking about where your organizations might need to get ready for these agents to really do their thing for you.



Poll 1: "Where does your organization need the most preparation to be ready for Agentic AI?" Our People will need the most help — 34.74%; It's our data that needs work — 30.53%; We need clearer policy guidelines — 34.74% (14:49)

So, seeing some votes coming in already for people needing the most help, some votes coming in for data needing that work. We're about a three-way tie, near about. We're just about neck and neck here. And I'm seeing a clearer policy guidelines coming in just a touch in the lead there.

So I really feel, when it comes to these different areas, that the pillars that we are preparing all need focus from this group.

Preparing Your People



Building Trust and Managing Change: Transparency · Clarity · Consistency · Feedback · Accountability (15:18)

And thinking of those different areas for preparation — our team, our data, our policies — I wanna give you some things to think about, some focus areas to consider.

Starting off with our people: we need to have them involved in and trusting this process of change and growth. Over time, new technology, new tools are going to be debuted. Over time, your organization is going to experiment with all sorts of different changes and updates. Some of them technology-based, some of them entirely out of that space. But for any change, any new update or addition, to really go forward, to really work right, we need to make sure that everyone's on board in the right way.

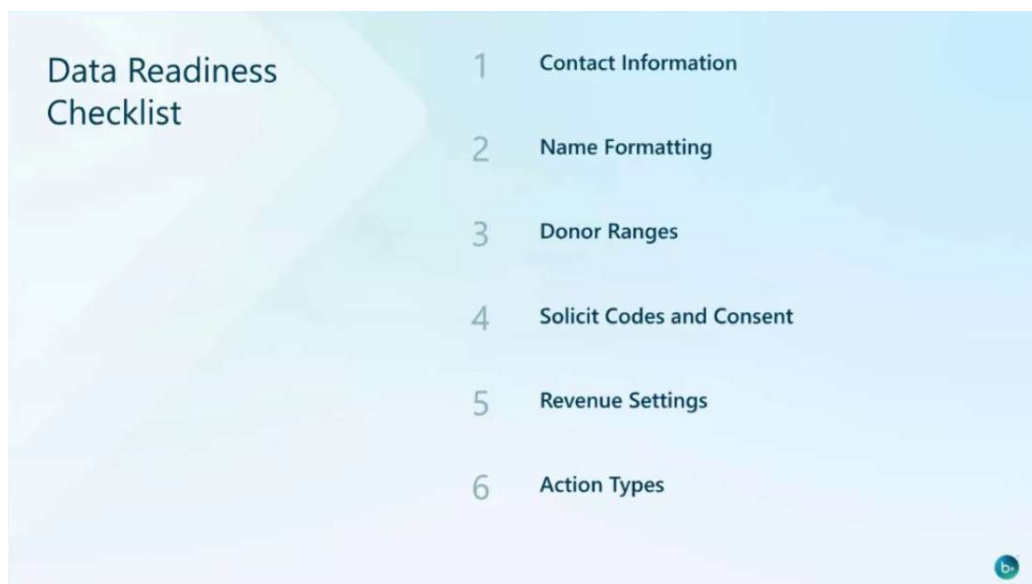
So we need to start this discussion, this conversation about what's changing, early. We need to make sure that the people who are going to be touched by this change, even tertiarily, know that the change is on its way. We want to make sure that they know when things are changing, what is changing, who is involved in the change, and how we are going to be approaching and measuring this change and its effectiveness. And we need to make sure that the answers to all those questions are approachable and clear, and that people can look back to them, and that we can cite that information.

We also need to make sure that we are staying on track with this: that we have appropriate milestones and timelines for this change, that we are making sure that our communication remains consistent and clear, and that we don't just let this project drop like some experiment that we're no longer working with — it's someone else's problem now.

But the first thing that I mentioned about this discussion about change was that word, discussion. It needs to be a conversation that people, that your teammates, can give you their thoughts and feedback through. People need to be able to ask questions. People need to be able to seek that clarity. And people need to be able to tell you how they feel about things. So when it comes to the embracing of any change, we can make sure where we're standing with our team, with our group, and with the progress.

And we need to take accountability for all that. There needs to be a point of contact for this discussion. There needs to be a named leader for whatever committee or group is leading the charge. There needs to be a consistent person, over the course of the use of this agent, that is going to be connected with this move.

Preparing Your Data



Data Readiness Checklist: 1. Contact Information 2. Name Formatting 3. Donor Ranges 4. Solicit Codes and Consent 5. Revenue Settings 6. Action Types (18:43)

But the people aren't the only thing that needs to change. The people aren't the only thing that needs to be ready. For our agent to work, it needs good data.

So when it comes to preparing our data for any agent's use, especially the development agent — using organizations — you need to have that contact information looking right. If we are going to have this agent sending out emails, making text messages, those contact points need to be accurate. And we also need to understand any kind of communication preferences, to the best of our ability, as well. Just because we have the capacity to communicate in a certain way does not mean that we should.

And when it comes to our outreach, people like to be communicated with in a certain way. So when it comes to the communications and the rollout of that discussion: name people, and call people by their names. There are all sorts of different mailers from all sorts of different nonprofits in my house right now. I'm on a bunch of different mailing lists where I am referred to by different variations of my name, different variations of my spouse's name, sometimes combinations of the both of us. But when it comes to our outreach to our different constituents, we wanna make sure that we are calling them by their name appropriately across all channels.

With the development agent, one of its key focuses is mid-level donors. So we need to have our donor ranges and define what a mid-level donor is inside of our database. I've worked at a bunch of different organizations, and what a mid-level donor meant to those different organizations, what a major donor was at those different organizations, was always different. It was different dollar amounts, or different ways that those dollars came across. So we need to make sure that that system, that that tool, understands the guidelines, the boundaries.

Same thing goes for our solicit codes and the boundaries there. If people should not be reached out to, if there are certain ways that people should not be communicated with, or certain topics that they should not be communicated with about, that needs to be clear. We need to make sure that those details are appropriately encoded and that those guidelines are effectively set.

And thinking back to our donor ranges: we need to understand where that revenue is being reported on from, what kind of gifts are involved in the processing and the analysis that the agent is performing. Maybe your organization has a lot of gifts coming your way from stock. That would need to be a consideration as to how you rate or consider what a mid-range donor is. Same idea goes for gifts in kind. Don't even get me started on the different gifts in kind and policies around gifts in kind that I've encountered at organizations I've worked with. If that's an important part of your operations, we need to make sure that those ideas are clearly set, that that framework is in place.

And when it comes to your agent, the development agent, it is going to be taking action. That is its job. It is going to be reaching out to your donors. So we need to define what kind of outreach it is supposed to be doing, and what that outreach is meant to be for. You might really need a lot of assistance in your stewardship operations, and you might need that donor agent — development agent, rather — to help you out with your stewardship and with your donor follow-up. But you might be focused instead on those initial donor connections being solidified right from the start, and it's cultivation action that you're taking instead.

So when it comes to preparing for these different agents being a part of your organization's operations and of your data work, there's a number of steps, a number of areas, that you need to make sure you are clear on right from the start.

Preparing Your Policies



Key Policy Considerations: Agent Guardrails · Special Cases · AI Onboarding · Human Accountability · Review Schedule (23:45)

When it comes to our preparations, with our data ready and with our people ready, we still need policies to hold it all together. Those agents need guardrails that are firmly set, that they'll stay inside of. With the Blackbaud agents, that is part of the configuration process before these agents even start to run. And with the Blackbaud development agent, it is trained on a very specific set of tasks. So for the Blackbaud agent, at least, those guardrails are firmly in place in most areas.

But you still need to consider those special cases. I could tell you all sorts of different stories of special donor needs, where this specific donor had this specific preference, and that specific preference was something that only a person might know and that only a person could approach. But we might also just have special cases where we need to make sure that those guardrails include them, that those people are appropriately directed and handled where they should be.

That's part of the onboarding of the AI agent. We need to practice and train this — we need to train this agent to learn its role better and give it steps to grow through. And Hannah had asked a question earlier about consistent use of the agent being a part of that training, and it is. We need to work with these agents to teach them where they need to go. We need to push them and give them opportunities to dig deeper when appropriate.

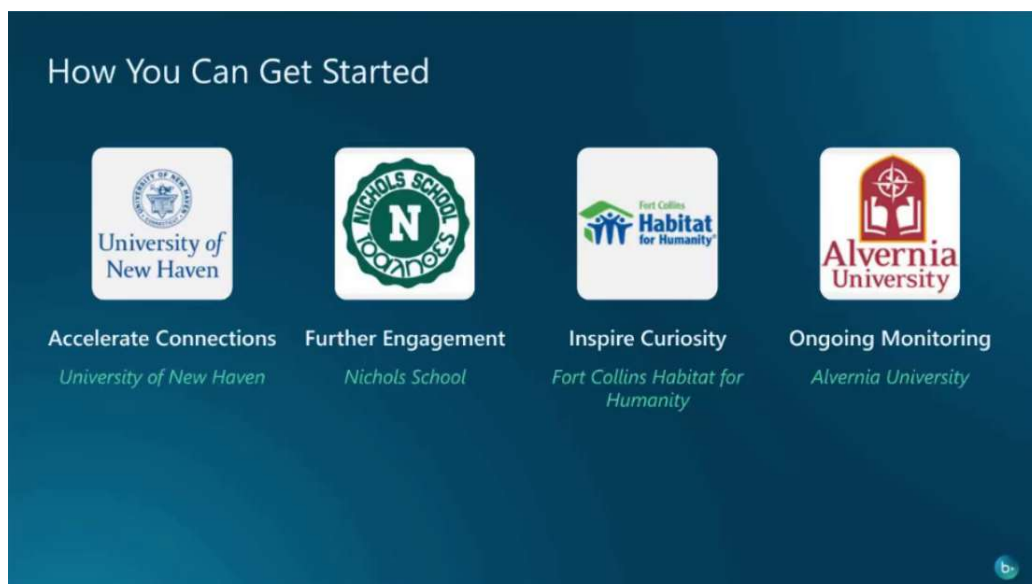
So that also brings up the idea of that consistency in training, that regularity in review and work with the agent. The agent in Raiser's Edge, or the development agent in Raiser's Edge, has a workspace of its own. It has a special portal of its own. So we need to decide: are we going there every week, every day? How frequently do we need to check in? And when we're thinking about our frequency of check-in, do we need to consider different areas of check-in and of review?

I'm seeing from Steven there in the Q and A: they're getting a lot of surveys from charities they support all of a sudden. Is that because they're building their readiness for AI and fixing their records? It might

be, Steven. Certainly, I wouldn't be surprised if some of those organizations are using agents as a part of that work. I will also note that AFP recently had a couple of good conversations, articles, about the importance of donor surveys and why you should build donor surveys. So it might just be that some development operations people got the bug out there. But it's probably a mix of technology and training and timing, all coming in. Summer is also a time when I feel a lot of organizations are doing more friend raising and outreach in a sort of general, broader scope.

But I could talk about donor surveys all day, and I really appreciate the questions that are coming through, and I appreciate getting a chance to loop back to Hannah's. I was waiting for this slide to talk to you, Hannah, about that. But when it comes to our preparations — for policy, for people, and for our data — I am hoping that some of those ideas gave you some things to think about, some areas to focus in on, and maybe some tasks that might be part of future agents' assignments.

How You Can Get Started



How You Can Get Started: Accelerate Connections (University of New Haven) · Further Engagement (Nichols School) · Inspire Curiosity (Fort Collins Habitat for Humanity) · Ongoing Monitoring (Alvernia University) (28:27)

But that brings me to my final portion of my tips for you here today, my ideas for you to think through, and that's to get you started working with these agents, if it's appropriate for your team. We wanna make sure you are appropriately prepared to bring those agents on.

And I will note, before I dig into these "how you can get started" areas, that some of those documents in the doc section up toward the top right are great resources to think more and to learn more, preparing for your organization using and incorporating development agents, or just agents in general.

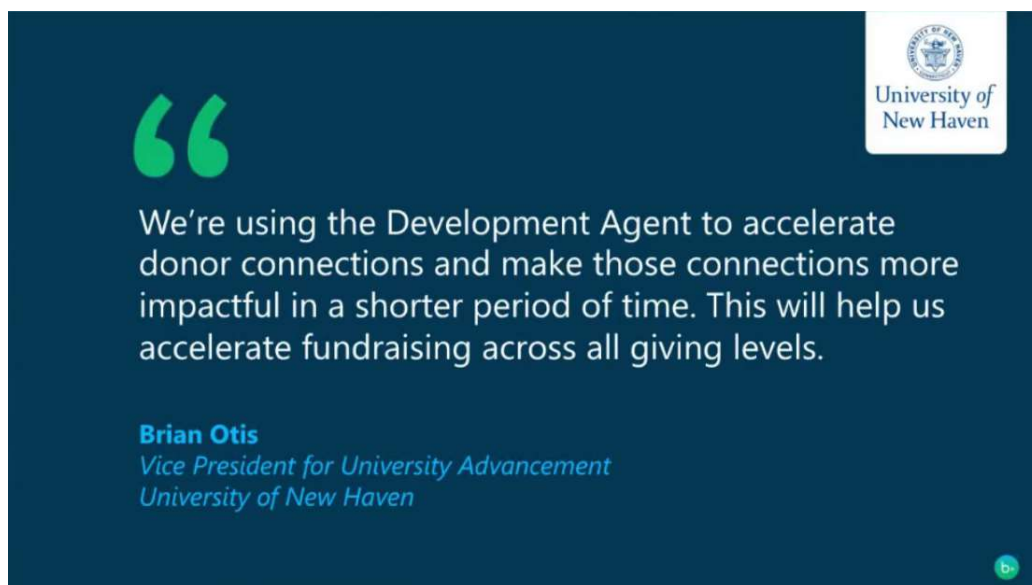
Inside of that document section, "Preparing AI Agents for Mission-Driven Work" is a piece that I helped to collaborate on, and I would love to see that be read and circulated by more folks. I think there's a lot

of great tips in there to prepare and to get ready. Same idea goes for the document “Seven Tips for Smooth AI Agent Onboarding.” I wasn’t involved in the writing of that, but definitely a lot of great tips and ideas to help you build that training, like Hannah mentioned, into your work, and to consider where in your data you need to focus. And that also goes for “Bridging the AI Effectiveness Gap.” If your data’s not effective, if your policy’s not effective, AI won’t be effective either. So definitely check that document out and learn more. We’d love to hear what other ideas that you have about, well, all these tools.

Thinking about all of those preparation steps: part of Blackbaud’s preparation for any kind of tool being used is to have some different clients give it a try, and to make sure that we’re heading in the right direction with things, but also to get some ideas on how other clients and how other organizations can utilize these tools.

So from University of New Haven, we have some ideas on how you can accelerate connections. From the Nichols School, how you can further engagement. Fort Collins Habitat for Humanity have some ideas on how we can inspire your curiosity about your donors. And Alvernia University is gonna help us to monitor that agent, monitor our data, in an ongoing fashion. And I wanna thank those organizations for providing these stories, and, of course, helping Blackbaud develop all these different tools.

Customer Stories



Brian Otis, Vice President for University Advancement, University of New Haven (31:00)

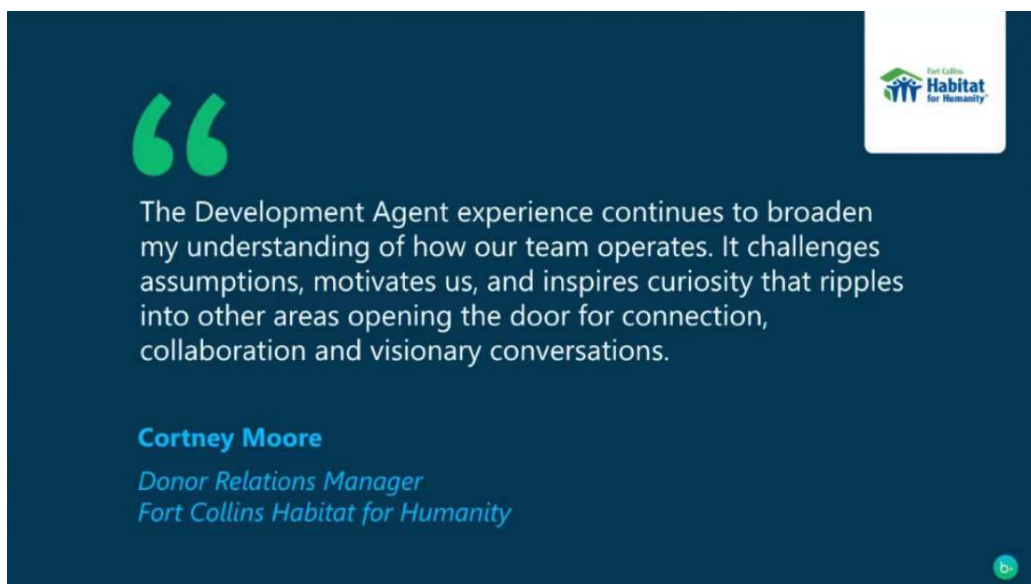
But Brian Otis, vice president for University of Advancement at University of New Haven, said that they’re using the development agent to accelerate donor connections and make those connections more impactful in a shorter period of time. This will help us accelerate fundraising across all giving levels. And I love that “shorter period of time” and “all giving levels” aspect of that idea. Your

organizations might have countless folks in your donor lists, in your house files, and you are trying to build meaningful and real connections with all those folks. You only have a certain amount of time on your hands. Your team only has a certain amount of capacity, and there's only so many donors that you can get in touch with and even identify.



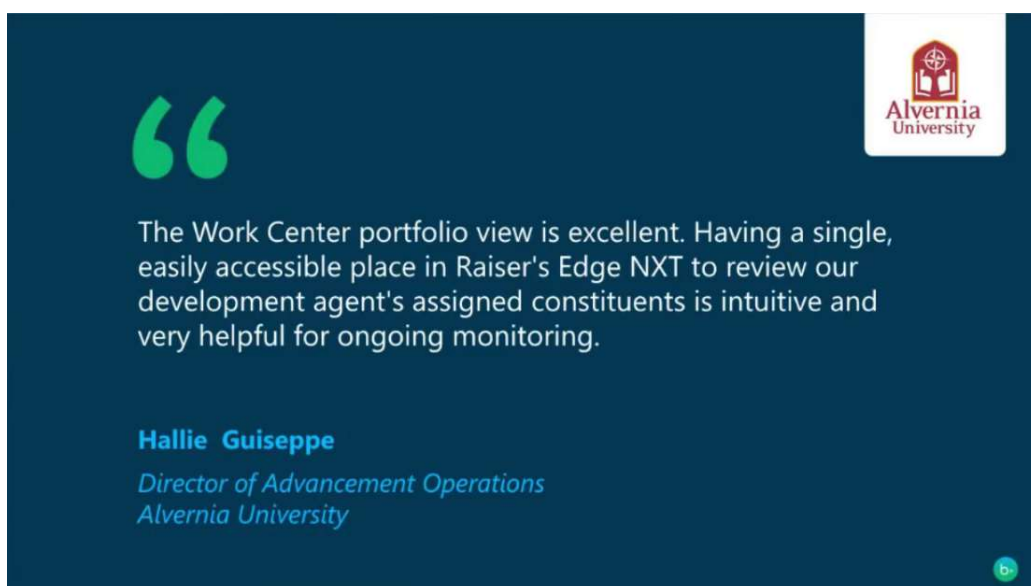
Austin Farber, Director of Advancement, Nichols School (32:02)

From Austin Farber of the Nichols School, director of advancement there: they said that when they heard about the development agent, it looked exactly what they needed. They're excited about the impact it'll have on our constituency base for further engagement, cultivation, stewardship, and solicitations. And I love that this agent is involved in every step of that donor life cycle, every step of our moves management operations. It has the ability to make sure to scale all of those different areas, all those different tools. So I'm loving getting to see that being used in those different diverse ways.



Cortney Moore, Donor Relations Manager, Fort Collins Habitat for Humanity (32:42)

From Fort Collins Habitat for Humanity, we’ve got Cortney Moore, donor relations manager there, saying, “The development agent experience continues to broaden my understanding of how our team operates. It challenges assumptions, motivates us, and inspires curiosity that ripples into other areas, opening the door for connection, collaboration, and visionary conversations.” I’ll just say, from my own part, experimenting and playing around with different development agents so far — just being able to look into the different alert areas, look into the different lists that are being set aside for human review — there are all sorts of different ways that my knowledge of my donor base is being advanced, and that curiosity could be inspired for my prospect research.

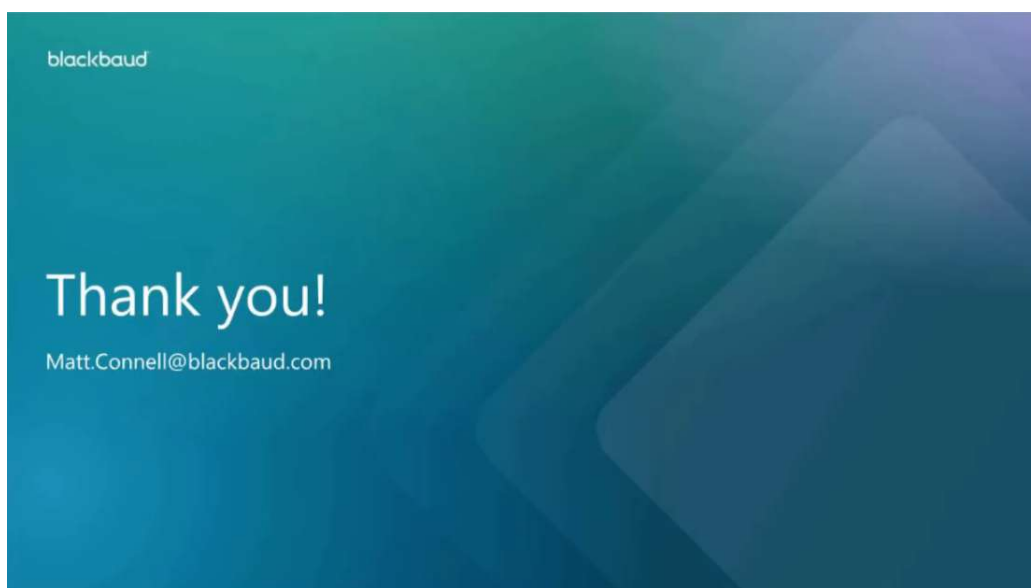


Hallie Guiseppe, Director of Advancement Operations, Alvernia University (33:35)

Last quote for you here, from Alvernia University's Hallie Guiseppe, director of advancement operations: "The work center portfolio view is excellent. Having a single, easily accessible place in Raiser's Edge NXT to review our development agent's assigned constituents is intuitive and very helpful for ongoing monitoring."

And that speaks to a touch, Aurora, you mentioned there, of the role of the agent in workflows. With the agent work center, with workflows in action, you're gonna be able to see how those are coordinating, so to speak, overlapping, so to speak, to review that. But I would say, as far as workflows specifically and the agent specifically, Aurora — and I love your question from earlier there — that they are two separate processes, two separate tools, but they can be working concurrently. And, as part of your data cleanup, those workflows would be a really key area to consider.

Question and Answer



Closing slide, displayed through the Q and A session (35:00)

But I really appreciate the questions that came through that I got to see. I realized that I did not get to see all of those questions. But I'm looking forward to digging into other areas that folks might be curious about, and opening up the floor. And, Ray, I see you're back with me right on time. There you go.

Ray Borkman: I'm just gonna spin some of these up that I kinda bird-dogged for you onto the screen, so you can see them and they can read them and you can do your best to attack them. And, by the way, y'all, this is happening in real time. Matt has not seen the questions, nor has he been provided the answers ahead of time, so he's gonna do his best here. But here's our first one here, from Steven. I just thought this was — I'm not sure you can answer this explicitly, but I think it brings up an interesting point.



Steven Meyers

all of a sudden, i'm getting surveys from lots of charities i support. is that because they are building their readiness for AI and fixing their records?

Question from Steven Meyers (35:24)

Matt Connell: So, yes, Steven — I got to, I saw Steven's question while I was digging in, and I spoke to that earlier, about all of a sudden they're getting a lot of surveys from charities that they support. And that might be the case, that agents are involved in that work. Organizations are putting agents to work, and that donor outreach, that kind of communication, is a big part of that.

But what I also mentioned when I was answering Steven earlier is that, at least from my own experience in the nonprofit world, there's been a good bit of survey discussion in fundraising, in philanthropy. There have been a couple of different articles that AFP just put out. There was a discussion on it in a couple of different areas that I saw. It's also getting easier and easier to produce these surveys as well. Just as it's getting easier to have AI in part of your work, it's easier to just build email forms and to build surveys in general. So there's probably a lot of reasons that are overlapping as to why you're getting a lot of surveys right now. But readiness for AI, and fixing those records, is probably a part of that.

But, yeah, that's a great question. I love that question. There are a lot of great questions that I saw coming through.



Aurora Milas

What, if any is the agent's role in Workflows?

Question from Aurora Milas (36:57)

Yes, and Aurora's note there — I saw that coming through as well, as far as the agent's role in workflows. So workflows and the agent are two separate processes. They're two separate tools. But we are able, with the agent, to review its portfolio, to review the actions that it's taking. We're also able to review the actions that are generated based off of those different workflows as well. So they can both do similar things, in that they can send out emails to your constituents and that they can take that action with a certain level of independence. Workflows are scheduled or triggered by various different giving reasons, giving thresholds. The agent has agency. It's doing its own thing, with human oversight. I think that that spoke to that there.

Ray Borkman: Yeah. Alright. Good. I'm gonna pull one up. I said I wasn't gonna answer any development agent questions, but I'm gonna do this, Annie, because this is the second version of this question. I think Lauren answered it previously.

That's not exactly what the development agent — our development agent — is optimized for. So, just to kinda give you the big strokes: we have a sort of, let's call it a pillar, that we call "agents for good" at Blackbaud. Alright? And under that will be many agents that are coming through. Matt mentioned a handful of them that we announced more of this week. The first one is the development agent, and that agent's specific role is to nurture that mid-tier, and grow that mid-tier, and communicate with that mid-tier donor base, to make sure that your fundraisers — sorry, I'm mixing my words here — are spending their time with things that are a little more active, but you're not ignoring maybe any of those passive conversations.

So the gift acknowledgment process is not something that exists in the development agent, because that's not what the development agent is designed to do. I can't speak to whether or not the gift acknowledgment piece will be a part of a future agent's responsibility. I do know that if you go to the partner section, Blackbaud — we partner with a company called Redarc, who has some even free tools that they offer for AI that is available in Raiser's Edge NXT. So you may look, or click into that Redarc area of the partner section of our website, and see if that's something that they can do. I'm just being honest about not having a full grasp of whether or not that's one of them, but I didn't wanna not give you an answer. And, Matt, I don't know if you have any additional color to that or not, but I sort of put that one up there for me to answer.

Matt Connell: No, I understood, and I appreciate you taking that. But as far as the development — and you were right on top with the development agent and acknowledgments — there is the AI acknowledgments function inside of Raiser's Edge NXT, but, like workflows, that's a separate tool.

Ray Borkman: Alright. And this is an interesting one as well, from Colette: "Comment on the OpenAI news story on agents going outside of the secured environment. I would like to hear more on your perspective."



Colette M. Black

Can you comment on the OpenAI news story on agents going outside of the secured environment (overseas article). I would like to hear your perspective.

Question from Colette M. Black (40:20)

Matt Connell: So I will say that escapability, I think, is the term that refers to agents going rogue and breaking outside of their environment. That is something that — guardrails against escapability are something that were discussed and put into place before any kind of development on any of these agents at Blackbaud began. So that is very much front of mind as far as the production of the Blackbaud agents.

As far as my broader perspective on AI agents going rogue: I would love to dig into some speculative fiction titles that I would gladly have a book club about, but this is not the place for that. But as far as the development agent, I know that those concerns are front of mind. If — or Lauren, perhaps, can

speak to that more thoroughly than I can — that’s something I’d be happy to hear your perspective on also.

Ray Borkman: I don’t know if Lauren’s available to jump in, so I’m gonna grab this question really quickly, while she’s figuring that out. Susana — and I’ll just, I wanted to answer this one out for the group, because I figured there may be other people who are interested in this.



Susana Piscitiello

Are these cases included in any of the docs? Would love to read more about how they have implemented!

Question from Susana Piscitiello (41:53)

As I mentioned at the beginning, you’re gonna get an email about twenty-four hours from now with a link to the on-demand recording. The documents will be there as well, but there’s also an opportunity to respond back to someone in that email. And the person that it indicates there — like, it says something like, “for more information” — if you wouldn’t mind sending that to them and asking them for that additional information? Because I happen to know that they have some curated information that they can send to you. They will fill that out, and that applies to anyone else on the call as well.

Let’s see here. Boy, Megan’s got a question here that is pretty in the weeds, Matt, and it may be one of these. I’m gonna put it up here, and it may be something that we have to take offline and get with her separately. So that’s fine. I’m just gonna throw it up, because I know — I don’t know that I can answer this question, and I honestly don’t know if you can either.



Megan Ollivier

I might have missed this. What redaction layer is Blackbaud running? And will there be MCP support?

Question from Megan Ollivier (43:10)

Matt Connell: I do not. I do not know that information.

Ray Borkman: Yep. Megan, I will save this question. I will get someone internally, and we will shoot you an email with an answer to this.

Matt, I think you mentioned these, so I’m gonna spin this one up to see if you can, Matt, if you can — did you grab some book titles?



Rebecca Petropoulos
Share the book titles in chat!

Comment from Rebecca Petropoulos (43:21)

Matt Connell: I'm sorry. So I mentioned that, as far as my perspective on AI agents going rogue, I mentioned that I'd be happy to start a book club about speculative fiction, to go down that path.

Ray Borkman: I see.

Matt Connell: Oh, that's definitely happened. But, yeah, now is not the time for—

Ray Borkman: This is why — this is why marketers, I don't make — this is why we don't make good comedians, because we miss the joke when it gets made.

Matt Connell: That's beautiful. That's funny.

Ray Borkman: Yeah. What's the person who dresses up like a meta professor in front of a camera and get them talking about my perspectives on?

So, Megan, I'm leaving your question unanswered intentionally, so that I remember to — so that it pops up for me to get back to you.



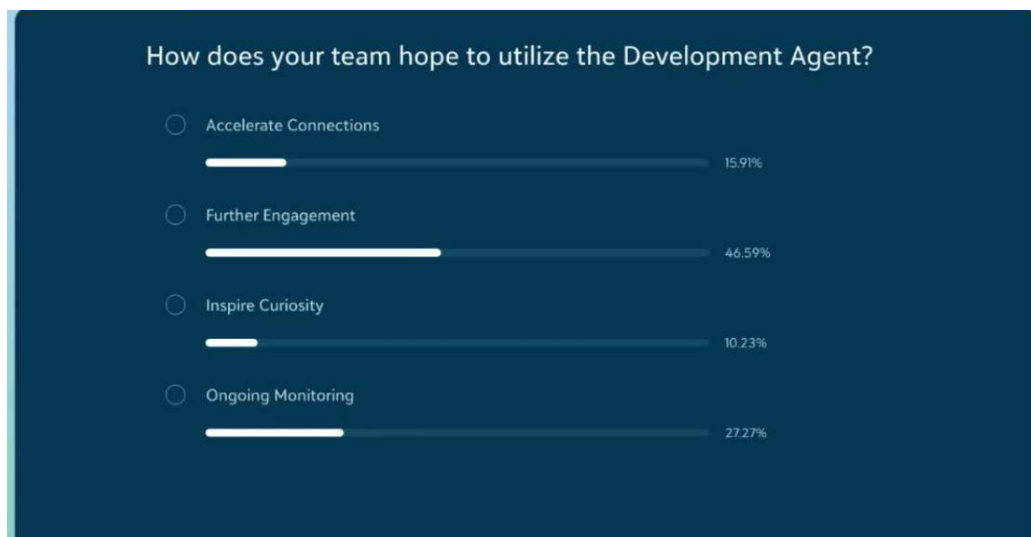
Daniel Melia
Will a recording of this seminar be distributed?

Question from Daniel Melia (44:23)

And, Danielle — Daniel, sorry — yes, you'll receive an email in about twenty-four hours with an on-demand recording of the full session today, including the Q and A. And then afterwards, you'll always be able to find it on the events hub at blackbaud.com. So if you go to blackbaud.com, there's a little drop-down menu, one of them is events, and you'll be able to see the recording of it there as well. But you'll get the copies tomorrow in an email.

Matt Connell: I will mention that I also just launched our final poll. We have about ten minutes left to us. But I'd love to hear what folks are excited about using the development agent for, if you are planning on going down that road — if you're gonna be using it to deepen your engagement, to inspire curiosity about your donors. I love that poll from earlier and folks getting involved there. So I felt like this would be a good note to end out on. But if there are any other questions from folks that didn't get answered —

those are some great questions. Really appreciate getting to speak to this group, and getting to answer some of those questions that came through.



Poll 2: “How does your team hope to utilize the Development Agent?” Accelerate Connections — 15.91%; Further Engagement — 46.59%; Inspire Curiosity — 10.23%; Ongoing Monitoring — 27.27% (46:12)

Closing

Ray Borkman: And I think Lauren is answering Andre’s question in there, and I don’t have any others that are more about the presentation coming in. So I’m gonna slowly start to guide us towards the conclusion. That way, if any of you are frantically typing any last-minute questions for Matt specifically, I’ll give — I’m giving you, I’m buying you some time by being intentionally slow as we go along here.

But I do wanna say thank you for attending today. If you are frantically typing the question and I happen to wrap this up before you get it typed in, don’t fear. Don’t stop typing now, because I will see those questions still for the next ten minutes. So we’re happy to respond to you via email if we don’t get to it here.

Matt, I wanna say thank you to you for taking your time to put this together. I know, between helping to author content and put together today’s presentation, you put in a lot of work to help, and I appreciate it. And I know that everyone else does as well, because, you know, we’re approaching this new world that we’re all living in, and having good guidance, and smart people say smart things about these topics, is incredibly important in our space right now.

Matt Connell: Oh, it’s a pleasure.

Ray Borkman: Wanna say, Matt, to wrap us up?

Matt Connell: Just that it was my pleasure, my privilege, to get to speak to this group about these ideas. I’m hoping that folks learn some great things, and that they have some tips that they can put into place,

and maybe some actions that they can move their organizations forward on. I hope that you're working toward your missions and visions well. And if agents can be a part of that, glad to have helped you add another tool to your work chest.

Ray Borkman: Excellent. Excellent. Well, Matt, thank you so much. And, again, thank you to everyone for attending. Have a great week.

Matt Connell: Have a great day.

Ray Borkman: And, yes, I echo what Matt said. Thank you so much for doing the important work that all of you do, and we promise we'll continue to try and support you in that work to the very best of our ability here. So thanks so much. Have a great day. And with that, we'll wrap it up.