# Sigma Phi in the Age of AI

Sigma Phi 2926 Convention Keynote
GGB David B Aronoff, v'83
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## I. Introduction

Brothers.

I'm Good Grad Brother David Bradley Aronoff, v83 Fall and it's an honor to speak with you this evening about Sigma Phi in the age of AI. I realize that during the most recent graduation season, several prominent commencement speakers were met with boos and jeers when they included AI in their speeches, and I thank you for giving me a few minutes to explain my point of view before you arm yourselves.

I've spent thirty years in early stage technology venture capital — at Greylock, then Flybridge, and six years ago I helped start MCJ, where I'm Chairman and Managing Partner, backing early-stage companies in energy, infrastructure and industry. This all means I spend most weeks listening to twenty-five-year-olds explain the future to me.

Some of them are going to be right.

But I want to tell you where I started. My first job after graduating UVM was at **Bell Laboratories**. // Bell Labs is where the transistor, laser, solar cells and neural networks were invented.  I began my career inside the building where the information age was born, and I've spent every year since watching it exponentially compound.

So when people tell me AI came out of nowhere — I have a different view.

One confession before I start. I wrote the first draft of this speech using AI. It was terrible. Confident, well-organized, grammatically flawless, and had nothing meaningful to say.

So I threw it out and wrote this one myself. // Which is, more or less, my entire speech. Thank you and good night.

Actually, please stay in your seats. I've got about nine more minutes.

## II. Two Bets Four Days Apart

Let’s go back to the beginning.

**March 4th, 1827.** Four students at Union College — Cromwell, the Bowie brothers, and Witherspoon — start a society. And I want to be precise: four undergraduates, with no money, no plan, and a Latin motto, Esto Perpetua. A startup with a terrible business model but excellent branding.

Consider the times: No photographs. No telegraph — Morse code is seventeen years out. Medicine still includes leeches. The average American dies at forty.

And only four days earlier — *four days* — Maryland chartered something called the Baltimore & Ohio Railroad (B&O for those who play Monopoly) which was the first common-carrier railroad in America.

Two bets, four days apart. One on connecting **places**. One on connecting **people**. The B&O railroad went bankrupt. // But we're still here and this weekend’s attendance proves we continue to thrive.

## III. Thirty-Five Times

Since March of 1827, our nation has been through roughly **thirty-five structural turning points**.

**Four phases** of the industrial revolution — steam, electricity, oil, information. **Six technology surges** — railways, telegraph, telephone, the automobile, the microchip, the cloud. **Four energy transitions,** with a fifth running right now. **Eight shifts in America's place in the world**. And **six economic crises** severe enough to rewrite the rules.

Every one of them arrived with a chorus chanting: *this is the end. This time the young do worse than their parents. This time is different.*

Sigma Phi has outlived all thirty-five crises. It outlived the telegraph that was going to kill conversation, the telephone that was going to kill the letter, the television that was going to kill the family, and the internet that was going to kill all three.

It has also outlived the disgusting couch in the barroom at 420 College Street, the speakers that Sigma Nu stole from us in 1984, and even Sigma Nu on this campus.

Why does Sigma Phi last?

GGB Elihu Root — H1860, Secretary of War, Secretary of State, Senator, Nobel Peace Prize — said perfectly it in one line:

> **"No human institution lives long unless it fulfills a human need."**

Good Grad Brother Root was born a year after the first telegraph message and died in the age of radio and airplanes. He watched more change than anyone in this room ever will. And he didn't think the answer was to move faster. He thought the answer was to *be needed*.

## IV. What Exactly is AI?

As we contemplate Sigma Phi in this new age, it makes sense to define exactly what AI "is". You'll hear some say AI is like the discovery of fire. I don't agree with this perspective. Fire took us four-hundred thousand years to get from *warm* to *barbecue*. We don't have that kind of runway with AI.

My take is that AI is not a new element, but **the next phase of the information age** — the fourth turn of a wheel that started with the steam-power and got its mathematics in a Bell Labs office in 1948. And most likely the biggest turn we'll see in our lifetimes. But a turn nonetheless and not a rupture.

And while the dangers of unbridled AI are significant, I am willing to bet we're not watching Skynet being built - for younger brothers who may be unfamiliar with the term, I suggest watching Good Grad Brother Arnold Schwartzenegger's epic film "Terminator"). The current AI doomsday coverage comes at us from both political extremes — which should tell us something. Fear performs. The real risks are more boring and more serious: concentrated power, degraded information, environmental and energy impacts and the greatest worry I have is that AI creates a generation that outsources its thinking before it has any of its own.

Now the more quiet part. **We are in a bubble.** It’s a modern day gold rush, private and public company valuations are unhinged and the rules get rewritten weekly. Bubbles are how this country has financed every infrastructure buildout since the railroad. The bubble pops. The rails stay.

## V. How Will AI Impact Us?

Undergraduates — you and your parents are likely wondering if **AI is a threat to your first job?** Yes it is. I'm not going to stand at a banquet in front of you, my brothers and tell you otherwise.

What's at greatest risk are the bottom rungs of the ladder, particularly for those who ignore the oncoming headlights. The analyst. The paralegal. The junior developer. The associate whose job was the tedious first pass — collating documents, redlining contracts, cleaning data. AI does that step now, faster and without complaint. But not every rung goes: work anchored in physical presence, licensure, or trust survives longest — the nurse drawing blood, the electrician's apprentice running conduit, the teacher managing a classroom of nine-year-olds.

New rungs are forming too. Early titles already carry names like Data Annotator / Content Analyst, Prompt Engineer, AI Trainer and AI Product Manager. The World Economic Forum projects roughly 170 million such roles globally by 2030 against 92 million displaced — a net gain, but a different shape: fewer seats for pure execution, more for people who can supervise a machine's judgment and translate between a model and a client. Whether that trade works out for a 22-year-old with a diploma and no experience is still the open question.

But here's what the headlines leave out. Every one of those thirty-five turning points destroyed a category of work and created a bigger one nobody could name in advance. In 1900, forty percent of Americans farmed. Today it's under two. That transition was brutal — *and* it was the greatest expansion of opportunity in human history. Both are true.

The people who do well over the next decade won't be the ones who avoided this tectonic shift. They'll be the ones who got their hands dirty early while everyone else was arguing about it.

You are twenty years old at the exact moment a new general-purpose technology is being installed. This is not a curse. It’s once-a-century timing and your cohort will spend doom-scrolling about it.

## VI. You Have a Vote

Which brings me to what I most want to convey:  **You have agency.**

The rules are being written *right now* — in courtrooms, in Congress, in companies, and at kitchen tables. None of them are settled. You get a vote.

Some of you will build these systems. Some of you will regulate them. All of you will use them. But it starts smaller. What tools are allowed in the Sigma Phi house? What happens when a brother turns in work he didn't write? How does your family use AI at dinner? Those are your calls. Nobody's going to make them for you.

And because the rules keep changing rapidly, **you need a compass, not a weathervane.** A weathervane points wherever the wind is. A compass points north in a storm. Building one is slow work: primary sources, engaging with people who know more than you, being wrong out loud,listening hard and developing a point of view that is flexible and not fixed. It's the least efficient thing you'll do here and also the most valuable.

Challenge a norm when that norm has stopped making sense. But don't change for the sake of change. That's not adaptation, that's whipsawing — and whipsawing is how people lose everything twice.

## VII. Independence and Interdependence

AI makes each of you radically more **independent**. One person with these tools does what took a team of ten. That's real and it's thrilling. What incredible intellectual power you possess because of these advances!

But it also makes us radically more **interdependent** — on infrastructure we don't control, models we can't inspect, electrical grids and supply chains and a handful of companies. More capable and more dependent, simultaneously.

And here's something that worries me greatly. Since COVID we've all gotten lonelier. Measurably. Young men especially. Into that loneliness we're introducing the most persuasive, patient, endlessly available companion ever built. Something that never

argues, never tires of you, and never asks you for anything. That's not a friend. It’s a mirror with good vocabulary.

## VIII. So, is AI a Threat to Sigma Phi?

So, is AI a Threat to Sigma Phi?
**Yes and No.**

**Yes.** AI competes for the scarcest thing we have — our attention — and it sells a cheap substitute for the thing we're actually in the business of.

**And no.** Because when the substitute gets cheap, the real thing gets more valuable.

Two hundred years ago this society's product was *a small community of men who took each other seriously.* And we possess an identical product tonight. Nobody has automated it.

## IX. A Word with the Good Grads

Good grad brothers - you've lived through your own turning points. For those of us of a certain age, we’ve lived through more than our fair share. Some of you may have learned a trade that no longer exists in the form you learned it. That experience is the most useful thing in this room — and we waste it, because we keep telling it as *"back in my day"* instead of *"here's what I got wrong."* Tell the younger brothers what you got wrong. That's the version they need.

## X. Three Takeaways and Three Challenges

**I want to leave you with three takeaways and three challenges.**

**First, the Takeaways:**

**One.** This is a phase, not an apocalypse — but phases reprice *everything*. Don't confuse calm with safe.

**Two.** Your compass beats your speed. Find your compass and act deliberately. We all need to move with a sense of thoughtful urgency to take advantage of this once-in-a-century disruption.

**Three.** The scarce asset is other people. It always was. And Sigma Phi teaches all of us how to engage meaningfully with others.

Now the challenges. We are less than **one year** from our Bicentennial — March 4th, 2027, back at Union, where it started.

**Undergraduates:** between now and then, put a hundred hours into actually *building* something with AI tools. Not reading about it. Building. And one hour a week in a room with your brothers, every phone in a bowl by the door. And Monday meeting doesn't count.

**Alumni:** one undergraduate. One real conversation. Before convention is over. That's the ask. And bonus points if you continue to make yourselves available after we part ways.

**All of you:** bring one hard question back to Schenectady next year. Not an opinion — a *question.* The kind you can't Google and the machine can't answer.

Four undergraduates with no money and a Latin motto, bet that this would last. **Esto Perpetua.** May it last forever.

One hundred ninety nine  years later, that bet is still open. And now it's yours.

Thank you.