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ROUNDTABLE REPORT

From AI Pilots to AI Practice

A Peer Roundtable for Philanthropy Leaders

Virtual roundtable · September 21, 2026

FEATURING

Alberto Ortega Hinojosa

David and Lucile Packard
Foundation

Greg Taylor

Robin Hood Foundation

Kaisha Vilcinor

William Penn Foundation

Five takeaways

64 foundation leaders registered for the September 21 roundtable, co-hosted by Exponent Partners and Giving Compass, to hear how three foundations are moving AI from individual experiments into everyday practice.

1 Give AI a named owner.

Robin Hood's initiative is co-led by two executives, and every consequential AI-assisted process has a named human owner. Greg Taylor's advice was to treat it as organizational change, with IT as a partner rather than the sole lead.

2 Start from pain points, not tools.

The use cases gaining traction each solve a specific problem: inconsistent fiscal due diligence at Robin Hood, mismatched numbers between proposals and outcome statements at William Penn, and a 200-plus-page grantmaking manual at The Packard Foundation.

3 Data quality sets the pace.

Robin Hood began its data strategy about three years ago, before its AI work started, and credits that for how quickly it has moved. Building its AI operations assistant is also forcing a cleanup of years of internal policy content.

4 Approve use cases, not just tools.

William Penn's governance committee reviews how a tool will be used, not only whether it's allowed. The Packard Foundation limits more advanced tools such as Claude Code to a small group of staff, and all three foundations are holding back on agentic AI for now.

5 Validate, then validate again.

The Packard Foundation found that tools can flatten documents, pick up example data inside skills, and report checks as complete when a second session still finds errors. People remain accountable for anything AI helps produce.

Closing poll. Attendees most wanted to hear success stories next time, followed by governance and policy, and organizational alignment or staff buy-in.

About this report. It shares what the panelists described, the questions the room asked, and themes from the small-group breakouts. Breakout comments are shared without attribution. Participants joined from Los Angeles, New York, Philadelphia, San Francisco, Silicon Valley, Vancouver and Washington, DC.

**MISSION**

"We work with people and communities to create enduring solutions for just societies and a healthy, resilient natural world."

Alberto Ortega Hinojosa

Data and Insights Officer

David and Lucile Packard Foundation

Alberto leads the implementation of monitoring and reporting on The Packard Foundation's strategies and co-leads its approach to generative AI. He has been at The Packard Foundation for about four years, after working in government consulting, and brings more than 20 years of experience in public health, evaluation and policy. He regularly convenes peer foundations on strategy, data and learning, including as co-lead of the Philanthropy Working Group of the MERL Tech Natural Language Processing Community of Practice.

About The Packard Foundation. The David and Lucile Packard Foundation is a family foundation that funds innovative leaders and organizations with powerful ideas, knowledge, and experiences who share our vision to build a just and equitable world where people and nature flourish. For over six decades, The Packard Foundation has helped build a world where families and communities have the power to shape their lives, societies are more just and inclusive, and all of nature is sustained by a healthy ocean and climate.

packard.org · [Alberto on LinkedIn](#) · [The Packard Foundation on LinkedIn](#)

**MISSION**

"Elevating New Yorkers out of poverty by funding, supporting, and connecting high-impact community organizations, partnering with government, and advocating for what works so that New York City can be an engine of upward mobility for all."

Greg Taylor

Chief Finance and Operations Officer

Robin Hood Foundation

Greg oversees finance, operations and IT at Robin Hood, where he has worked for about three years. He co-leads the foundation's AI for Impact initiative with Robin Hood's Chief Program and Impact Officer. He has spent two decades in finance and operations leadership at international NGOs and multilateral organizations, including nine years at the Open Society Foundations, most recently as Global Director of Operations.

About Robin Hood. New York City's largest poverty-fighting philanthropy spends about \$140 million a year to almost 300 grantee partners, with about 115 staff. Under one set of guiding principles, its AI for Impact initiative runs four workstreams: internal AI use, AI grantmaking, partner capacity building, and tech sector engagement.

robinhood.org · [Greg on LinkedIn](#) · [Robin Hood on LinkedIn](#)



Kaisha Vilcinor

Grants and Information Systems Manager
William Penn Foundation

Kaisha works to improve the use of Salesforce and other data systems across the William Penn Foundation, where she has worked for a little over four years. She joined as a Salesforce administrator and moved into a combined compliance and technology role. Before that, she rebuilt data management processes and systems at Philadelphia Futures, a college access and success organization and a William Penn grantee.

MISSION

"We are committed to expanding access to resources and opportunities that promote a more vital and just city and region for all. We do this through funding programs in the Philadelphia region in arts and culture, children and families, democracy and civic initiatives, environment and public space, and workforce training and services."

About William Penn. The foundation funds the greater Philadelphia region. After a strategic review, it moved from invitation-only grants to open RFPs, which increased proposal volume and changed how staff review and award grants. Kaisha's colleague Samantha Shain, the foundation's data solutions manager, leads its implementation of AI tools.

williampennfoundation.org · [William Penn on LinkedIn](#)

Hosts and facilitators



Rebecca Bailey
Impact Partner
Exponent Partners

Rebecca leads client relationships at Exponent Partners. She was a grantmaker for six years, has worked in the nonprofit sector for over 20 years, and has twice served as a nonprofit CEO. For the last six years she has focused on where technology and impact meet.

[Rebecca on LinkedIn](#)



Dale Nirvani Pfeifer
Distinguished Fellow, AI and
Philanthropy
Giving Compass

Dale works on how AI is changing the way funders and donors find nonprofits. As CEO of Giving Compass from 2023 to 2026, she led the build of GC Pro, its AI platform for nonprofit discovery. She co-founded Goodworld, which facilitated nearly \$500 million in grants, and wrote *Artificial Intelligence for Nonprofit Fundraising* (2026).

[Dale on LinkedIn](#)

Kai Harris
Solution Engineer
Exponent Partners

Jeremy Riga
Director of Integrated
Operations
Exponent Partners

Amanda Villa
Development and Partnerships
Associate
Giving Compass

Where the field is

Most foundations now use AI, but few report results at scale, and nine in ten offer grantees no AI support.

81%

of foundations report some use of AI, but only 30% have an AI policy

[TAG, 2024 State of Philanthropy Tech Survey](#)

83%

of foundation leaders cite data security and privacy as a concern about AI

[CEP, AI With Purpose, September 2025](#)

90%

of foundation leaders say their foundation offers no funding or non-monetary AI support to grantees

[CEP, AI With Purpose, September 2025](#)

87%

of foundation leaders say their staff have limited or no understanding of grantees' technical capacity to use AI

[CEP, AI With Purpose, September 2025](#)

The AI maturity model

Maturity model: Exponent Partners. Panelists placed their foundations as marked. Robin Hood and The Packard Foundation both said their work spans several stages at once.

Stage 1
Awareness

Stage 2
Individual experimentation

Stage 3
Pilot projects

The Packard Foundation
William Penn

Stage 4
Organizational integration

Robin Hood

Stage 5
Governance and scaling

What the room said

What's your foundation's biggest AI challenge right now?



Opening poll, 8 respondents

What topic would you want to go deeper on next time?



Closing poll, 19 votes from 10 respondents

Three foundations, three stages

How the three foundations compare on scale, tools, use cases and governance.

	The Packard Foundation	Robin Hood	William Penn
Stage	3 · Pilot projects	4 · Organizational integration	3 · Pilot projects
Scale	605 grants, \$323M in 2025	About \$140M a year, almost 300 grantees, about 115 staff	About 400 grants, \$150M a year; open RFPs across greater Philadelphia
Enterprise tools	Claude, ChatGPT, Copilot	Claude, ChatGPT, Copilot	Claude
Use cases	Grants MCP; Claude skills incl. grantmaking manual; AI for sensemaking in strategy reviews	Fiscal analysis skill; AI operations assistant	Proposal summaries; board document prep; custom contract-review software
Governance	Same principles as all data security; AI Responsible Use Policy and AI Philosophy agreed by the executive team; Foundation-wide AI Steering Committee	Use policy based on NIST guidance; three-tier data classification; named human owner	AI policy; governance committee reviews tools and use cases; AI-specific legal review
Agentic AI	Limited to a few staff	Controlled pilot only	Very limited so far

In their words

“

AI at a foundation is not just one thing in one project, but really a suite of tools and overall scaffolding.



Alberto Ortega Hinojosa
The Packard Foundation

“

IT is an absolutely essential partner, but we saw it really as an organizational change and not a technology rollout.



Greg Taylor
Robin Hood

“

Approval for tools doesn't necessarily mean approval for all use cases.



Kaisha Vilcinor
William Penn



David and Lucile Packard Foundation

Building the scaffolding

Stage 3

The Packard Foundation is taking a thoughtful, practical approach to AI adoption, providing staff with secure enterprise tools that allow them to explore how AI can support their work while protecting Foundation data. Alberto described AI not as a single initiative, but as a growing set of tools and capabilities that could change how staff access information, learn, and work across the Foundation.

Current pilots are focused on practical applications. These include an **MCP connection** that allows staff to query grants data using plain language; **Claude skills** that make the Foundation's 200-plus-page grantmaking manual easier to navigate and use; and early exploration of how **AI could support sensemaking** during year-end and mid-strategy reviews.

The Foundation is testing these tools based on their usefulness to staff: whether they provide reliable and relevant answers, where they fall short, and whether they offer a better way to access and work with information. To reduce cyber security risks and duplicative work, The Packard Foundation is limiting more advanced tools, such as Claude Code, to a small group of staff, and it has established a Foundation-wide AI Steering Committee to prioritize work aligned with institutional goals.



Robin Hood Foundation

From access to shared use cases

Stage 4

Every staff member has enterprise access to Claude, ChatGPT and Copilot, and all have used at least one. The tools connect to Box, Notion, Slack and Microsoft Office. A Salesforce connector is in pilot.

The **fiscal analysis skill** standardizes grantee fiscal due diligence, including trend analysis across years and 990 review. With more than 400 grants a year across almost 300 partners, the old process was slower and quality depended on who did it. The grant strategy team built it with IT as a partner, and newer program officers still learn diligence principles and own the output.

The **AI operations assistant** answers staff questions across HR, finance, IT, legal and facilities. Operations staff are testing it now, and it goes to all staff in October. Building it exposed policy gaps, overlaps and inaccuracies, and forced a cleanup of years of internal content.



William Penn Foundation

AI for a higher-volume process

Stage 3

The move to open RFPs raised proposal volume, which made AI support necessary. The foundation started with staff focus groups, tested tools against the use cases they raised, and then wrote an AI policy with its finance and administration lead.

Proposal summaries help staff catch mismatches between a proposal narrative and the outcome statement that goes into the grant agreement, for example 100 people served in one and 50 in the other. Staff aren't yet using AI to identify strong and weak proposals.

Board document prep helps staff draft the docket memos that go with their one-page proposal summaries, which previously started from scratch. A member of the **investments team**, which was already comfortable with AI, is building custom software in Claude to evaluate fund contracts and terms.

Lessons from the panel



Alberto Ortega Hinojosa
The Packard Foundation

Know what the tool reads

Documents added to a project are flattened, and diagrams and relationships between files are lost.

Tools may store more than you think

Skills can absorb example data. One peer's shared skill held internal data the owner didn't know about.

Validate, then validate again

A fresh session still found errors after the first one reported its checks complete.



Greg Taylor
Robin Hood

Name a clear owner

An empowered executive with the competence, confidence and time to stay current.

Start from use cases

Begin with process and data pain points, not the tools. Team-wide use cases return the most.

Fix data first

Prioritize data hygiene before you need it. Most organizations find data problems when AI exposes them.



Kaisha Vilcinor
William Penn

Don't write policy in a silo

At minimum, involve senior leadership. AI affects their whole teams, and they want a say in which use cases start first.

Approve use cases, not just tools

A governance committee reviews both the tools and how they will be used.

Get technical help

They brought in an AI-specific lawyer to review tools and are bringing in a trainer to teach staff Claude basics.

Patterns across the room

Five themes came up in the panel, the Q&A and the breakouts.

01 **Accountability stays with people.**

All three foundations name a human owner for AI-assisted work. At The Packard Foundation, AI use is optional, but guidelines say who is responsible for the result when it's used.

02 **Disclosure practice is splitting.**

Robin Hood does not include an AI disclosure requirement in its guidelines because AI now touches too much work to track, and relies on staff accountability instead. In a breakout, a participant from a long-established family foundation described a different approach: staff are encouraged to use AI and to disclose it, to make use normal among peers.

03 **Culture matters as much as policy.**

Breakout participants said stigma pushes AI use out of sight, which raises risk. One nonprofit leader described treating risk as both an individual and an organizational job, with leadership watching closely and open conversation about how staff use AI. Another participant described still feeling unsure whether AI-assisted analysis would be seen as their own work.

04 **Agentic AI is tightly limited.**

None of the three foundations allows agentic AI broadly. Robin Hood is running a limited pilot because of concern about risks, including overwritten data. The Packard Foundation limits tools like Claude Code to a small group of staff. William Penn uses very little so far and reminds staff to remove personal information before uploading anything.

05 **Tools behave in ways people don't expect.**

The Packard Foundation found that documents added to a Claude project lose diagrams and relationships between files, and that skills can pick up the example data used to build them. A peer's shared skill contained internal data and a link the owner didn't know about.

Questions from the room

Attendees asked these in the chat. Answers are summarized from the panel.

Q How do you keep junior staff from producing low-quality AI output?

Make accountability explicit. Greg asks staff to rewrite weak AI-drafted work, reminding them that they're still responsible for their output, no matter the tool. The Packard Foundation's guidelines name who owns the result. William Penn pairs that with prompt training.

Q How do you disclose AI use to grantees and partners?

Robin Hood does not disclose AI use on specific outputs, because AI now touches almost all of its work in some way. Staff remain the owners of anything they produce, as before AI.

Q What are the main data and cybersecurity considerations for agentic AI?

Robin Hood is running a controlled pilot before allowing agentic use, because of concern about risks, including overwritten data. The Packard Foundation applies its existing data security principles to AI and limits more advanced tools, such as Claude Code, to a small group of staff. William Penn tells staff to strip personal information before uploading.

Q Did you have a detailed rollout plan?

Robin Hood's plan has changed over time. Early sessions included prompt training from outside presenters, and Anthropic ran training for staff and community partners. It now relies more on peer demos, such as a recent lunch-and-learn where the staff who built two use cases showed them to colleagues.

Q How do you tell private data from sensitive data?

At Robin Hood, the classification predates its AI work. Private covers material like meeting minutes that isn't public but isn't high-risk. Sensitive covers personally identifiable information and, for organizations that hold it, health data. Only specifically approved tools may handle private and sensitive data, and staff mask sensitive data first.

What attendees took away

"This is not IT but everyone."

"Pacing and culture adoption is key."

"AI use needs a culture of acceptance among peers. This can be cultivated, but it needs to be intentional."

"Key for our sector is to ensure humans are always accountable for output."

From the closing poll: "What's one thing you're taking away from today?"

Where to start at your stage

These steps draw on what the panelists described. Pick the row that fits your foundation today.

- | | | |
|----------|-----------------------------------|--|
| 1 | Awareness | Name an executive owner with time to stay current. Run staff focus groups to collect pain points before choosing tools. |
| 2 | Individual experimentation | Provide enterprise tools so staff aren't using personal accounts. Set a data classification (e.g. public, private, sensitive) and a practical use policy. |
| 3 | Pilot projects | Pick one or two team-level use cases tied to a slow or inconsistent process. Test each in a fresh session to catch errors. Get outside legal and technical review. |
| 4 | Organizational integration | Connect AI tools to the systems where work happens. Clean up the underlying data and content. Use peer demos to spread what works. |
| 5 | Governance and scaling | Approve use cases, not only tools. Pilot agentic AI with limited permissions. Review what skills and projects store before sharing them. |

90%

The grantee gap

Ninety percent of foundation leaders say they offer no AI support to grantees ([CEP, 2025](#)). Robin Hood is one exception, with a workstream on partner capacity building. Our suggestion: foundations further along could start by asking grantees how they use AI today.

Resources and next steps

AI Readiness for Foundations

Exponent Partners offers a readiness assessment, a four-module starter pack, and sandbox labs for testing with mock data.

Book your free 30 minute strategy session today

exponentpartners.com/mission-ready-ai

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Contact [Amanda Villa](#)

Further reading

- [CEP, *AI With Purpose: How Foundations and Nonprofits Are Thinking About and Using Artificial Intelligence*](#) (September 2025)
- Project Evident, [Funding the Future: Grantmaker Strategies in AI Investment](#) (March 2025), with a rubric for reviewing grantee AI requests
- Technology Association of Grantmakers, [Grantmaking in the Age of AI](#) (September 2025)
- [NIST AI Risk Management Framework](#) (Robin Hood's policy draws on NIST guidance)
- Dale Nirvani Pfeifer, [Artificial Intelligence for Nonprofit Fundraising](#) (2026)

Thank you to everyone who joined us on September 21, and to Alberto, Greg and Kaisha for sharing their work so openly.



A Certified B Corporation founded in 2005, Exponent Partners has completed more than 2,000 technology projects for more than 900 foundations and nonprofits.

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