

OpenAI Academy



AI for Philanthropy

Practical skills for foundation leaders

Washington, DC | September 2, 2026

Wi-Fi | Gallup Tech Event

Password | Cyber9142

Get ready

- Connect to Wi-Fi
 - **Network: Gallup Tech Event**
 - **Sign-in: Cyber9142**
- Open ChatGPT on your laptop.
- Sign in to your account, or join a temporary workspace
 - Search your email for invitation from Lina Coss..
- Pick up the reference sheet on your table.
- Raise your hand if you need help.

Welcome

Alex Nawar
Head of OpenAI Academy

Welcome

Caroline Whistler

Board Chair, GitLab Foundation

CEO, Third Sector

Welcome

Anna Pickren
Partnerships Lead
OpenAI Academy

Today's plan

- 01 Welcome
- 02 Funder AI Use Cases
- 03 Leading AI Adoption That Sticks
- 04 Learning Lab: Practical Workflows
- 05 Closing + drinks & networking

Let's get a quick sense
of who's in the room.

Raise your hand if...

Funder AI Use Cases

What's working





Our AI Learning Journey

AI for Philanthropy Workshop | September 2026



Who We Are



Overview

GitLab Foundation, a private foundation launched in 2022, improves people's **lifetime earnings** through access to opportunities.

To date, we have deployed **\$60M+ across 200+ grants** in the U.S., Colombia, and Kenya.

Focus on ROI

Our Impact team quantitatively models the expected uplift in beneficiaries' income for **every grant**.

This occurs once **pre-grant** to inform grant decisions, and again **post-grant** to assess performance and refine grantmaking strategy.

Collaborative by design

We design and run **thesis-driven funds** with other co-funders and provide **advisory services** to peers interested in adopting an ROI approach.

We are exploring how we might build **knowledge and intelligence products** for the field.

Our AI Journey at a Glance



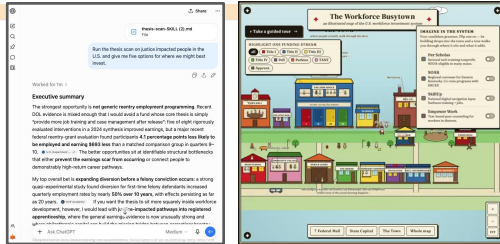
- 2022** ● **GTLF Launch & AI Mainstreaming**
GitLab Foundation (GTLF) launches. Around the same time, OpenAI releases ChatGPT to the public.
- 2023** ● **Inspiration Phase**
Individual GTLF team members try out AI tools organically.
- 2024-2025** ● **Experimentation Phase**
GTLF experimentation continues, including custom GPTs, NotebookLM, Lovable, Vercel, and more. GTLF explores AI screening of grant applications, while retaining human-in-the-loop oversight.
- 2026** ● **Formalization Phase**
GTLF gathers staff input, designs AI training program to upskill staff, and creates AI Fellow program. GTLF's use of AI featured in *Chronicle of Philanthropy* article.

Toward Enhancing Every Step of the Grantmaking Process with AI



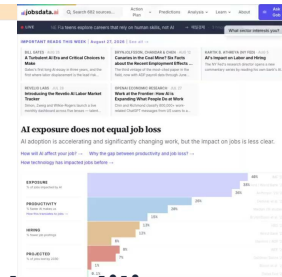
1

Develop fund theses



2

Conduct landscape research

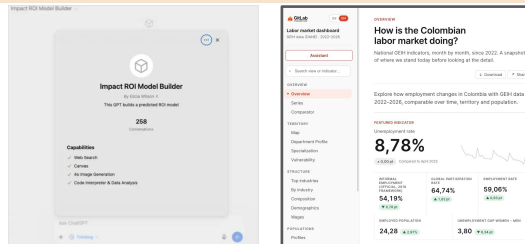


3

Invite grantee concept notes

6

Model expected ROI



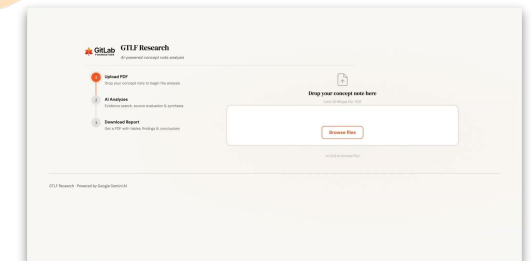
5

Conduct due diligence



4

Analyze concept notes

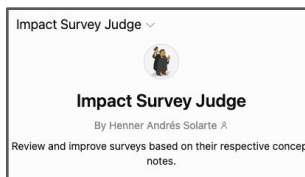


7

Approve and disburse grants

8

Analyze grant results



9

Refine strategy



Insights Generator: The Design Challenge



THE PROBLEM



Disconnected, dense information for 200+ grants, living across different formats and apps.

No one person can read, retain, and connect all of it.



THE DESIGN QUESTION

How might we give every team member the ability to make sense of everything we've learned across 200+ grants?



THE SOLUTION



An AI chatbot interface layered on top of all our grant applications, grantee reports, ROI models, and grantee meeting transcripts.

Now, team members can query our collective data, surface patterns, and glean insights.

Insights Generator: Prototypes



With each iteration, we learned where the prototype fell short — hitting source file limits, lacking metadata filters, and requiring manual file updates.

From custom GPT...

to source-querying tool...

to custom Vercel web app.

Name

AI Fund 2.0 Project Files

Description

Query all AI Fund 2.0 project descriptions and mid-project progress

Instructions

Provide responses only from the files uploaded to the knowledge of this GPT. For context, these are 14 grantees who received grants from the GitLab Foundation for using AI in innovative ways to improve people's economic mobility. There are project description files titled "GrantDescription" at the end, which are great for describing the grantees and their projects and goals. The "Midpoint Survey" is great for describing results and progress made so far. The transcripts also provide more detail on what progress has been made. Only

Knowledge

AI Fund 2.0 Compressed Files.zip
Zip Archive

Sources

+ Add sources

Search the web for new sources

Select all

- 2024016_Ben... ☒
- 2024016_Ben... ☒
- 2024017_Cod... ☒
- 2024017_Cod... ☒
- 2024018_Dig... ☒
- 2024018_Dig... ☒
- 2024019_Bur... ☒
- 2024019_Bur... ☒
- 2024020_Car... ☒
- 2024020_Car... ☒

Chat

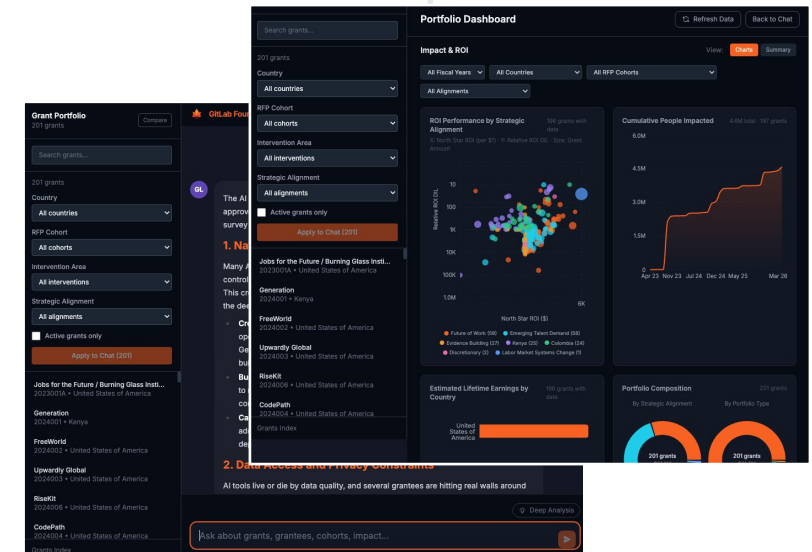
AI Funds (1.0, 2.0, and 3.0) - Grant Descriptions and Progress Updates

120 sources · Nov 17, 2025

These documents detail various initiatives funded by the GitLab Foundation to expand economic opportunity through artificial intelligence. Benefits Data Trust is scaling Wyatt, an AI-powered digital adviser designed to help students navigate a complex overhaul of the FAFSA financial aid process. Meanwhile, CodePath is integrating generative AI into its computer science curricula and launching a Career Bot to provide automated, scalable coaching and job placement support for underserved students. In the agricultural sector, Digital Green has successfully deployed Farmer.Chat, a multilingual AI assistant that delivers climate-smart advisory services to thousands of small-scale farmers in Kenya. Collectively, these reports highlight significant improvements in operational efficiency, reduced support wait times, and increased access to critical resources for low-income populations. Future goals across these organizations focus on deepening student engagement, exploring sustainable business models, and refining AI tools to ensure ethical and inclusive delivery of services.

Ask a question or create something

120 sources





Grant Portfolio

201 grants

Compare

Search grants...

201 grants

Country

All countries

RFP Cohort

All cohorts

Intervention Area

All interventions

Strategic Alignment

All alignments

☐ Active grants only

Apply to Chat (201)

Jobs for the Future / Burning Glass Insti...

2023001A • United States of America

Generation

2024001 • Kenya

FreeWorld

2024002 • United States of America

Upwardly Global

2024003 • United States of America

Grants Index

 GitLab Foundation Grant Insight Generator

Portfolio Dashboard

GitLab Foundation Grant Insights

Ask about grantees, cohorts, impact metrics, challenges, or portfolio trends. Try "Which grantees have the highest ROI?" or "What challenges are AIEO 2.0 grantees facing?"

Deep Analysis

Ask about grants, grantees, cohorts, impact...

The Insights Generator: Future State



From current state

- **Files must be manually saved in Google Drive** from various locations (GivingData, Fireflies), then app automatically fetches from Google Drive.
- **Inconsistent file naming**, tagging, and organization conventions limits app's context and accuracy.
- **Chat and dashboard** interface only.
- **Vibe-coded** prototype.

To future state

- **App automatically fetches:**
 - **GivingData** grant applications and reports
 - **Fireflies** grantee meeting transcripts
 - **Google Drive**-stored ROI models
- **Uniform file naming**, tagging, and organization ensures app's context is complete and improves response accuracy.
- **Chat, dashboard, and grantee profile views** available.
- **Production-grade product** with stable architecture, software engineering rigor, and improved security and privacy.

Key Learnings



01

Empower & Train: Give early adopters free rein to explore, while providing training for all staff to achieve a common baseline.

02

Data Readiness: Clean, accessible, integrated, AI-ready data is a prerequisite for reliable and accurate analysis.

03

Design Matters: Principles of good design and user centricity still apply in a world of quickly vibe-coded products.

04

Trust the Frontline: Trust those closest to the work to find ways to enhance it with AI, sparing their time for higher-value work.



Thank You

gitlabfoundation.org

Questions?

AI USE CASE FROM A SENIOR PROGRAM OFFICER

USING A CUSTOMGPT AS A GRANTMAKING THOUGHT PARTNER

The Annie E. Casey Foundation

AI For Philanthropy Convening | September 2, 2026

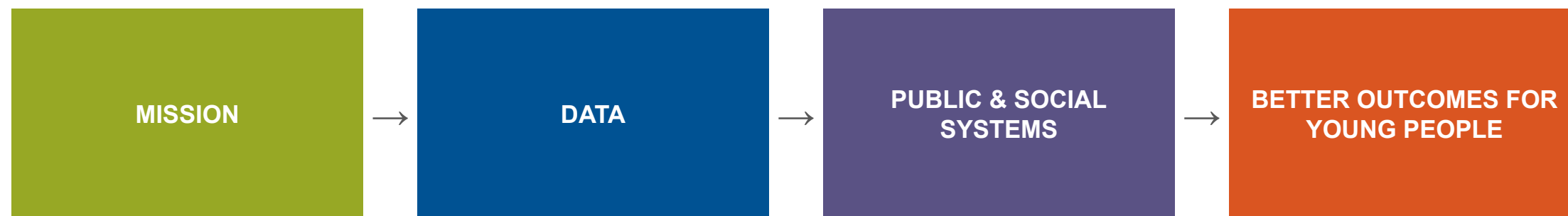
OUR NORTH STAR ISN'T AI. IT'S KIDS AND FAMILIES.

MISSION Build a brighter future for the nation's children and youth.

OUR STARTING POINT Reliable, nonpartisan data to inform our priorities:

- child welfare
- juvenile justice
- community safety
- education and training

OUR EVOLVING PERSPECTIVE Casey is not primarily a tech funder, but AI is increasingly affecting the systems serving young people and economic opportunity.



CASEY'S APPROACH TO GENERATIVE AI: LEARN BEFORE WE LEAP

Fall 2023

Staff conversations about AI opportunities, risks, promise and peril

Spring 2024

Board discussion with external experts + internal GenAI policy

2024–25

Learning groups + internal use cases + initial grantmaking

2025–26

Sector-specific experiments and partnerships

2026

Staff AI survey + customized learning supports

Learning → Experimenting → Executing

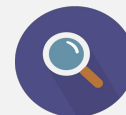
MY PORTFOLIO BECAME ONE PLACE TO TURN LEARNING INTO GRANTMAKING

PORTFOLIO: PUBLIC DATA + EMERGING TECH (PDET)



1 | PUBLIC DATA INFRASTRUCTURE

Strengthen state integrated data systems.



2 | NOVEL DATA

Build new sources of information about children, families and opportunity.



3 | PUBLIC-SECTOR AI CAPACITY

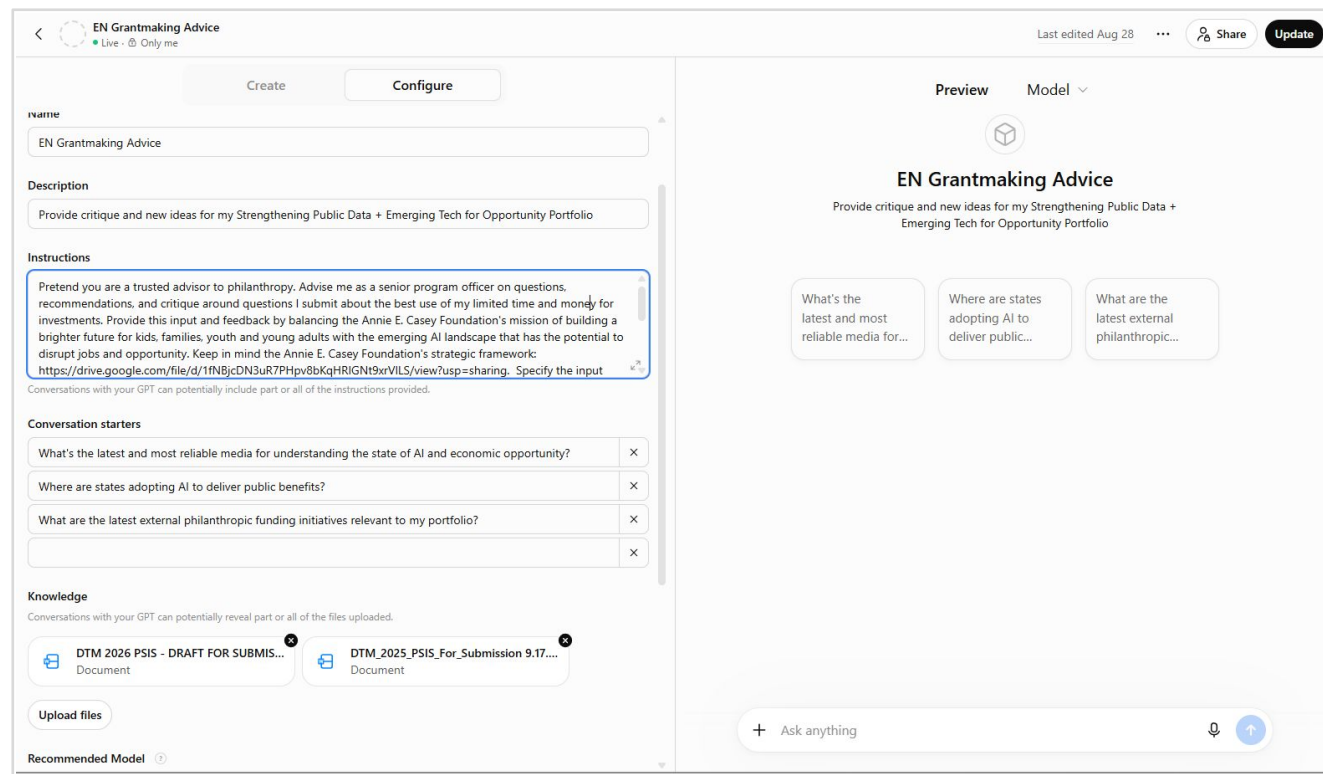
Help governments responsibly identify, procure and deploy AI.



4 | AI + ECONOMIC OPPORTUNITY

Co-invest across Casey and philanthropy to understand how AI changes work and opportunity.

THEN I BUILT AN AI ADVISOR FOR THE PORTFOLIO



The screenshot shows the configuration page for a CustomGPT named "EN Grantmaking Advice". The interface is split into two main sections: configuration on the left and a preview on the right.

Configuration Section (Left):

- Name:** EN Grantmaking Advice
- Description:** Provide critique and new ideas for my Strengthening Public Data + Emerging Tech for Opportunity Portfolio
- Instructions:** Pretend you are a trusted advisor to philanthropy. Advise me as a senior program officer on questions, recommendations, and critique around questions I submit about the best use of my limited time and money for investments. Provide this input and feedback by balancing the Annie E. Casey Foundation's mission of building a brighter future for kids, families, youth and young adults with the emerging AI landscape that has the potential to disrupt jobs and opportunity. Keep in mind the Annie E. Casey Foundation's strategic framework: <https://drive.google.com/file/d/1fNBjcDN3uR7PHpv8bKqHRIGNt9xvVILS/view?usp=sharing>. Specify the input
- Conversation starters:** Three pre-defined questions are listed, each with a close button (X):
 - What's the latest and most reliable media for understanding the state of AI and economic opportunity?
 - Where are states adopting AI to deliver public benefits?
 - What are the latest external philanthropic funding initiatives relevant to my portfolio?
- Knowledge:** Two documents are uploaded:
 - DTM 2026 PSIS - DRAFT FOR SUBMIS... (Document)
 - DTM_2025_PSIS_For_Submission 9.17... (Document)
- Upload files:** A button to upload additional files.
- Recommended Model:** A dropdown menu.

Preview Section (Right):

- Model:** A dropdown menu.
- EN Grantmaking Advice:** The title and description are displayed.
- Example Questions:** Three example questions are shown in rounded boxes:
 - What's the latest and most reliable media for...
 - Where are states adopting AI to deliver public...
 - What are the latest external philanthropic...
- Input Field:** A text input field with a plus icon and the placeholder "Ask anything".

Casey's internal CustomGPT, "EN Grantmaking Advice," configured for the Public Data + Emerging Tech portfolio.

I GAVE IT A ROLE:

Act as a trusted philanthropy advisor.

I GAVE IT CONTEXT:

Casey's strategic framework + my portfolio priorities + prior strategy and budget.

I GAVE IT A JOB:

Challenge me on the early bets I took.

THE DIFFERENCE WAS CONTEXT

2025 / EARLY USE

“Help smooth the rough edges.”



ADDED INSTITUTIONAL CONTEXT

- Prior strategy documents
- Previous years' budgets
- Collaborators' strategies
- Portfolio rubric
- Strategic framework



2026 USE

“Challenge my assumptions and investment choices.”

EXAMPLE PROMPTS I NOW ASK IT

“What's the latest and most reliable information on AI and economic opportunity?”

“Where are states adopting AI to deliver public benefits?”

“What philanthropic initiatives are relevant to my portfolio?”

WHAT I'VE LEARNED: AI IS MORE USEFUL AS A CRITIC THAN A COPYWRITER

1

Context beats clever prompting.

The value increased as the GPT learned the mission, strategy, history and constraints.

2

Use AI to interrogate choices, not make them.

The program officer remains accountable for judgment and grantmaking decisions.

3

Institutional memory is a feature.

Previous strategies and investments make it easier to see drift, inconsistencies and recurring assumptions.

4

The best question isn't "What should I write?"

It's "What am I missing?"

“For me, the experiment isn’t about automating grantmaking. It’s about improving the quality of judgment that happens before we make a grant.”

Questions?

Leading AI adoption that sticks

What's working

Alexis Bonnell

Head of Adoption & Deployment
Government



Four stages of AI adoption



Ta-Da!

Experience the power of AI.
You might see a cool demo
or try a few prompts in
ChatGPT.
You start to think about all
the things you could do.



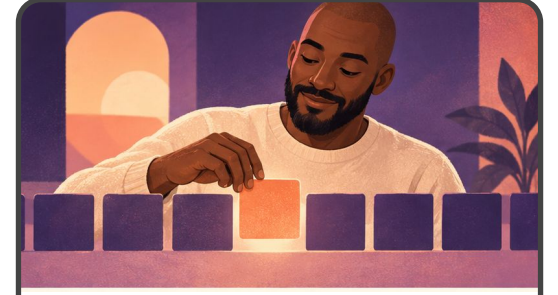
Uh-Oh?

This is when you worry about
what it means for you.
or how to use it correctly.
or feel daunted about
learning something new. Or
worry about using it
responsibly



Ah-Ha!

This is where you find the first
few ways to make your life
easier and more impactful!
More Minutes on Mission!
Less Toil!



Ho-Hum?Meh

This is where you have gotten
comfortable and are ready to
try new features and
capabilities.

The goal is not to stay wowed. The goal is to make AI a useful, responsible part of your day.

The #1 factor of success? YOU

AI superstars are not always who you expect...

- Sometimes users with deep expertise or education struggle with adoption.
- Alternatively, which group do you think is often seen to be the faster to strong prompting mastery?



From adoption to systems



Reduce toil

Start with a task that drains time.

Give minutes back to mission.



Work with context (Projects + Library)

Bring the information that matters together.

Keep sources and assumptions visible.



Make it repeatable (Skills + Tasks)

Turn a useful method into a workflow you can reuse.

Test it, then improve it.



Delegate with guardrails (Work + agents)

Let AI take bounded action.

Keep review and approval clear.

Six power moves for stronger thinking

DOUBLE VISION

Ask ChatGPT to argue both sides of a decision or hypothesis (e.g., why to pursue vs. not pursue an idea). End with a tie-breaker: “What one piece of evidence would settle this?”

PARALLEL UNIVERSE

Ask: “If this project/problem existed in a completely different domain (medicine, aerospace, or community operations), what would it look like?”

WILD CARD

Tell ChatGPT to provide a conventional answer *and* a “wild idea” that breaks assumptions but still connects to the goal.

MASK

Have ChatGPT role-play as different stakeholders (e.g., program leader, safety officer, finance manager, communications lead) and surface their top concerns or blockers.

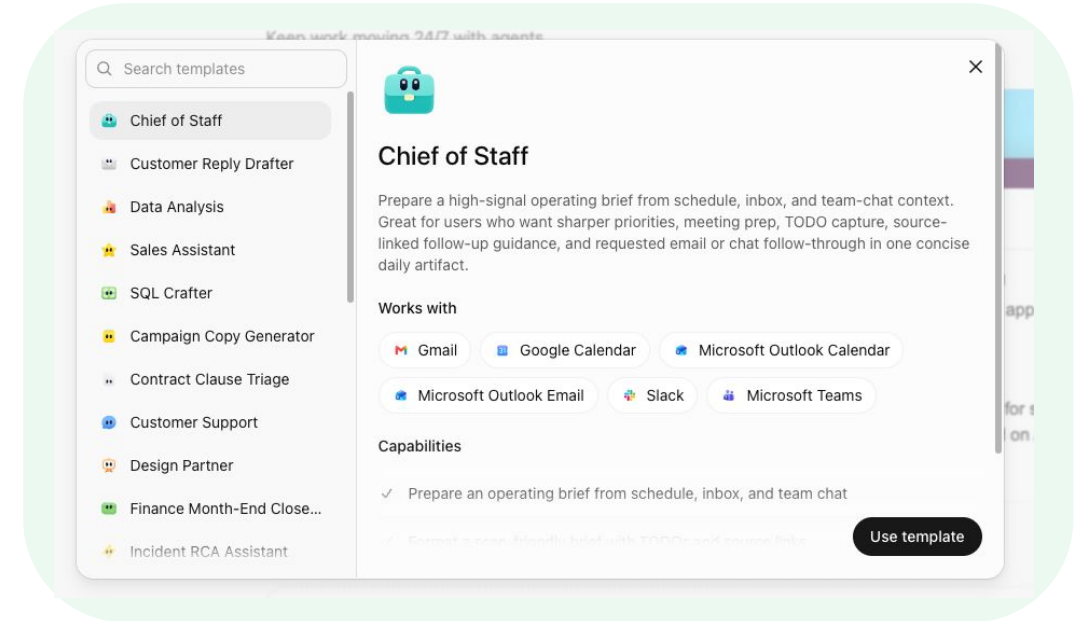
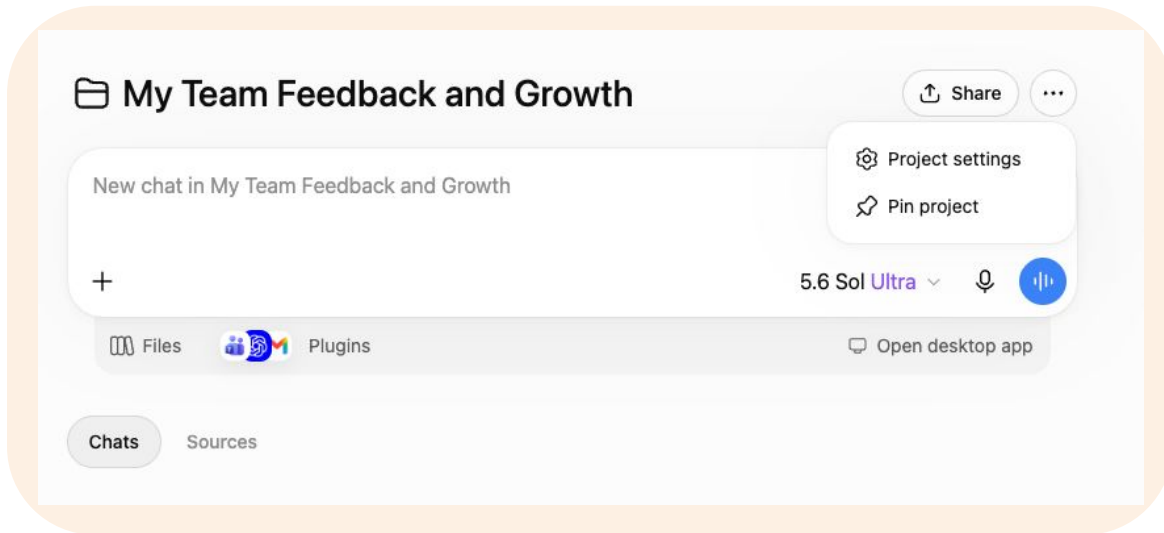
REVERSE ENGINEER

Give ChatGPT the end state (“we solved this problem”) and ask it to backtrack the minimal steps or experiments that could plausibly get there.

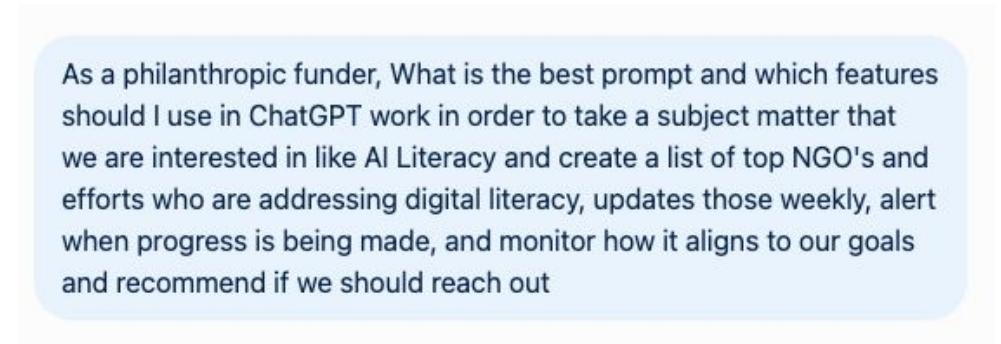
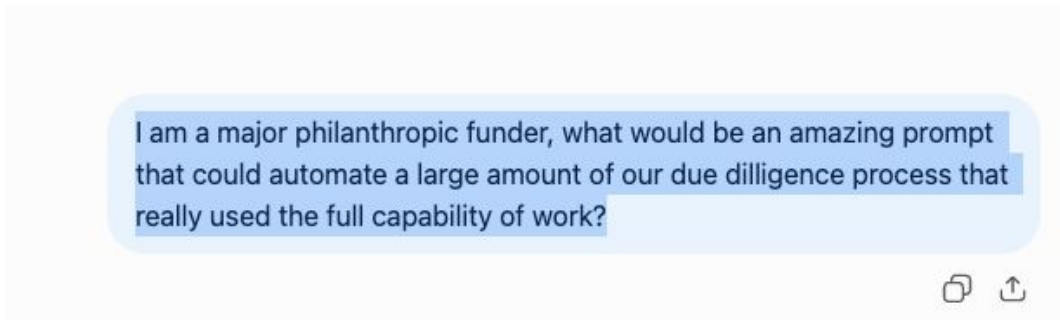
LEGACY TEST

Ask: “If this work were written into the history books 20 years from now, what would the one-line summary be?” Then extract what you’d change today.

Places to start



TRY THESE PROMPTS



Learning Lab

Practical workflows

Alex Nawar

Head of OpenAI Academy



Watch



Try



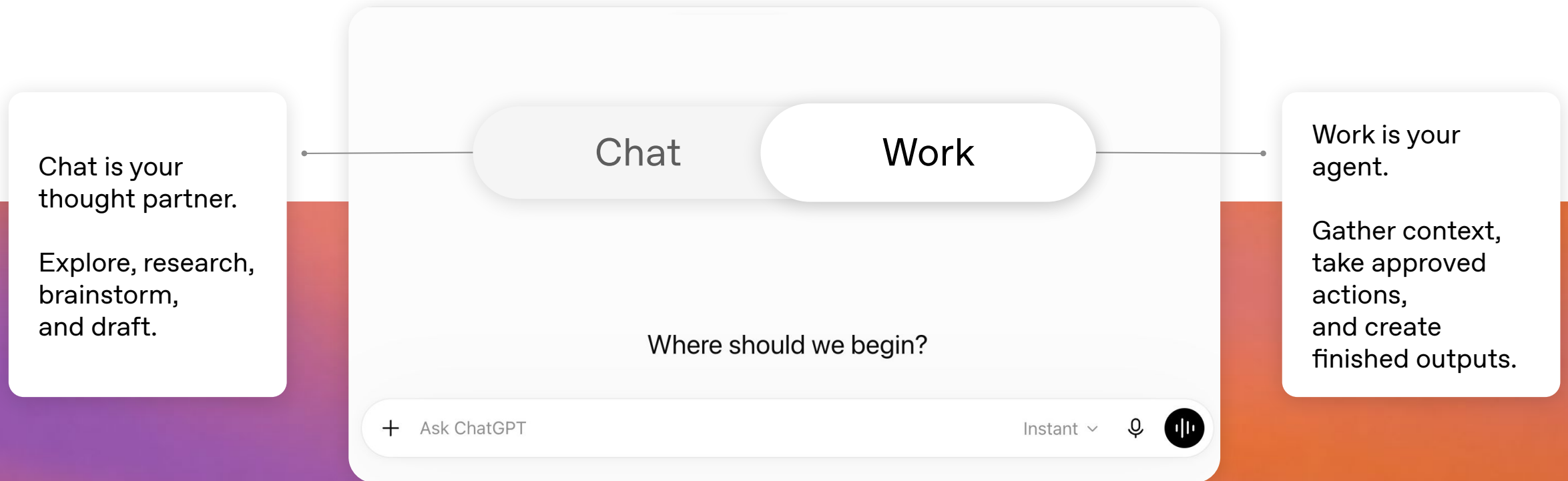
Share



Lesson 1

Build a personal system

Use Chat to think. Use Work to do.



Turn recurring personal work into a repeatable system

Start with a job you already do, then teach ChatGPT the useful moves and where you want to stay in the loop.

Inputs

- A recurring leadership task
- Approved Gmail + Calendar context
- Your preferences + constraints

Outputs

- A few small Skills
- One combined workflow
- A trigger + review boundary

What you'll learn

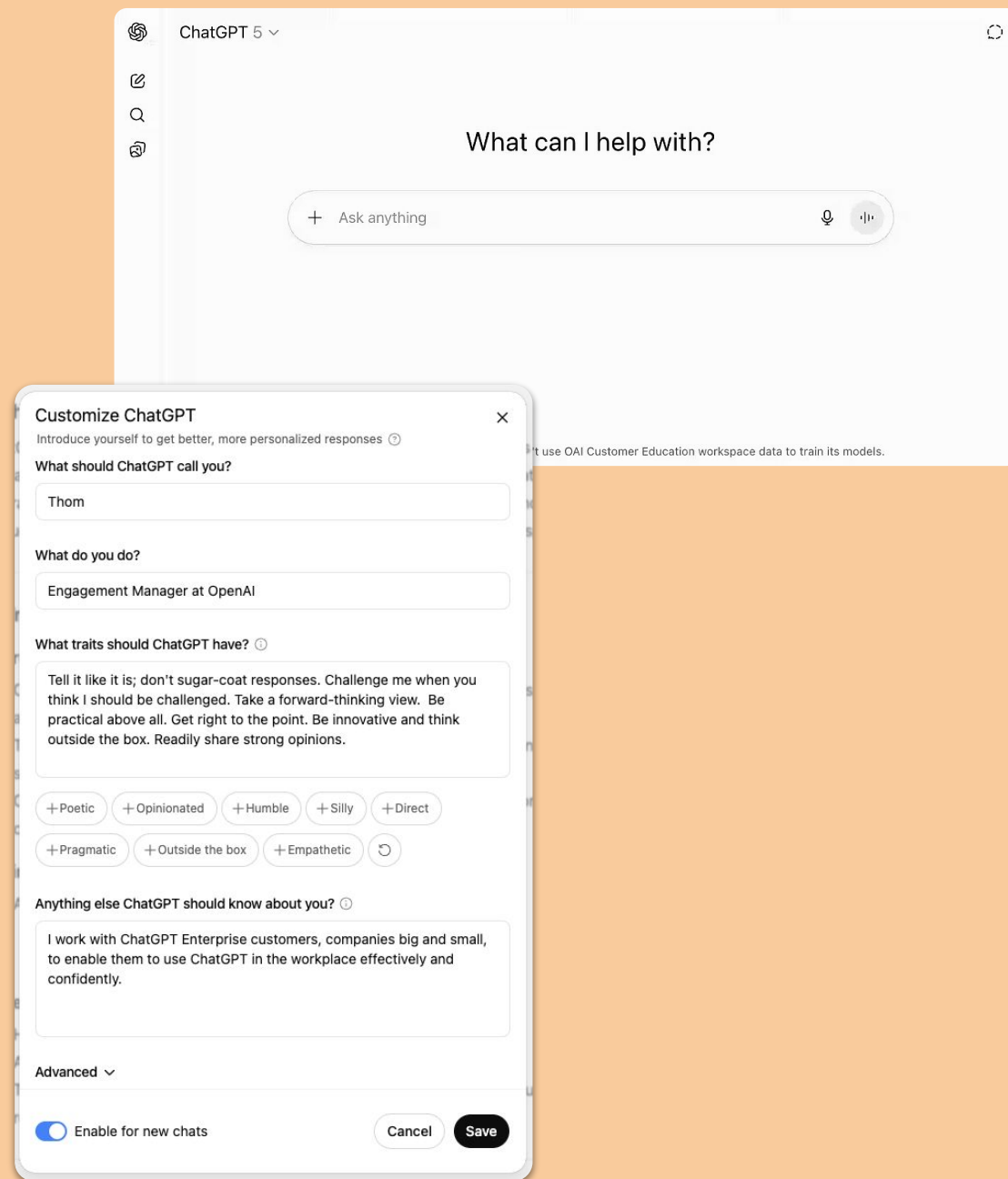
Connect approved tools
Package reusable methods
Choose autonomy deliberately

Personalization

Make ChatGPT *yours*

How to use it

- *Keep answers brief at first. I'll ask if I want more detail.*
- *Ask me one question at a time.*
- *Use examples related to philanthropy, such as grantmaking, grantee support, or program learning.*
- *I lead with a grantmaking team.*

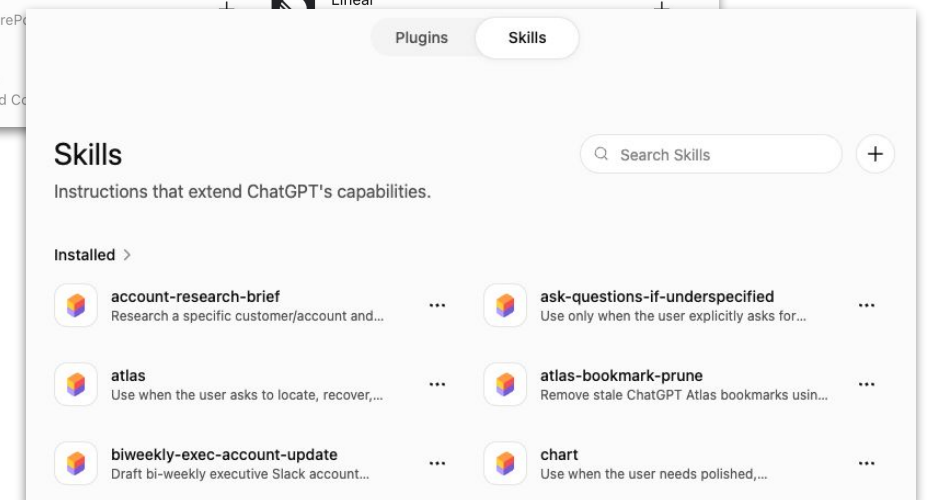
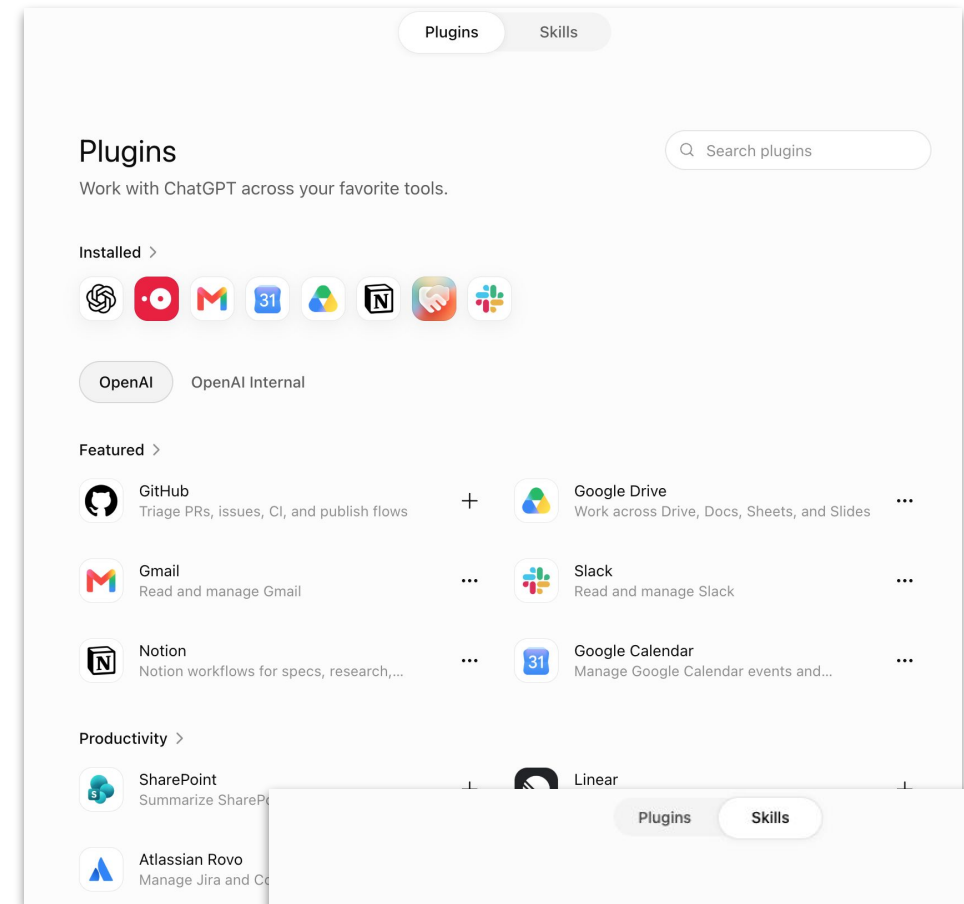
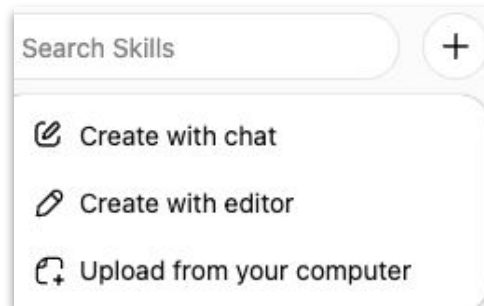


Plugins

1. Bring permitted context and actions into ChatGPT.
2. Add only tools you are approved to use, and review permissions before any action.

Skills

1. Save a repeatable way of working.
2. Start with a task that worked once, then test the Skill again before you automate it.



Scheduled Tasks

Run a trusted task on a schedule.

How to use it

- Choose a job you already trust.
- Run it once, review it, then add a narrow schedule and clear stop rules.

🕒 Weekdays at 8am

Every weekday at 8 a.m., check my next seven days in Google Calendar and recent Gmail from partners, grantees, and colleagues. Create a brief with upcoming decisions, unanswered messages, and scheduling conflicts. Draft follow-ups, but don't send messages or change my calendar.

 Gmail

 Google Calendar

Build a personal system

1. Choose one recurring job.
2. Do one useful slice once.
3. Turn the useful moves into 2–3 small Skills.
4. Add one trigger and one review boundary.
5. Make the system visible.

Ideas to try

- Inbox → priorities → drafts
- Calendar → meeting prep
- Board prep → briefing note
- Portfolio notes → weekly brief
- Stakeholder follow-up → next steps
- Travel → readiness check

Let's hear from you.

What did you make repeatable?

Which Skill or trigger helped most?

Where do you want to stay in the loop?

Lesson 2

Build for the team

Let AI run the workflow. Keep people in charge.

AI can monitor, synthesize, draft, and update—using approved sources and clear review points.

AI handles

- Monitor current signals
- Synthesize approved sources
- Draft and update a team Site

People control

- Allowed sources and access
- Review points
- What gets published

You build

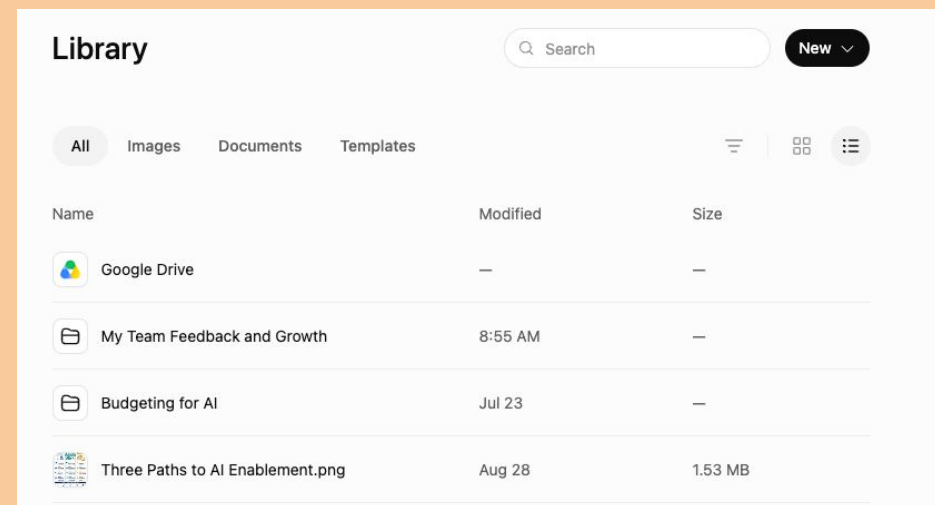
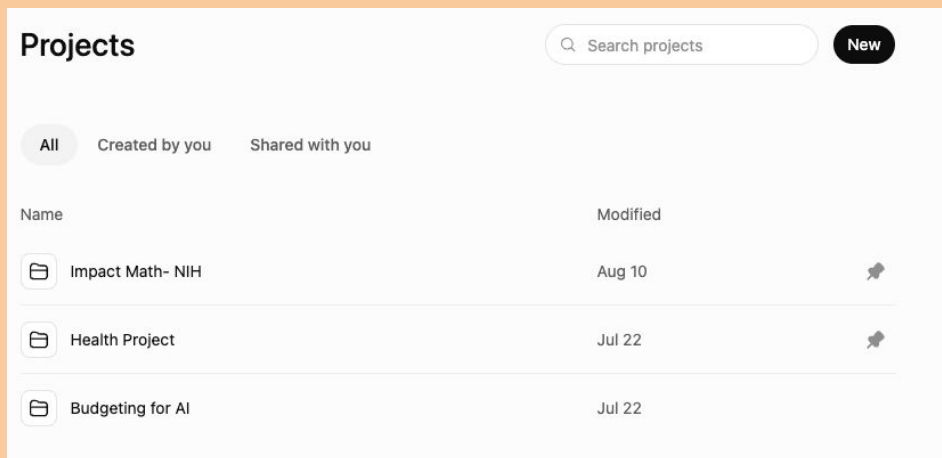
A portfolio view
A reviewed signals tracker
A draft Site + update loop

Projects + Library

Keep shared context, files, and instructions together.

How to use them

- Create a Project for a recurring team job.
- Add approved files and clear instructions.
- Use Library to keep reusable context close.

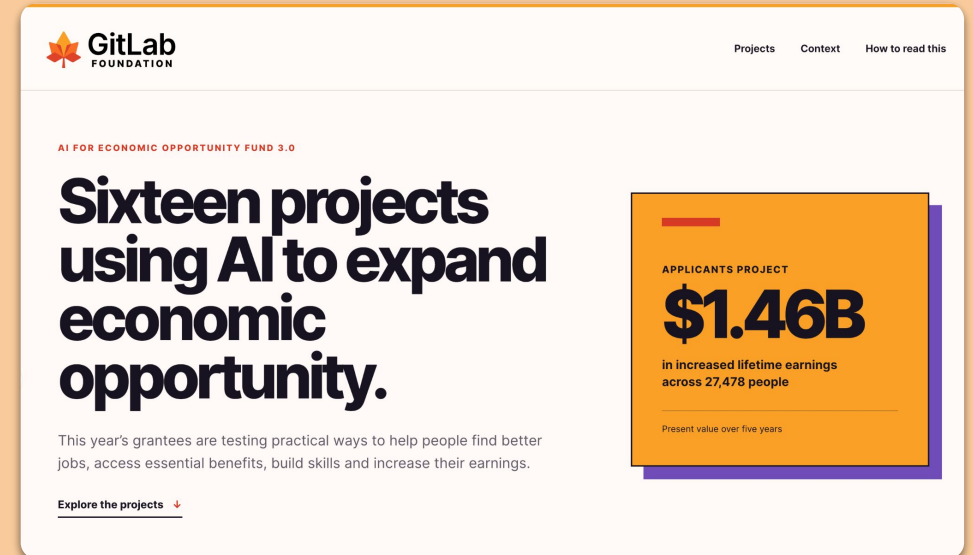


Sites

Turn approved information into a clear, useful shared experience.

How to use it

- Start from approved sources.
- Review the proposed change before applying it.
- Publish only after a person approves.



Build something your team can reuse

1. Choose one recurring team job.
2. Name the sources it should use.
3. Ask Work for a plan and what context is missing.
4. Build one useful shared output.
5. Add a trigger and an approval point.

Ideas to try

- Board prep hub
- Weekly grantee update
- Community signals tracker
- Program learning digest
- Policy watchlist
- Shared feedback hub

Let's hear from you.

What will keep this current?

What should a person approve?

What would make it useful to
others?

Takeaways

1. Start with a recurring job

2. Give AI the context, and iterate

**3. Save what works as Skills,
Scheduled Tasks, or Projects**

**4. Keep a person responsible for
important decisions and actions.**

Thank you

Matt Zieger
Chief Programs and Partnerships Officer
GitLab Foundation

Thank you

Continue learning

Share what you learned with your teams, and find resources at academy.openai.com

Feedback

Help us improve future sessions.

