



Harnessing AI for Fundraising: Trends and Tips for Nonprofit Teams

Christina Macchiarola

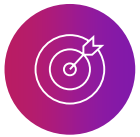
Global Engagement & Content Lead
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Christina Macchiarola



Former nonprofit marketer in NYC, focused on arts, science and education institutions



Leads content development for Microsoft Tech for Social Impact

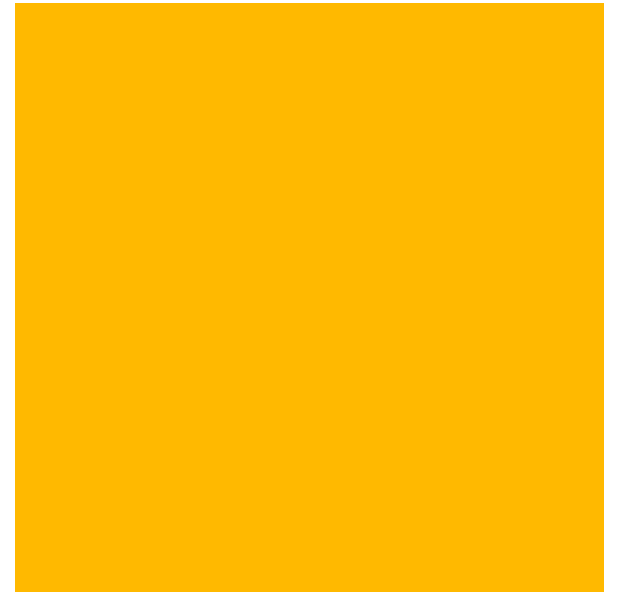
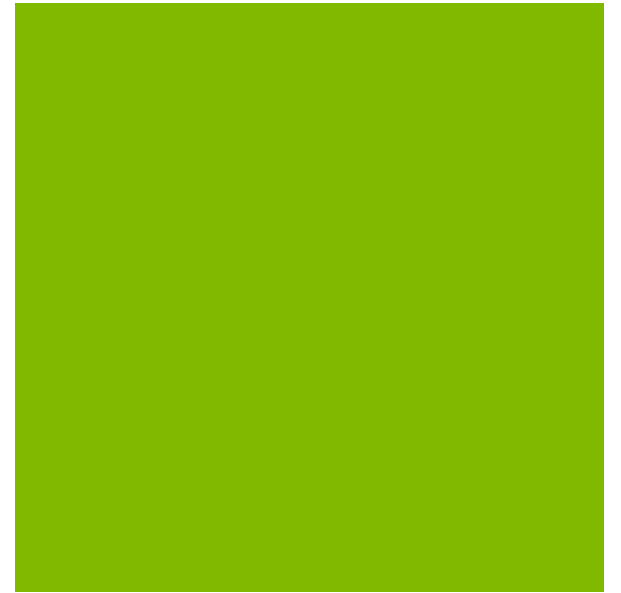


Moonlights as a barre and Pilates instructor



Microsoft mission

Empower every person
and every organization on the
planet to achieve more



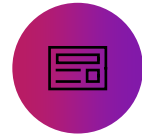
Tech for Social Impact

Empower every nonprofit and mission driven organization with Microsoft technology to accelerate social good.



Supporting nonprofits is a part of our DNA

**In the last
year
Microsoft
provided:**



\$4.7 billion

In grants or discounted software and services



\$250 million

Donated by Microsoft employees (including company match) to support nonprofits around the world



375,000+

Nonprofit organizations equipped with modern, secure, and scalable Microsoft cloud solutions

Agenda

- 01 / Prompt-along
- 02 / AI + fundraising trends
- 03 / AI usage trends
- 04 / Putting it all together
- 05 / Q&A

Phones out / Tabs open!

(That's right...it's interactive...)

Free version of Microsoft Copilot:

copilot.microsoft.com

Preview a version of Copilot in Windows on your Windows 11 PC.

Google Play



Apple Store



Learn more at adoption.microsoft.com.



Prompt ingredients



Include the right prompt ingredients

To get the best response, it's important to focus on some of the key elements below when phrasing your Copilot prompts.

Goal: What response do you want from Copilot?

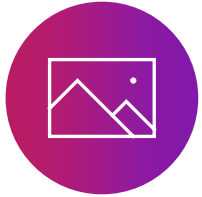
Context: Why do you need it and who is involved?

Generate a short 3-5 article reading list to inform me about nonprofit initiatives in Brooklyn, NY. Focus on local publications. Please summarize each article.

Source: Which information sources or samples should Copilot use?

Expectations: How should Copilot respond to best meet your expectations?

Fundraising Scenario



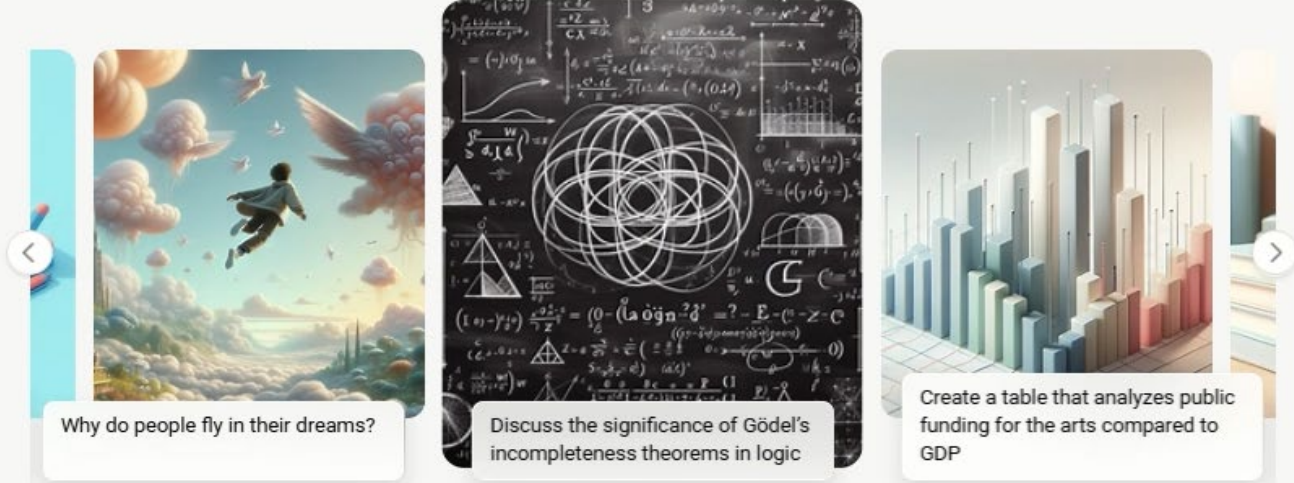
Scenario: Our organization wants to send emails to first-time donors that supported our fundraising campaign.



Prompt: Write a donor-centric thank-you email to first-time donors for contributing to our fundraising campaign in May 2024. Include the following details: The donation will help create a new shelter for animals, which will help Pets4All treat more than 200 rescues in the county. Keep the tone grateful and make sure it doesn't exceed 100 words.



Your everyday AI companion



Why do people fly in their dreams?

Discuss the significance of Gödel's incompleteness theorems in logic

Create a table that analyzes public funding for the arts compared to GDP

[Terms](#) | [Privacy](#) | [FAQs](#)



Write a donor-centric thank-you email to first-time donors for contributing to our fundraising campaign in May 2024. Include the following details: the donation will help create a new shelter for animals, which will help Pets4All treat more than 200 rescues in the county. Keep the tone grateful and make sure it doesn't exceed 100 words.



 You

Write a donor-centric thank-you email to first-time donors for contributing to our fundraising campaign in May 2024. Include the following details: the donation will help create a new shelter for animals, which will help Pets4All treat more than 200 rescues in the county. Keep the tone grateful and make sure it doesn't exceed 100 words.

 Copilot

Subject: A Heartfelt Thank You from Pets4All 🐾

Dear [Donor's Name],

We are immensely grateful for your generous donation to our May 2024 fundraiser. Your support is creating a new haven for over 200 rescued animals in our county. Thanks to you, these precious lives will find the care and shelter they deserve.

Warm regards, [Your Name] Pets4All Team 🐾

 Stop Responding

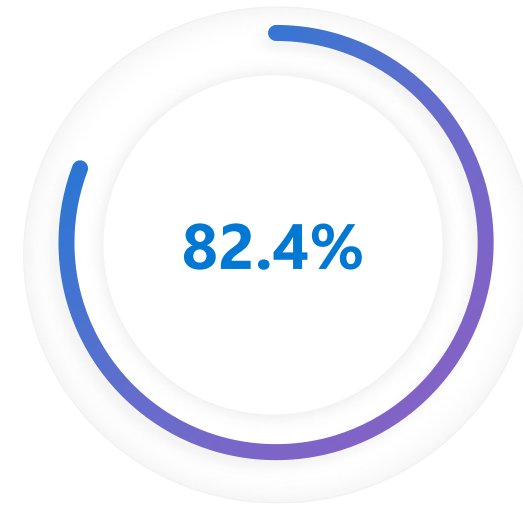
 New topic

Ask me anything...



Donor
perspectives:

AI familiarity and comfort

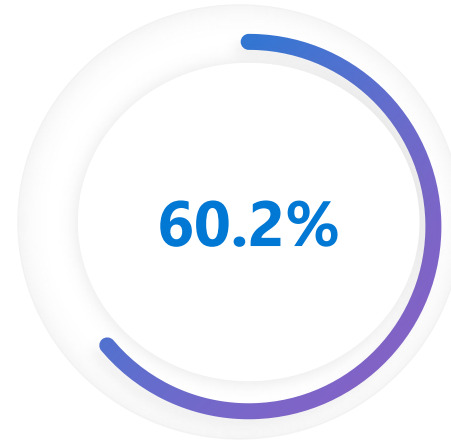


Somewhat or very familiar with AI

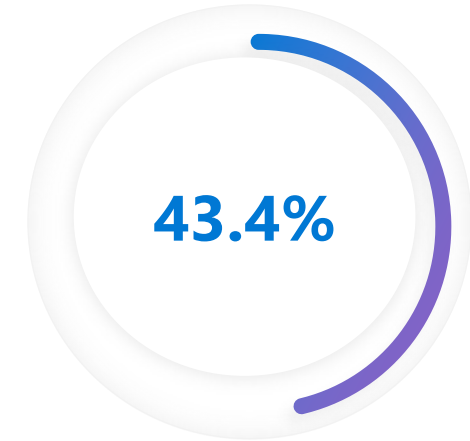
Comfort with AI in charitable contexts varies significantly, with higher comfort levels correlating with increased familiarity and younger age groups

Donor perspectives:

Perceived downsides



Lack of Human Touch

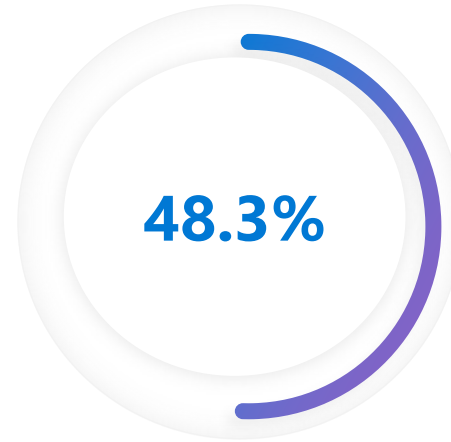


Job security

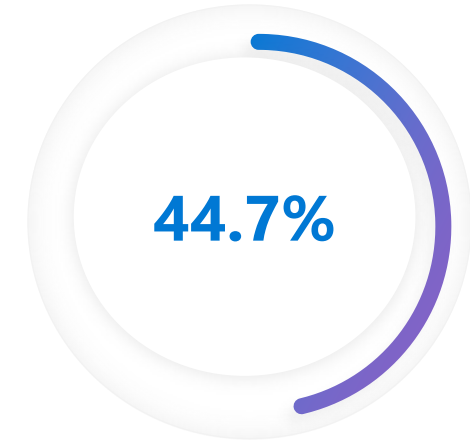
Donor concerns reflect broader societal concerns about AI.

Donor perspectives:

Perceived benefits



Fraud Prevention

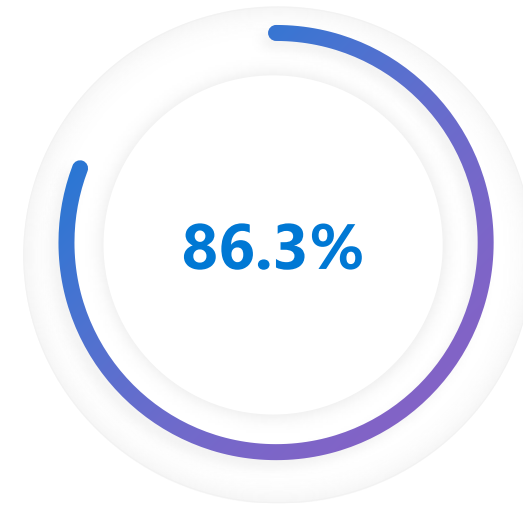


Improved Operational Efficiency

Most popular perceived AI benefits from the donor perspective

Donor
perspectives:

Ethics and transparency



**Transparency and ethics is somewhat
to very important**

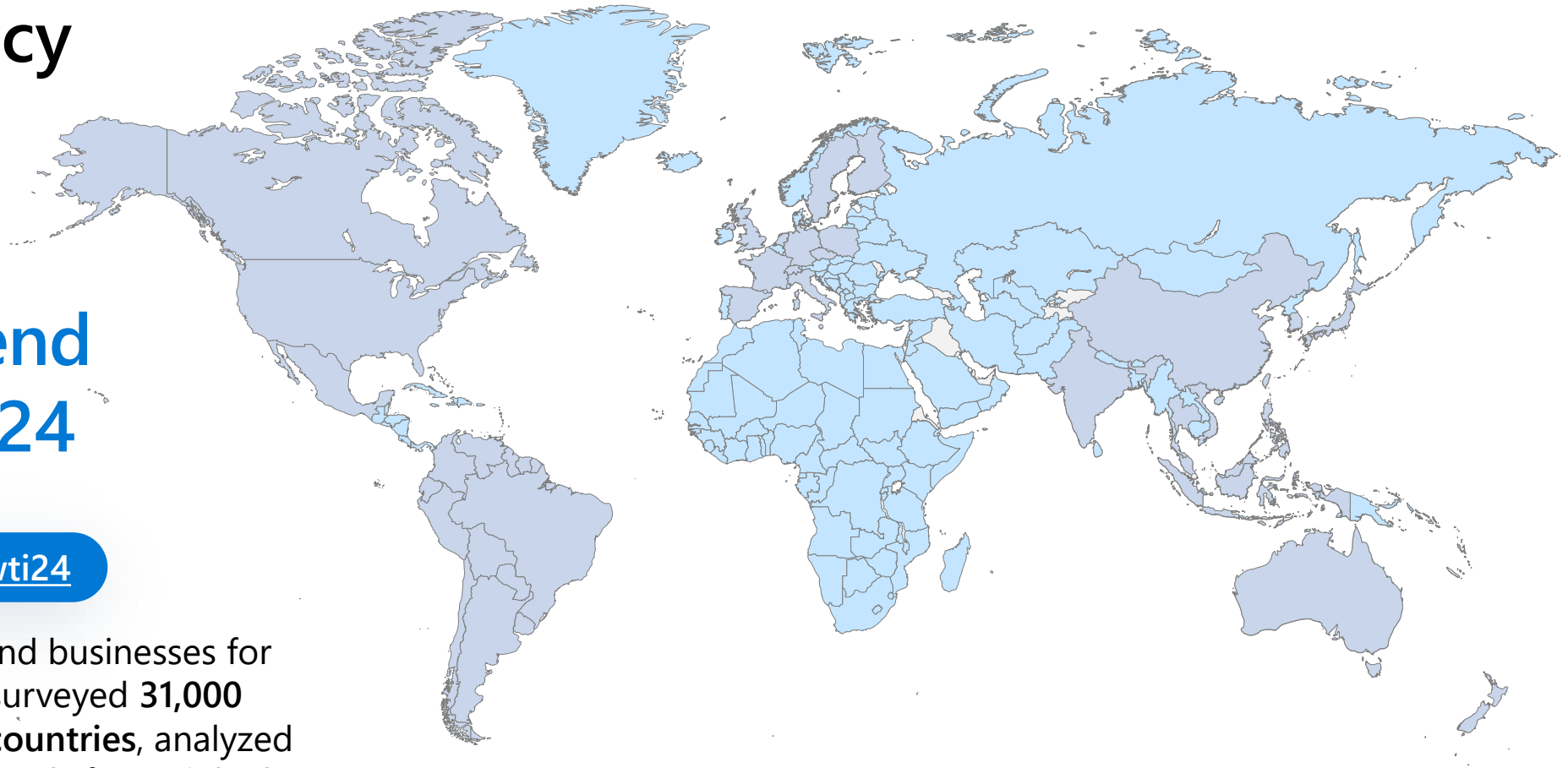
Ethical considerations and usage are
critical to maintaining donor trust.

AI efficacy

Work Trend Index 2024

<http://aka.ms/wti24>

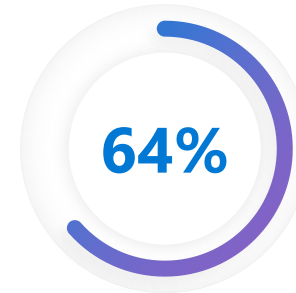
To ready leaders and businesses for the age of AI, we surveyed **31,000 people** across **31 countries**, analyzed labor and hiring trends from LinkedIn, and productivity patterns of Microsoft 365 customers globally.



Empowering growth: Embracing AI trends

“

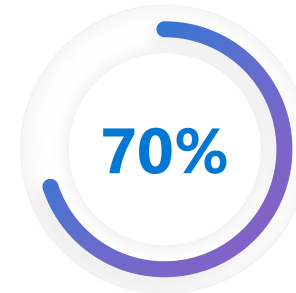
Employees are ready to embrace AI.”



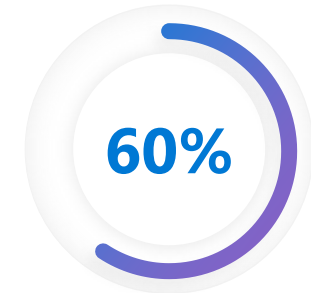
Employees lack time and energy to do their job



More likely to struggle with strategic thinking



Employees willing to delegate work to AI



Of leaders say a lack of innovation is a concern

Three findings stood out

01

Employees want AI at work—and won't wait for companies to catch up.

02

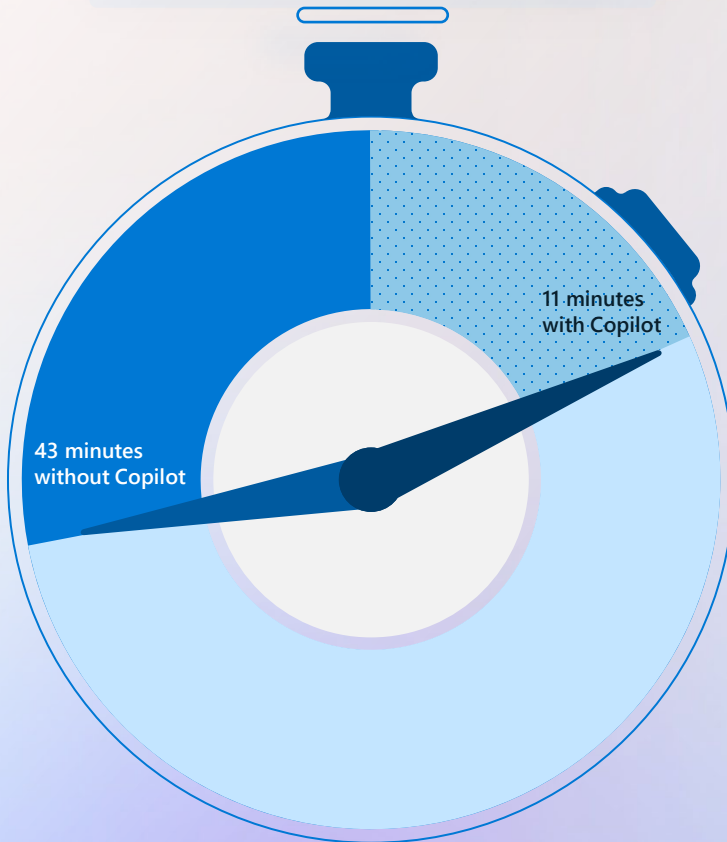
The rise of the AI power user—and what they reveal about the future.

03

For employees, AI raises the bar and breaks the career ceiling.

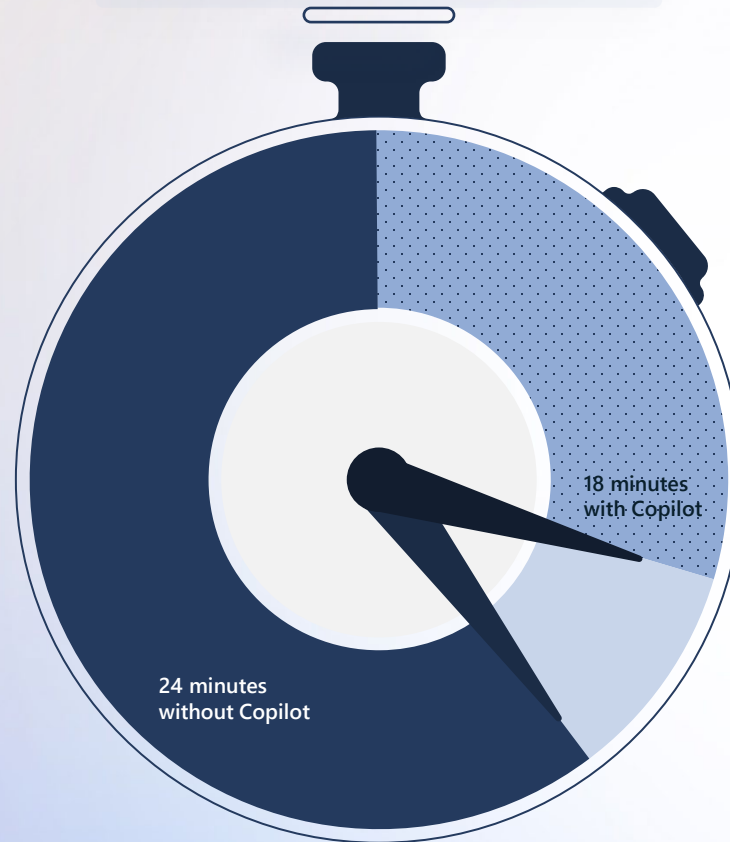
Key metrics from the Work Trend Index

Summarize a missed meeting



Time saved
32 minutes

Search for information



Time saved
6 minutes

Write a first draft



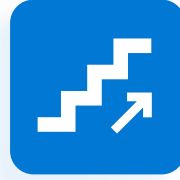
Time saved
6 minutes

AI usage in nonprofits



Augment staff talent

47% of nonprofits are automating administrative tasks with AI to free up staff time, allowing them to dedicate more energy toward directly supporting constituents and communities.*



Increase community response times

31% of nonprofits are utilizing AI assistants to offer instant support to both donors and beneficiaries, enhancing their engagement and responsiveness.*



Illuminate data

50% of nonprofits are utilizing AI tools for data management, data visualization, and data analysis.**



For every \$1 a company invests in AI,
it is realizing an average return of

\$3.50 (USD)

14 months

Average time it takes for
organizations to realize a return
on their AI investment

Microsoft 365 Copilot: Projected benefits

A Forrester New Technology Projected Total Economic Impact™ Study projected that Microsoft 365 Copilot has the potential to:

Increase fundraising output up to 20% in 3 years



Improved communications and campaign development make it easier for marketing and fundraising staff to reach more donors and communicate with these donors more often.

Decrease technology costs by at least 50%



Streamlining AI use on a unified platform reduces the need for third-party services and other AI tools, and services, like translation.

Improve operational efficiency up to 25%



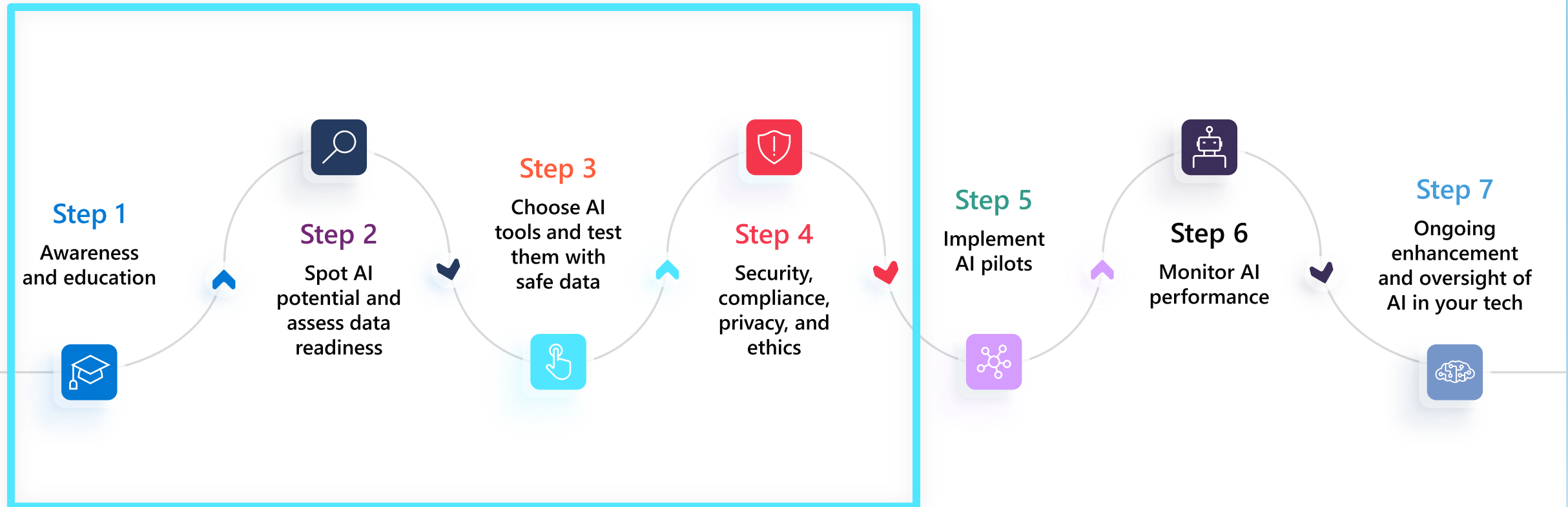
Staff spend less time in meetings, searching for information, and creating content by leveraging prompt engineering.

Increase staff retention by up to 18%



When staff can spend less time on mundane, repetitive tasks, they are also able to complete more of their work faster and improve their work life balance.

AI adoption journey



Step 1: Awareness and education

The screenshot shows the Microsoft AI Skills Navigator homepage. At the top, there are navigation links for Microsoft, AI Skills Navigator, Digital Skills, Microsoft Learn, and LinkedIn Learning. The main heading is "New! AI Skills Navigator" in large blue and black text. Below it, a sub-heading reads "Chart your course. Learn AI today." followed by a paragraph: "The opportunity of AI is here—and it's available to everyone. Discover AI-assisted learning to open up new opportunities now and in the future." A blue button labeled "Build your skills plan" is positioned below the text. At the bottom of the page, there is a dark blue section with a chat icon and the text "AI-powered assistant. Need help learning new skills? Try the AI-powered assistant." To the right of this text is a search bar with the placeholder "Ask a question about learning AI" and two buttons: "How can I build skills for AI jobs?" and "How can I learn AI prompting?".

1

AI-powered assistant helps learners find their best path to AI skills

2

Assessment to find the right starting point

3

Access breadth of learning pathways

The screenshot shows a chat window titled "AI-powered assistant" with a close button (X) in the top right corner. The chat history includes a message from the assistant: "Build your skills plan. Tell us a little about yourself to get personalized resources." followed by a timestamp "02:20 PM". Below this, a question is asked: "How are you hoping to leverage AI?". Four response options are provided in separate boxes: "I want to use AI to boost my productivity.", "I want to build AI solutions or leverage its power to solve complex problems.", "I want to harness AI to drive business transformation.", and "I want to train others to leverage AI.". Another timestamp "02:20 PM" follows. The assistant then provides a response: "To learn AI prompting, you can follow these steps and utilize the resources available:" followed by a numbered list: "1. Start with the Basics: - Learn the core concepts of Artificial Intelligence and generative AI functionality. This will provide a solid foundation for understanding how AI prompting works." and "2. Explore Generative AI Tools: - Familiarize yourself with currently available generative AI tools and their impacts. This includes understanding the ethical considerations when using these tools." At the bottom of the chat, there is a warning: "AI-generated content may be incorrect" and a text input field with the placeholder "Ask a question." and a character count "0/2000" with a send button.

aka.ms/AISkillsNavigator

Step 2: Spot AI potential – what’s your “AI why”?

Function Nonprofit role in the organization	 Fundraising	 Marketing	 Program delivery	 Data management	 Finance	 Operations
Job Primary responsibilities/ duties in the organization	Donor management <ul style="list-style-type: none"> • Fundraising strategy and communications • Grant management 	Mission activation <ul style="list-style-type: none"> • Advocacy and communications • Public relations and media relations 	Program management <ul style="list-style-type: none"> • Mission implementation 	Database management <ul style="list-style-type: none"> • Data collection • Data analysis and reporting 	Financial management <ul style="list-style-type: none"> • Financial analysis and reporting 	Recruitment <ul style="list-style-type: none"> • Training and professional development • Diversity, equity, and inclusion
Task Discrete activities required to perform these responsibilities/duties	 <ul style="list-style-type: none"> • Donor cultivation • Donor communication • Donor stewardship • Donor data management 	 <ul style="list-style-type: none"> • Mission definition • Mission: Impact alignment • Stakeholder engagement 	 <ul style="list-style-type: none"> • Program planning • Program design • Program implementation and evaluation • Program communication 	 <ul style="list-style-type: none"> • Database maintenance and training • Data privacy and security • Data integration 	 <ul style="list-style-type: none"> • Financial processing • Financial investments • Financial planning 	 <ul style="list-style-type: none"> • Needs/role definition • Hiring management • Onboarding

Step 2: Spot AI potential - Tactics



1

Recap a meeting

Let Copilot keep track of key topics and action items so you can stay focused during the meeting and avoid listening to the recording after.

» Draft an email with notes and action items from meeting.



2

Summarize an email thread

Get quickly caught up to a long, complex email thread.

» Click on the Summarize icon.



3

Draft email

Personalize the tone and length.

» Draft an email to [name] that informs them that [Project X] is delayed two weeks. Make it short and casual in tone.



4

Summarize a document

Get right down to business by summarizing long documents and focusing on the relevant sections.

» Give me a bulleted list of key points from /[file X].



5

Tell me about a topic/project

Provide insights and analysis from across multiple sources to get up to speed quickly.

» Tell me what's new about topic organized by emails, chats, and files?



6

Give me some ideas for

Boost your creativity with ideas for your work such as agendas, product names, social media posts, etc.

» Suggest 10 compelling taglines based on file.



7

Help me write ...

Jumpstart creativity and write and edit like a professional by getting a first draft in seconds.

» Generate three ways to say [X].



8

What did they say ...

When you vaguely remember someone mentioning a topic, have Copilot do the research.

» What did [Person X] say about [Topic X]?



9

Revise this content

When you've got a rough draft of an idea, turn it into usable text and then vary the length and tone.

» Rewrite with Copilot.



10

Transform from Word to PowerPoint

When you want to summarize the information from a Word document into a PowerPoint presentation.

» Create presentation from/[file X].

Spot AI potential: A day in the life of the Head of Strategy

8:00 AM

John uses Copilot to obtain market-research insights for donor behavior within the sector by segment, based on reports received.



Summarize latest three reports with a focus on donor behavior by segment. Highlight key paragraphs or figures.



8:30 AM

John uses Copilot to analyze donor datasets and determine an optimum value to request from a donation.



Create a scatter plot of donation amounts against donor age.



Any available graph can be created if the data exists in the Excel spreadsheet.

10:00 AM

Copilot accelerates catching up on emails for John by summarizing email threads and preparing draft responses and updates to donors.



Generate a brief thank-you email template for donors that can be personalized with their name, donation amount, and preferred cause. The tone should be warm and appreciative.



11:00 AM

John meets with his team to share insights and uses Copilot to help brainstorm how to craft personalized, satisfying donor experiences that underscore the tangible impact of their support.



Identify and outline action steps to implement personalized engagement tactics that enhance donor satisfaction and visibly demonstrate the impact of their contributions.



2:00 PM

John is interested in establishing international donor links. He uses Copilot to assist with research and investigate suitable partners.



Identify potential partnerships and effective network opportunities aligning with the values outlined in "Our Values" document.



4:00 PM

Having found a suitable international partnership opportunity, John uses Copilot to update a proposition pitch.



Add additional slide based on the new potential partnership details outlined below...



John is Head of Strategy

Using Microsoft 365 Copilot in fundraising



Goals and challenges

Goals: Expand donor base and increase social media presence to attract more funding. Fostering donor relationships with current and new donors, improve fundraising campaign effectiveness, and leveraging technology for efficient operations.

Challenges: Expanding the donor base and enhancing social media visibility in a crowded landscape. Ensuring the establishment of consistent funding streams, given the complexities involved in grant applications and reporting.



Copilot can assist with ...

- [Grant management: Grant writing proposal](#)
- [Grant management: Grant tracking and reporting](#)
- [Donor management: Donor recognition](#)
- [Donor management: Network expansion](#)
- [Donor management: Donor campaign planning and design](#)
- [Fundraising strategy and communications: Predictive analysis for increased donations](#)
- [Fundraising strategy and communications: Analyze donor datasets for optimum donation value request](#)
- [Donor management: Data-led insights into crafting donor experiences](#)



Fundraising roles



Major Gifts Officer



Grant Manager



Chief Philanthropy Officer



Director of Development

Microsoft Copilot use cases and potential benefits



[Grant writing proposal](#)

For fundraisers, a strong grant proposal is essential, aligning goals with the grantor's mission for securing substantial funding.



[Grant tracking and reporting](#)

Nonprofits monitor grants and report outcomes to adhere to guidelines, show results, build trust, and secure future funding.



[Donor recognition](#)

Donor recognition tactics thank supporters, fostering engagement and sustaining their commitment to objectives.



[Network expansion](#)

Expanding donor networks is key for growth and support. Social media and events help build partnerships to broaden a cause.



[Donor campaign planning and design](#)

Campaign planning involves crafting compelling narratives and visuals to increase donations and support for our cause.



[Predictive analysis for increased donations](#)

Analyzing data informs optimal timing and targets for fundraising, enhancing earnings and attracting new or larger donations.



[Analyze donor datasets for optimum donation value request](#)

Analyzing donor datasets to determine the ideal donation request is important for maximizing fundraising potential and respecting donor capacity.



[Data-led insights into crafting donor experiences](#)

Utilizing data-driven insights to shape donor experiences is crucial for building lasting relationships and enhancing donor satisfaction and loyalty.



Increased donations



Effective insights



Grant process efficiency

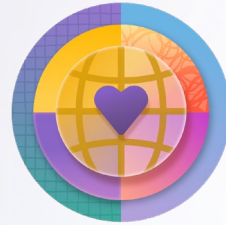
Step 3: Choose AI tools and test them with safe data

Microsoft principles of responsible AI:



Fairness

AI systems should treat all people fairly.



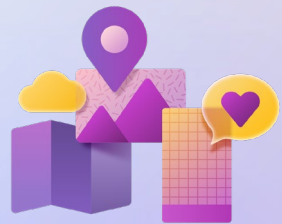
Inclusiveness

AI systems should empower everyone and engage people



Reliability and safety

AI systems should perform reliably and safely.



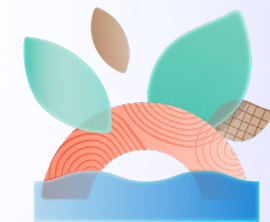
Transparency

AI systems should be understandable.



Privacy and security

AI systems should be secure and respect privacy.



Accountability

People should be accountable for AI systems.



Microsoft 365 Copilot: Your AI assistant at work

Key facts about Copilot:

Helps you achieve more as you work smarter by bringing generative AI to your everyday tasks and workflows.

Runs with large language models (LLMs) that can process data and files in your systems at lightning speed.

Enables uncompromised human control.

Augments familiar Microsoft apps.

In 2023, the adoption of generative AI
outpaced that of tablets and smartphones.*

*Source: EMARKETER [Generative AI adoption climbed faster than smartphones, tablets](#), August 11, 2023.

Step 4: Security, compliance, privacy and ethics



Bring the right people into the conversation

Don't keep this conversation in the IT sphere alone. Bring in all the relevant security, legal, and compliance professionals.



Build a foundation for automation

Microsoft Purview Data Loss Prevention has powerful, intelligent detection, but it relies on establishing good defaults.



Think about how your employees will use Microsoft 365 Copilot

Determine the primary use cases for Microsoft 365 Copilot. The kinds of collaboration and access employees need will affect your default labeling architecture.



Take this opportunity to train employees

If you've been looking for an excuse to refresh employee knowledge around data privacy, let this moment be your milestone. It will be far easier to start with a clean data estate.



Don't overwhelm your employees

Make labeling simple and intuitive, and ensure it isn't overwhelming. Employees should have a limited set of choices to keep things comprehensible. It's also valid for different employees to see different choices.

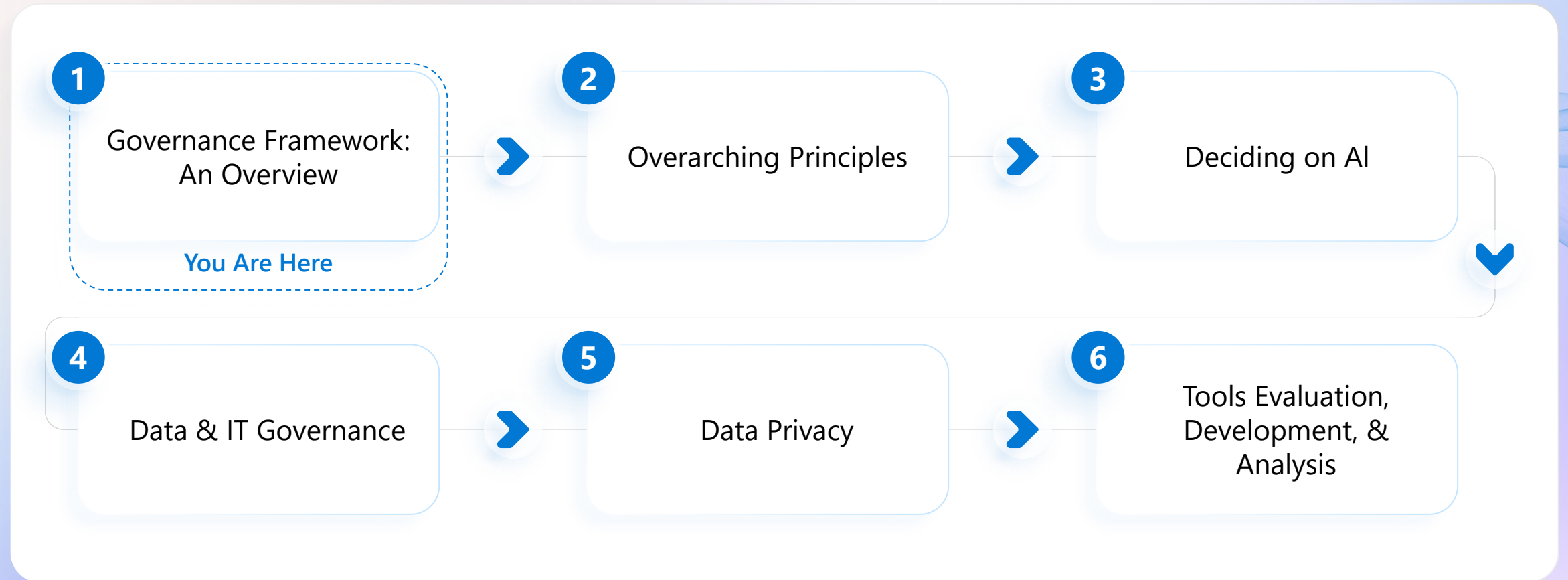


Balance good governance with time to value

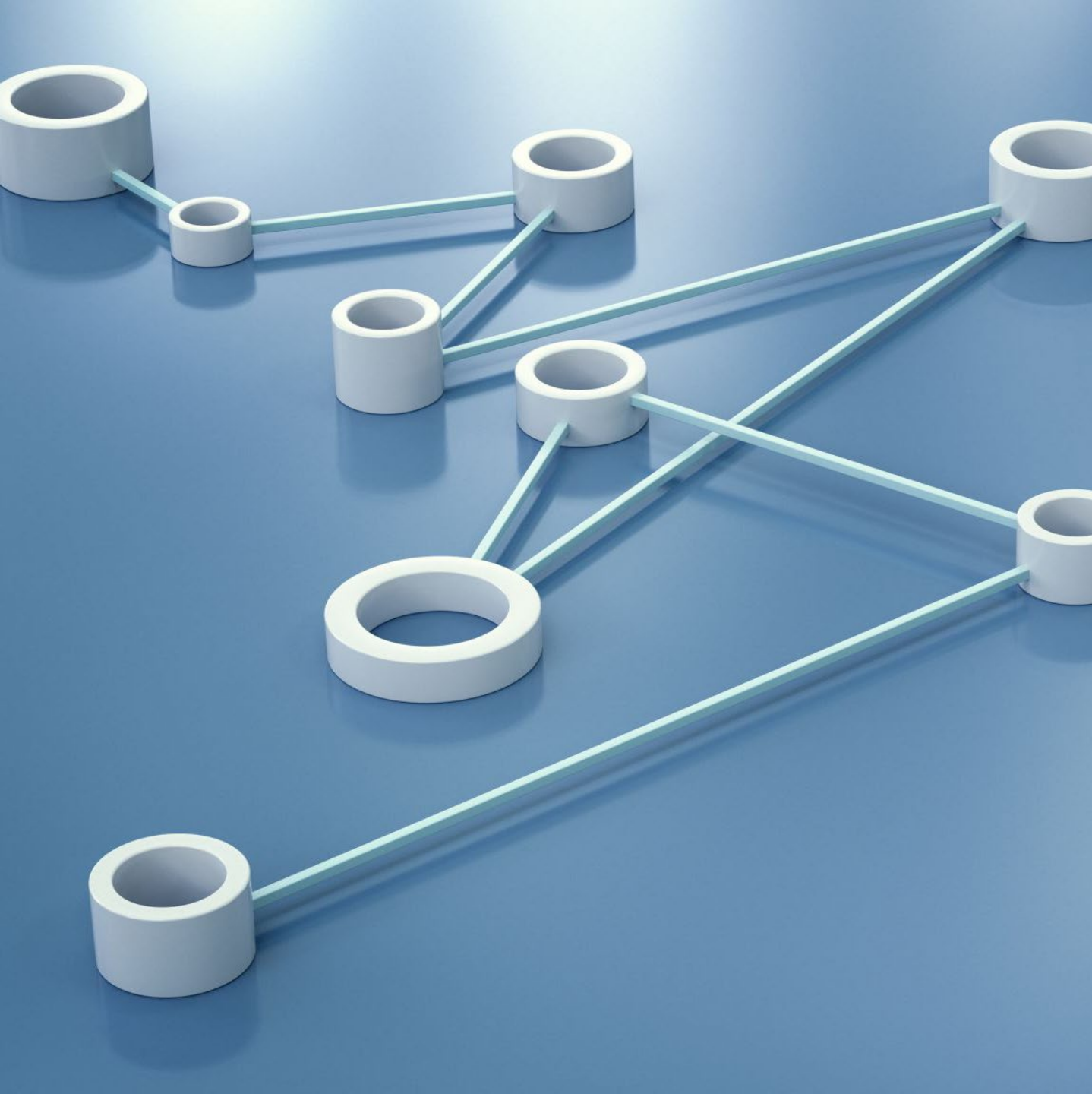
Because of the scope and complexity of Microsoft's deployment, we took a very thorough approach to governance. If speed is your priority, you might consider a faster deployment with a less comprehensive governance approach, for example, using Restricted SharePoint Search to restrict both Enterprise Search and Copilot experiences to a curated set of SharePoint sites of your choice.

AI Governance Framework for Nonprofits

Six modules for nonprofits to guide them through important considerations for nonprofits when implementing AI



aka.ms/AIGovernanceFramework



Closing Thoughts

Emphasize a Human-First Approach

Clearly articulate how AI complements rather than replaces human interactions to address concerns about losing the personal touch.

Enhance Data Security and Privacy Measures

Implement and communicate robust data protection strategies to alleviate donor concerns.

Create Transparent AI Policies

Establish and disseminate clear guidelines on AI utilization, decision-making processes, and ethical considerations.

Demonstrate Impact

Regularly provide concrete examples of how AI enhances operational efficiency, fraud detection, and overall charitable impact.

Address Workforce Concerns

Clearly explain how AI will affect staffing, emphasizing new roles and opportunities rather than job displacement.

Next steps

Learn more about our nonprofit offers:
aka.ms/nonprofit

Start your AI skills journey:
aka.ms/AISkillsNavigator

Download AI resources for you and your board:
aka.ms/AIGovernanceFramework



Fundraising Use Cases

Grant writing proposal



Grant writing proposals are essential for obtaining financial support, enabling organizations to execute impactful projects and sustain their operations.

Benefits of using Copilot to help grant proposal writing

Streamlined proposal process

- Automation of data aggregation and formatting accelerates proposal creation, increasing overall efficiency in grant writing.

Strategic insight enhancement

- The ability to analyze previous successful grants to offer insights on effective structuring and content strategies for new proposals.



Roles

- Major Gifts Officer
- Director of Development
- Grant Manager
- Chief Philanthropy Officer



Microsoft AI solutions

- Microsoft 365 Copilot
- Microsoft Copilot

Fundraising | Grant proposal writing

Potential benefits

Improve understanding

Improve quality and presentation

Avoid simple tasks

Create first draft proposal

Prompt Microsoft 365 Copilot in Word to create draft briefs based upon specific criteria.

Microsoft 365 Copilot in Word

Write a three-page grant proposal, adopt the tone of a short timeline for funding approval. The content should outline...

Market research

Use AI to search and compile financial trends from successful grant proposals and funder preferences to inform and enhance your grant application strategy.

Microsoft 365 Copilot in Edge

Search and summarize key financial elements from successful grant proposals and funder reports to guide our grant application financial strategy.

Have Copilot browse the internet and research key areas of interest.

Analyze datasets for key insights

Show insights from the data which you have gathered to understand the data better.

Microsoft 365 Copilot in Excel

Show data insights on the/[Grant Approval] spreadsheet.

Data insights could be in tabular or graph form, if specifically requested.

Grant Requirements for the Lifelong Learning Initiative Grant

A grant opportunity for nonprofit organizations that support higher learning and continuing education for seniors

Overview

The "Lifelong Learning Initiative Grant" is a grant aimed at promoting higher learning and continuing education for adults aged 55 and over. This grant is available to nonprofit organizations that have programs designed to help seniors continue their education and improve their skills.

The grant committee will award up to \$50,000 to selected organizations that demonstrate the effectiveness and impact of their programs on the target population. The grant money can be used for program development, implementation, evaluation, and reporting.

Eligibility



To apply for this grant, the following requirements must be met:

- The nonprofit organization must be registered and in good standing.
- The organization must have a program specifically designed for adults aged 55 and over.
- The organization must provide evidence of the impact of their program on the target population.

Header

100% Looks good!

Get a summary from Copilot. Ask questions and gain insights about this doc.

 Draft with Copilot 

Draft a grant proposal for Contoso's nonprofit digital literacy program. Use the data in the provided documents to detail how funds were used in the past and success of previous cohorts. Draft should be persuasive and show how the requested funds will be used for the program expansion. Include details on the importance of digital literacy and Contoso's commitment to serving its community. [FY23 DL Grant Requirements.docx](#)

423/2000

Combing through info... Stop generating ESC

Working on it... Stop generating ESC

Grant Proposal for the Lifelong Learning Initiative Grant

Contoso Nonprofit: Digital Empowerment Program

Executive Summary

- Contoso Nonprofit is a Seattle-based organization that has been serving the community for 20 years, offering free classes on digital literacy, ESL, counseling, and foodbank services.

Clipboard Font Paragraph Styles Editing

Calibri (Body) 11 A A Aa A

B I U x x² A A

Normal No Spacing Heading 1

Find Replace Select

Dictate Sensitivity Add-ins Editor Copilot

SENSITIVITY Due to content created by Copilot, your organization automatically applied the sensitivity label: General\All Employees (unrestricted)

- Digital literacy is defined as the ability to use information and communication technologies to find, evaluate, create, and communicate information, and to participate in social and civic activities.
- Digital literacy is essential for seniors to access information, services, and opportunities, and to stay connected with their families, friends, and communities.
- However, according to a 2022 study by the American Community Survey, only 48% of senior citizens have basic digital literacy, and many face barriers such as lack of access, skills, confidence, and motivation to use technology.
- Digital Empowerment addresses these challenges by providing seniors with free classes on basic computer skills, internet usage, and social media, as well as access to technology resources, such as computers and internet access, at Contoso's facilities.
- The program curriculum is based on the Northstar Digital Literacy Standards, which cover topics such as computer basics, email, internet, Windows, Mac OS, Word, Excel, PowerPoint, and social media.
- The program is delivered by Contoso's program staff and volunteers, who are trained and certified in digital literacy instruction and adult education.
- The program runs for 12 weeks, with two sessions per week, each lasting two hours. The program is offered in English and Spanish, and accommodates different learning styles and paces.
- The program also includes guest speakers, field trips, and social events to enhance the learning experience and foster a sense of community among the students.
- The program's goals are to increase the digital literacy of seniors by 25%, to improve their confidence and satisfaction in using technology, and to encourage them to continue their education and lifelong learning.

Draft a grant propos... < 1 of 1 > AI-generated content may be incorrect

Keep it For example, "Make it formal"

File Home Insert Draw Design Layout References Mailings Review View Help

Clipboard: Paste, Cut, Copy, Format Painter

Font: Aptos Display (Head), 28, A[^], A^v, Aa, A, B, I, U, x₂, x², A, color, background color

Paragraph: Normal, No Spacing, Heading, Heading 2, Heading 3, Title

Editing: Find, Replace, Select

Voice: Dictate

Sensitivity: Add-ins

Editor: Editor, Copilot

Comments, Editing, Share

Navigation

Search document

Headings Pages Results

- Proposal Summary
 - Deadline
 - Introduction
 - Program needs
 - Objective
 - Program Impact FY22
- Sample Monthly Program Budget

Digital Empowerment FY24

Proposal Summary

Contoso is dedicated to improving the lives of senior citizens ages 66 and older through increased digital literacy. A 2022 study by the American Community Survey concluded that only 48% of senior citizens have basic digital literacy. Contoso digital literacy program aims to increase seniors' digital literacy through classes held by our staff and volunteer efforts.

Deadline

February 15th 2023.

Introduction

Contoso Nonprofit has been serving our community in Seattle Washington for 20 years. We offer free classes on digital literacy, English as a second language (ESL), as well as counseling and a foodbank for our underserved community. The organization's digital literacy program is designed to provide individuals with the skills they need to use technology effectively. The program includes training on basic computer skills, internet usage, and social media. Digital Empowerment also provides access to technology resources, such as computers and internet access, to individuals who may not have access to them otherwise.

Program needs

Last year we had a cohort of 200 people sign up for our digital literacy program. We have identified there are approximately 1000 people in our community this year that could benefit from the program. Due to this high demand we want to increase our capacity by 50%. In order to increase our capacity we will need \$120,000 in additional funding through grants and donations.

Objective

44°F Cloudy

Search

Windows taskbar icons: File Explorer, Microsoft Edge, Teams, OneDrive, Word

System tray: Network, Volume, Power, Notification

Navigation

Search document

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- Proposal Summary
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Sample Monthly Program Budget

Digital Empowerment FY24

Draft with Copilot

Create an Executive Summary for this document

45/2000

Generate Reference a file

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Digital Empowerment FY24

Pulling things together... Stop generating ESC

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Digital Empowerment FY24

Executive Summary

The goal of this document is to present a proposal for the Digital Empowerment FY24 project, which seeks to enhance the digital literacy of senior citizens in the United States. The project is motivated by the need to address the digital divide that affects older adults, who often lack the skills and confidence to use digital technologies for their personal, social, and civic needs. The project will provide senior citizens with access to digital devices, internet connectivity, and training courses that will help them learn how to use various online platforms and applications. The project will also leverage the expertise and enthusiasm of Contoso employees and volunteers, who will serve as mentors and instructors for the senior participants. The expected outcomes of the project are improved quality of life, social inclusion, and civic engagement for senior citizens, as well as increased brand awareness and social responsibility for Contoso.

Proposal Summary

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Create an Executive... < 1 of 1 > AI-generated content may be incorrect

Keep it [Refresh] [Delete] For example, "Make it formal" [Next]

Grant tracking and reporting



Grant tracking and reporting ensure transparency, measure progress, and demonstrate accountability to funders, which is essential for maintaining trust and securing future funding.

Benefits of using Copilot to help grant tracking and reporting

Efficiency and clarity boost

- Streamline grant tracking, unlock insights into successful applications, and save time to support future funding.
- Enhances transparency and accountability through regular reporting, while saving time creating the reports.

Proactive status tracking

- Provides real-time updates on grant status, enabling proactive decision-making.



Roles

- Major Gifts Officer
- Director of Development
- Grant Manager
- Chief Philanthropy Officer



Microsoft AI solutions

- Microsoft 365 Copilot
- Microsoft Copilot

Fundraising | Grant tracking and reporting

Potential benefits

Save time

Improve data quality

Avoid simple tasks

Automate data entry and identify outliers

Copilot can automate data entry and remove any data that will change results.

Microsoft 365 Copilot

Create a **script** to auto-populate Excel with grant data from CSVs and highlight entries that could skew our grant tracking results.

Generate reports

Create reports in Power BI to see your report request visually.

Microsoft 365 Copilot in Power BI

Generate a **report** that shows me the number of successful grant applications.

Microsoft 365 Copilot in Power BI can generate various reports and visuals based on the request of the user.

Standardized grantee report forms

Use Microsoft 365 Copilot in Word to create standardized template for grantees to supply information in an easy-to-assess format.

Microsoft 365 Copilot in Microsoft Teams

Generate a **template** to assist grantees returning a progress update on the usage of a grant. Include sections for grantee information, financials, project progress, outcomes, challenges, future plans, and supporting documentation.

Donor recognition



Donor recognition is important because it acknowledges contributions, fosters ongoing support, and strengthens relationships with benefactors who are vital to an organization's success.

Benefits of using Copilot to help donor recognition

Retention through recognition

- Enhanced efficiency in recognizing donors, aids with donor retention.
- Personalized communication with donors can be created.

Personalized donor outreach

- Foster strong relationships with additional communication features.
- Save time when visually appealing recognition materials can be generated.



Roles

- Major Gifts Officer
- Director of Development
- Grant Manager
- Chief Philanthropy Officer



Microsoft AI solutions

- Microsoft 365 Copilot
- Microsoft Copilot

Fundraising | Donor recognition

Potential benefits

Save time

Improve understanding

Accelerate expressing gratitude to donors

Analyze data to gain insights

Analyze donor data to gain insights for who has donated.

Microsoft 365 Copilot in Excel

Create a **table** showing me the names of who donated, with the total amount and date of donation.

Draft tailored emails

Starting in a new email, prompt Microsoft 365 Copilot in Outlook to draft the email to a specific contact, including any key points.

Microsoft 365 Copilot in Outlook

Draft a **tailored email** for our donor, inviting them to an upcoming fundraising event and highlighting the impact of their previous contribution.

Social media recognition

Use Copilot to generate thank you posts at each fundraising milestone, recognizing individual major donors.

Microsoft 365 Copilot

Generate **thank you posts** for various social media platforms to thank donors. Individually mention [donor's name], to thank them for their generous donation.

Network expansion



Network expansion is important because it broadens an organization's reach, creates new opportunities for collaboration, and enhances its ability to achieve its mission.

Benefits of using Copilot to help network expansion

Brand awareness efficiency

- More efficient methods of brand awareness can attract more attention and support from individuals or organizations.

Communication enhancement

- Improved communication with networking prospects and assistance when writing emails.



Roles

- Major Gifts Officer
- Director of Development
- Grant Manager
- Chief Philanthropy Officer



Microsoft AI solutions

- Microsoft 365 Copilot
- Microsoft Copilot

Fundraising | Network expansion

Potential benefits

Save time

Improve quality and presentation

Improve understanding

Discover opportunities

Discover potential donors or partners.

Microsoft 365 Copilot

Find **potential donors** or partners who align with our mission, outlined in `/[Mission]` document.

You can provide Copilot with the nonprofit's mission and ask it to scan the internet for potential donors or partners to match.

Draft compelling emails

Draft a well scripted email to create a new partnership proposal.

Microsoft 365 Copilot in Outlook

Compose an email proposing a partnership with `[potential partner's name]` including possible funding, outlining how our mutual goals align and the potential benefits of our collaboration. Use the information below to guide content...

Create first draft document

Prompt Microsoft 365 Copilot in Word, include important information or tone of the text.

Microsoft 365 Copilot in Word

Create a comprehensive donor information pack, detailing our mission, the impact of our work, and how donations are utilized. Use the `/[Key information]` document for required information.

Donor campaign planning and design



Donor campaign planning and design are crucial for effectively communicating an organization's cause, engaging potential supporters, and maximizing fundraising efforts.

Benefits of using Copilot to help donor campaign planning and design

Engagement and efficiency

- Enhances efficiency in outreach strategies, saving time and resources.
- Increase donor engagement through compelling narratives.

Brand identity enhancement

- Strengthens brand identity through cohesive design elements.



Roles

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Microsoft AI solutions

- Microsoft 365 Copilot
- Microsoft Copilot

Fundraising | Donor campaign planning and design

Potential benefits

Save time

Improve data quality and insights

Avoid simple tasks

Draft content for a donor campaign

Prompt Microsoft 365 Copilot in Word to create draft briefs based upon certain criteria.

Microsoft 365 Copilot in Word

Create a donor campaign, aimed at raising funds to build sustainable housing for families in need. Make it engaging for our audience and include public recognition for our significant donors, detailed in `/[Significant Donors]`.

Analyze data to gain insights

Identify trends in the data to view the preferences of previous significant donors.

Microsoft 365 Copilot in Excel

Generate a list of donors, who donated above \$50,000 last year.

Copilot can identify various trends within a specified dataset and produce tailored insights to the user's needs.

Design a donor campaign presentation

Use Microsoft 365 Copilot to create a draft PowerPoint presentation which will be the foundation of a new campaign.

Microsoft 365 Copilot in PowerPoint

Create a draft presentation for our new donor campaign "Education for all," including slides on the campaign overview, fundraising goals, potential impacts, and ways for donors to contribute. Base this on the `/[Education for all Campaign overview]` document.

Predictive analysis for increased donations



Predictive analysis for increased donations is vital as it helps organizations anticipate giving trends, tailor fundraising strategies, and optimize donor engagement for better financial outcomes.

Benefits of using Copilot to help predictive analysis for increased donations

Conversion maximization

- The efficiency efforts are increased, leading to potential higher conversion rates and a more cost-effective allocation of marketing resources.
- Helps predict donor behavior for more effective fundraising strategies.

Optimized campaign timing

- Timing campaigns effectively can increase donor response rates, and the total amount of donations received.



Roles

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Microsoft AI solutions

- Microsoft 365 Copilot
- Microsoft Copilot

Fundraising | Predictive analysis for increased donations

Potential benefits

Save time

Improve data quality

Avoid simple tasks

Analyze and forecast trends

Analyze donation trends and forecast the best times to approach donors.

Microsoft 365 Copilot in Excel

Analyze the **dataset** for donation amounts over time, **forecasting** when the best times are to approach donors over the next three months.

Create visual insights

Visualize the donation amounts and generate a potential donation amount.

Microsoft 365 Copilot in Excel

Generate a **line graph** for donation amounts over time and **generate a potential donation amount** from [Client A], which would maximize the potential donation made.

Create draft emails

Draft tailored emails to potential donors.

Microsoft 365 Copilot in Outlook

Generate an **email** which will be sent to [potential donor's name], outlining the new campaign and including the benefits of the campaign and benefits for the donor. Base this on the information below...

Analyze donor datasets for optimum donation value request



Analyzing donor datasets for optimum value requests maximizes fundraising efficiency by aligning donation appeals with individual donor capacity and inclination.

Benefits of using Copilot to help analyze donor datasets for optimum value request for donations

Maximizes donations

- Maximize potential donation amount by suggesting an appropriate amount.
- Identifies donation patterns to set realistic and achievable fundraising targets.



Roles

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Microsoft AI solutions

- Microsoft 365 Copilot
- Microsoft Copilot

Fundraising | Analyze donor datasets for optimum donation value request

Potential benefits

Enable precise request tailoring

Data-driven decision-making

Boost fundraising

Donor segmentation

Analyze donor datasets to segment donors based on their giving history, frequency, and amount, helping to tailor donation requests for optimal value.

Microsoft 365 Copilot in Excel

Analyze the giving patterns in our donor database to segment donors effectively and customize our donation requests for better results.

Predictive donation modelling

Predict future giving patterns and suggest the ideal donation request amounts based on past donor behavior and demographic data.

Microsoft 365 Copilot in Excel

Use historical donor data to model and predict optimal donation amounts, to enhance the effectiveness of our fundraising efforts.

Lifetime value analysis

Employ Copilot to calculate the lifetime value of donors, identifying the most valuable supporters and determining appropriate ask levels for each segment.

Microsoft 365 Copilot in Excel

Calculate the lifetime value of our donors from the dataset to inform strategic donation request levels and maximize overall fundraising potential.

Data-led insights into crafting donor experiences



Data-led insights enable the crafting of personalized donor experiences, enhancing satisfaction, and fostering long-term supporter relationships.

Benefits of using Copilot to help data-led insights into crafting donor experiences

Personalized engagement

- Designs unique donor journeys based on individual giving history and preferences.
- Enhances donor satisfaction with customized acknowledgments and updates.

Donor retention

- Encourages long-term support by aligning experiences with donor expectations.



Roles

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- Grant Manager
- Chief Philanthropy Officer



Microsoft AI solutions

- Microsoft 365 Copilot
- Microsoft Copilot

Fundraising | Data-led insights into crafting donor experiences

Potential benefits

Enhanced donor retention

Increased donation rates

Personalized and satisfying donor experiences

Opportunities for donor appreciation

Identify opportunities for demonstrating donor appreciation by analyzing contribution levels and engagement. Personalized recognition can enhance donor relationships and loyalty.

Microsoft 365 Copilot in Excel

Analyze donation data to identify appropriate tiers and suggest personalized recognition tiers for each level, such as bronze, silver, gold, and platinum donors.

Analyze engagement data

Leverage Copilot to dissect and compare donor engagement data, identifying the most impactful experiences and touchpoints that correlate with higher donation retention and frequency.

Microsoft 365 Copilot in Excel

Analyze donor engagement metrics to identify key experiences and interactions that significantly boost donation frequency and donor retention.

Personalization

If data shows that personalized experiences lead to higher donations, Copilot can help craft further individualized experiences that acknowledge each donor's previous contributions, interests, and the impact of their support.

Microsoft 365 Copilot

Suggest gift or special event ideas based on an Excel file,/[Donor Information], which details donors' past interactions with the organization and demographic information.

Detailed examples of Microsoft 365 Copilot prompts

Discover opportunities

Fundraising



As
someone in...

Fundraising team.



I want to...

Discover potential donors or partners whose values are consistent with our organization's mission.



Prompt...

"Identify and summarize a list of potential donors or partners with a track record of supporting infant and young child feeding in emergencies, whose values are consistent with our organization's. Our values are listed in /[Our Values] document."



I'll know this is successful when...

I receive a list of potential donors or partners with consistent values.



The value Copilot provided me in completing this job (functional, emotional, social)

- Reduces time spent searching online for opportunities.
- Potentially identify previously unknown funding opportunities.
- Reduces time spent checking potential donors and partners for consistency with organizational values.

Market research

Fundraising



As
someone in...

Fundraising team.



I want to...

Search and compile financial trends from successful grant proposals and funder preferences to inform and enhance our grant application strategy.



Prompt...

"Search and summarize key financial elements from successful grant proposals and funder reports in the area of infant and young child feeding in emergencies."



I'll know this is successful when...

I receive a summary of successful grant proposals and funder preferences that I can use to inform and enhance our grant application process.



The value Copilot provided me in completing this job (functional, emotional, social)

- Reduced desk research time in finding and examining data.
- Quickly receive data-based insights into previous funding successes.
- Accelerate and guide grant application completion process.

Draft content for a donor campaign

Fundraising



As
someone in...

Fundraising team.



I want to...

Get started with producing documents for a new donor campaign, beginning with creating a first draft of a campaign plan document.



Microsoft 365
Copilot in
Word

Prompt...

"Create a first draft outlining a donor campaign to raise \$500,000 for building sustainable homes for families in need. Make it appeal to eco-conscious individuals and businesses, highlight donor benefits, and provide public recognition for significant contributions as detailed in /[Significant Donors]. Include emotional language and a strong call to action."



I'll know this is successful when...

A draft document outlining the new campaign is provided with specified details included.



The value Copilot provided me in completing this job (functional, emotional, social)

- Reduces time and effort spent elaborating on campaign concept with suitable narrative.
- Offers speedy insight into how final documents might look and provides opportunities for others to provide feedback.
- Accelerate progress towards reaching final stage.

Analyze data to gain insights

Fundraising



As
someone in...

Fundraising team.



I want to...

Predict future giving patterns and suggest the ideal donation request amounts based on past donor behavior and demographic data.



Microsoft 365
Copilot in
Excel

Prompt...

"Use regression analysis in Excel on /[Donation Records 2010–2024] to segment donors into groups and predict optimal donation request amounts, rounded to the nearest whole pound, tailored to their historical giving patterns."



I'll know this is successful when...

I receive an analysis that indicates optimal donation amounts to request from donors, and this is reflected in increased giving.



The value Copilot provided me in completing this job (functional, emotional, social)

- Provides data democratization by reducing the need for advanced statistical expertise among fundraising staff.
- Offers quick insights into data that are easily modifiable (e.g., by age group), shareable, and actionable.

Update a slide deck

Fundraising



As
someone in...



I want to...



Microsoft 365
Copilot in
PowerPoint

Prompt...

Fundraising team.

Update a proposition slide deck for relevance to pitch to an international partnership opportunity and translate the deck into the local language.

In a new PowerPoint file, **select the Copilot button** and ask Copilot **to add a new slide.**

Example prompts:

"Add a slide outlining our existing activities in the region, including child health and water, sanitation, and hygiene."

"Add an image of someone washing their hands."



I'll know this is successful when...

The slide deck is updated according to instructions.



The value Copilot provided me in completing this job (functional, emotional, social)

- Reduces time spent creating narrative and selecting a suitable accompanying image.
- Streamlines completion of repetitive tasks, e.g., for different potential opportunities, freeing up time and accelerating progress to delivery-ready stage.

Create draft emails

Fundraising



As
someone in...

Fundraising team.



I want to...

Create a personalizable email template that can be used to thank significant donors.



Microsoft 365
Copilot in
Outlook

Prompt...

Select New Email. To start a new message, **select the Copilot icon from the toolbar.** **Select Draft with Copilot** from the drop-down menu. In the Copilot box, **type your prompt.**

Example prompt: "Generate a brief thank-you email template for donors that can be personalized with their name, donation amount, and preferred cause. The tone should be warm and appreciative."



I'll know this is successful when...

The required email is quickly composed and can be personalized according to need.



The value Copilot provided me in completing this job (functional, emotional, social)

- Reduced time spent considering email composition.
- Reduced human error in checking for spelling and grammatical errors.
- Accelerating pace of response to significant donors, facilitating demonstration of gratitude.