

Microsoft Copilot for *Not for Profits*

Everything your organisation needs to get real value from Copilot inside Word, Excel, Outlook, Teams and PowerPoint: setup and nonprofit pricing, prompting that works, copy-paste templates, and the dos and don'ts of responsible use.

GETTING STARTED

PROMPTING

TEMPLATES

DOS & DON'TS

GOVERNANCE

Copilot is Microsoft's AI assistant, built into the **Microsoft 365 apps your team already uses**. It recaps meetings in Teams, summarises email threads in Outlook, drafts documents in Word, analyses donor data in Excel and builds presentations in PowerPoint. Because it works where your files live, it can draw on your own documents when it writes.

01 Getting started and what it costs

Register your organisation at microsoft.com/en-au/nonprofits and confirm eligibility (ACNC-registered charities and equivalent not-for-profits qualify). Grants and deep discounts then apply across Microsoft 365, and the entry point is free: **Copilot Chat is already included** in Microsoft 365 business plans at no extra charge.

PLAN	NONPROFIT PRICE (AUD)*	WHAT YOU GET
M365 Business Basic GRANT	Free, up to 300 users	Web and mobile Office apps, Teams, 1TB storage each, and Copilot Chat included
M365 Business Premium	A\$8.20 / user / month	Desktop Office apps plus advanced security; the usual base for Copilot rollouts
Microsoft 365 Copilot ADD-ON	About A\$39 / user / month	Full Copilot inside Word, Excel, PowerPoint, Outlook and Teams, grounded in your own files and meetings

*Australian nonprofit pricing, ex GST, annual commitment. The Copilot add-on figure is the approximate AUD equivalent of Microsoft's US\$25.50 nonprofit rate; confirm the exact AUD price at checkout.

★ **Good to know:** start free with Copilot Chat for drafting and research, then buy the full add-on only for the staff who live in documents, spreadsheets and meetings. Work data stays protected by your Microsoft 365 tenant's enterprise data protection and is not used to train the underlying models.

02 How to ask: the four-part prompt

Microsoft's own prompt guidance uses four ingredients. Build every request from:



✗ WEAK PROMPT

"Write a donor thank you letter."

Missing: goal detail · audience · source files · tone · length

Result: generic, ignores everything already in your files.

✓ STRONG PROMPT (COPILOT IN WORD)

"Draft a thank you email to donors who gave under \$100 in our winter appeal. **[GOAL]** We are a Brisbane community food bank; the appeal raised \$48,000 from 312 donors and funded 15,000 meals. **[CONTEXT]** Use the results in **/Winter Appeal Results.xlsx** and match the tone of **/2025 Donor Newsletter.docx**. **[SOURCE]** Warm and personal, under 150 words, with a subject line and one clear impact sentence. **[EXPECTATIONS]**"

Result: specific, on-brand, grounded in your real numbers.

Reference files with /

Type **/in** a prompt to point Copilot at a specific document, spreadsheet or deck. Grounding a prompt in real files is the biggest quality jump.

Use it in the right app

Recaps live in **Teams**, thread summaries in **Outlook**, drafting in **Word**, analysis in **Excel**, decks in **PowerPoint**. Same Copilot, different superpowers.

Iterate, don't restart

Treat draft one as round one. Reply **"shorter"**, **"warmer"**, **"make it a table"**, **"add a slide on impact"**. Each pass takes seconds.



Quick wins first. Microsoft's nonprofit playbook recommends starting with meeting recaps and email thread summaries: they need no setup, save hours in week one, and build the team's confidence before you move to grants and donor analytics.

03 Copy-paste templates

Swap the **[bracketed]** parts for your details. The **/file** references point Copilot at your own documents.

1 Grant application draft

COPILOT IN WORD

Draft responses to each question in **/Funder Guidelines.pdf** for **[organisation name]**, which **[one-line mission]**. Use plain, confident language and the real figures in **/Project Summary.docx** and **/Impact Data.xlsx**: **[beneficiaries served, outcomes, budget]**. Flag any question we lack evidence for with **[NEED INFO]** rather than inventing anything. Respect word limits exactly.

2 Donor data insights

COPILOT IN EXCEL

Analyse the donor data in this workbook. Show giving patterns by **[age group / suburb / campaign]**, highlight donors who gave last year but not this year, and create a chart of donation frequency by segment. Then suggest three segments we should approach for our **[next appeal]** and why.

3 Campaign & social pack

COPILOT CHAT

Here is our news: **[paste announcement, event or story]**. Create one Facebook post (warm, 80 words), one LinkedIn post (professional, 120 words), three Instagram caption options with hashtags, and a short newsletter piece. Audience: **[local families / partners / volunteers]**. End each with a call to action to **[link]**.

**What early
Copilot users
report**

70%

say they are more
productive

85%

get to a good first draft
faster

75%

spend less time searching
files

77%

would not go back to
working without it

4 Meeting recap & minutes

COPILOT IN TEAMS

Recap this meeting: key decisions, action items with owners and due dates, and open questions, in a table. Then draft a follow-up email to attendees summarising the outcomes and asking owners to confirm their deadlines. Flag anything ambiguous as [CHECK].

5 Inbox catch-up

COPILOT IN OUTLOOK

Summarise this email thread: what has been agreed, what is still open, and who is waiting on us. Then draft a reply that **[confirms the grant report deadline / declines politely / asks the three missing questions]**. Professional but warm, under 120 words.

04 Dos and don'ts

✓ DO

- ✓ **Verify every fact, figure and citation** before it goes out. AI can state wrong things confidently.
- ✓ **Ground prompts in your files** with / references; that is where Copilot beats a blank chatbot.
- ✓ **Tidy SharePoint and OneDrive permissions first.** Copilot can surface anything a user can already access.
- ✓ **Start with free Copilot Chat** and quick wins, then license the add-on for heavy document users.
- ✓ **Write a one-page AI use policy** covering governance, privacy and responsible AI, and train everyone.
- ✓ **Keep the human voice:** edit drafts so they sound like your organisation.

✗ DON'T

- ✗ **Don't publish AI output unread.** A human always reviews anything public or sent to funders.
- ✗ **Don't use personal Copilot accounts for work.** Client and donor data belongs inside your tenant's protection.
- ✗ **Don't let AI decide about people:** service eligibility, hiring, performance.
- ✗ **Don't use AI for grief, trauma or crisis comms** without care and senior review.
- ✗ **Don't roll out to everyone at once.** Pilot with a few champions, gather wins, then scale.
- ✗ **Don't assume Copilot saw a file.** If it can't access a document, it may answer from general knowledge instead.

05 Governance and responsible use in 60 seconds

Governance

Review who can access what across Microsoft 365 before rollout, define roles and permissions for Copilot, and assign an owner for AI decisions.

Privacy & security

Prompts and responses stay inside your tenant and are not used to train the models. Still, de-identify client details wherever possible and comply with the Privacy Act and APPs.

Responsible AI

Update your policy to cover AI: approved uses, banned uses, human review, and transparency with your board. Revisit it as tools and attitudes change.

Adopt in waves

Microsoft's playbook maps use cases as Now, Next and Beyond. Start with recaps and summaries now; move to donor analytics and grant drafting next.

06 Useful links

Nonprofit offers microsoft.com/nonprofits/offers-for-nonprofits

Free credential AI for Nonprofits (Microsoft, LinkedIn, NetHope) aka.ms/ChangemakerCredential

AI & Copilot resources microsoft.com/nonprofits/resources

Training Intro to AI Skills for Nonprofits on Microsoft Learn · Copilot Success Kit at adoption.microsoft.com