

# Copilot prompts for grants managers

Four kinds of work. Twelve prompts to try this week.

## Works from your work, not the open web.

With a Microsoft Copilot license. Copilot Chat alone uses the web and what you paste or upload.



### Your files

Documents and workbooks in SharePoint and OneDrive



### Your email and chats

Outlook mail and Teams conversations



### Your meetings

Teams recaps and who agreed to what



### Your permissions

Only what you can already open

01

## Choose what to apply for

Word · Excel · Outlook · PowerPoint



Word

### Reduce an RFP to one page

**Try:** Summarize this request for proposals on one page: eligibility, deadline, award range, match requirement, required attachments, and how proposals are scored.



Word

### Read the guidelines against your program

**Try:** Read this funder's guidelines next to our program description. Where do we clearly fit, where is it a stretch, and what would a reviewer question?



Excel

### Track every prospect in one place

**Try:** Set up a tracker from this list of prospective funders with the amount, due date, current stage, owner, and next step for each, sorted by due date.

02

## Write the proposal

Word · Excel



Word

### Draft to the funder's outline

**Try:** Draft the project description following the section order in this RFP, using our program plan and logic model. Mark every place where I need to add a number.



Word

### Write the evaluation plan

**Try:** Write the evaluation plan section from our logic model: each outcome, how we measure it, who collects the data, and when we report.



Excel

### Explain every budget line

**Try:** Write the budget narrative for this workbook. For each line, explain what it pays for and how it connects to the project activities.

03

## Compliance after the award

Word · Excel · Teams



Word

### List every condition in the award

**Try:** List every condition in this award agreement: reports and due dates, allowable and unallowable costs, match, and changes that need the funder's approval first.



Excel

### Check spending against the approved budget

**Try:** Compare spending to date in this workbook with the approved grant budget. Show the percent spent by line and flag any line likely to overspend.



Word

### Brief program and finance staff

**Try:** Write a start-of-grant memo for program and finance staff from this award letter: what we promised, the key dates, what each team tracks, and who to ask.

04

## Reports and renewals

Word · Excel · Outlook



Word

### Draft the year-one report

**Try:** Draft the narrative for our year-one report from this outcomes summary and our original proposal. Compare what we promised with what we delivered and explain any gaps plainly.



Excel

### See every report due this year

**Try:** From these award letters, build one calendar of every report due in the next 12 months and highlight the weeks where two or more fall together.



Word

### Make the case for year two

**Try:** Draft a renewal request that opens with what last year's grant achieved, then makes the case for year two with the updated budget.

**Copilot drafts; a person checks every name, number, and fact.** Keep individual case, health, and student records out of prompts, and follow your organization's AI and data policies.



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