20 BEST WAYS TO USE COPILOT FOR NONPROFIT EXECUTIVE DIRECTORS

You carry the board, the budget, the staff and the story — usually at the same time. These 20 prompts use **Microsoft 365 Copilot grounded in your own documents, email and meetings**, so the work that fills your week takes less of it.

Grounded in your work, not the open web
Licensed Microsoft 365 Copilot reasons over your real content. Free chatbots can't see any of it.

- **Your files** — SharePoint, OneDrive, Word, Excel
- **Your email & chats** — Outlook and Teams threads
- **Your meetings** — Recaps, decisions, commitments
- **Your permissions** — It only sees what you can already see

NEW TO COPILOT? Start with 2, 6 and 11 — they pay off on day one and need nothing set up first.

Run the Board Relationship

5 PROMPTS · WORD · TEAMS · POWERPOINT

1 Build the Board Packet

WORD

Assemble the whole packet from documents you already have.

Try: *"Build our board packet from these reports: agenda, ED memo, financial summary and decisions we need."*

2 Turn the Meeting into Minutes

TEAMS

Leave the board meeting with minutes already drafted.

Try: *"Summarize this board meeting into minutes with motions, votes, decisions and action items with owners."*

3 Prep for a Hard Conversation

WORD

Walk into a difficult board discussion with the arguments mapped.

Try: *"Help me prepare to raise our deficit with the board: likely objections, my responses and three options to offer."*

4 Draft Governance Policies

WORD

Get a first draft of the policy your board keeps deferring.

Try: *"Draft a conflict-of-interest policy and a document retention policy consistent with our bylaws."*

5 Onboard a New Board Member

POWERPOINT

Turn scattered documents into an orientation someone will actually read.

Try: *"Build a 10-slide new board member orientation from our bylaws, strategic plan and last annual report."*

Lead the Organization

5 PROMPTS · TEAMS · WORD · EXCEL · OUTLOOK

6 See What Is Actually Happening

TEAMS

Get the picture across every team without another status meeting.

Try: *"Summarize what moved across our programs this month from my email and Teams, with risks and decisions needed."*

7 Draft the Strategic Plan

WORD

Turn a retreat and a pile of notes into a real document.

Try: *"From our retreat notes and last plan, draft a three-year strategic plan with goals, strategies and measures."*

8 Model a Budget Scenario

EXCEL

See what happens before it happens.

Try: *"Model our budget if our largest grant is not renewed: cash runway, deficit by quarter and three response options."*

9 Prepare a Staff Conversation

WORD

Think through a difficult personnel discussion before you have it.

Try: *"Help me prepare for a performance conversation: how to open it, likely responses and how to document it fairly."*

10 Write the All-Staff Update

OUTLOOK

Say the hard thing clearly and once.

Try: *"Draft an all-staff message about this organizational change: what is changing, why, what it means and next steps."*

Make the Case Externally

5 PROMPTS · OUTLOOK · POWERPOINT · WORD

11 Prep for a Funder Meeting

OUTLOOK

Walk in with the full relationship history in front of you.

Try: *"Prepare me for this funder meeting: our history with them, current grant status, and three things I should ask for."*

12 Pitch a Partnership

POWERPOINT

Make the case to a peer organization or corporate partner.

Try: *"Build a 6-slide partnership pitch: shared goals, what each side brings, the model and what we are asking for."*

13 Write Your Talk

WORD

Turn your impact data into remarks you can actually deliver.

Try: *"Draft a 7-minute speech for our gala from this year's results, opening with a story and closing with an ask."*

14 Answer a Hard Question

OUTLOOK

Respond to a community, media or donor challenge with care.

Try: *"Draft a response to this question about our overhead ratio — direct, non-defensive and grounded in our numbers."*

15 Build the Case for Investment

WORD

Make the argument for capacity, not just programs.

Try: *"Draft a case for unrestricted operating support using our growth, outcomes and infrastructure needs."*

Delegate the Heavy Lifts

5 PROMPTS · COPILOT COWORK

16 Assemble the Whole Board Packet

COWORK

Hand off the entire packet, not one memo.

Delegate: *"Build our full board packet: agenda, ED report, dashboards from our data, financials and a summary deck."*

17 Research a Strategic Question

COWORK

Get a cited answer instead of a hunch.

Delegate: *"Research whether nonprofits like ours should merge, partner or stay independent, with cited examples."*

18 Build the Annual Plan

COWORK

Turn strategy into an operating plan with owners and milestones.

Delegate: *"From our strategic plan, build a 12-month operating plan with quarterly milestones, owners and measures."*

19 Scan Your Landscape

COWORK

Know what comparable organizations and funders are doing.

Delegate: *"Research ten peer organizations in our field: programs, budget size, funding mix and where we differ."*

20 Put Your Monday Brief on Autopilot

COWORK

Start the week already caught up.

Delegate: *"Every Monday, brief me on what moved last week across programs, fundraising and finance, and what needs me."*

MORE WAYS EXECUTIVE DIRECTORS ARE USING COPILOT

Prep the Succession Plan
Draft the leadership continuity document your board should already have.

Review a Contract
Summarize obligations, termination terms and risks before you sign.

Write the Job Description
Turn a real need into a posting that attracts the right candidate.

Debrief a Site Visit
Turn funder or partner visit notes into follow-ups and commitments.

A note for the person who sets the tone: 76% of nonprofits still have no formal AI policy (TechSoup/Tapp Network, 2025). Your staff are almost certainly using AI already — the only question is whether they are doing it with guidance. Decide what is acceptable, write it down, and make sure donor records and beneficiary data never go into consumer AI tools. You do not need a perfect policy. You need a published one.



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Repost