20 BEST WAYS TO USE COPILOT FOR NONPROFIT GRANTS MANAGERS

Grant work is deadline-driven, detail-heavy and usually one person deep. These 20 prompts use **Microsoft 365 Copilot grounded in your own RFPs, proposals and reports**, so you spend less time assembling paperwork and more time winning and keeping funding.

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 1, 6 and 12 — they pay off on day one and need nothing set up first.

Find & Qualify Funders — 5 PROMPTS — WORD · POWERPOINT · EXCEL

1 Decode a 60-Page RFP
WORD

Reduce a dense funder solicitation to what actually decides whether you apply.

Try: *"Summarize this RFP into eligibility, deadlines, award range, required attachments and evaluation criteria."*

2 Check Fit Before You Write
WORD

Find out where you are strong and where you are stretching — before you invest 40 hours.

Try: *"Compare this RFP against our program description and rate our fit on each criterion, flagging our weakest areas."*

3 Brief Your Leadership
POWERPOINT

Turn a go/no-go decision into a short deck your ED can approve in one meeting.

Try: *"Build a 5-slide go/no-go brief on this opportunity: fit, award size, match requirement, effort and risks."*

4 Draft the Letter of Inquiry
WORD

Get a credible LOI in front of a new funder without starting from a blank page.

Try: *"Draft a 2-page letter of inquiry for this foundation using our program summary and their stated priorities."*

5 Build a Pipeline Tracker
EXCEL

Get every open opportunity into one view with deadlines you can actually see coming.

Try: *"Build a grant pipeline tracker from this list with funder, amount, deadline, stage, owner and next action."*

Write a Stronger Proposal — 5 PROMPTS — WORD · EXCEL

6 Draft the Full Narrative
WORD

Turn your program documents into a first draft that follows the funder's structure.

Try: *"Using our program plan and logic model, draft the project narrative following this RFP's required section order."*

7 Build the Budget Justification
EXCEL

Turn budget lines into the written rationale reviewers actually score.

Try: *"Write a line-by-line budget justification for this workbook, explaining how each cost supports the activities."*

8 Write the Need Statement
WORD

Ground your case in evidence instead of adjectives.

Try: *"Draft a need statement for our service area using the demographic and outcomes data in this document, with sources."*

9 Score It Against Their Criteria
WORD

Review your own draft the way a reviewer will, while you can still fix it.

Try: *"Score this draft against the funder's published evaluation criteria and list the three weakest sections with fixes."*

10 Mine Your Winning Proposals
WORD

Stop rewriting language you already got funded for.

Try: *"Pull the strongest organizational capacity and evaluation language from our funded proposals into a reusable library."*

Manage, Comply & Report — 5 PROMPTS — EXCEL · TEAMS · OUTLOOK

11 Extract Every Requirement
EXCEL

Turn an executed award into a checklist nothing falls off.

Try: *"List every deliverable, reporting deadline, match requirement and allowable-cost restriction in this grant agreement."*

12 Build the Reporting Calendar
EXCEL

See every report for every grant on one timeline, before they collide.

Try: *"Build a 12-month reporting calendar from these grant agreements with due dates, report type and responsible staff."*

13 Chase Down Program Inputs
TEAMS

Get the numbers out of your colleagues without another round of reminders.

Try: *"Draft messages to each program lead requesting the specific data I need for this report, with a clear deadline."*

14 Answer the Program Officer
OUTLOOK

Reply to a funder question with the history already assembled.

Try: *"Draft a reply to this program officer question using our last report and current spend-down figures."*

15 Prep for the Audit
EXCEL

Walk into a monitoring visit knowing where the gaps are.

Try: *"Compare our grant spending workbook against the approved budget and flag every variance over 10% with a likely explanation."*

Delegate the Heavy Lifts — 5 PROMPTS — COPILOT COWORK

16 Build the Full Application
COWORK

Hand off an entire submission package, not a single section.

Delegate: *"From this RFP and our program files, build the full application: narrative, budget workbook and attachment checklist."*

17 Research Your Next 15 Funders
COWORK

Get a cited prospect list instead of another afternoon on funder databases.

Delegate: *"Research 15 foundations that fund our issue area in our state and return a cited brief with fit, range and deadlines."*

18 Assemble the Renewal Package
COWORK

Turn a year of delivery into a renewal request while the results are fresh.

Delegate: *"Build our renewal request: outcomes summary against original goals, budget actuals and a narrative for year two."*

19 Debrief a Declined Proposal
COWORK

Turn a no into something that improves the next submission.

Delegate: *"Review this declined proposal and the funder's feedback, then produce a revision plan for resubmission."*

20 Put Report Prep on a Schedule
COWORK

Have the draft waiting for you two weeks before it is due.

Delegate: *"Two weeks before each reporting deadline, assemble a draft report from our program data and email it to me."*

MORE WAYS TO PUT COPILOT TO WORK

Write the Sustainability Plan
Turn results and diversified funding into the plan funders ask for.

Translate Federal Jargon
Convert uniform guidance and NOFO language into plain instructions for your team.

Onboard a New Grant
Turn an award letter into a kickoff packet for program and finance staff.

Prep the Board Funding Update
Summarize pipeline, awards and pending decisions for your next board meeting.

A note on your data: these prompts work from institutional documents — RFPs, proposals, budgets, agreements and aggregate outcomes. Keep individual beneficiary records, case notes and any health information out of AI prompts, and follow your organization's policy and any HIPAA, FERPA or 42 CFR Part 2 obligations that apply to you.



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Repost