



COMMUNITY CONFERENCE **SPARK**





AI for Fundraising Success: How to Kickstart Your Nonprofit's AI Journey

Craig Parker, Global SaaS Partnerships Lead, Digital Natives Partner Program, Microsoft Tech for Social Impact



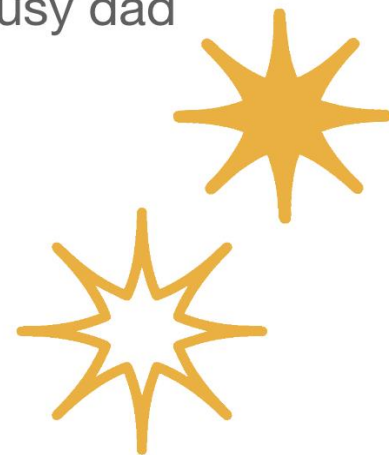


Hello, my name is Craig Parker

Global SaaS Partnership Lead, Digital Natives Partner Program at Microsoft Tech for Social Impact.

Live in the beautiful countryside near Manchester, UK.

Passionate about helping partners succeed. Busy dad with two energetic sons.



Supporting nonprofits is a part of our DNA

In fiscal year
2023, Microsoft
provided:



\$3.8 billion

In grants or discounted software and services



\$242 million

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



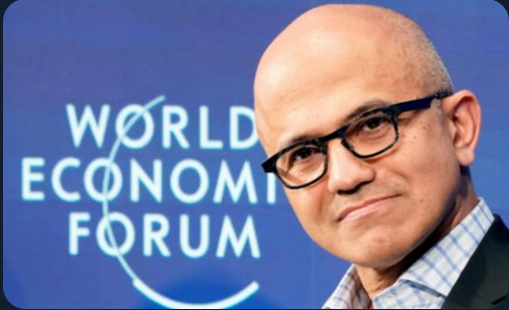
325,000+

Nonprofit organizations equipped with modern, secure, and scalable solutions

We're at a tipping point in nonprofit technology



The AI spark



Satya Nadella Says AI Golden Age Is Here and 'It's Good for Humanity'

[World Economic Forum](#)



Microsoft Invests \$10 Billion in ChatGPT Maker OpenAI

[Bloomberg](#)



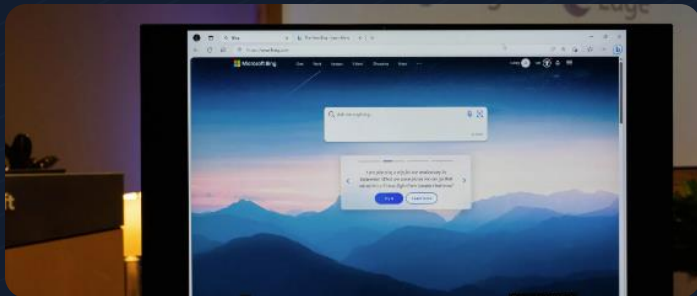
Microsoft Launches AI-Powered Search, 'Binging' In The Next Generation Of The Internet

[Forbes](#)



Bing (Yes, Bing) Just Made Search Interesting Again

[New York Times](#)



A Conversation With Bing's Chatbot Left Me Deeply Unsettled

[New York Times](#)



Microsoft's President Backs New Agency to Regulate ChatGPT, Other AI Systems

[The Wall Street Journal](#)



What is AI, is it dangerous and what jobs are at risk?

[BBC News](#)

AI and how it's already used everyday

**Virtual
assistants**

Translation

**Image editing
and filters**

**Autocorrect
and complete**

**Security and
fraud detection**

**Autonomous
driving**

Analytics

What is AI for everyone?





Microsoft Copilot

Your everyday AI companion

Your universe of data
at work and the web

You are always in control of
the output

Enterprise-grade security,
privacy, compliance &
responsible AI

Microsoft AI Principles

01

Fairness

02

Inclusiveness

03

Accountability

04

Transparency

05

Privacy and security

06

Reliability and safety

Today's nonprofit challenges and AI opportunities

Staffing and burnout

33% of nonprofits report **20%** of job vacancies go unfilled and **40%** for fundraising roles.

50% of social impact professionals are burnt out.

Workers globally spend 35% of their time on repetitive tasks. ⁵

Make the most of your staff's time and energy

Donor engagement

Donor retention fell **6.2%** and total donors fell **5.6%**.²

77% of nonprofits believe personalizing donor communication is critical.³

Retain and deepen connections with donors

Giving trends

Total donations decreased 10.4% in 2022

Since 2021, online giving has grown **12% YoY**.⁴

Create engaging experiences 24/7

Creating a new way to work

“ The best antidote to burnout is not teaching coping skills to handle stress. It’s redesigning work to reduce stress.

To prevent exhaustion, we need to remove overwhelming demands and reject the norm of self-sacrifice.

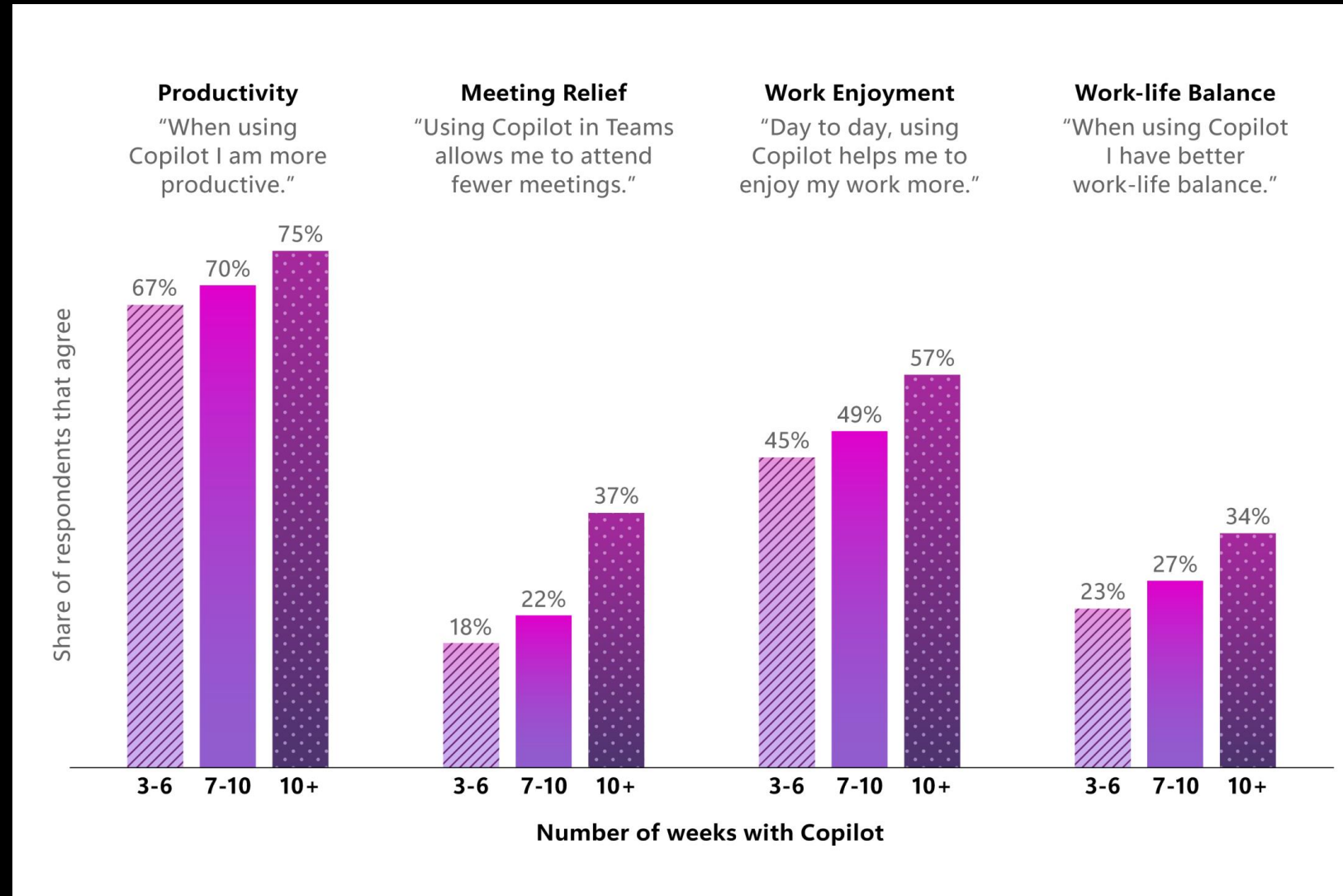
Healthy workplaces value well-being as much as performance.”

Adam Grant

The 11x11 tipping point

Users start to realize the value of Copilot when they:

- **Save 11 minutes a day**
- **Use it for 11 weeks**



Nonprofits and AI: 3 use cases



High Volume Engagement

- AI Powered Content Creation to improve Donor Outreach



High Touch Engagement

- Proposal Generation and Follow-Up to better engage Constituents



Operations and Admin

- Make the most of your time and engage staff and focus on high-value tasks



A Day-in-the-Life with AI: Your donor communications

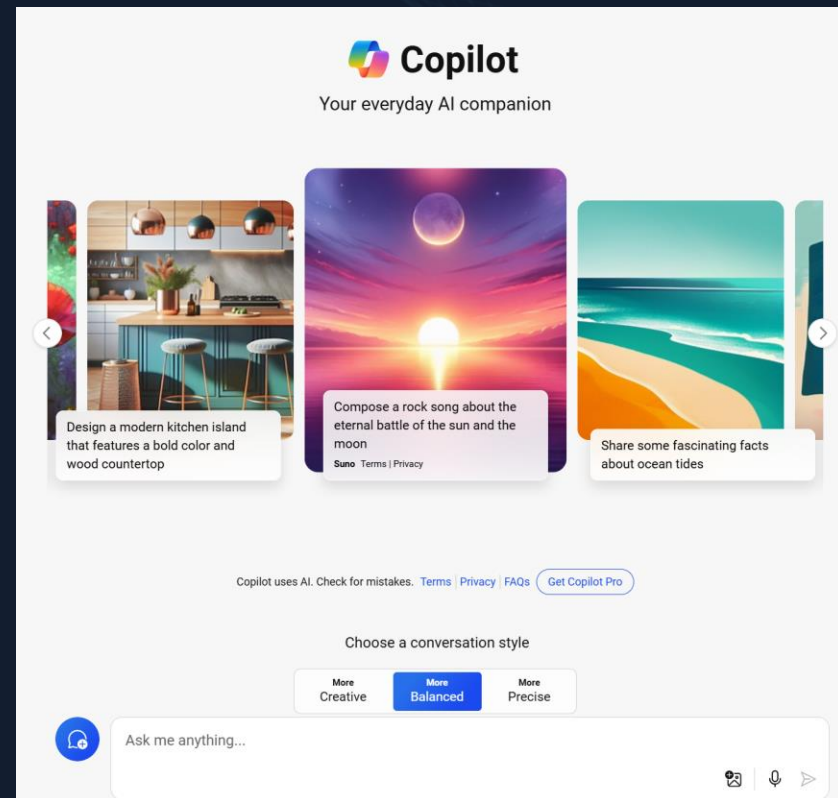


Development

Create quick content for emails, social posts, and summaries

With **Copilot**, create quick short content for any marketing and outreach communications.

- Create short content with any tone
- Quickly summarize complex content
- Get multiple options from a single prompt
- Personalize and scale content for multiple people
- Web-based **free** tool [copilot.Microsoft.com](https://copilot.microsoft.com)
- Easy way to start using AI




 Microsoft Copilot

Quickly write a broad reach email



Write a prompt with:


- **Action:** What you want
- **Style:** The format you need
- **Key Details:** Context and details

“When creating a prompt, think of it as if you were talking to a helpful coworker – no need to stress over order, formatting, or structure; just keep it conversational.”

 **You**

Write a save-the-date email promoting our auction to benefit veterans who need housing assistance. The auction will be on August 15, 2024, at 8:00 PM, at the Springfield Auditorium. Tickets will be available on June 2, 2024. Make the email short and inspiring.

 **Copilot**

Subject: Save the Date - Veterans' Housing Assistance Auction

Dear [Recipient's Name],

We are excited to invite you to our upcoming auction, where we will come together to make a difference in the lives of our veterans. us

Event Details:

- **Date:** August 15, 2024
- **Time:** 8:00 PM
- **Location:** Springfield Auditorium

This event is not just about bidding on incredible items; it's about bidding for hope, support, and a brighter future for those who have served our country. All proceeds will directly benefit veterans in need of housing assistance.






Ticket Sales Open on June 2, 2024! Mark your calendars and be part of this impactful evening.

Thank you for your support. Let's make a positive impact together!

Warm regards,

[Your Name] [Your Organization]

Note: Feel free to customize the email with your organization's branding and additional details. 🌟

     1 of 30 responses

Iterate and vary


You can ask Copilot to try again and offer new variations:

- Change the tone
- Change the length
- Add more information


Make the tone more fun so everyone knows this is a social event, too

Make the email shorter

Include a CTA to follow us on LinkedIn for more information

 You

Make the tone more inspiring

 Copilot

Subject: Save the Date - Veterans' Housing Assistance Auction

Dear [Recipient's Name],

We are **thrilled** to invite you to our upcoming auction, where we will come together to make a **profound impact** in the lives of our veterans. us

Event Details:

- **Date:** August 15, 2024
- **Time:** 8:00 PM
- **Location:** Springfield Auditorium

This event is not just about bidding on incredible items; it's about bidding for **hope, support**, and a **brighter future** for those who have served our country. All proceeds will directly benefit veterans in need of housing assistance.






Ticket Sales Open on June 2, 2024! Mark your calendars and be part of this **transformative** evening.

Thank you for your **unwavering support**. Let's make a **positive impact** together!

Warm regards,

[Your Name] [Your Organization]

Note: Feel free to customize the email with your organization's branding and additional details. 🌟


     2 of 30 responses

Change the format to a social post


You can ask Copilot for next related tasks:

- Change the context
- Change the length
- Iterate on tone for context

Copilot will also suggest next steps and new ideas – like adding stories, statistics, or images.

 **You**



Can you write a social post for this email?

 **Copilot**

Certainly! Here's a captivating social media post to promote the upcoming veterans' housing assistance auction:


us **Save the Date!** us

Join us on August 15, 2024, at 8:00 PM for an unforgettable evening at the Springfield Auditorium. 🌟

 **Veterans' Housing Assistance Auction** 

🔥 Bid for hope. Bid for support. Bid for our heroes. 🔥






All proceeds directly benefit veterans in need of housing assistance. Let's come together and make a difference! 🤝


 Mark your calendars! Ticket sales open on June 2, 2024. 📅

Spread the word and let's create positive impact! 🧡

#SupportOurVeterans #HousingAssistance #CommunityImpact

Feel free to customize this post with your organization's branding and share it across your social channels! 📱❤️

     3 of 30 responses

 Add a compelling image to the post.


Include some powerful statistics about veterans' housing needs.

Mention any celebrity guests or special performances at the auction.


Personalize emails

You can personalize communications quickly by:

- Adding personal context
- Customize the tone

 You

Write a thank you note for George Contoso, who donated \$1500 at our auction to benefit veterans housing. He has been a supporter of our organization for 10 years and he is a retired Army veteran. Make the tone friendly and personal.

 Copilot

Dear George Contoso,

Thank you so much for your generous donation of \$1500 at our recent auction to benefit veterans' housing. Your unwavering support over the past 10 years has made a significant impact on our organization and the lives of those we serve. As a retired Army veteran, your commitment to helping fellow veterans find stable housing is truly commendable.

We are deeply grateful for your continued dedication and belief in our mission. Your contribution will directly benefit those who have served our country and deserve a safe place to call home.

Once again, thank you for being an integral part of our community and for making a difference in the lives of our veterans. We look forward to continuing this important work together.

With heartfelt gratitude,

[Your Organization's Name]



1 of 30 responses

Iterate and personalize at scale

You can ask Copilot for new versions for each donor:

- Personalize the tone
- Change the context

Copilot builds on the key details, format, and tone you've already established.



You

Can you write another thank you email for Martha Smith, who donated \$5000 in memory of her husband. Make the tone grateful and emphasis impact.



Copilot

Subject: A Heartfelt Thank You for Your Generosity

Dear Mrs. Martha Smith,

On behalf of our entire organization, I want to express our deepest gratitude for your incredibly generous donation of \$5000 in memory of your beloved husband. Your act of kindness has touched our hearts profoundly, and we are honored to receive such a meaningful contribution.

Your gift will have a lasting impact on our mission to support veterans' housing and create a safe haven for those who have served our country. With your support, we can continue to provide essential services and make a difference in the lives of those who need it most.

In memory of your husband, we will ensure that these funds are used wisely and effectively. Your dedication to our cause inspires us every day, and we are committed to honoring his legacy through our work.

Once again, thank you for your unwavering support. Your generosity will echo through the lives of our veterans, their families, and our entire community.

With heartfelt appreciation,

[Your Organization's Name]

Feel free to personalize this message further or let us know if there's anything else we can do to express our gratitude. 🙏 us

Summarize complex content

Get assistance on outlining a complex idea or issue

- Copilot does the research
- Summaries include links and references for each point



You

Write a short bulleted summary of housing challenges that veterans face in the U.S. Add information on the work that nonprofits are doing to address veterans housing shortage. Make the tone solution-focused and optimistic.



Copilot

Certainly! Here's a concise summary of the housing challenges veterans encounter in the U.S., along with the positive efforts by nonprofits to address these issues:

1. Affordability Struggle:

- Veterans face housing affordability challenges compared to civilians of similar ages and demographics.
- Despite higher homeownership rates, some veterans still struggle to find affordable housing.

2. Social Isolation and Reintegration Difficulties:

- Lack of societal support and social isolation are leading causes of homelessness among veterans.
- Reintegrating into civilian life can be challenging, especially for those dealing with post-traumatic stress disorder (PTSD).

3. Nonprofits' Positive Impact:

- The Department of Veterans Affairs (VA) has made significant strides in reducing veteran homelessness.
- Coordinated efforts between local, state, and federal agencies, screening protocols, and billions of dollars in federal funding have contributed to this success.
- In 2022, the VA exceeded its goal by permanently housing 40,401 homeless veterans, surpassing the target.
- Nonprofits like Insight Housing and others are working to provide affordable, sustainable housing opportunities for veterans.

4. Remaining Challenges:

- While progress has been made, overall homelessness increased in recent years, highlighting the need for continued efforts.
- Partnerships between government agencies, nonprofits, and corporate foundations remain crucial in tackling this issue.

In summary, nonprofits and government initiatives are making a positive impact, and by continuing to collaborate, we can create lasting solutions for our veterans. 🌞🏠 us

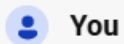


2 of 30 responses

Dive into more detail where you need it

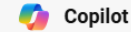
Start with a summary and then ask for elaboration:

- Copilot does *more* research
- Get ideas for new messages and approaches to bring into proposals and outreach



You

Can you explain more about reintegration difficulties?



Copilot

Certainly! Reintegration difficulties refer to the challenges veterans face when transitioning from military service back into civilian life. Here are some key points:

1. Cultural Shift:

- Military culture is distinct, with its own rules, language, and norms. Veterans may find it challenging to adapt to the different cultural environment outside the military.
- The structured and hierarchical nature of military life contrasts with the more individualistic and decentralized civilian world.

2. Loss of Identity and Purpose:

- In the military, individuals often have a strong sense of purpose and identity tied to their roles (e.g., soldier, sailor, airman).
- Upon leaving, veterans may struggle with finding a new sense of purpose and identity, leading to feelings of loss and disorientation.

3. Skills Mismatch:

- Military training provides specialized skills (e.g., combat, logistics, technical expertise) that may not directly translate to civilian jobs.
- Veterans may face challenges in identifying how their skills align with civilian employment opportunities.

4. Mental Health and Trauma:

- Many veterans experience mental health issues such as post-traumatic stress disorder (PTSD), depression, or anxiety.
- Coping with trauma and adjusting to civilian life can be overwhelming, affecting relationships, work, and overall well-being.

5. Social Isolation:

- Leaving the close-knit military community can lead to feelings of isolation.
- Veterans may miss the camaraderie and support they had while serving.

6. Financial and Housing Concerns:

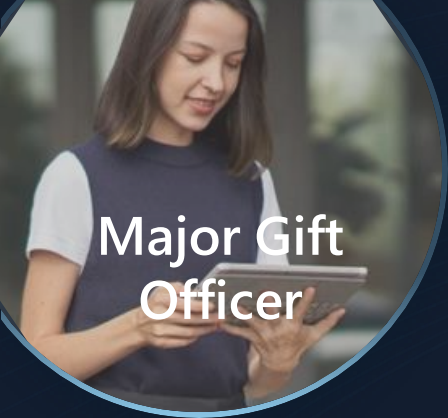
- Some veterans struggle with financial stability due to unemployment, debt, or housing instability.



Ask me anything...



A Day-in-the-Life with AI: Major Gift Officer



Major Gift
Officer

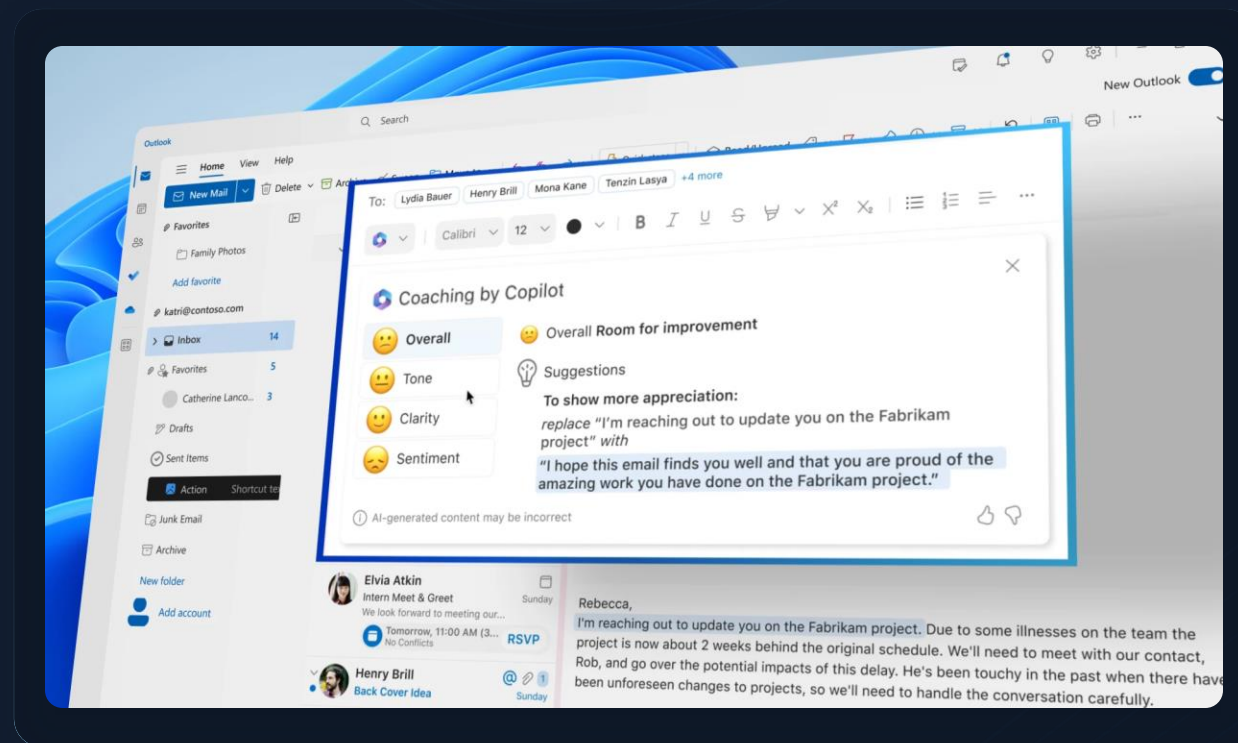
Stay focused on raising funds with an AI assistant in Copilot for Microsoft 365

With Copilot in Outlook, stay on top of your inbox, manage meeting follow-ups, and create impactful communication in a fraction of the time.

- Customize an email prompt with options for length and tone
- Include people's viewpoints in conversation summaries
- Summarize email threads to catch up quickly

Copilot for Sales

- + Enhance Copilot for Microsoft 365 with CRM platform connectivity to provide sales-specific insights and recommendations, sales content generation, and CRM record updates in the flow of work.



AI in Outlook

The screenshot displays the Microsoft Outlook web interface. The left sidebar shows navigation icons for Mail, Calendar, People, and Tasks. The main pane is divided into a 'Focused' tab and an 'Other' tab. The 'Focused' tab shows a list of emails, each with a 'Tracked To Dynamics' button. A red circle with the number '1' highlights one of these buttons. The 'Other' tab shows a conversation thread with Jim Ballou. A red circle with the number '2' highlights the 'Copilot for Sales' button in the top right corner. The right sidebar shows the 'Copilot for Sales' panel, which includes an 'Email from: Gabriela Morales' section, an 'Opportunity summary' section, and a 'Connected to' section.

Outlook Interface Details:

- Search Bar:** Search
- Navigation:** Home, View, Help
- Buttons:** New mail, Quick steps, Read / Unread
- Focused Tab:**
 - Gabriela Morales: Maternal health (2/27/2023). Tracked To Dynamics... Hello- I was re...
 - Derek Bennett: Please take my money! (2/24/2023). Tracked To Dynamics... Hello, Kind Sir...
 - Erin McHugh Saif: Time to meet around Ma... (2/15/2023). Tracked To Dynamics... Jim, It was grea...
 - abby Jackson: Lunch with Abby (1/13/2023). Tracked To Dynamics... Accepted. On F...
 - abby Jackson: I would love to donate (1/12/2023). Tracked To Dynamics... Please give me...
 - Patty Kennington: Glad to speak with you! (1/11/2023). Tracked To Dynamics... Jim, I'd love to ...
 - 2022
 - Jim Ballou: Donation for Food (2/16/2022). Tracked To Dynamics... Good morning...
- Other Tab:**
 - Maternal health (Tracked To Dyn...)
 - Jim Ballou: https://teams.microsoft.com/l/meetup-join/19:meeting_MWE0MmJm... (Wed 9/6/2023 1:18 PM)
 - Jim Ballou: Hello Gabriella, Thank you for reaching out to me. I would be happy t... (Mon 2/27/2023 4:08 PM)
 - Gabriela Morales <gabbie.d.morales9@gmail.com>: Hello- I was reading an article the other day and it mentioned your charity and your excellent work on Maternal Health. I am very concerned about the health of newborn babies and how better prenatal care is so important. I would love to talk about how I can make a positive impact with a donation. (Mon 2/27/2023 3:24 PM)
- Copilot for Sales:**
 - Email from: Gabriela Morales (Received 02/27/23, 3:24 PM). Saved email
 - Ask Copilot to... Draft an email
 - Opportunity summary: The estimated revenue for this opportunity is \$150,000.00. The estimated close date for this deal is 3/29/2024. This opportunity is currently open and the total amount is \$0.00. (Note: There are no input records with the topic "Other", "Maternal Health Morales" or "Gabriella" that can be used to generate a meaningful sentence.)
 - Connected to: Maternal Health - Morales Opportunity, Maternal Health - Morales • O...
 - Contacts: Saved in Dynamics 365 (4)

AI in Teams

Activity

Chat

Teams

Calendar

Calls

Files

...

Apps

Annual Report Meeting

Chat Files Details Scheduling Assistant Recap Attendance Recordings & Transcri... Q&A

Feb 13, 2024 1:33 PM - 1:38 PM Open in Stream Copilot

Julian Isla

Debra Berger

Irvin Sayers

Megan Bowen

Speakers

Topics

Chapters

Megan Bowen

Debra Berger

Julian Isla

Irvin Sayers

Content

Grant Money Usage.xlsx Contoso Financial Overview.pptx

Contoso Annual Report FY24.docx Attendance

Notes AI notes Mentions (1) Transcript

Generated by AI. Be sure to check for accuracy Copy all

Meeting notes

Debra and Megan discussed 4 main points in the meeting, which included the program expansion strategy, success metrics and outcomes, Contoso's financial performance, and the impact of their programs over the years.

Debra and Megan discussed the annual report for the digital literacy program. Megan presented the success metrics and outcomes of the program, which included a cohort of 200 students, of which 87% graduated with increased digital literacy.

Follow-up tasks

Irvin Sayers will send the annual report for the program to Debra Berger as soon as they are done.

Debra Berger will share a list of previous donors so that potential new donors can be identified.

Irvin Sayers will drop the grant proposal and share the feedback with Debra Berger.

Are these tasks useful?

Copilot

recap the meeting

Copilot 2/13

Key Topics:

4

Annual report document: Debra, Megan and Irvin discussed the main points of the annual report, including program expansion, success metrics, outcomes and financial performance. 1

Program expansion strategy: Megan shared the plan to hire one more teacher, buy new laptops and expand into another classroom to accommodate the bigger cohort. 2

Success metrics and outcomes: Megan highlighted the high graduation rate, positive feedback and enhanced confidence of the program participants. 3

Contoso's financial performance: Julian reported an increase in grants, donations, average donation amount and total number of donors. 4

Donor outreach: Debra shared a list of previous and potential donors and emphasized the need to personalize the invitations and proposals. 5

Timeline: Debra set the deadline for the initial draft of the annual report within two weeks and the outreach to potential donors in about a month. 6

AI-generated content may be incorrect

Build an adoption plan

Where do you begin? 4 steps to start AI transformation

1

Create a roadmap for use cases

Identify where to improve productivity and processes. Go for easy wins AND big wins!

2

Find your internal champions

Start with your most eager learners, teachers, and early adopters then have them build momentum.

3

Get your team ready

Build organizational alignment and confidence with free learning opportunities.

4

Build the 11x11 AI habit

Build AI into your existing everyday processes, meetings, and emails to start saving time immediately.

Connect, learn, and innovate *together*

Join the Nonprofit Community to learn from each other!

- Blogs with nonprofit stories, thought leadership, and skilling resources
- Discussion spaces for peer-to-peer connections and problem-solving
- Events to find new ways to connect and learn

aka.ms/nonprofitcommunity



Tech for Social Impact Nonprofit offers

Enable your team's day-to-day work



Microsoft 365 Business Premium

Best for small and mid-sized nonprofits that need email, Office desktop applications, cloud file storage and sharing, audio and HD video, and device management. Free for up to 10 users and discounted pricing of \$5.50 (USD) per user/month for additional users.



Surface devices

Empower staff with high quality screens, microphones, speakers, cameras, and more. Save up to 8% on select Surface devices.

Visualize and measure impact



Power BI Desktop

Connect to data sources, build visualizations, publish to the Power BI service, and embed on websites. Available free for eligible nonprofits.



Power BI Pro

Gain real-time views of data, access Power BI desktop features, distribute content, and more for \$3 (USD) per user/month.

Optimize operations with cloud migration



Azure

Leverage annual Azure services credits and access the complete portfolio of Azure products and cloud services.

Modernize processes and manage constituents



Power Apps

With the extensibility to connect to hundreds of other business systems, databases, and other apps. Power Apps can make app development more efficient and secure. Run unlimited applications and access unlimited Power Pages websites; \$5 (USD) per user / month



Dynamics 365 Sales Enterprise

Enable full relationship management with constituents, volunteers, and program participant. Discounted pricing of \$23.80 (USD) per user/month for additional users.



**Microsoft Cloud
for Nonprofit**

Microsoft Cloud for Nonprofit aligns the capabilities of Microsoft 365, Power Platform, Dynamics 365, Azure, and LinkedIn to address common non-profit scenarios—all based on a Common Data Model to unite disparate data sources.

Get started with AI

Find information at work easily via a quick online search with Microsoft Copilot. Free for Microsoft 365 Business Premium users, Copilot includes additional controls, customization, and secure enterprise features: bing.com/copilot

Accelerate your AI fluency with our free learning pathways: aka.ms/MicrosoftDigitalSkillsCenter

Improve your team's productivity and accelerate creativity when you add Microsoft Copilot for Microsoft 365 to your existing Microsoft 365 plan: aka.ms/AmplifyCreativity



Q&A

Ready to make technology work for your mission?

Microsoft Tech for Social Impact is committed to delivering affordable and innovative cloud solutions to help nonprofits tackle the world's biggest challenges.

- Access grants and discounts across our cloud products: aka.ms/nonprofits.
- Join the Nonprofit Community: aka.ms/nonprofitcommunity



Thank you

Microsoft.com/nonprofits

