



Boost Productivity with AI

A practical guide to Microsoft 365 Copilot for nonprofits

Nonprofits are asked to do a lot. They strive to increase outputs, improve outcomes, and strengthen impact—all with finite time, staff, and budget. Tasks like writing emails, summarizing meetings, preparing reports, or organizing information can distract from the work that matters most.

Artificial intelligence (AI) is reshaping how nonprofits operate—reducing administrative burden and giving teams more time to strengthen communications, analysis, and team management. The right AI does this while keeping information safe and secure. Routine tasks can become easier, manual effort is reduced, and teams are better able to handle their workloads.

Benefiting from AI doesn't have to involve a major technology shift. In fact, by making a plan for intentional AI adoption, your team can start by simplifying tasks that are currently taking more time than they should. Nonprofits are putting AI to work in many parts of their organizations—and seeing results. [Seventy-four percent of nonprofits surveyed are already using AI](#) as a transformative tool to address operational and mission-driven challenges. Organizations that are just beginning to use AI can learn from already proven use cases. As your team builds confidence with AI, you can add tools that enhance even more systems and workflows.



Microsoft 365 Copilot is a practical first step because it gives you access to AI within the Microsoft tools you may already be familiar with.

For nonprofits exploring AI, guidance matters. TechSoup understands nonprofits because we are one. We can help you access and use technology more productively, in ways that match your organization's capacity, goals, and day-to-day needs.

This guide is designed to help nonprofits take their first steps with AI. Inside, you'll find:

- **Examples** of how nonprofits are using AI in everyday work.
- **An overview** of Microsoft 365 Copilot options and how they're used.
- **Guidance** on choosing the right next step for your team.
- **What to know** about security, data protection, and where to get support.

Copilot is built into the Microsoft 365 tools your team already uses, including Word, Outlook, and Teams.

Nonprofit organizations are exploring AI

85%

have a high interest in tools like generative AI and predictive analysis.

47%

believe AI can improve their organization's efficiency and productivity.

51.5%

have yet to start planning AI for fundraising, but 13.7% aim to adopt it within six months.

Source: <https://page.techsoup.org/ai-benchmark-report-2025>

How nonprofits are putting AI to work

Many nonprofits begin using AI with queries and prompts that strengthen their writing and research. Some individuals in your organization may already be taking advantage of Copilot as part of Microsoft 365. At the next level of adoption, AI can be used to replace repetitive work, analyze information, and help with routine tasks. With these applications, staff can start to see significant time savings, allowing them to contribute to the mission at a higher level.

Here are five ways AI is supporting the work of nonprofits:

- **Targeted outreach and fundraising:** Copilot is being used to organize campaign and event activity, identify patterns in donor or participant data, and group supporters by shared interests, giving staff more information to tailor contacts and campaigns. Steel Hearts, a nonprofit in South Carolina that honors fallen service members and supports veteran nonprofits, has been using Copilot to locate important data in Outlook, including members' email addresses or phone numbers—even from emails sent or received months or years ago.
- **Improved volunteer and program management:** More time can be spent face-to-face when Copilot is taking care of other details. Nonprofits are using AI to consolidate training materials, feedback, and notes; organize responses to surveys and listening sessions; and reveal issues that help staff improve future events, services, or programs.
- **Streamlined case documentation:** Service professionals are using Copilot to create and edit intake notes, summarize case histories, organize follow-up actions, and prepare records for future review. Time saved allows staff to focus on the needs of more clients. Community Counseling Solutions, a behavioral health services organization in Oregon with about 20,000 clients, started with five team members using Copilot. That number quickly expanded to 15, and continued growth is expected. Copilot helps staff refocus hours of work by automating routine tasks and contributing to a healthier work-life balance.
- **Elevated operations:** Operational departments can begin to look at their jobs more strategically when they use Copilot to handle routine tasks. This gives them more time to add value through analysis and insight. Angela Gillisse, chief of data and technology at Community Rebuilders in Grand Rapids, Michigan, uses Copilot to draft emails, transcribe meetings, apply for funding, and prepare PowerPoint presentations. She says it helps her save at least 15 hours per week.
- **Simpler grant reporting and funder updates:** Grant requests usually need to follow a prescribed format, and funders often want outcomes provided in a specific template. Rather than having staff create multiple versions from essentially the same data, Copilot can automatically pull the right data into each funder's preferred template. The savings in manual work can be substantial, and the reporting is more consistent.

When it comes to AI, Microsoft 365 Copilot is easy to start with and easy to grow with as you adopt AI at your own pace. On the following pages, you'll learn strategies for implementing AI safely and strategically.

Which Copilot option is right for your organization?

Just as AI continues to evolve, your organization can evolve in its use of AI. That's why Copilot offers multiple options based on organizational readiness. Every member of your team with a Microsoft 365 license already has Copilot Chat. For more AI functionality, you can add on Microsoft 365 Copilot licenses. Here's a quick overview:

Microsoft 365 Copilot Chat is a highly secure AI assistant available with Microsoft 365 business and enterprise licenses. Using the internet and uploaded documents, team members can do research, draft content, create images, and brainstorm ideas. Because Copilot works within your Microsoft environment and respects existing permissions, it offers a more secure way to explore AI than a public tool.

Microsoft 365 Copilot is an add-on option integrated into Word, Excel, PowerPoint, Outlook, and Teams. With this highly secure, AI-powered productivity tool, you can access internal data without the need to manually upload files. Microsoft 365 Copilot enables you to automatically draft an email in Outlook based on a previous thread, summarize live Teams meetings, rewrite Word documents, build charts in Excel, and generate PowerPoint slides from text.

The paid version comes in two forms: **Microsoft 365 Copilot Business** for eligible Microsoft 365 Business plans with up to 300 users, and **Microsoft 365 Copilot** for eligible enterprise plans. The core experience is similar, but the version available [depends on your Microsoft plan](#).

If your organization uses Microsoft 365, your team can immediately dive into Copilot Chat. The paid version may require a license upgrade and some setup support, depending on your Microsoft environment.

What about AI agents?

AI agents are designed to automate repeatable or multistep processes. Once your organization has experience working with Copilot, you might begin to identify processes that can be streamlined with an agent. You can design an agent to handle routine tasks like answering common staff questions, helping new employees navigate onboarding, routing requests to the right team, or guiding staff through an internal process.

Agents can be customized to fit your organization's needs and applied to one process at a time—but your team always remains in control. As your team becomes more proficient, you can expand your use of agents for even more productivity gains.

The most impactful AI decision isn't necessarily the most advanced one. It's the one that fits your organization's capacity, systems, and priorities. The right support will help you make that decision.

The right AI is the AI you need right now

The most useful AI tools are the ones that help with the work your team is already trying to manage. For many nonprofits, the best place to begin is where staff are losing time, repeating the same tasks, or struggling to keep work moving. Every process that you're able to streamline gives time back to people whose efforts are better spent serving the community and fulfilling the organization's mission.

AI adoption usually grows step by step. Many nonprofits are still early in the process, which is normal, especially for organizations with limited staff time or IT support. The table below shows a simple path organizations can follow as they begin using AI and mapping out a plan for the future.

Implementing AI is not like flipping a switch. For most nonprofits, phased AI adoption makes the most sense financially and operationally.

Stage 1:

Try AI in everyday work

Individuals safely explore Copilot and see where it can be useful.

Moving forward:

Use Copilot for drafting content, summarizing documents and emails, or following up after a meeting.

Stage 2:

Use AI where it saves the most time

Teams identify ways Copilot can streamline regular tasks.

Moving forward:

Focus on frequent tasks that create bottlenecks or take staff away from important work.

Stage 3:

Expand where the value is clear

Once AI is deployed in several areas, use that as a model for supporting additional teams.

Moving forward:

Look for repeatable processes where Copilot or automation can add value.

What to review before expanding AI use

As AI use grows, it helps to know where important information lives, who can access it, and whether shared files and systems are set up properly. Your organization will need to establish AI policies and data practices, but they don't have to be complicated to be useful.

In many nonprofits, staff may be using public AI tools, either at work or in their personal time. That experimentation is helpful, but as AI use spreads, organizations need to take a more planned approach. Clear guidance, shared practices, and attention to data security will help you expand AI use with confidence.

Before broader AI use, review the basics:

- **Ensure your teams have enterprise accounts** for using AI tools at work and are not using personal logons.
- **Make sure documents are current**, consistently named, and stored in the right place.
- **Review how files, folders, and sites are shared**, and who has access to them.
- **Look for content that may be accessible** to more people than intended.
- **Set clear rules for handling sensitive information**, guest sharing, and access changes.
- **Give staff guidance** on what they can and should not do with AI tools.
- **Make sure there's a simple process** for reporting possible data or security issues.

How Copilot helps protect data

Copilot works within your Microsoft 365 environment and respects the permissions and security settings already in place. Users should only be able to see content they currently have access to.

When staff use Copilot in their Microsoft work account, your organization's data is not used to train public AI models.

Nonprofits still need clear AI policies, good access controls, and practical staff guidance, but Copilot can help by working within the protections your Microsoft environment provides.

If files are stored in multiple locations or shared too broadly, Copilot may return results that feel incomplete or unexpected.



Helpful resource

If your organization doesn't yet have an AI policy, TechSoup has created a practical [AI policy template for nonprofits](#) to help you get started.

WHERE TO GO FROM HERE

Get support from TechSoup

For many nonprofits, the next step is simply choosing one or two practical ways to use the tools you already have. TechSoup helps nonprofits make practical decisions about technology, data readiness, and responsible AI use, including how tools like Microsoft 365 and Copilot may fit your needs. Since 1987 we've helped nonprofits use technology more effectively, and today we support more than 300,000 organizations around the world each year.

TechSoup helps nonprofits with:

- **Unique discounts** on software and hardware.
- **Expert-led courses**, workshops, and webinars.
- **Technical assessments** and one-on-one guidance.
- **A community** of nonprofit peers and practitioners.
- **Practical** guides, tools, and resources.

For nonprofits that need more tailored help with Microsoft-related questions, licensing, or planning, TechSoup also offers [complimentary consultations](#) to review your Microsoft environment and discuss practical next steps for best supporting your staff and advancing your mission.

Join TechSoup for ongoing access to these resources, guidance, and community support.

Join TechSoup

Ready for Copilot?

Once your organization is validated, you can request discounted Microsoft 365 Copilot licenses through the TechSoup catalog.

[View Copilot subscriptions](#)

