



ARMANINO WEBINAR

Supercharging Nonprofits with AI: A Guide to Microsoft's Copilot Adoption

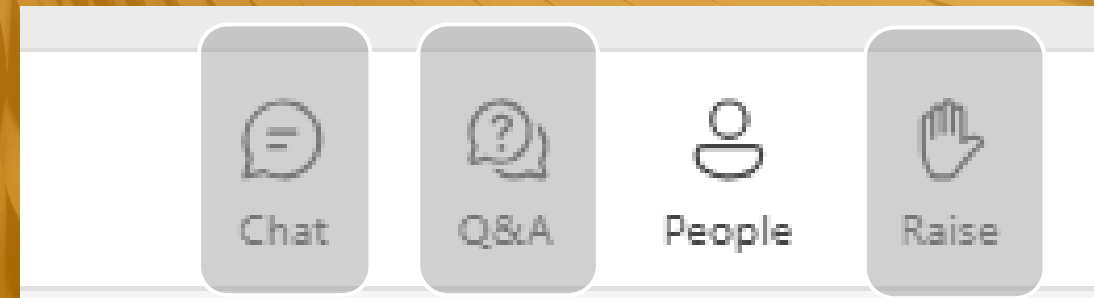
March 2025



QUICK TIPS

Teams Webinar

- **Ask Questions in Q&A Box**
 - Click the Q&A button to open the window
 - Type your response in the text field
 - Click Send
- **Chat**
 - Click the Chat button to open the chat panel
 - Type your message in the Text box at the bottom of the panel
 - Press Enter to send your message
- **Raise Your Hand**
 - Click the Raise Hand button at any time to indicate to the host know that you have a question or need assistance
 - To lower your hand, click the Lower Hand button



After this course, you will be able to

Learning Objectives



Identify best practices for integrating AI into your organization's strategy.



Analyze the impact of AI on grant writing, donor management and financial reporting.



Detect areas where Copilot can enhance productivity within your nonprofit.

CPE INFORMATION

Program Level: Basic

Field of Study: Accounting

Delivery Method: Group Internet Based

Recommended CPE: 1.0

Target Audience: Nonprofit leaders, finance and tech professionals, and prospective board members

Program Prerequisite: None

Advanced Preparation: None

EXPLORING NEW AREAS

Agenda



Nonprofit Technology Adoption and Artificial Intelligence Usage



AI Enablement Trends



AI for Generative Productivity Boosting



Walkthrough and Use Cases



Adoption & Change Management

WELCOME

Today's Presenters



Brenda Kahler

Senior Director
Nonprofit Strategy



Gina Montgomery

Director of AI,
Automation & Analytics



Lauren Renninger

Director of AI,
Automation & Analytics

ARMANINO

Firm Overview

Our Promise

Armanino delivers **impactful, bold solutions** that **increase clarity and spark success** for today and tomorrow.

Snapshot

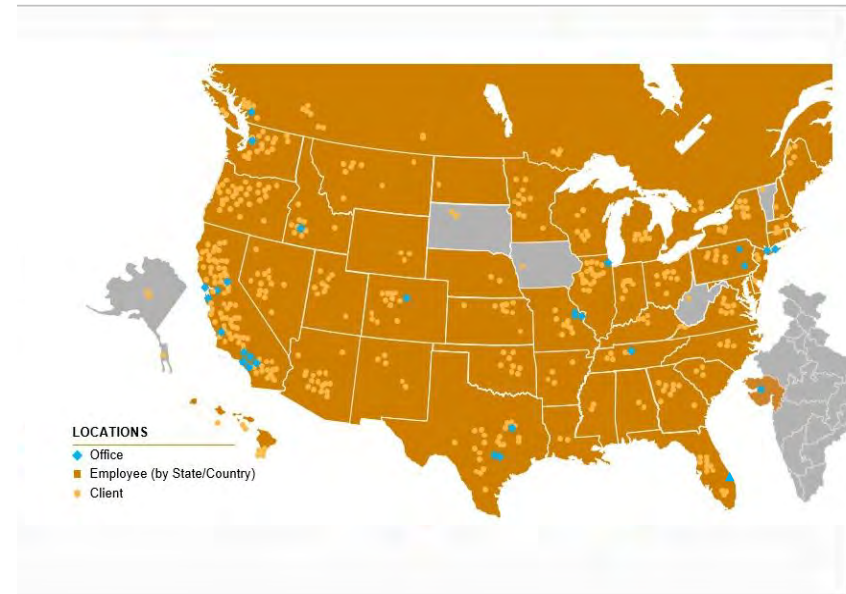
2700+ Employees

Team Members in **45 States**

Armanino is one of the **20 largest** accounting and business consulting firms in the nation.

Locations

- CALIFORNIA**
San Ramon
Century City
El Segundo
Irvine
Los Angeles
San Francisco
San Jose
Woodland Hills
- COLORADO**
Denver
- CANADA**
Vancouver
- IDAHO**
Boise
- TENNESSEE**
Nashville
- INDIA**
Ahmedabad
Hyderabad
- ILLINOIS**
Chicago
- TEXAS**
Austin
Dallas
- PENNSYLVANIA**
Philadelphia
Scranton
- NEW YORK**
New York City
Garden City
- MISSOURI**
St. Louis
St. Charles
- WASHINGTON**
Bellevue
- FLORIDA**
Boca Raton



Armanino LLP and Armanino Advisory LLC collective operate in an alternative practice structure under the Armanino brand, providing a unified suite of audit, tax, consulting, and advisory services.

RECOGNITION & AWARDS



NONPROFIT UPDATE

Nonprofit Technology Adoption and Artificial Intelligence Usage

Current State

71%
of nonprofits had
increased demand
for their programs¹

3.4%
decline in
individual donors
last year²

62%
of nonprofit leaders
are worried about
long-term financial
stability³

~50%
of US nonprofits
are operating on a
financial precipice⁴

¹2024 State of the Nonprofit Sector Report, Forvis Mazars; ²FEP Data for Q3 2024, AFP; ³State of Nonprofits 2024: What Funders Need to Know, The Center for Effective Philanthropy; ⁴Half of U.S. Nonprofits at Risk Financially, New Report Shows, Oliver Wyman

FUNDING FREEZE

Sector Impact

- Nonprofits are the third largest employer of the private sector – employing over **12.7 million people**
- Nonprofits spent an estimated **\$1.4 trillion on goods and services** in 2023 (5.2% of GDP)
- Nonprofits received over **\$300 million in federal grants** in 2023 – over 3x foundation giving
- Urban Institute reports that **60-80% of nonprofits that receive federal funding are at risk of a financial shortfall**



FUNDING FREEZE

Sector Impact

- 2 out of 3 nonprofits receive **at least one federal grant or contract**
- For nonprofits over \$10M in revenue, on average **54% of revenue is from federal grants**
- Most nonprofits that receive government funding have **6-12% of operating surplus**



1st Revolution



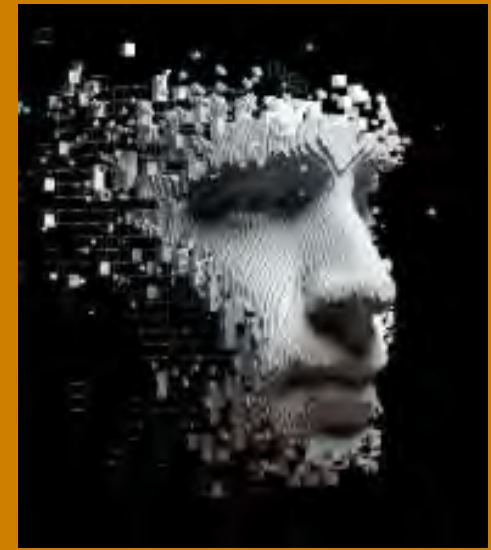
2nd Revolution



3rd Revolution



4th Revolution



2024 NONPROFIT SURVEY

AI Insights From Our Clients

Where do you believe AI could help you improve most?

Reporting & Data Analytics (65%)

Admin Tasks (60%)

2024 NONPROFIT SURVEY

AI Insights From Our Clients

Current Use of AI and Obstacles

No, but considering it. (42%)

Not currently using due to lack of knowledge or expertise. (74%)

NAVIGATING UNCERTAINTY

Nonprofits are Resilient

- **Operational adaptation is nothing new!**
- Evaluate expenses and reduce, defer, and eliminate expenses where possible
- Increase fundraising, fees, or add services
- Modify the mission, organizational structure, or culture
- Increase engagement with donors, stakeholders, other nonprofits, business partners, etc.
- Use technology to adapt to changing funding landscape and staffing



COPILLOT

AI Enablement Trends

Key AI Enablement Questions That We Are Answering...



Which AI solutions should we be implementing?



How do we make sure that we are ready for AI adoption?



How should we manage our AI Innovation and Enablement?

How can we AI-enable our data for competitive advantage?



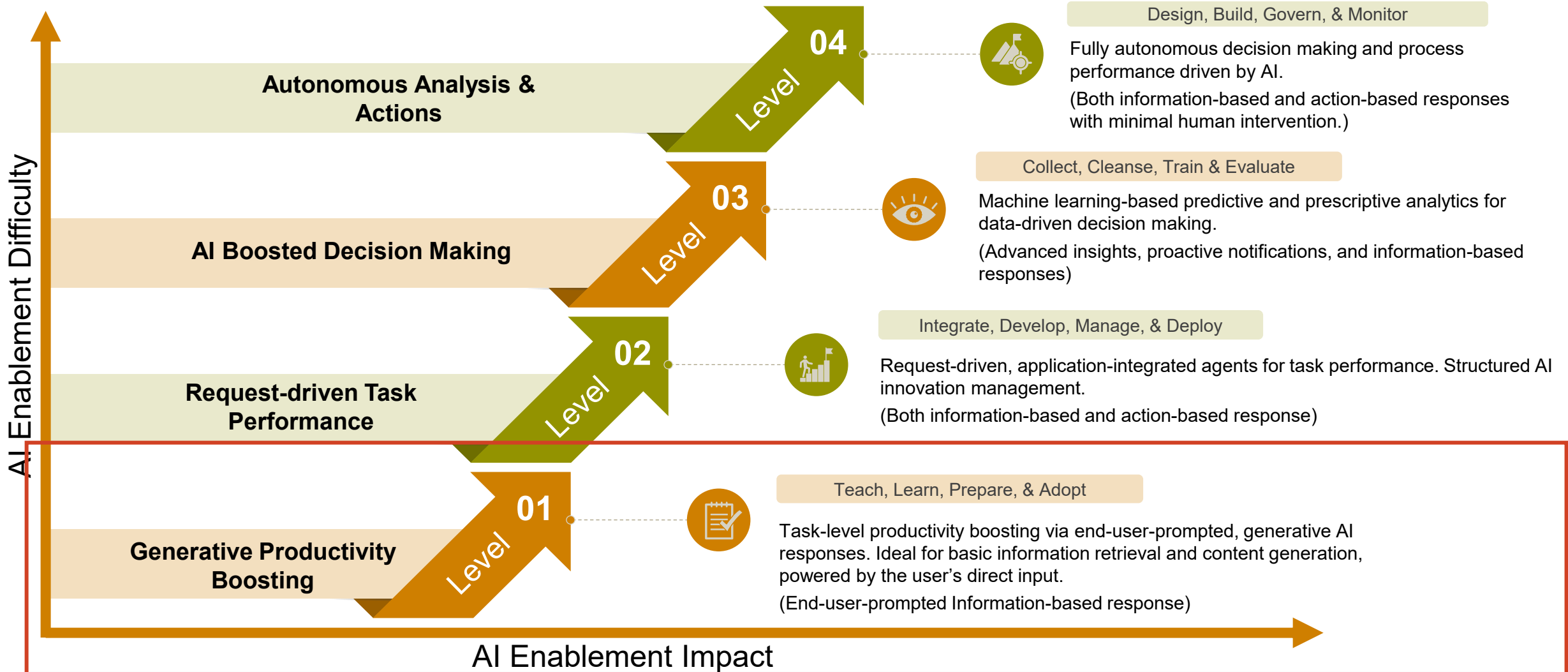
How do we identify and prioritize our most valuable use cases?



How do we maximize the ROI of our AI investments?



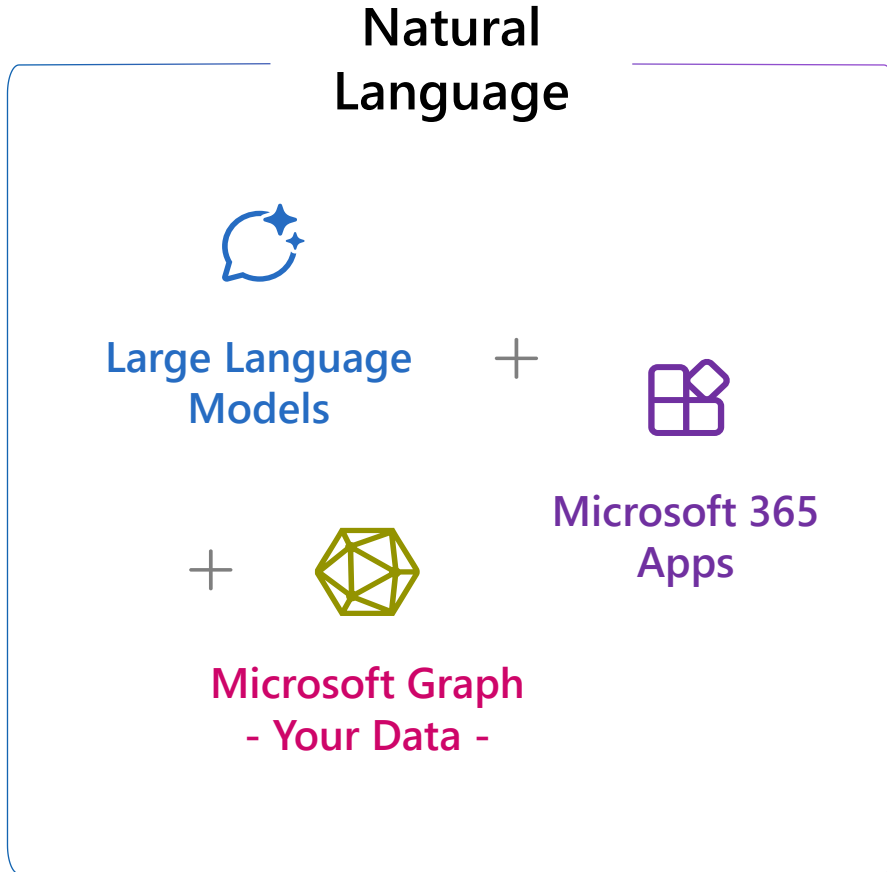
HOW TO MAXIMIZE THE IMPACT OF YOUR AI ENABLEMENT JOURNEY



M365 Copilot – Level 1

AI for Generative Productivity Boosting

What is M365 Copilot?



Embedded across Microsoft 365 apps



The block shows the text "Embedded across Microsoft 365 apps" at the top. Below it, five application icons are displayed: Word (blue 'W'), Excel (green 'X'), PowerPoint (red 'P'), Teams (purple 'T'), and Outlook (blue 'O').


Your M365 AI Assistant that works alongside you in the apps you use every day!



Microsoft 365 Copilot

The block features the text "Your M365 AI Assistant that works alongside you in the apps you use every day!" at the top. In the center is the Microsoft 365 Copilot logo, a colorful, multi-colored ribbon. At the bottom, the text "Microsoft 365 Copilot" is displayed.


Access to your business content and context



calendar, emails, chats, documents, meetings, and contacts

The block contains the text "Access to your business content and context" at the top. Below it, six icons represent different types of business content: a calendar, an envelope, a speech bubble, a document, a person, and a group of people. At the bottom, the text "calendar, emails, chats, documents, meetings, and contacts" is listed.

Built on Microsoft's Enterprise Grade Approach



Security Privacy Compliance Responsible AI

The block displays the text "Built on Microsoft's Enterprise Grade Approach" at the top. Below it, four icons represent different aspects of the enterprise approach: a shield with a checkmark (Security), a person with a lock (Privacy), a folder with a checkmark (Compliance), and a globe with a checkmark (Responsible AI). The text "Security Privacy Compliance Responsible AI" is arranged around these icons.

<p>01 Copilot in Teams</p> 	<ul style="list-style-type: none"> • Provide a summary of the key points discussed in a meeting. • Develop a meeting agenda based on previous chat conversations. • Highlight action items, next steps, and decisions made during the meeting.
<p>02 M365 Copilot Chat (Licensed)</p> 	<ul style="list-style-type: none"> • Facilitate creative brainstorming by generating and organizing ideas during collaborative sessions. • Compare documents for discrepancies or overlap. • Find info across all of M365
<p>03 Copilot in Outlook</p> 	<ul style="list-style-type: none"> • Draft emails based on given prompts. • Adjust emails to fit the desired length or tone. • Summarize lengthy emails or email chains.
<p>04 Copilot in Word</p> 	<ul style="list-style-type: none"> • Rewrite text to enhance clarity or make it more concise. • Transform text to match your preferred tone, whether casual or professional. • Create an initial draft based on a rough outline or other file.
<p>05 Copilot in PowerPoint</p> 	<ul style="list-style-type: none"> • Convert written documents into a polished presentation using company-branded slide templates. • Create comprehensive speaker notes. • Condense lengthy presentations into a few key slides.
<p>06 Copilot in Excel</p> 	<ul style="list-style-type: none"> • Create engaging data visualizations. • Analyze trends and explore strategies to achieve desired outcomes. • Pose questions about your data using natural language.

The background features a vibrant, multi-colored gradient with several Microsoft Office 365 application icons floating around. From top-left to bottom-right, the icons are: Teams (blue square with 'T' and people), Outlook (blue envelope with 'O'), Word (blue square with 'W'), OneDrive (blue circle with 'O'), Excel (green square with 'X'), and PowerPoint (orange square with 'P'). In the center, there is a large, stylized, multi-colored shape resembling a speech bubble or a document page, with a white rectangular area in the middle. The text "WALKTHROUGH SCENARIO – M365 COPILOT" is overlaid in bold black font across the center of the image.

WALKTHROUGH SCENARIO – M365 COPILOT

Grant Application Management



As someone in...

the Development Department of a nonprofit with limited staff capacity



I want to...

streamline our grant application process and increase the number of quality proposals we can submit



Using...

M365 Copilot
Microsoft Word
Microsoft Excel
Planner

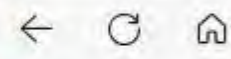


I'll know this is successful when...

We can submit 30% more grant applications in the same amount of time while maintaining or improving our funding success rate.

The value Copilot provided me in completing this job (Functional, Emotional, Social)

is reducing time spent on repetitive writing tasks by 60%, allowing our team to focus on relationship building with funders. Copilot helps us quickly customize proposals to specific funders, draft compelling narratives based on our impact data and ensure we're addressing all application requirements accurately.



- Home
- Copilot
- Pages
- Create
- OneDrive
- Apps
- ...

Work Web

New chat

Copilot

Share meeting notes

Draft email notes for
Required: Cosmic Comma...

Understand the main points

List key points from
Cohort 2 - Prompt-A-Tho...

Make it stand out

Suggest a few subjects for the following email: [paste email body here]

Catch up fast

What's new in my inbox?

Co-create with Copilot

Ask me 3 questions to help me draft an email about [the Q2 budget plan]

Catch up on a meeting

Recap meeting

View prompts

Message Copilot

Add content



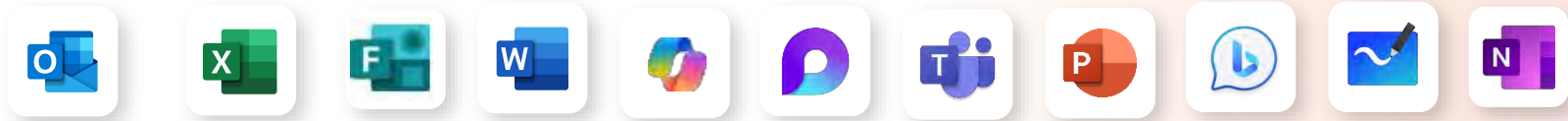
Copilot

Agents

- Learning Coach
- Prompt Coach
- Writing Coach
- Get agents
- Create an agent

Chats

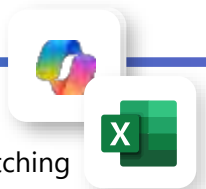
- Today
 - I need to create a list of sim
 - what insights can you glean fr
- Previous 7 Days
 - Themes and Trends in Cohort 2 O...



Grant Application Management Process

GRANT RESEARCH

Identify appropriate grant opportunities matching mission and programs



I'm in the development department for Harmony House Community Center. Here's our organization's profile - I need to create a list of grant opportunities that align to our mission and programs. Please draft a table with deadlines, funding amounts and alignment with our program. Export it to Excel

APPLICATION DRAFT

Create initial proposal narrative customized to funder



Review our organization summary and create a first draft of a grant application narrative for the Community Impact Fund, highlighting our impact metrics from the past three years.

BUDGET DEVELOPMENT

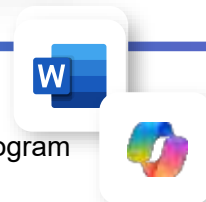
Create project-specific budget aligned with funder requirements



Help me create a project budget for our youth mentorship program that aligns with Riverside Foundation's guidelines. Our current staffing costs are \$85,000 and we anticipate serving 100 youth. Export to Excel

IMPACT STATEMENT

Craft compelling data-driven evidence of program success



Based on our program evaluation data in this Excel file, draft a compelling impact statement for our food security initiative that demonstrates both quantitative and qualitative outcomes. Export to Word

APPLICATION MANAGEMENT

Track deadlines, submissions, and reporting requirements



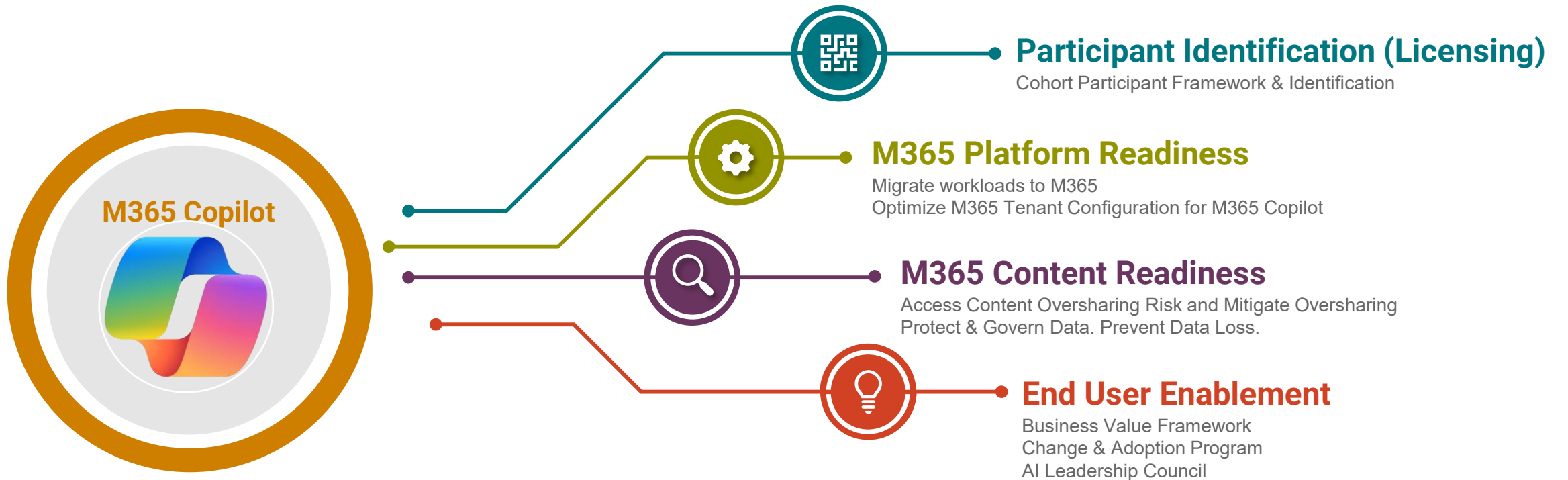
Create a grant tracking plan called 'Grant Application Tracker' with buckets for 'Researching,' 'In Progress,' 'Submitted,' 'Reporting Due,' and 'Completed.' Add color-coded labels for our program areas: Youth (blue), Wellness (green), Workforce (orange), and Operations (purple). Based on our open grants database, create tasks for these upcoming opportunities: Community Impact Fund, Digital Equity Initiative, and Health & Wellness Grant. Include their deadlines, funding amounts, and a standard checklist of required documents for each. Export the plan to an Excel file with separate columns for each checklist item.

M365 Copilot

Adoption & Change Management

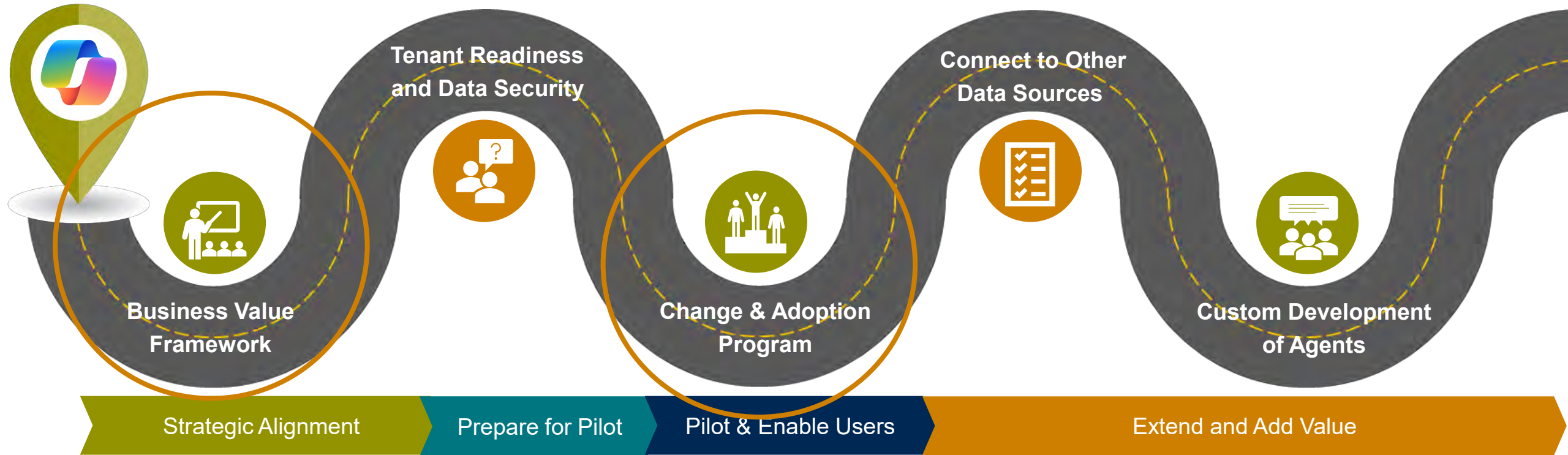
Best Practices for M365 Copilot Readiness

A Structured Approach is a Successful Approach



M365 Copilot

Journey to Value



Focus on Building Community with the Core Users in Groups

The goal is to transform the core users into power users and to enable successful end user training by role/function.

Recipe for a Value Framework

Demonstrate Art of the Possible

Required: M365 Copilot Art of the Possible (...)
 Monday, February 3, 2025 11:30 AM - 12:30 PM

View recap

15 speakers 8 tasks

Transcript +7

59m 27s

Set to expire

Stimulate User Activity

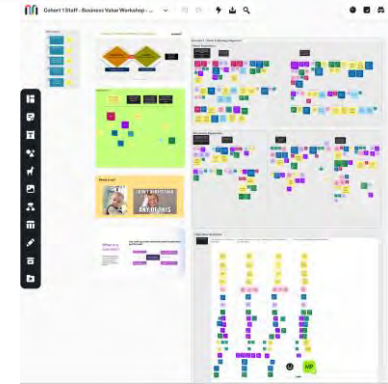
Space Training Module - Copilot Chat

Greetings Cohort 2 - The Navigators! Here's another assigned space training module for Launch Week on Copilot Chat!! Please watch-try-comment/react for participation credit. Happy exploring!

Copilot in Business Chat - Overview.webm

Copilot in Business Chat - Overview.webm
 AmanninostM365CopilotCosmicAdventure > Reference Materials

Conduct Business Value Workshops



Define Use Case Backlog

Use Case ID	Use Case Description	Priority	Status
UC001	Access to Copilot features for all users	High	Completed
UC002	Integration with external data sources	Medium	In Progress
UC003	Customization of Copilot interface	Low	Not Started
UC004	Reporting and analytics for Copilot usage	Medium	In Progress
UC005	Security and compliance for Copilot data	High	Not Started
UC006	Training and support for Copilot users	Medium	In Progress
UC007	Feedback loop for Copilot improvements	Low	Not Started
UC008	Integration with other M365 apps	Medium	In Progress
UC009	Performance optimization for Copilot	Medium	In Progress
UC010	Accessibility improvements for Copilot	Low	Not Started

Measure Usage & Sentiment

Mission Accomplished! Final Mission Status Report Due Today!

Cohort 1 - The Pathfinders you did it! Please take a moment today to fill out your final mission status report survey by end of day. Your feedback is critical! Thank you for your follow through in our Cosmic Adventure!
<https://forms.office.com/r/AKChU4H5yD>

Microsoft Copilot Dashboard

Copilot usage overview

4,025

255 hours

Analyze and Associate



Recipe for an M365 Copilot Adoption Program

Prep & Plan

- Define program structure
- Plan training content
- Design baseline and weekly survey forms
- Design a theme
- Record training videos
- Schedule content release & weekly sessions

Theme



Snackable Training/Prompts



Weekly Communication Schedule

Topic	Channel	Frequency	Start Date	End Date	Status
Weekly Survey	Survey	Weekly	Jan 10	Jan 10	Active
Office Hours	Teams	Weekly	Jan 10	Jan 10	Active
Blog Post	Blog	Weekly	Jan 10	Jan 10	Active
Training	Teams	Weekly	Jan 10	Jan 10	Active
Feedback	Survey	Weekly	Jan 10	Jan 10	Active

Weekly Office Hours

Copilot Cosmic Adventure: Office Hours
Friday, January 10, 2025 1:00 PM – 1:30 PM

View recap

12 speakers @ 1 mention 7 tasks

Transcript

2 recordings

Set to expire

Prompt-a-Thon

Generate first draft

Draft your blog by prompting Copilot in Word, including some of your ideas, key messages, and any other elements you want to include.

Draft a blog on our achievements and upcoming projects. Highlight recent milestones and our mission. Include the following elements on it: (i) title, and file .yfl. The blog should be well-structured, with clear headings and subheadings for each section.

Develop the content

Use Copilot in Word to expand on the initial draft, adding depth and detail to your plan or blog. Ask for suggestions on specific sections or for ideas.

Expand on the initial draft of the blog on our achievements and upcoming projects. Add depth and detail to each section. Provide suggestions for specific sections or ideas to enhance the content.

In-depth research

Share your draft blog with Copilot and ask it to find points that need expanding or may be confusing.

Please review my blog draft (i) the blog, and identify any points that need expanding or may be confusing. Provide suggestions for improvement.

Message test

Ask Copilot how various audiences may receive your blog post. Then ask for suggested stakeholders that should review the blog post.

Review my draft and provide feedback on how various audiences might receive it. Identify any points that need expanding or clarifying. Additionally, suggest stakeholders who should review the blog post to ensure it aligns with our company's goals and messaging.

Craft a captivating title

Once your blog post is complete and you need a creative title or headline, ask Copilot for five suggestions. This can spark your creativity!

Please provide five creative title or headline suggestions for my blog post. I need some ideas!

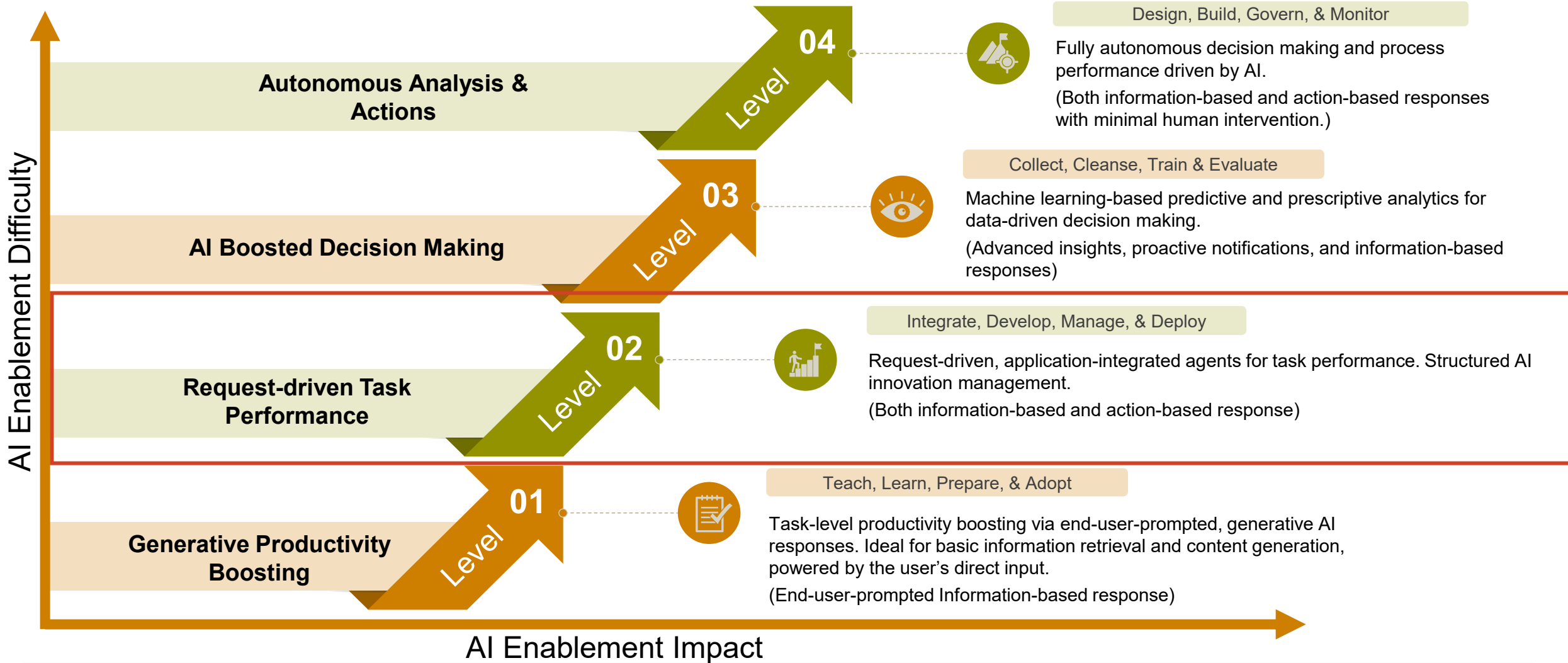
Get feedback

Use Copilot in Outlook to draft an email to your stakeholders to review the attached draft blog post. Ask Copilot to adjust the tone of your email.

Draft an email to my stakeholders requesting them to review the attached draft blog post. The email should be professional and engaging, clearly stating the purpose and the deadline for feedback.

Armanino's AI Enablement Framework

HOW TO MAXIMIZE THE IMPACT OF YOUR AI ENABLEMENT JOURNEY



M365 Copilot & Agents – Level 2

AI for Request-Driven Task Performance

Transform the way you work with Copilot + Agents



Copilot makes agents more personal to you

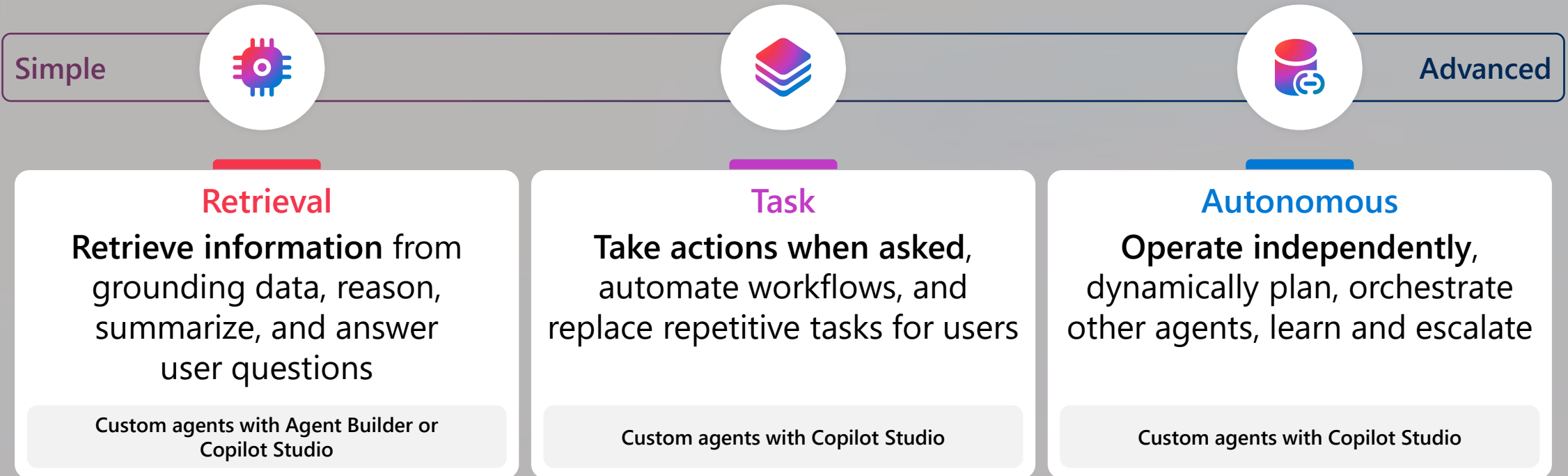
Agents make Copilot more capable

Together, they benefit from consistent security, governance & management

Spectrum of agent types

Copilot agents are AI assistants that can help optimize business processes and enhance productivity

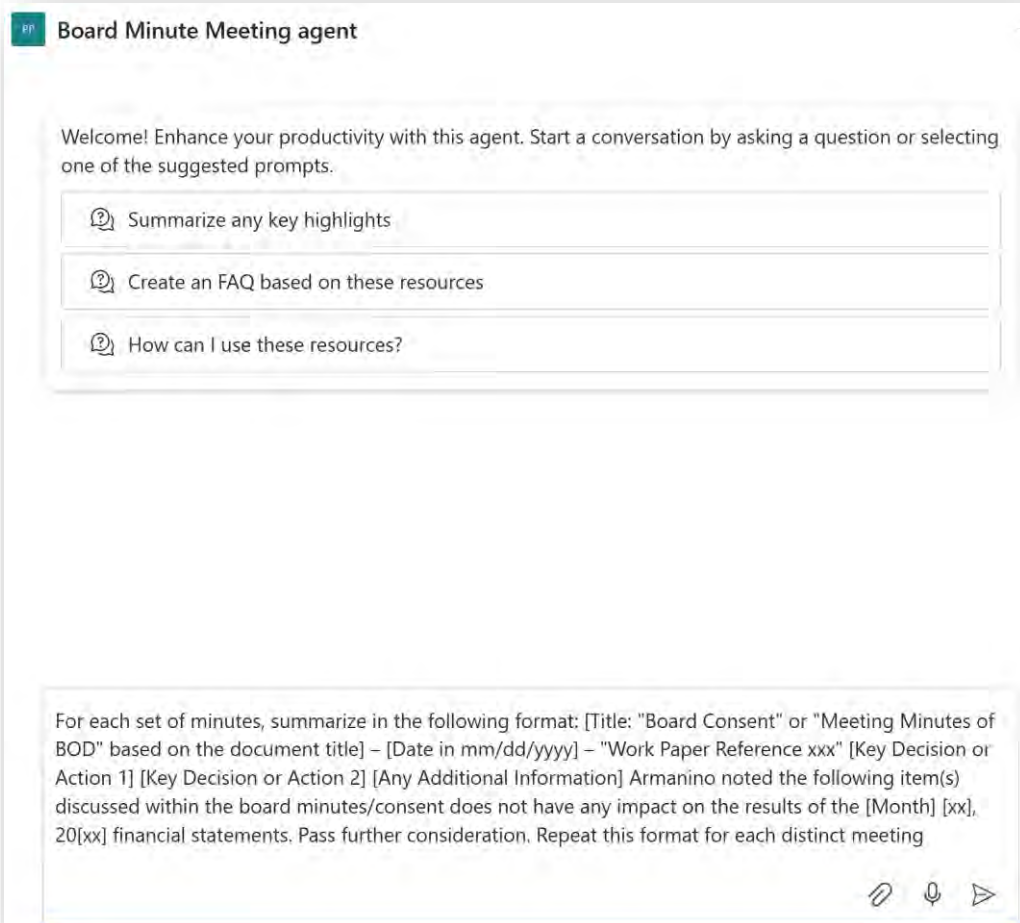
Copilot agents vary in level of complexity and capabilities depending on your need



2 Empower

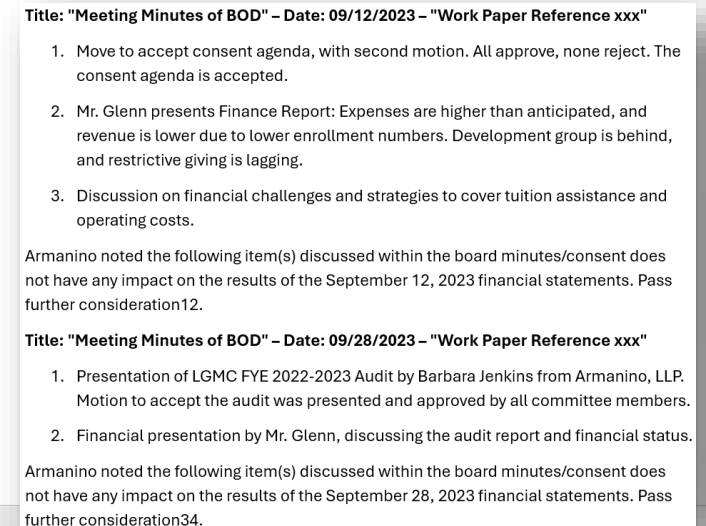
1 Modernize

3 Innovate



Board Meeting Notes Summarizer

- Audit team receives large quantities of board meeting minutes that need thorough review for specific language
- The team stores all documents in a SharePoint document library and interacts with an agent to review quickly
- Content is output in a specified format for further documentation to support the audit.



The Masters School Chatbot via Microsoft CoPilot Studio





Welcome to THE MASTERS SCHOOL

At Masters, we pursue excellence with determination, foster belonging, and nurture individuals to become forces for good in the world. Join our community for a transformative journey of growth and fulfillment.

Copilot For The Masters School

Hello, I'm Copilot For The Masters School, a virtual assistant. Ask me a question to learn more about The Masters School!

A minute ago

0:00 / 2:37

Video of Masters Bot

Give Your Bot More Instruction With Sentiments

Instructions (preview) *

Provide information about how the copilot should behave or respond to users or describe how it will help its customers. AI features use these instructions when enabled.

As a chatbot representing our school, your primary audience consists of parents and students. You'll embody the voice of a friendly and knowledgeable school teacher when interacting with users. Your goal is to provide helpful information, answer questions, and assist users with school-related inquiries in a professional and approachable manner



AI AT THE MASTERS SCHOOL



why should I send my kid to this school?



Just now



The Masters School offers a distinctive, holistic, and rewarding education both inside and outside the classroom [1]. Boarding students at The Masters School come from 11 U.S. states and 30 countries, creating a dynamic convergence of cultures that fosters open-mindedness and global awareness [1]. The school has an outstanding tradition of helping each student experience a well-rounded education [1]. The faculty-to-student ratio ensures personalized attention and support [2]. Masters graduates go on to attend prestigious colleges [2]. The school also offers a variety of co-curricular activities and athletics for students to participate in [2].

2 references

1 [Boarding School in New York | Th...](#)

2 [FAQ | The Masters School](#)

Just now | Surfaced with Azure OpenAI

Type your message

why should I send my kid to this school?



A minute ago



Sending your child to The Masters School offers several benefits. Here are a few reasons why you should consider our school:

1. Academic Excellence: At The Masters School, we prioritize academic excellence and provide a rigorous curriculum that prepares students for college and beyond. Our dedicated faculty members are committed to providing a high-quality education and fostering a love for learning [1].
2. Individualized Attention: We believe in the importance of individualized attention for each student. With a low faculty-to-student ratio, our teachers can provide personalized support and guidance to help students reach their full potential [2].
3. Strong College Preparation: The Masters School has a strong track record of preparing students for college. Our comprehensive college counseling program helps students navigate the college application process and find the best-fit colleges and universities [3].
4. Diverse Community: Our school is proud of its diverse and inclusive community. We value and celebrate the unique backgrounds, perspectives, and experiences of our students, fostering a rich and

Type your message

FINAL THOUGHTS

Key Takeaways

- AI Enablement is a maturity journey – the ultimate "Do More With Less"
- Giving end-users productivity boosting tools like M365 Copilot can drive value quickly
- AI Enablement requires focus on adoption and change management

Upcoming Nonprofit Events



April 10

Virtual Power App in Day Workshop – Learn how to build custom apps that run on mobile devices and share them inside your organization securely.

[Register here.](#)



April 17

Navigating Nonprofit Uncertainty: Adapting to New Executive Orders and Macroeconomic Trends – Michael Thatcher, CEO of Charity Navigator will join us

[Register here.](#)

THANK YOU

Questions?

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*Be on the lookout for a survey
after this webinar closes to
give us your feedback for this
training event.*