

# Prompt engineering for Fundraising

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# AGENDA



Image created with Designer in Copilot

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Connect. Learn.  
Innovate.  
*Together.*

Keep the conversation going!

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[aka.ms/nonprofitcommunity](https://aka.ms/nonprofitcommunity)





# Explore AI skills for nonprofit professionals

Build AI skills in the way that works best for you and your team with the **Microsoft Digital Skills Center for Nonprofits**, a collaboration with TechSoup.

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# Copilot overview



Features

	 Copilot	 Copilot PRO with Commercial Data Protection
GPT Large Language Model	✓	✓
AI-Powered Web Search	✓	✓
Image generation	✓	✓
Commercial Data Protection		✓

# Data protection

To help business and educational organizations protect corporate data, Copilot adds commercial data protection when eligible users sign in with their work or school accounts.

Commercial data protection means user and organizational data are protected, prompts and responses are not saved, Microsoft has no eyes-on access, and chat data isn't used to train the underlying large language models.

Work

Copilot

https://copilot.microsoft.com

Microsoft

COPILOT

WorkWeb


NOTEBOOK

Protected


Copilot

PRO


Your everyday AI companion



Write a joke that my coworkers would find funny



Why do people fly in their dreams?



Design a sign for my classic truck repair garage

Copilot uses AI. Check for mistakes. [Terms](#) | [Privacy](#) | [FAQs](#)

Choose a conversation style





GPT-4  
Creative

Fast  
Balanced

GPT-4  
Precise

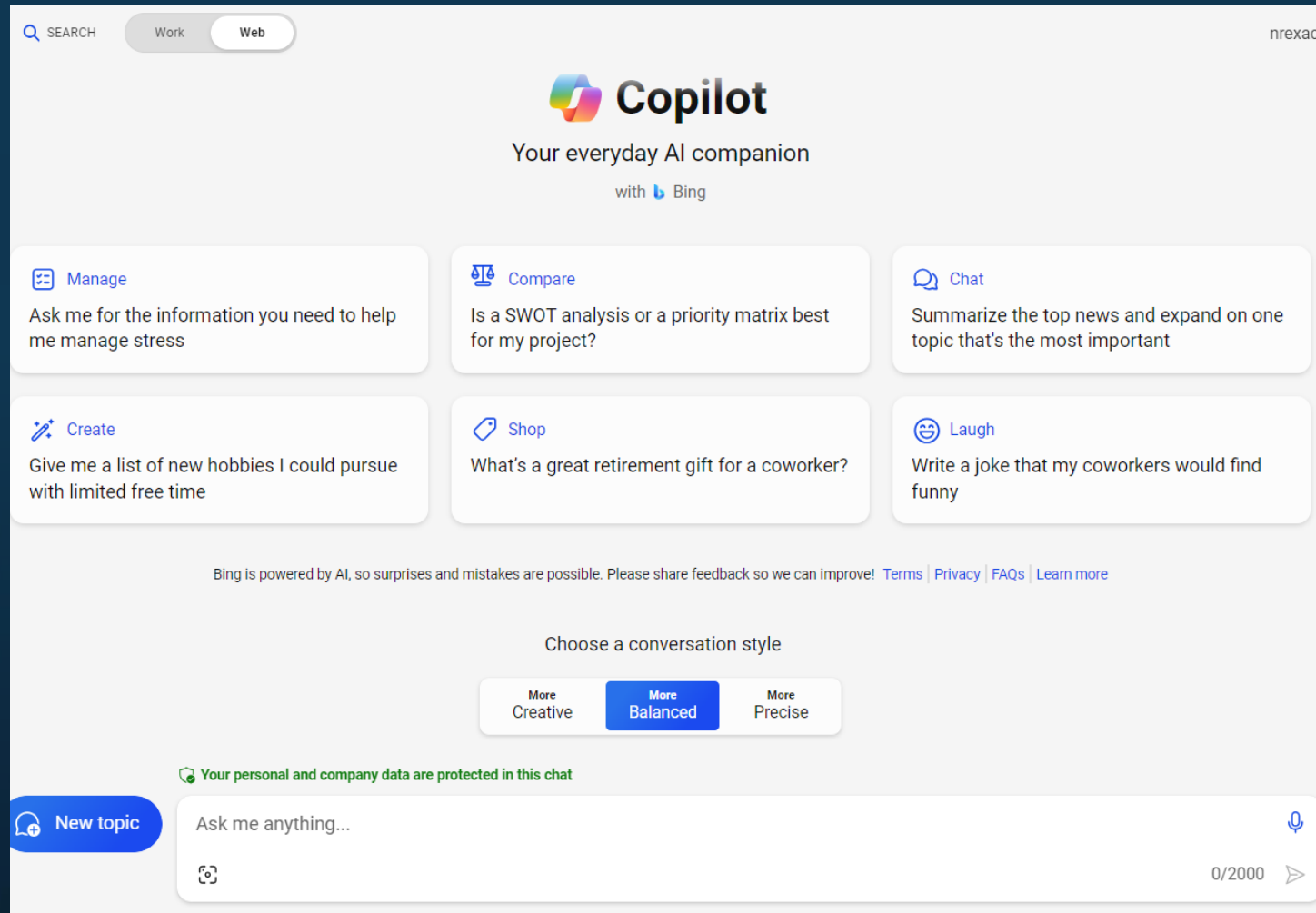
New topic

Ask me anything...



Feedback

# Meet Copilot



**More Creative:** This style delivers reasonable responses with a **creative** touch. This style allows the AI more creative leeway in how it formulates answers to your queries.



**More Balanced:** This is the **default** conversational mode, and it tries to strike a balance between accuracy and creativity during your conversations.



**More Precise:** In this mode, responses are more likely to be **factual**, concise and accurate. The chatbot places more focus on relevancy when formulating results.

# Workday efficiencies



## Summarize a long PDF

Turn a 20-page, jargon-filled PDF into 5 bullets using Bing Chat Enterprise in the Edge sidebar



## Draft emails and social content

Use Bing Chat Enterprise as your professional writer on call to draft emails, captions, and more



## Generate images

Leave behind stock images and text-only reports in favor of custom-generated images for emails, on social, and more



## Learn new skills

Ask questions tailored to your needs and interests to get consolidated key points from the internet for you



## Get answers for specific and complex questions

Elegantly handle questions that require multiple data points or a degree of analysis

# What do you want to try with Copilot first?



Summarize document

---



Compose email

---



Compose social media post

---



Generate images

---



Learn new skills

---



Get answers for specific and complex questions

# Types of prompts



# Different prompts, different results

Zero-shot prompts: Asks a single question, AI answers

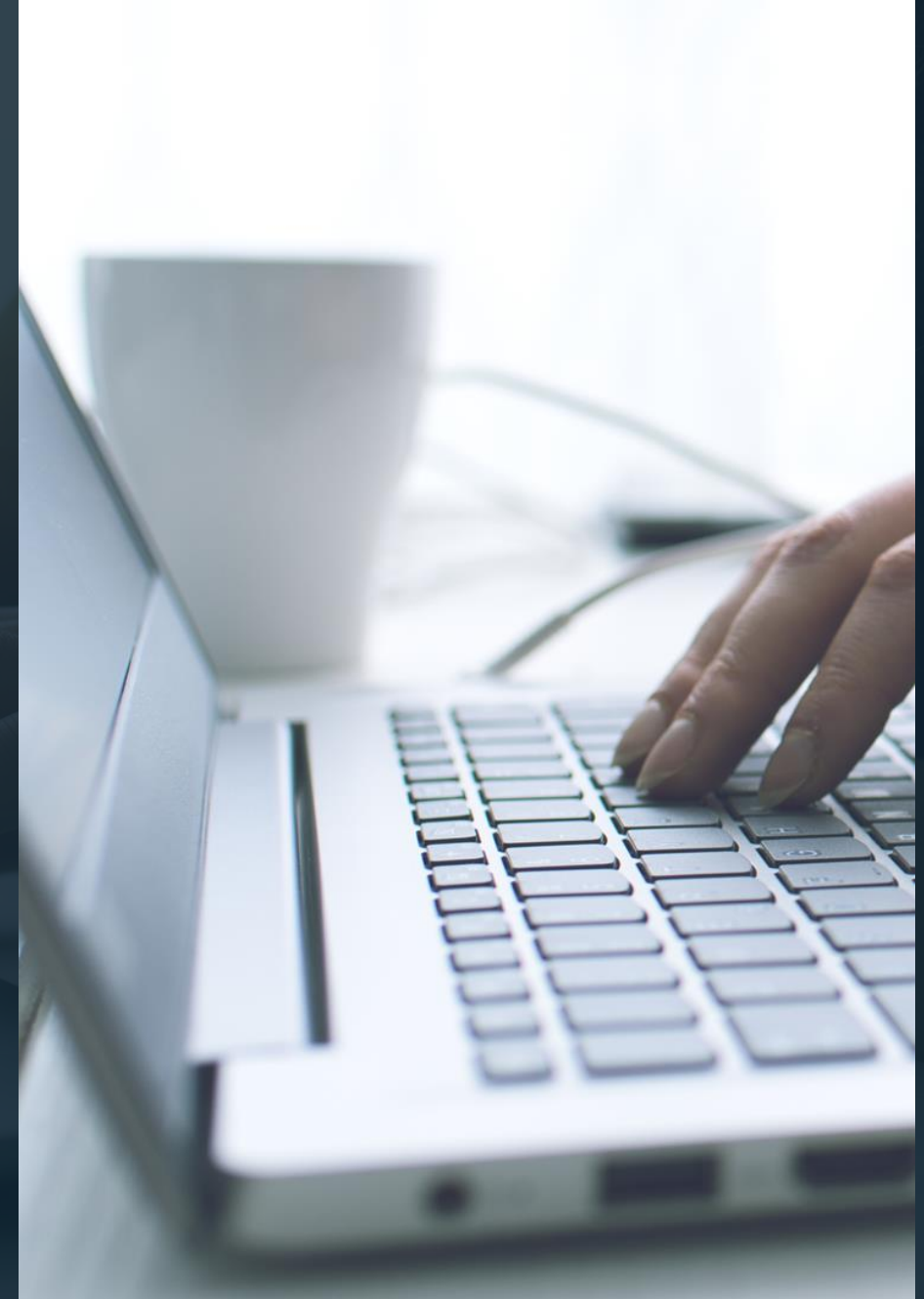
One-shot prompts: Add one example with the prompt

Few-shot prompts: Include multiple examples with the prompt

Get-in-character prompts: Ask the AI to assume a certain role or perspective while generating a response

Chain-of-thought or changing prompts: Uses a series of questions that prompt the AI to reason out the answer

<https://aka.ms/TechSoup>



# Prompting best practices



# Prompt ingredients



## Include the right prompt ingredients

To get the best response, it's important to focus on some of the key elements below when phrasing your Copilot prompts.

**Goal:** What response do you want from Copilot?

**Context:** Why do you need it and who is involved?

**Generate a short 3-5 article reading list** to inform me on nonprofit initiatives in the UK. **Focus on journals and blogs.** Please summarize each article.

**Expectations:** How should Copilot respond to best meet your expectations?

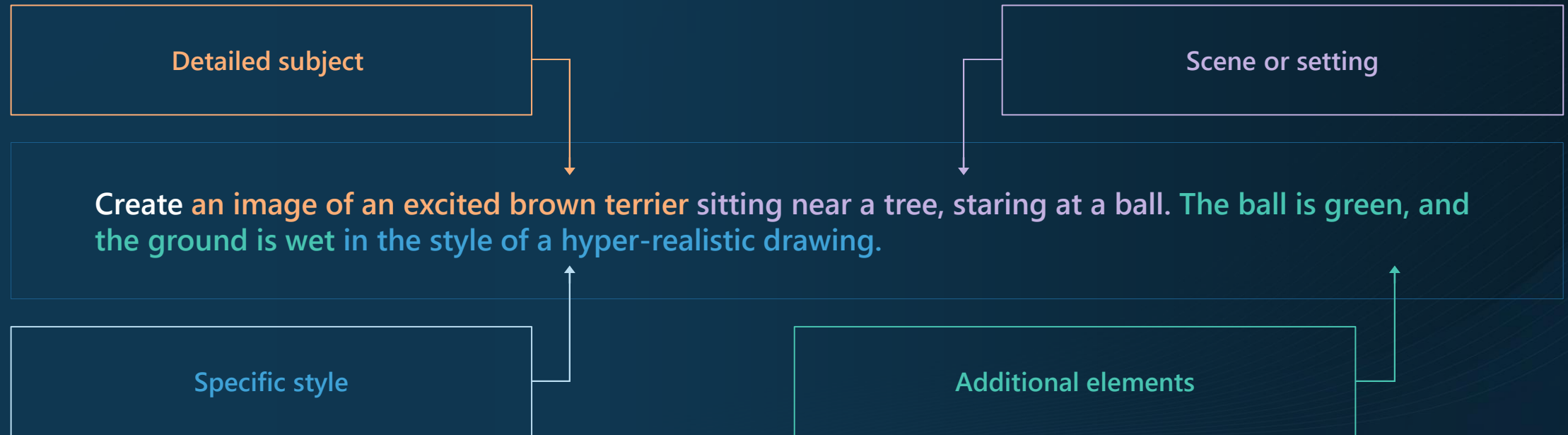
**Source:** Which information sources or samples should Copilot use?

# Prompt ingredients for images



Include the right prompt ingredients

Begin with a clear action (make, create, paint, illustrate, draw generate)



# Functions at a Nonprofit



## Program management

Research best practices, monitor progress and generate reports for their projects

Draft emails and messages to communicate with stakeholders and team members



## Fundraising

Find and contact potential donors sponsors and partners

Write proposals grants and thank you letters and track their fundraising goals and outcomes



## Marketing

Create engaging content such as blog posts social media posts newsletters and Flyers



## People development

Design and deliver effective training sessions such as webinars workshops and courses

Find relevant sources summarize articles and generate citations



## Administrative tasks

Manage and organize various tasks such as scheduling meetings booking travel ordering supplies and filing documents

# Funding activities



## Research and Planning:

---

Get a sense of trends in fundraising activities. Brainstorm ideas on fundraising strategies and campaigns.

## Marketing:

---

Draft communications and create visual images aligned to marketing campaigns.

## Data analysis:

---

Summarize key findings. Create goals and metrics.



# What prompts are you most interested in creating?

Research and planning

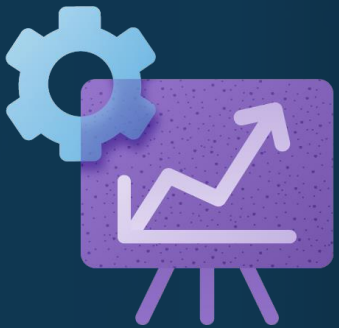
Marketing

Data analysis



## Demo: Research and planning

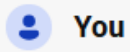
# Research and planning Scenario 1



**Scenario:** Our nonprofit organization is focused on hunger relief and is planning to participate in Giving Tuesday for the first time. We are curious about what other campaigns have gone well.

---

**Prompt:** Name some popular Giving Tuesday campaign Ideas for food banks in America in 2023.



You

Name some popular Giving Tuesday campaign Ideas for food banks in America in 2023.



Copilot

Certainly! Here are some popular **Giving Tuesday campaign ideas** for food banks in America in 2023:

1. **Holiday Food Drive:** Host a food drive during the holiday season to collect non-perishable items for those in need [1](#) [2](#).
2. **Nutritious Meals Sponsorship:** Encourage donors to sponsor a week of nutritious meals for community members or families in need. For example, a \$100 donation can provide a week of meals for an individual, while \$250 can cover a family's meals for a week [3](#).
3. **Multichannel Fundraising:** Utilize various channels such as social media, email, and events to engage donors and raise funds. Tell compelling stories about your organization's impact to draw people in [4](#) [5](#).

Remember, Giving Tuesday is a day of global generosity, and these ideas can help your food bank make a meaningful impact! 🌞 🍽️ 🗑️ [1](#).

Learn more [1](#) [qgiv.com](#) [2](#) [❤️ givingtuesday.org](#) [3](#) [👉 donate.foodbanksbc.org](#) [+2 more](#)



Ask me anything...



# Research and planning Scenario 2



**Scenario:** As a nonprofit food bank, we are actively seeking partnerships with local businesses to support our mission. We're looking for organizations within our community that can assist us with organizing food drives, coordinating volunteer events, and securing corporate sponsorships.

---

**Prompt:** Suggest organizations in [location] that could be helpful for a food bank to engage local companies. Provide results in tabular form.



You

Suggest organizations in North Carolina that could be helpful for a food bank to engage local companies. Provide results in tabular form.



Copilot

Certainly! Here are some organizations in North Carolina that could be helpful for a food bank to engage with local companies:

Table		
Organization Name	Description	Location
<a href="#">FeedNC</a>	Provides meals, displacement services, and donations for guests in need in the Mooresville, NC community.	275 S Broad St, Mooresville, NC, 28115
<a href="#">North Carolina Local Food Council (NCLFC)</a>	Advocates for communities, fishermen, and farmers hungry for more and better local foods. Supports existing food councils across North Carolina.	Statewide
<a href="#">Feeding the Carolinas</a>	Unites the ten Feeding America Food Banks serving North and South Carolina, ensuring a healthy, adequate, and consistent food supply to every community.	Statewide

Feel free to explore their websites for more information! 😊

Learn more [1](#) [bing.com](#) [2](#) [feednc.org](#) [3](#) [nclocalfoodcouncil.org](#) [4](#) [healthyfoodaccess.org](#)



New topic

Ask me anything...



# Research and planning Scenario 3



**Your Scenario:** We are the digital innovation team at an international child rights organization, uniting to craft digital strategies that will captivate and inspire a new generation of donors.

---

**Prompt:** Provide five ideas for a digital fundraising strategy for an international organization that works for child rights, to help us bring in new donors.



You

Provide five ideas for a digital fundraising strategy for an international organization that works for child rights, to help us bring in new donors.



Copilot

Certainly! Here are **five ideas** for a digital fundraising strategy that can help your international organization focused on child rights attract new donors:

1. Assess Your Maturity and Build a Strategy:

- Start by evaluating your current digital fundraising capabilities. Identify the most critical business processes and tools impacting donors and prospects. Understand data exchange between systems and assess your strengths and weaknesses.
- Define clear objectives, processes, and key performance indicators (KPIs) for your digital fundraising strategy. This assessment will provide an overview of your situation and guide your next steps<sup>1</sup>.

2. Implement the Fundamentals:

- Create a 360° view of your donors internally. Use a CRM tool to understand donor data, including legacy donors. Centralize data exchange in the CRM system.
- Optimize donor services with a user-friendly interface (UI) for a seamless experience. Ensure painless payment processing for donors using their preferred methods<sup>1</sup>.

3. Leverage Social Media and Online Fundraising Techniques:

- Utilize social media platforms to raise awareness. Engage donors through crowdfunding and peer-to-peer fundraising campaigns. Leverage the digital sphere to reach a wider audience<sup>2</sup>.

4. Personalize Communication:

- Segment your donor base based on demographics, interests, and giving history. Send personalized emails and messages to connect with donors on a deeper level.

New topic

Ask me anything...



3. Leverage Social Media and Online Fundraising Techniques:

- Utilize social media platforms to raise awareness. Engage donors through crowdfunding and peer-to-peer fundraising campaigns. Leverage the digital sphere to reach a wider audience<sup>2</sup>.

4. Personalize Communication:

- Segment your donor base based on demographics, interests, and giving history. Send personalized emails and messages to connect with donors on a deeper level.
- Tailor your communication to resonate with their specific interests in child rights and the impact of their contributions<sup>3</sup>.

5. Create Engaging Content:


- Develop compelling stories, videos, and visuals that highlight the organization's impact. Showcase success stories related to child rights.
- Regularly update your website and social media channels with fresh content to keep donors engaged and informed<sup>4</sup>.





Remember that consistency, transparency, and building trust are essential in any digital fundraising strategy. Good luck with your efforts to make a positive impact on child rights! 🌟💡<sup>1</sup><sup>3</sup><sup>4</sup><sup>2</sup>

Related to: digital fundraising strategy for child rights international organization Ads ⓘ

ChildFund International | Change A Child's Life Today

Every child has dreams for the future. Your donation can help make them reality. Somewhere in the world, a child could use a supportive friend like you. Donate today.

 <https://www.childfund.org/donate>

Learn more <sup>1</sup>  [elca.ch](#) <sup>2</sup>  [donorbox.org](#) <sup>3</sup>  [charitycharge.com](#) <sup>4</sup>  [nonprofitHub.org](#)

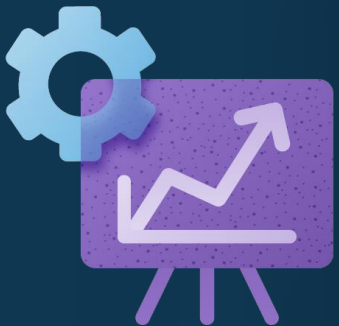
- How can I improve donor retention?
- What are some successful examples of digital fundraising campaigns?
- Can you provide more details on segmenting donors?

New topic

Ask me anything...



# Research and planning Scenario 4



**Your Scenario:** Think of a scenario that is relevant to your organization and role.

---

**Your Prompt:** Write one sample prompt that you could use for research and planning based on your scenario. Share your prompt in the chat.



## Demo: Marketing

# Marketing Scenario 1



**Scenario:** Our org wants to send emails to first-time donors that supported our fundraising auction.

---

**Prompt:** Write a donor-centric thank-you email to first-time donors for contributing to the fundraising auction on Tuesday, May 21, 2024. Include the following details: the donation will help create a new shelter for animals, which will help Pets4All treat more than 200 rescues in Missouri. Keep the tone grateful and make sure it doesn't exceed 100 words.



You

Write a donor-centric thank-you email to first-time donors for contributing to the fundraising auction on Tuesday, May 21, 2024. Include the following details: the donation will help create a new shelter for animals, which will help Pets4All treat more than 200 rescues in Missouri. Keep the tone grateful and make sure it doesn't exceed 100 words.



Copilot

**Subject: Thank You for Your Generosity!**

Dear [Donor's Name],

We are thrilled to express our heartfelt gratitude for your first-time donation to our fundraising auction. Your contribution will directly impact the lives of over 200 rescued animals in Missouri by helping us build a new shelter. 🐾

Thank you for being a part of our mission to provide love, care, and hope to these precious creatures. Your kindness makes a world of difference!

Warm regards, [Your Name] Pets4All Team



That's perfect! Thank you!

Can you add a call-to-action?

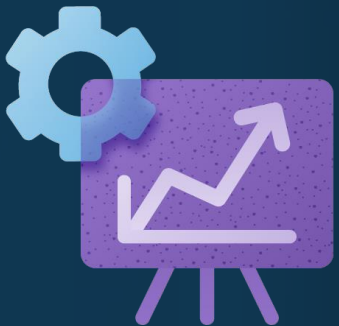
I'd like to see another version.



Ask me anything...



# Marketing Scenario 2



**Scenario:** Our org wants to share information about our summer volunteering initiative. We want to advertise on X, LinkedIn and Facebook.

---

**Prompt:** Our organization is running a summer volunteer initiative for career coaching for career switchers. Can you create social media postings for X, LinkedIn and Facebook?



You

Our organization is running a summer volunteer initiative for career coaching for career switchers. Can you create social media postings for X, LinkedIn and Facebook?



Copilot

Certainly! Here are some sample social media postings for your summer volunteer initiative on X, LinkedIn, and Facebook:

### X (Twitter/Instagram):

#### ☀️ Summer Career Coaching Opportunity! ☀️

Are you considering a career switch? Our organization is thrilled to offer FREE career coaching sessions this summer! 🚀 Whether you're transitioning industries or exploring new paths, our experienced coaches will guide you toward success. 🌐 Learn more: YourWebsiteLinkHere

#CareerSwitch #CareerCoaching #SummerOpportunity

### LinkedIn:

#### ☀️ Unlock Your Potential with Summer Career Coaching! ☀️

Are you ready to take the next step in your career? Our summer volunteer initiative provides personalized coaching for career switchers. 🚀 Gain insights, build networks, and discover new opportunities. Connect with us today! 🌐 YourLinkedInPage

#CareerDevelopment #CareerSwitch #ProfessionalGrowth

### Facebook:

#### ☀️ Calling All Career Switchers! ☀️



New topic

Ask me anything...



### X (Twitter/Instagram):

#### ☀️ Summer Career Coaching Opportunity! ☀️

Are you considering a career switch? Our organization is thrilled to offer FREE career coaching sessions this summer! 🚀 Whether you're transitioning industries or exploring new paths, our experienced coaches will guide you toward success. 🌐 Learn more: YourWebsiteLinkHere

#CareerSwitch #CareerCoaching #SummerOpportunity

### LinkedIn:

#### ☀️ Unlock Your Potential with Summer Career Coaching! ☀️

Are you ready to take the next step in your career? Our summer volunteer initiative provides personalized coaching for career switchers. 🚀 Gain insights, build networks, and discover new opportunities. Connect with us today! 🌐 YourLinkedInPage

#CareerDevelopment #CareerSwitch #ProfessionalGrowth

### Facebook:

#### ☀️ Calling All Career Switchers! ☀️

Join our summer career coaching program and ignite your professional journey! 🚀 Whether you're pivoting industries or seeking fresh challenges, our dedicated coaches will support you every step of the way. Don't miss out—reserve your spot now! 🌐 YourFacebookEvent

#CareerCoaching #CareerSwitch #SummerOpportunities

Feel free to customize these posts to fit your organization's voice and branding. Best of luck with your summer initiative! 😊 😊



Thank you! These are great.

Can you also create a post for Instagram?

How can I promote this initiative further?



New topic

Ask me anything...




# Marketing Scenario 3



**Scenario:** We need some images for our media campaign support schools in India.

---

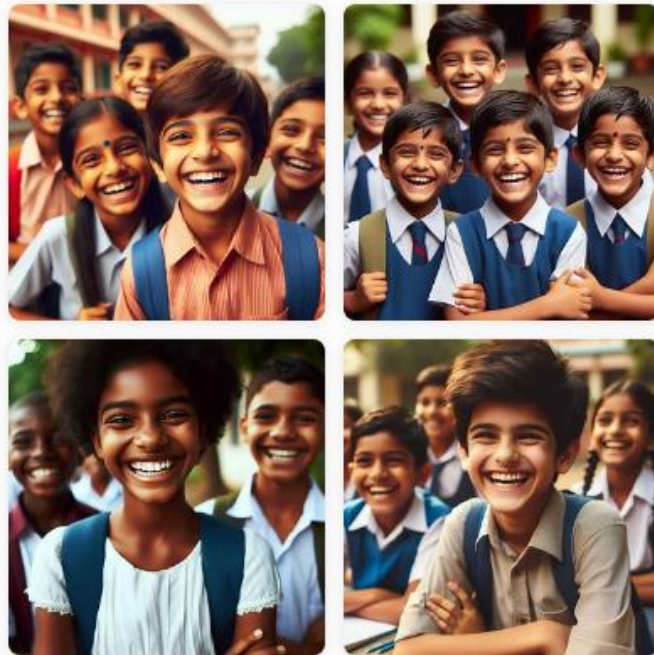
**Prompt:** Generate a high-quality macro photo of happy school children laughing outside a school in India.

 You

Generate a high-quality macro photo of happy school children laughing outside a school in India.

 Copilot

I'll try to create that.



"high quality macro photo of happy school children laughing outsi..."

 Designer

Powered by DALL·E 3



 New topic

Ask me anything...



# Marketing Scenario 4



**Your Scenario:** Think of a scenario that is relevant to your organization and role.

---

**Your Prompt:** Write one sample prompt that you could use for marketing based on your scenario. Share your prompt in the chat.



## Demo: Data analysis

# Data analysis

## Scenario 1



**Scenario:** We want to increase our donor base and donor engagement score and conduct three fundraisers. We need KPIs to track our progress.

---

**Prompt:** Establish key performance indicators (KPIs) for a fundraising team with the following goals: Increase donor base from 200 to 1,000 donors, conduct three fundraisers to raise over \$50,000, increase donor engagement score from 2% to 5%. Present results in a table.



You

Establish key performance indicators (KPIs) for a fundraising team with the following goals: Increase donor base from 200 to 1,000 donors, conduct three fundraisers to raise over \$50,000, increase donor engagement score from 2% to 5%. Present results in a table.



Copilot

Certainly! Let's create a table with relevant KPIs for your fundraising team based on the goals you've outlined:

Table	
KPI	Target
Donor Acquisition Rate	Acquire new donors steadily
Donor Lapse Rate	Minimize donor attrition
Average Gift Size Growth	Increase average donation
Fundraising ROI	Optimize return on investment
Donor Retention Rate	Retain existing donors
Number of Meaningful Interactions	Foster donor engagement

Here's a brief explanation of each KPI:

- Donor Acquisition Rate:** Measure the percentage of new donors acquired within a specific period (e.g., monthly, quarterly, annually). Aim to improve this rate over time.
- Donor Lapse Rate:** Calculate the percentage of donors who haven't given again within a certain timeframe (usually one year). Lower lapse rates indicate better donor retention.
- Average Gift Size Growth:** Track the average donation amount and work towards increasing it.



Ask me anything...



Donor Acquisition Rate

Acquire new donors steadily

Donor Lapse Rate

Minimize donor attrition

Average Gift Size Growth

Increase average donation

Fundraising ROI

Optimize return on investment

Donor Retention Rate

Retain existing donors

Number of Meaningful Interactions

Foster donor engagement

Here's a brief explanation of each KPI:

- Donor Acquisition Rate:** Measure the percentage of new donors acquired within a specific period (e.g., monthly, quarterly, annually). Aim to improve this rate over time.
- Donor Lapse Rate:** Calculate the percentage of donors who haven't given again within a certain timeframe (usually one year). Lower lapse rates indicate better donor retention.
- Average Gift Size Growth:** Track the average donation amount and work towards increasing it.
- Fundraising ROI:** Evaluate the return on investment for your fundraising efforts. Compare the funds raised to the costs incurred.
- Donor Retention Rate:** Focus on retaining existing donors by implementing effective stewardship activities.
- Number of Meaningful Interactions:** Engage donors through personalized interactions, events, and communication.

Remember that these KPIs should align with your specific goals and organizational context [1](#) [2](#) [3](#). Feel free to adjust them as needed! 😊

Learn more [1](#) [garecht.com](#) [2](#) [topnonprofits.com](#) [3](#) [aperiophilanthropy.com](#) [4](#) [callhub.io](#) [+1 more](#)



Thank you! Can you provide more details on how to calculate each KPI?

How can I track donor engagement score?

What strategies can help achieve these goals?



New topic

Ask me anything...



# Data analysis

## Scenario 2



**Scenario:** We recently had a fundraising campaign for our mentoring program.

---

**Prompt:** *[Insert table] in protected version.* This is a table of our donors for a campaign. Clean up this list by segmenting them into three tiers, according to the size of their donation.



You

Donors    Receive date    Date    Donation

Halima, Yakubu    27-Jan    \$500

Kovaleva, Anna    29-Jan    \$250

Smith, Avery    3-Feb    \$50

Glazkov, Ilya    16-Jan    \$275

Lawson, Andre    26-Jan    \$550

Cartier, Christian    3-Jan    \$800

Barden, Malik    23-Feb    \$600

Macedo, Beatriz    25-Feb    \$800

Halima, Yakubu    13-Feb    \$500

Connors, Morgan    17-Feb    \$635 This is a table of our donors for a campaign. Clean up this list by segmenting them into three tiers, according to the size of their donation.



Copilot

Sure, I can help with that. Let's segment the donors into three tiers: low, medium, and high. We can define the tiers as follows:

- **Low Tier:** Donations less than \$300
- **Medium Tier:** Donations between \$300 and \$600
- **High Tier:** Donations more than \$600

Here's how your donors segment according to their donations:

#### Low Tier

- Smith, Avery: \$50
- Kovaleva, Anna: \$250



New topic

Ask me anything...



Sure, I can help with that. Let's segment the donors into three tiers: low, medium, and high. We can define the tiers as follows:

- **Low Tier:** Donations less than \$300
- **Medium Tier:** Donations between \$300 and \$600
- **High Tier:** Donations more than \$600

Here's how your donors segment according to their donations:

#### Low Tier

- Smith, Avery: \$50
- Kovaleva, Anna: \$250
- Glazkov, Ilya: \$275

#### Medium Tier

- Halima, Yakubu: \$500 (27-Jan and 13-Feb)
- Lawson, Andre: \$550

#### High Tier

- Cartier, Christian: \$800
- Barden, Malik: \$600
- Macedo, Beatriz: \$800
- Connors, Morgan: \$635

This segmentation helps you identify your most generous donors and could be useful for future fundraising strategies. Let me know if you need further assistance! 😊



Thank you! This is helpful.

Can you also calculate the total donation amount for each tier?

What other information do we have about these donors?



New topic

Ask me anything...



as follows:

- **Low Tier:** Donations less than \$300
- **Medium Tier:** Donations between \$300 and \$600
- **High Tier:** Donations more than \$600

Here's how your donors segment according to their donations:

**Low Tier**

- Smith, Avery: \$50
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- Glazkov, Ilya: \$275

**Medium Tier**

- Halima, Yakubu: \$500 (27-Jan and 13-Feb)
- Lawson, Andre: \$550

**High Tier**

- Cartier, Christian: \$800
- Barden, Malik: \$600
- Macedo, Beatriz: \$800
- Connors, Morgan: \$635

This segmentation helps you identify your most generous donors and could be useful for future fundraising strategies. Let me know if you need further assistance! 😊



- Thank you! This is helpful.
- Can you also calculate the total donation amount for each tier?
- What other information do we have about these donors?



Identify donors most likely to donate to a campaign or give a major gift based on previous giving behavior.



You

Identify donors most likely to donate to a campaign or give a major gift based on previous giving behavior.

Copilot

Based on the previous giving behavior, donors who have donated large amounts or have donated multiple times are more likely to donate to a campaign or give a major gift. Here are the donors who fit these criteria:

**High Tier Donors (Donations more than \$600)**

- These donors have previously made significant contributions and may be likely to do so again.
  - Cartier, Christian: \$800
  - Barden, Malik: \$600
  - Macedo, Beatriz: \$800
  - Connors, Morgan: \$635

**Multiple Donations**

- These donors have shown their commitment to your cause by donating more than once.
  - Halima, Yakubu: \$500 (Donated twice)

Please note that while this analysis can help identify potential major donors, it's also important to consider other factors such as the donor's engagement with the organization, their philanthropic interests, and their capacity to give. It's always a good idea to build relationships with your donors and understand their motivations for giving.



New topic

Ask me anything...



# Data analysis


## Scenario 3



**Your Scenario:** Think of a scenario that is relevant to your organization and role.

---

**Your Prompt:** Write one sample prompt that you could use for data analysis based on your scenario. Share your prompt in the chat.



# Ready to make technology work for your mission?

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- Join the Nonprofit Community: [\*\*aka.ms/nonprofitcommunity\*\*](https://aka.ms/nonprofitcommunity)

## Questions

Start learning with the

# Nonprofit Digital Skills Center with TechSoup



We provide training and learning paths so employees can build their skills and organizations can drive greater impact with technology.



>60% of nonprofit orgs say they need improved IT training

We believe that improved use of Microsoft products by nonprofits will lead to improved mission outcomes

---



TechSoup Courses provides the **platform, reach, and methodology** to deliver this training

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Get started at [aka.ms/MicrosoftDigitalSkillsCenter](https://aka.ms/MicrosoftDigitalSkillsCenter)



# Thank you!