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# CLIENT PARTNER

*Powered by Cogeo*

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COGEO

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Cogeo is a consulting firm that specializes in fundraising.

Through advice and supporting services, Cogeo works with 501c3s to professionalize fundraising programs to generate incremental revenue to support all aspects of the agency's programs and operations.

Cogeo's management team has 70+ years of fundraising experience raising over \$750 million for more than 200 nonprofit organizations.

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# COGEO SERVICES

Cogeo does more than just offer expert advice and guidance. Our Services team will do the work alongside you. Below are some of the tasks we will help you with:



Writing (*Templates, emails, marketing material, advertisements, press releases, newsletters, etc.*)



Designing (*Case statement, flyers, trifolds, leave-behinds, emails, etc.*)



Operational Management (*Keeping track of campaign progress through Salesforce or other CRM, creating weekly/monthly tasks*)



Planning (*Events, galas, thons, raffles, etc.*)

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# COMMUNICATION WITH COGEO

When Cogeo partners with a new client, we do just that -- become a true partner. This means that we will leave the door of communication wide open.

You are free to call or email us anytime to discuss any fundraising needs or get spur of the moment coaching.



We request that your team meet with your assigned Cogeo campaign consultant once a week.

You'll receive an agenda from your consultant prior to the meeting to make sure all campaign needs are addressed.

After the meeting, you'll receive a clear list of tasks for both your team to complete and Cogeo Services to complete.

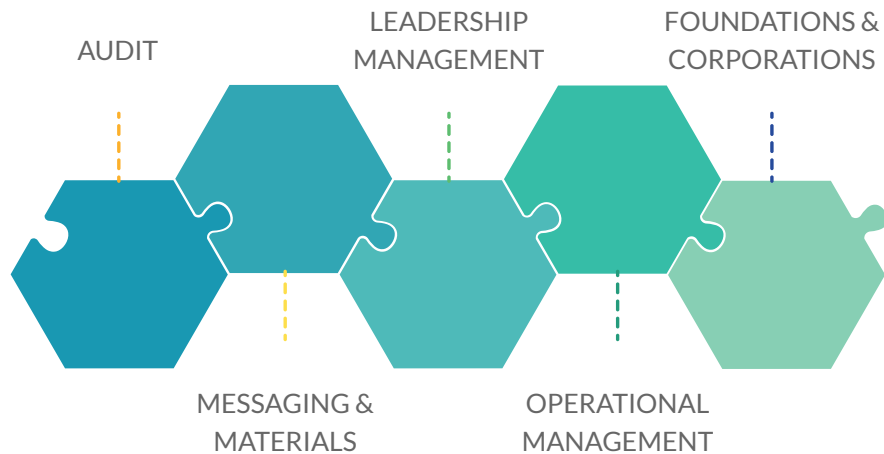
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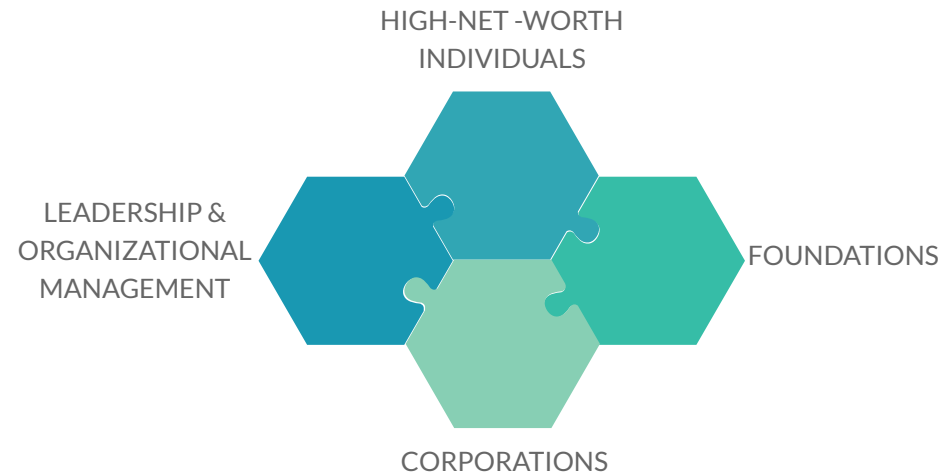
# SUMMARY

Cogeo proposes to partner with your organization to provide consulting advice and campaign support to support this growth plan and achieve your fundraising goals.

## PREPARATION PHASE (MONTHS 1 - 3)



## EXECUTION PHASE (MONTHS 4 - 12)



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# PREPARATION PHASE

*Months 1 - 3*

**OBJECTIVE:** Evaluate your internal systems and structures.

- Informal audit of current systems and structures
  - Cogeo performs an informal organizational audit to understand the current organizational systems and structures of your.
- Identify your strategic priorities
  - your develops a list of the strategic priorities facing the organization with guidance by Cogeo.



**AUDIT**

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# PREPARATION PHASE

**OBJECTIVE:** Establish and formalize systems and structures to institute organizational management best practices and prepare for the engagement of all types of funders and partners at every stage of the organization's campaign. The audit results will drive the operational structure of the campaign.

- Complete your case statement(s)
  - you creates the first draft of Case Statement content with advice and guidance from Cogeo. The audit will determine if more than one Case Statement is necessary.
  - Cogeo advises internal your resources to edit and create the final design of the Case Statement document.
  - Examples available [here](#).
- Complete campaign collateral materials
  - Cogeo advises your on any additional internal resources, including gift recognition and naming opportunities, pledge letters, stock transfer letters, and gift chart.



## MESSAGING & MATERIALS

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# PREPARATION PHASE

- Establish a Steering Committee
  - With Cogeo's guidance, your identifies prospective campaign steering committee members within its community.
  - Cogeo develops the campaign Steering Committee responsibilities and job description.
  - Cogeo advises your on how to recruit Steering Committee team members.
- Establish and/or augment leadership structures
  - Cogeo provides a board matrix outlining the strategic priorities of your and guides your on how to evaluate the current board of directors' capacity to address the strategic priorities and where there are gaps.



## LEADERSHIP MANAGEMENT

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# PREPARATION PHASE

- Cogeo to establish a Salesforce CRM
  - Cogeo initiates and finalizes Salesforce application for your.
  - Cogeo to mass import and organize all constituent data.
  - Cogeo to structure profile for optimal campaign progress tracking.
  - Cogeo to train your leadership on Salesforce management.
- Cogeo to collect and analyze all available your data
  - Cogeo to perform wealth screening on all available constituent data gathered and organized from your.



## OPERATIONAL MANAGEMENT

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# PREPARATION PHASE

- Evaluate previous grant writing efforts and prepare for future efforts
  - Cogeo requests your to provide all previous grant writing activity to-date by your.
  - Cogeo generates the appropriate research parameters for foundation research based on the case statement, the established strategic priorities of your, and feedback from the leadership of your.
  - Cogeo researches and identifies qualified foundation prospects using research parameters and the foundation center online research tool.
  - Cogeo provides your a list of qualified and researched foundation prospects.



**FOUNDATIONS & CORPORATIONS**

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# PREPARATION PHASE

- Evaluate previous corporate engagement (donations and sponsorship) efforts and prepare for future efforts
  - Cogeo requests your to provide all available data on corporations linked to the list of provided current community members.
  - Cogeo requests your to provide all previous corporate engagement activity to-date by your.
  - Cogeo creates a compelling value proposition sheet with level-based benefit for corporate partner prospects.



**FOUNDATIONS & CORPORATIONS**

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# EXECUTION PHASE

*Months 4 - 12*

**OBJECTIVE:** Satisfy all organizational management needs.

- Cogeo has finalized CRM structure and begins utilizing task management tools to track campaign progress.
- your and Cogeo will finalize first iteration of Steering Committee and will begin engaging members.
- Cogeo advises on all other activity (to be determined) to address your short-term and long-term internal organizational systematic and structural needs.



**LEADERSHIP & ORGANIZATIONAL MANAGEMENT**

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# EXECUTION PHASE

## OBJECTIVE: Engage and solicit High Net Worth Individuals.

- Cogeo advises your on the prioritization of the identified and qualified HNW individual prospects. Cogeo and your collectively review each individual to create custom optimized engagement strategies (donor-centric).
- your executes HNW individuals engagement, with customized engagement plan for each, under Cogeo's direction.
- Cogeo advises your on how to engage your current prospect network to discover and prepare for the engagement of additional qualified high net worth prospects. Cogeo advises on how to cross reference relationships into qualified foundation and corporate prospects, if applicable.
- Cogeo to advise your on the development and implementation of donor stewardship activities.
- Cogeo advises your on identifying and recruiting additional members to join the steering committee as appropriate.
- Cogeo trains your on Salesforce, if necessary.



## HIGH NET WORTH INDIVIDUALS

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# EXECUTION PHASE

**OBJECTIVE:** Engage and solicit foundations and corporations as opportunities organically arise out of the engagement of HNW individuals.

- Cogeo advises your on the execution of Foundation Outreach grant writing by your resources when qualified opportunities arise out of the engagement of HNW individuals.
- Cogeo advises your on the execution of Corporate Engagement and sponsorship development by your resources when qualified opportunities arise out of the engagement of HNW individuals.



**FOUNDATIONS & CORPORATIONS**

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# WHAT YOU'LL NEED

In order to complete the Starter Program, you'll need:

- Internet access
- Computer or tablet
- 3-5 hours per week to work on lessons
- A clear understanding of or willingness to uncover your nonprofit's mission, programs, goals, and fundraising needs
- Access to your nonprofit's data
- Access to Board of Directors
- Access to nonprofit's community members
- A great attitude and willingness to learn and work cohesively with Cogeo

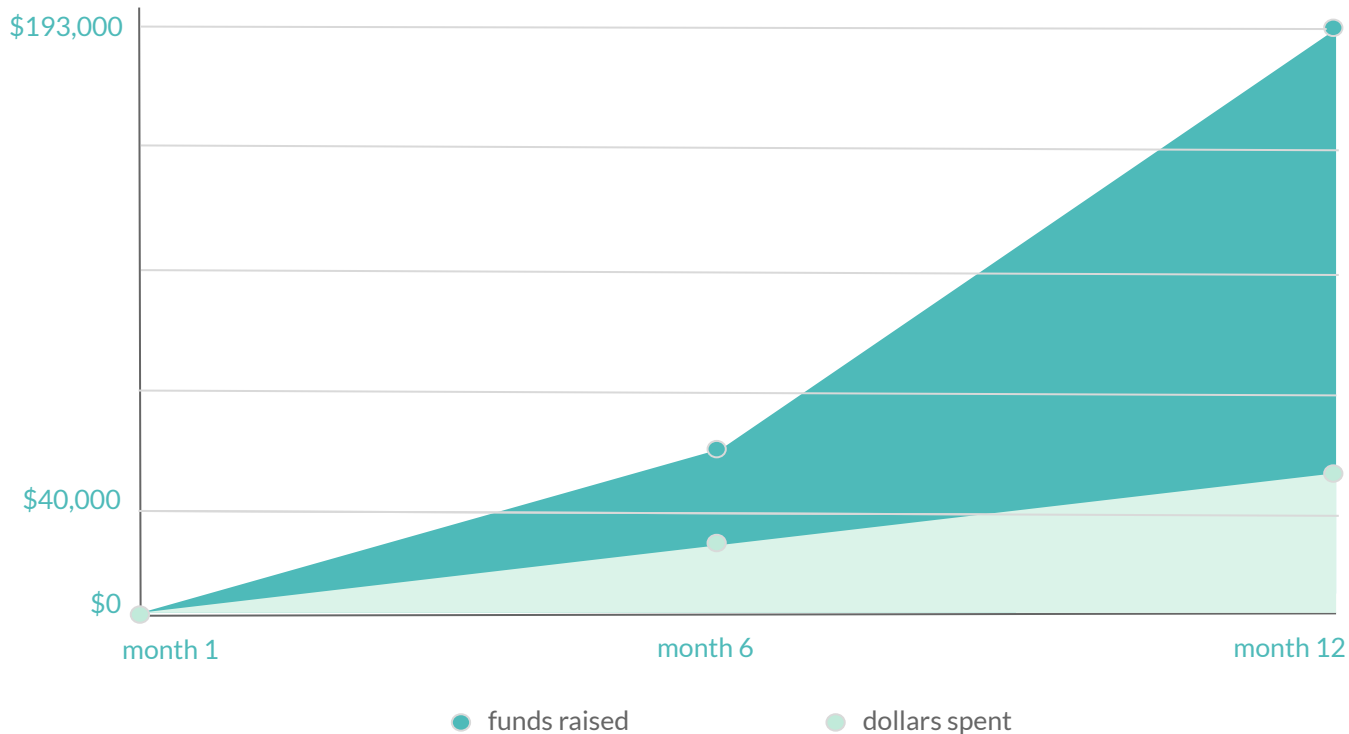
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# RESULTS

Cogeo understands how important it is to know what to expect from this work. Based on historical client data, we have put together the estimated fundraise rate timeline to showcase your return-on-investment:



We estimate that within the Partner Program, those dedicating a minimum of 5 hours per week will be able to raise \$193,000 in the first 12 months of their fundraising campaign.

estimated funds raised per hour  
**\$807 per hour\***

*\*Estimates are generated based on Cogeo's historical client data. However, past performance does not guarantee future results.*

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# PRICING

Cogeo proposes the following cost options to perform the components of this organizational development and fundraising proposal:

Fixed Retainer ..... *price varies*

*This price is based on the scope of work required from Cogeo. Because Cogeo has taken no outside investors, we have control over the pricing we offer to our client partners. If this program is the best option for you and your team, please set up a call so we can provide you with a price.*

TALK TO AN EXPERT

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# PROGRAMS

The Partner Program is one of three options that Cogeo offers to nonprofits. If you are ready to implement the tactics within this program but may not be able to invest to this degree, you may consider exploring our Starter or Starter Plus+ programs:

	STARTER	STARTER+	PARTNER	
<i>Get started on a budget</i>	<b>FREE</b>	<b>\$500/mo</b>	<b>\$5,000/mo</b>	<i>Members will have the option to upgrade anytime throughout the program.</i>
	<b>12 months</b>	<b>12 months</b>	<b>Ongoing</b>	
	The Starter Program is designed to help your startup nonprofit on a budget develop strong organizational systems and start to implement fundraising strategies to increase your impact in your community.	If you are ready to take your fundraising strategy to the next level, the Starter+ Program is an affordable way to maximize your efforts in the first year. In this program, you'll gain limited access to Cogeo's consultants and program support team to aid your fundraising.	If your organization understands the true value of organizational development and is willing to invest in your future, then you may be a good fit for our Partner Program. Cogeo will partner closely with you to launch and execute a successful fundraising campaign.	
	\$20,000 raised over 12 mo <i>funds raised per hour</i> <b>\$83/hr*</b>	\$50,000 raised over 12 mo <i>funds raised per hour</i> <b>\$208/hr*</b>	\$193,000 raised over 12 mo <i>funds raised per hour</i> <b>\$807/hr*</b>	<b>SHARE THE DREAM.</b>

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