Introduction

CONGRATULATIONS!

If your team is interested in the Starter Plus+ Program, that means your organization is ready and eager to evolve.

To successfully see your organization through to its next phase, fundraising and development work will play a crucial role in your growth.

If your organization has discussed the benefits of creating a successful fundraising strategy and is willing to invest in your future, this program is the right fit. The Starter Plus+ Program will help you establish the:

- KNOWLEDGE
- TEAM
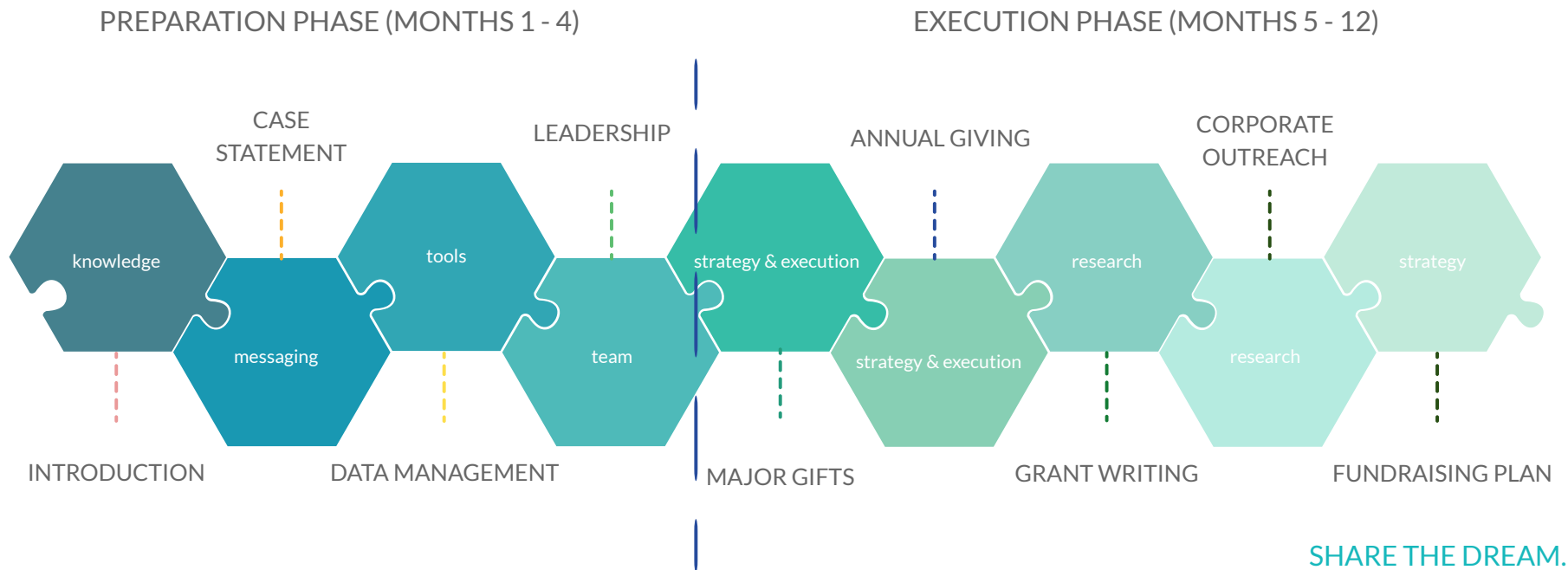- MESSAGING
- RESEARCH
- TOOLS
- STRATEGY

that you'll need to succeed. By the end of this 12-month program, you'll establish a strong culture of development within your nonprofit.

SHARE THE DREAM.

COGEO

What to Expect

The Starter Program will take you through the first 12 months of a strategic fundraising campaign. The following is an estimated timeline and breakdown of what to expect from the program.

PREPARATION PHASE (MONTHS 1 - 4)   EXECUTION PHASE (MONTHS 5 - 12)

CASE STATEMENT   LEADERSHIP   ANNUAL GIVING   CORPORATE OUTREACH

knowledge   tools   strategy & execution   research   strategy

messaging   team   strategy & execution   research

INTRODUCTION   DATA MANAGEMENT   MAJOR GIFTS   GRANT WRITING   FUNDRAISING PLAN

SHARE THE DREAM.

This program includes support from the Cogeo Services team. Tasks completed by Cogeo Services will be **bolded** *on the following slides. All meetings with Cogeo Services will be over phone or video.*

COGEO

Starter Plus+ Program

LESSON 1 | Introduction

OBJECTIVE: Explain the program, define the term [Development](#), and provide general resources.

- **Meet with Cogeo Services to discuss specific goals and communication methods**

- Understanding the Starter Program

    - See the answers to frequently asked questions about the program

    - Understand the timeline in which you can expect to complete the program

    - Learn how to upgrade into the Starter Plus+ Program or initiate Cogeo for paid services

- Learn the definition of Development as it pertains to the nonprofit industry

    - Get a robust understanding through Cogeo's visual representation: The House of Development

- See a list of resources that Cogeo highly recommends

    - Technology resources

    - Accounting resources

    - Legal resources

SHARE THE DREAM.

COGEO

Starter Plus+ Program

LESSON 2 | Case Statement

OBJECTIVE: You will create your nonprofit's very own [Case Statement](#).

- Learn what a Case Statement is

- Understand why a Case Statement is vital to your fundraising campaign

- Check out other exemplary Case Statements for inspiration

- Follow a clear step-by-step guide to create the content of your Case Statement

  - Write data-driven content

  - Collect powerful quotes

  - Select strong images and pictures

- **Cogeo Services will perform a final edit of your Case Statement content**

- **Cogeo Services will design your Case Statement**

SHARE THE DREAM.

COGEO

Starter Plus+ Program

LESSON 2 | Case Statement

OBJECTIVE: You will create your nonprofit's very own [Case Statement](#).

- Learn what a Case Statement is

- Understand why a Case Statement is vital to your fundraising campaign

- Check out other exemplary Case Statements for inspiration

- Follow a clear step-by-step guide to create the content of your Case Statement

    - Write data-driven content

    - Collect powerful quotes

    - Select strong images and pictures

- **Cogeo Services will perform a final edit of your Case Statement content**

- **Cogeo Services will design your Case Statement**

SHARE THE DREAM.

COGEO

Starter Plus+ Program

LESSON 3 | Data Management

OBJECTIVE: You will establish a Salesforce Nonprofit CRM.

- Learn what a [customer relationship manager (CRM)](#) is
- Understand why you must have a data management system in order to execute a successful fundraising campaign
- Learn why Salesforce Nonprofit CRM is so highly recommended
  - Tracking features
  - Task management features
  - Reporting features
- **Cogeo Services will establish a Salesforce Nonprofit CRM account for you**
- **Cogeo Services will upload your data and organize your database**
- **Cogeo Services will host a 1-hour Salesforce training session with your team**

SHARE THE DREAM.

COGEO

Starter Plus+ Program

LESSON 4 | Leadership

OBJECTIVE: Understand your nonprofit's leadership and establish a [Steering Committee](#).

- Learn more about your Board of Directors
    - Board positions
    - Committees within a Board of Directors
    - The Board's role in fundraising and development
    - How to recruit ideal Board members
- Learn what a Steering Committee is
- Understand why a Steering Committee is crucial to the success of your fundraising campaign
- **Meet with Cogeo Services to review Steering Committee prospect list and outline upcoming meetings**
- Follow the step-by-step guide to build your own Steering Committee
    - Use templates to invite members to a Steering Committee meeting
    - Use scripts to initiate and engage members

SHARE THE DREAM.

COGEO

Starter Plus+ Program

LESSON 5 | Major Gifts

OBJECTIVE: Begin to approach Major Gift donors for donations.

- Learn the definition of a Major Gift

- Understand why Major Gifts are a key piece to reaching your fundraising goals

- Follow a clear step-by-step guide on how to identify prospective Major Gift donors

- **Meet with Cogeo Services to review Major Gifts prospect list and outline meetings**

- Host one-on-one Major Gifts meetings

  - Use the script or template to invite prospective donors

  - Use the outline and script to execute the meeting and make the ask

- Follow some best practices to properly steward your Major Gift donors

  - Learn about Moves Management

  - Set Salesforce Nonprofit follow-up tasks

SHARE THE DREAM.

COGEO

Starter Plus+ Program

LESSON 6 | Annual Giving

OBJECTIVE: Launch a successful [Annual Giving](#) program.

- Learn about Annual, Membership, and Recurring Giving
- Understand why Annual Giving is a cornerstone of a fundraising campaign
- See a list of tools that will help you execute an Annual Giving Program
  - Marketing resources
  - Technology resources
  - Design resources
- Check out exemplary Annual Giving emails and campaigns for inspiration
- **Meet with Cogeo Services to discuss and strategize around your Annual Giving program**

SHARE THE DREAM.

COGEO

Starter Plus+ Program

LESSON 7 | Grant Writing

OBJECTIVE: Uncover strong grant opportunities and how to apply for them.

- Learn how to prepare for the grant writing process
- **Cogeo will research and provide a list of applicable grant opportunities for your organization**
- Use the foundation outreach checklist to ensure its the right grant for your nonprofit
  - Use the instructions to compare your organization to others that have received grants from the same foundation
  - Use the script to have a conversation with the program officer
- Follow the best practices while writing your grant application

SHARE THE DREAM.

COGEO

Starter Plus+ Program

LESSON 8 | Corporate Outreach

OBJECTIVE: Uncover corporate giving opportunities and learn how to engage corporations.

- Learn about corporate engagement and sponsorships

- Understand why corporate engagement is a crucial part of any fundraising strategy

- **Cogeo Services will conduct a search for corporate opportunities within your area**

- Use the best practices provided to begin your outreach

  - Use the triangulation method to organize meetings with corporations

  - Use the case statement or a pitch deck to lead your meetings

- Follow the stewardship best practices in regards to corporations

SHARE THE DREAM.

COGEO

Starter Plus+ Program

LESSON 9 | 12-Month Development Plan

OBJECTIVE: Receive a detailed fundraising plan with action steps.

- **Meet with Cogeo Services to discuss your progress**
- **Cogeo Services will create a unique 12-month fundraising plan for your organization**
- Use the 12-month plan
    - Continue Major Gifts work
    - Continue Annual Giving program
    - Continue foundation and grant writing efforts
    - Explore corporate and sponsorship opportunities
    - Plan and execute fundraising events
- Cogeo will continue check in with your fundraising efforts periodically

SHARE THE DREAM.

COGEO

What You'll Need

In order to complete the Starter Plus+ 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

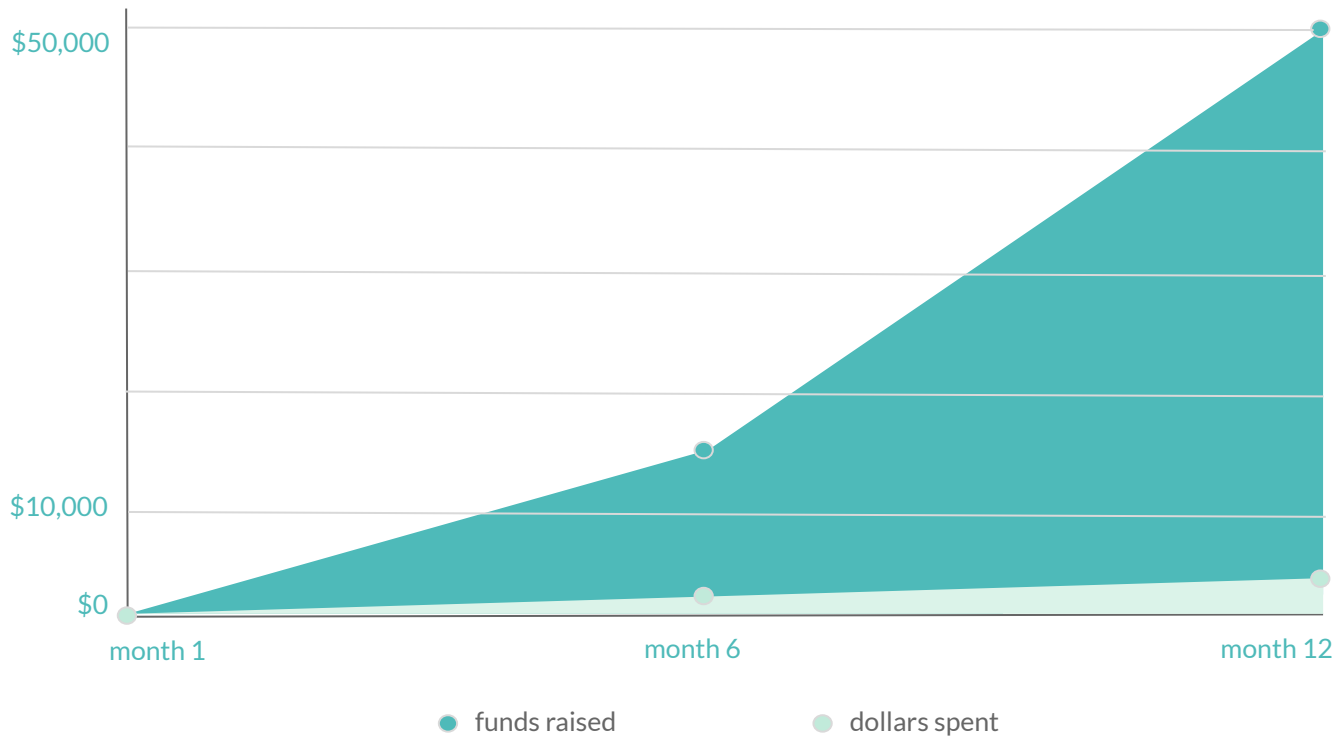- A great attitude and a willingness to work hard. *Self starters welcome!*

SHARE THE DREAM.

COGEO

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 Starter Plus+ Program, those dedicating a minimum of 5 hours per week will be able to raise $50,000 in the first 12 months of their fundraising campaign.

estimated funds raised per hour
$208 per hour*

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

	month 1	month 6	month 12
$50,000			
$10,000			
$0			

● funds raised   ● dollars spent

SHARE THE DREAM.

COGEO

Pricing

Cogeo has bundled this information together in an efficient way that allows us to offer it to you at a significantly discounted price.

Cogeo proposes the following cost options to initiate the :

12-Month Subscription Plan.. $500/mo

One-time Fee .... ~~$6,000~~ $5,000

TALK TO AN EXPERT

SHARE THE DREAM.

COGEO

PROGRAMS

The Starter Plus+ is one of three options that Cogeo offers to nonprofits. Depending on your organization's ability to invest in your fundraising efforts and the amount of support you're seeking, you may consider our Starter or Partner programs:

STARTER

Get started on a budget

FREE

12 months

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.

$20,000 raised over 12 mo
funds raised per hour
$83/hr*

STARTER+

Take it to the next level

$500/mo

12 months

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.

$50,000 raised over 12 mo
funds raised per hour
$208/hr*

PARTNER

Maximize investment

$5,000/mo

Ongoing

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.

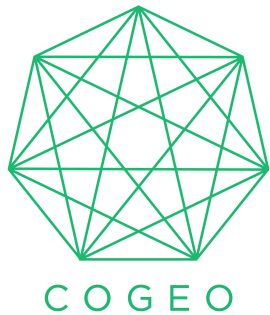$193,000 raised over 12 mo
funds raised per hour
$807/hr*

Members will have the option to upgrade anytime throughout the program.

SHARE THE DREAM.

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

COGEO

Powered by COGEO

C O G E O

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.

Appendix

Development: The act of growing an organization through relationships; a long-term process of creating genuine, powerful connections with the right people. A proper development strategy will include educating, cultivating, and stewarding prospects and donors.

Case Statement: An external facing document that includes text, images, and quotes and makes a case for your organization's fundraising campaign. *See examples here*.

CRM: Customer Relationship Manager. This is a database that stores all the information about your prospects and donors, as well as tracks your tasks and progress.

Steering Committee: A group of key individuals who have a strong affinity for your organization, are very well connected within your community, and are willing to push and steer your campaign forward.

Major Gift: By Cogeo's definition, a Major Gift is a donation that equals or exceed .1% or 1/1,000th of an organization's annual budget.

Annual Giving: This fundraising tactic targets those members that offer small donations -- normally 90% of your membership. Interacting with such a large section of your contact list requires hyper-organization, a strong marketing strategy, and skillful stewardship.

Click on the defined word to return to its stage.

SHARE THE DREAM.

COGEO