

---

# STARTER PROGRAM

*Powered by Cogeo*

---



# Introduction

## CONGRATULATIONS!

If your team is interested in the Starter 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 is just beginning its fundraising journey, then the Starter Program is the perfect place to start. This is a completely FREE program that will help you establish the:

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

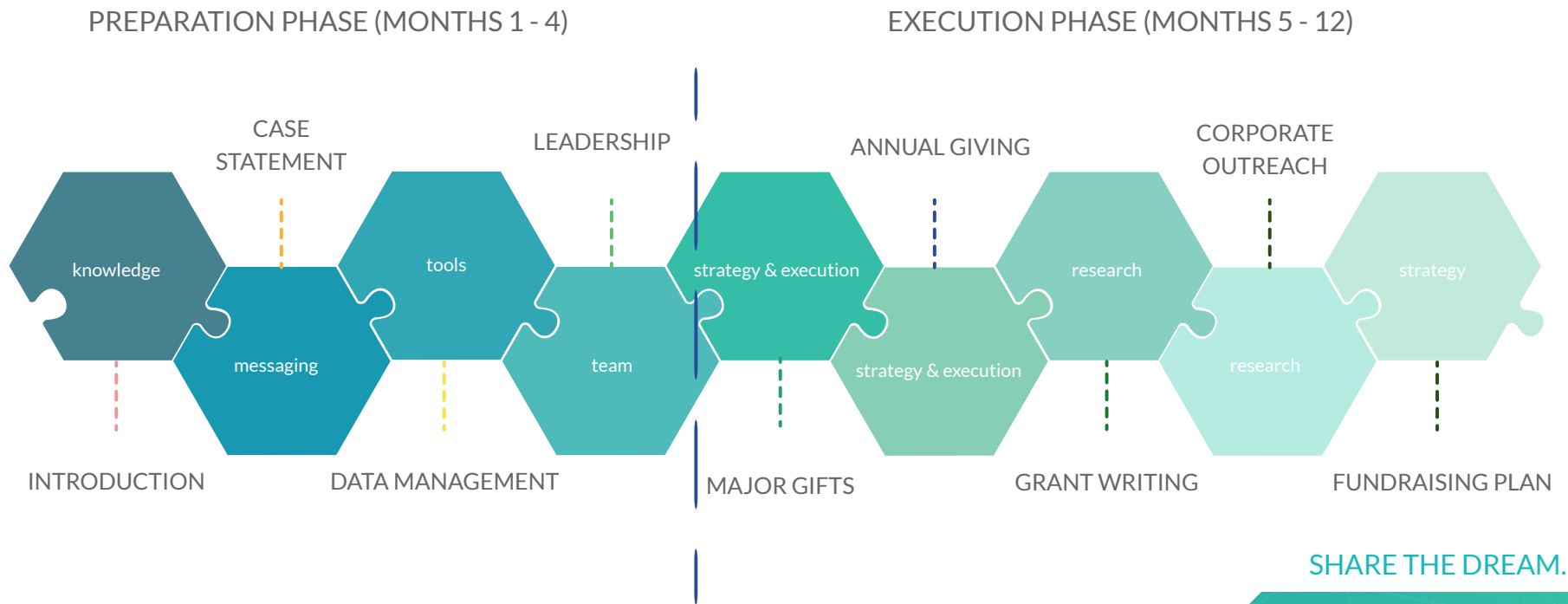
that you'll need to succeed. By the end of this 12-month program, you'll establish a strong culture of development within your nonprofit.

SHARE THE DREAM.



# 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.



SHARE THE DREAM.



# Starter Program

## LESSON 1 | Introduction

**OBJECTIVE:** Explain the program, define the term Development, and provide general resources.

- 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.



# Starter 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
- Use the design template provided by Cogeo to create your own Case Statement

SHARE THE DREAM.



# Starter 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
- Follow a clear step-by-step guide to establish a Salesforce Nonprofit CRM for your nonprofit
- Learn from recommended Salesforce Trailheads how to use your CRM

SHARE THE DREAM.



# Starter 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
- 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 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
- 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 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

SHARE THE DREAM.



# Starter 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
- Follow the step-by-step guide on how to search for applicable grants
- 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 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
- Use the best practices provided to begin your outreach
  - Use the triangulation method to organize meetings with corporations
  - Use research tactics to uncover corporate opportunities within your community
  - Use the case statement or a pitch deck to lead your meetings
- Follow the stewardship best practices in regards to corporations

SHARE THE DREAM.



# Starter Program

## LESSON 9 | 12-Month Development Plan

**OBJECTIVE:** Receive a detailed fundraising plan with action steps.

- Once you've reached this point in the program, you'll meet with Cogeo Consulting one-on-one
- A consultant will discuss your progress and create a unique 12-month organizational development and fundraising plan for you
- 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.



# What You'll Need

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

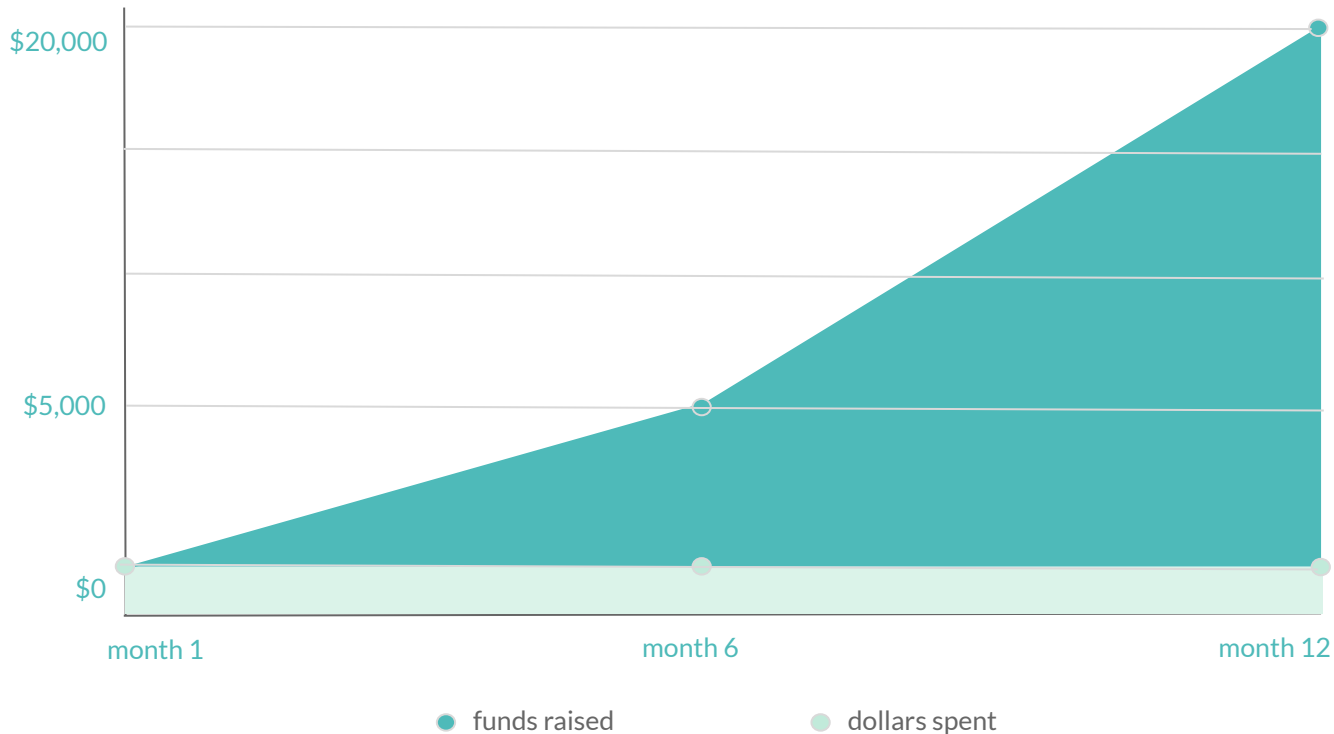
- Internet access
- Computer or tablet
- 3-5 hours per week to work on lessons
- A clear understanding of or willingness to uncover your nonprofit's mission, programs, goals, and fundraising needs
- Access to your nonprofit's data
- Access to Board of Directors
- Access to nonprofit's community members
- A great attitude and a willingness to work hard. *Self starters welcome!*

SHARE THE DREAM.



# 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 Program, those dedicating a minimum of 5 hours per week will be able to raise \$20,000 in the first 12 months of their fundraising campaign.

estimated funds raised per hour  
**\$83 per hour\***

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

SHARE THE DREAM.



# Pricing

Cogeo has bundled this information together in an efficient way that allows us to offer it to you for free

Cogeo Starter Program..... \$0

APPLY FOR PROGRAM

SHARE THE DREAM.



# PROGRAMS

The Starter Program is one of three options that Cogeo offers to nonprofits. If you are ready to implement the tactics within this program and are able to invest in the future of your nonprofit, you may consider exploring our Starter Plus+ or our Partner programs:

Get started on a budget

STARTER

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\***

Take it to the next level

STARTER+

\$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\***

Maximize investment

PARTNER

\$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.

Starter Plus+ program will be prorated month over month.

SHARE THE DREAM.

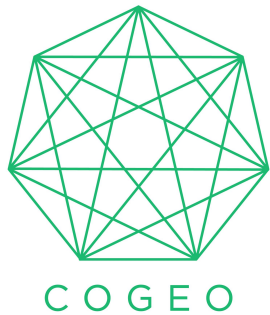
\*Estimates are generated based on Cogeo's historical client data. However, past performance does not guarantee future results.



COGEO



# Powered by COGEO



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.

SHARE THE DREAM.



# 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.

