

SCOPE OF SERVICES

The **Capital Campaign Solution** supports shlichim in driving a successful capital and milestone campaign from start to finish. This scope outlines the plan for keeping the project moving while raising more money and ensuring long-term sustainability.

1 Strategic Coaching and Campaign Guidance

- Provide structure and strategy to the entire campaign, helping the shliach establish a clear plan, defined priorities, and a focused roadmap that guides every stage from campaign design, donor outreach, until the end-of-campaign celebrations.
- Support the Rabbi's mindset and decision-making, ensuring that fundraising remains purposeful, warm, and aligned with the mission.
- Provide feedback on donor conversations, meeting preparation, and follow-through, helping the Rabbi inspire donor confidence and partnership.

2 Donor Pipeline and Prospect Management

- Build and maintain a comprehensive Prospect List segmented into high, mid, and entry-level donors.
- Connect prospects with appropriate dedication opportunities and recommended giving levels.
- Identify donors capable of giving from \$1,000 to \$50,000+ and map their engagement flow.
- Identify matchers and anchors
- Create a projection calendar from <Date-Date>, including weekly targets and key donor groups to prioritize.
- Set milestone goals: amount every number of days

3 Donor Engagement

- Develop and refine campaign materials aligned with Chabad's mission and the community's identity. Materials include:

Campaign Brochure
Case for support
Dedications list

Thank-you letters for gifts and pledges

One-pagers

Any additional campaign assets

Donor updates

- Create a campaign calendar with clear messaging and touchpoints.
 - Schedule and prepare donor updates every 6 to 8 weeks, sharing progress, new developments, renderings, and ways donors are involved.
 - Coordinate campaign milestones that reinforce excitement and communal pride.
- Support planning of a celebratory event to honor donors and highlight campaign impact.
- Meaningful gifts for High-Level Donors

4 Monitoring and Follow-Through

- Systematically track all donor engagement activities:

Calls made

Meetings scheduled and completed

Responses received

Responses received

- Ensure **highest-value prospects** are prioritized and approached early and consistently.
- Maintain balanced activity across all donor levels so progress continues on multiple fronts, preventing bottlenecks.
 - Monitor campaign communications and follow-through

Note: Services do not include digital media or campaign website

WORKFLOW

The flowchart below outlines the RC Campaign Solution team structure designed to meet the specific needs of your Chabad.

TEAM STRUCTURE AND ROLES	Strategic Coaching	Donor and Prospect Management	Donor Engagement	Monitoring and Follow-Through
Shmuly, Lead Coach	Campaign strategy, coaching, and leadership support	Guides prioritization of high-value prospects and major gift strategy	Provides direction on donor messaging, framing, and relationship building	Ensures accountability, maintains clarity, removes roadblocks, and fuels momentum
Executive Assistant	Handles clear records, reminders, and progress tracking		Supports scheduling, and tracks communication timelines	Tracks progress, flags delays, ensures follow-up actions are completed
DRM Department	Implements structured systems to support campaign workflow	Alongside the shliach, builds and maintains the Prospect List across all donor levels	Maintains the campaign calendar of donor communications Making sure that thank you letters and campaign updates are sent out regularly	Monitors outreach activity, logs calls, emails, meetings Ensures consistent follow-through across donor levels
Communications Department		Designs materials that support donor management	Develops and refines all campaign materials	Update campaign materials as milestones are reached

MULTI-YEAR CAMPAIGN TIMELINE

[SUBHEADLINE]

ACTIVITY	TARGET DATE	2025	2026				2027	
		Q4	Q1	Q2	Q3	Q4	Q1	Q2
Phase 1: [Campaign Goal]								
Milestone 1								
Milestone 2								
Milestone 3								
Phase 2: [Campaign Goal]								
Milestone 1								
Milestone 2								
Milestone 3								
Milestone 4								
Milestone 5								

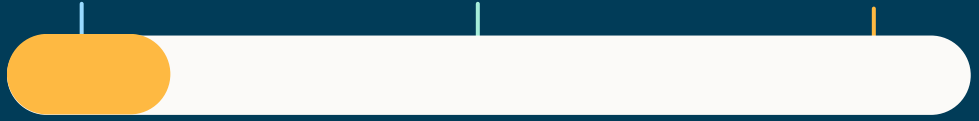


FUNDRAISING TRACKER

Current Pledges
\$0,000,000

Phase 1 Goal
\$0,000,000

Phase 2 Goal
\$0,000,000



Funds Raised
00% of \$0,000,000 GOAL

Number of Donors
000