

SCOPE OF SERVICES

The **DRM Solution** provides the hands-on support needed to turn strategy into consistent action. While executive coaching focuses on mindset, vision, and fundraising clarity, the DRM complements it by turning guidance into steady follow-through. This ensures that every follow-up is tracked, every relationship is nurtured, and every opportunity is cared for.

1 Comprehensive Data Organization and Tagging

- Review and organize all existing community and donor data. This includes making sure all data is current and accurate.
- Ensure all donor and community information is accurately recorded in the CRM.
- Monitor donor records for accuracy and completeness.
- Create structured categories including specific program donors, entry-level, mid-level, high-level donors, prospects, lapsed donors, and donors at risk of falling off.
- Bring visibility to donor data that will guide stronger donor engagement and follow-through.

2 Donor Nurturing and Opportunity Identification

- Develop a nurture plan for each donor tier.
- Identify high-potential donors who may be ready for larger gifts.
- Craft individualized strategies to build deeper donor relationships.
- Craft personalized proposals and donor pitches. Communications Manager handles higher level proposals.

3 Donor Communications Calendar

- Build a year-round communications plan to maintain consistent engagement between solicitations, demonstrating impact of gift.
- Showcase impact throughout the year through updates, thank-you notes, and reports.
- Identify the annual events that require donor reporting.

4 Custom Campaign Relationship Management

Custom campaigns include and are not limited to:

Capital Campaigns

Year-End Crowdfunding Campaigns

Tisherei and Pesach Campaigns

Milestone Anniversary Campaigns

Torah Dedication Campaigns

Support and strengthen donor relationships throughout these specific campaigns through:

- Tracking donor commitments and pledges
- Tracking the flow of communications and donor interactions
- Preparing campaign materials and donor presentation tools
- Supporting the entire process from initial outreach to donor nurturing

5 Weekly Pledge Capture and Follow-up

- Gather pledge data from Shabbos and Yom Tov services.
- Draft and send pledge acknowledgment letters.
- Monitor pledge fulfillment and follow up appropriately. Send scheduled pledge reminders until the pledge is fulfilled.

WORKFLOW

Visualization of roles and processes

TEAM STRUCTURE AND ROLES	Program Onboarding	CRM Use and Management	Client Relations & Strategic Support	Donor Engagement
Shmuly, Lead Coach	Learning about the shliach, their mission, donors, and moisad		Learning about the high-level donors; DRM Director will take over this role in the future	
DRM Director	Support		Strategizes and plans for the realization of shliach's goals Monthly meeting to gather feedback and insight	Strategizes and plans for campaign outreach
DRM	Support	Captures timely information and brings it to shliach's attention	Independently schedules and leads further donor meetings	Handles day-to-day donor operations Donor calendar, etc
VP of Communications			Higher-level communication and design	Higher-level communication and design
Communications Manager			Higher-level communication and design support	Higher-level communication and design support

DONOR COMMUNICATIONS CALENDAR

Sample Calendar for Meaningful Donor Touchpoints

MONTH	WEEK 1	WEEK 2	WEEK 3	WEEK 4
January	Year-end Donation Report		Newsy Letter	
February		Donor Appreciation Report (Mail)		Donor Appreciation Report (Email)
March	Purim Communication	Pesach Appeal Letter		Erev Yom Tov Communication
April	Pesach-Themed Email		Newsy Letter	
May		Post-event Nachas		
June				Gimmel Tammuz Communication
July		Summer Blessings Email	Newsy Letter	
August	HH Appeal Letter			Pre-Rosh Hashanah Communication (Top 10)
September	Pre-Rosh Hashanah Email			
October		HH-Themed Thank You Email	Newsy Letter	Donor Appreciation Report (Mail)
November		Donor Appreciation Report (Email)		Year-end Appeal Letter
December	Chanukah Communication			December 31st Email