

# SCOPE OF SERVICES

The **Crowdfunding Campaign Solution** helps shlichim raise more money through focused strategy, structured execution, and hands-on support for crowdfunding and year-end campaigns. It turns short-term campaigns into sustainable donor growth.

## 1 Strategic Coaching and Campaign Guidance

- Create a clear campaign roadmap from early planning through post-campaign follow-through.
- Support the shliach's mindset and decision-making during a fast-paced campaign.
- Provide feedback on donor conversations, meeting preparation, and follow-through.
- Build the customized **campaign dashboard** to set goals, track commitments, and guide execution.
- Ensure messaging remains purposeful, calm, aligned with mission, and engaging to the donors.

## 2 Donor and Prospect Management

- Build a focused Prospect List segmented into matchers, anchors, mid-level donors, and new supporters.
- Coach the shliach on approaching each group safely and effectively.
- Provide matcher and anchor presentation tools and talking sheets.
- Guide timing and sequencing of asks to maximize early commitments.
- Monitor donor activity and follow-through throughout the campaign cycle.

## 3 Donor Engagement

- Develop campaign materials including matcher/anchor documents, one-pagers, donor messages, and thank-you templates.
- Prepare clear, respectful donor-facing communication aligned with the campaign's mission.
- Support the shliach in planning and timing donor touchpoints from pre-campaign through public launch.
- Ensure all outreach reflects clarity, uplift, and strong donor alignment.

## 4 Post-Campaign Analysis and Planning

- Analyze campaign results to identify upgrade potential, recurring donor opportunities, and future matchers/anchors.
- Guide appropriate thank-you communication to elevate and honor donors at every level.
- Conduct a structured post-campaign debrief with the shliach (and DRM where applicable).
- Capture lessons learned and convert campaign insights into the next year's strategy.
- Support planning for a more balanced annual giving rhythm using campaign data.



### Testimonial

"B"H, the coaching we did for our year-end was a success. We now have more money in the bank than we've ever had. Looking forward to continue coaching!"

# WORKFLOW

The flowchart below outlines the RC Crowdfunding 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	Post-Campaign Analysis and Planning
Shmuly, Lead Coach	Campaign strategy, coaching, and leadership support	Directs matcher/anchor approach  Provides framing and asks strategy	Provides direction on donor messaging, framing, and relationship building	Analyzes results and identifies opportunities for further growth  Leads debrief and future planning
Executive Assistant	Handles clear records, reminders, and progress tracking	Tracks outreach, follow-ups, and deadlines	Supports scheduling, and tracks communication timelines	Organizes data, schedules follow-ups and debriefs
DRM Department	Implements structured systems to support campaign workflow	Alongside the shliach, builds and maintains the Prospect List across all donor levels  Monitors outreach and records commitments	Maintains the campaign calendar  Making sure that thank you letters and campaign updates are sent out regularly	Compiles results, identifies next-step donors  Ensures systematic post-campaign follow-through
Communications Department		Design materials that support donor management	Develops and refines all campaign materials  Update campaign materials as milestones are reached	Prepares thank-you messages and post-campaign updates

# CROWDFUNDING CAMPAIGN CALENDAR

[Rabbi Name] - [Chabad]  
[Campaign Dates]

Legend

Work in Progress

Due Date

ACTIVITY	TARGET DUE DATE	[MONTH]			[MONTH]					[MONTH]		
		W2	W3	W4	W1	W2	W3	W4	W5	W1	W2	
<b>PRE-CAMPAIGN</b>												
Work on matchers	[now until 2 weeks before launch]											
Work on anchors	[now until 1 week before launch]											
Finalize copy: website, email, and social media	[now until 1 week before launch]											
List of Active Campaign Donors	[1 week before launch]											
Calling scripts	[1.5 weeks before launch]											
Campaign teams	[3 weeks]											
Platform setup	[1 week before launch]											
Appeal letter (snail mail)	[1 week before launch]											
<b>DURING LIVE CAMPAIGN</b>												
Campaign Launch	[On launch day]											
Launch email	[On launch day]											
Update #1 - 25%	[On launch day]											
Update #2 - 50%	[On launch day]											
Update #3 - 75%	[On launch day]											
Success email	[On launch day]											
<b>POST-CAMPAIGN</b>												
Thank you to matchers and anchors	[Day after campaign]											
Send out appeal letter	[2 days after campaign]											
Thank you post card to all campaign donors	[2 weeks after campaign]											