

| | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 |
|----------------------|--------------|--------------|--------------|--------------|--------------|
| Costs | | | | | |
| Salary | \$ 48,500.00 | \$ 49,712.50 | \$ 50,955.31 | \$ 52,229.20 | \$ 53,534.93 |
| Taxes | \$ 3,710.25 | \$ 3,803.01 | \$ 3,898.08 | \$ 3,995.53 | \$ 4,095.42 |
| Benefits | \$ 14,017.50 | \$ 14,105.44 | \$ 14,401.65 | \$ 14,497.19 | \$ 14,600.00 |
| Travel | \$ 1,800.00 | \$ 1,900.00 | \$ 2,000.00 | \$ 2,100.00 | \$ 2,200.00 |
| Training/Dues | \$ 2,000.00 | \$ 500.00 | \$ 500.00 | \$ 500.00 | \$ 500.00 |
| Misc. supplies, etc. | \$ 500.00 | \$ 1,000.00 | \$ 1,000.00 | \$ 1,000.00 | \$ 1,000.00 |
| Computer and phone | \$ 3,000.00 | \$ 1,200.00 | \$ 1,200.00 | \$ 1,200.00 | \$ 1,200.00 |
| Furniture-Donated | | | | | |

| Cost Benefit Analysis | |
|------------------------------|-------------------|
| Total PV Benefits | \$ 735,571.56 |
| Total PV Costs | \$ 357,838.39 |
| NET BENEFIT | 377,733.17 |

| | | | | | | |
|------------------------------------|------------------|------------------|------------------|------------------|------------------|----------------------|
| Total Costs (Future Value) | \$ 73,528 | \$ 72,221 | \$ 73,955 | \$ 75,522 | \$ 77,130 | \$ 372,356.01 |
| Total Costs (Present Value) | \$ 73,528 | \$ 70,805 | \$ 71,083 | \$ 71,166 | \$ 71,257 | \$ 357,838.39 |

| Benefits | | | | | |
|----------------------------|--------------|--------------|--------------|--------------|--------------|
| Increased Leadership Gifts | \$ 15,000.00 | \$ 22,500.00 | \$ 25,000.00 | \$ 27,500.00 | \$ 32,500.00 |
| Tocqueville Gifts | \$ 10,000.00 | \$ 10,000.00 | \$ 10,000.00 | \$ 10,000.00 | \$ 10,000.00 |
| New Campaigns | \$ 10,000.00 | \$ 15,000.00 | \$ 20,000.00 | \$ 25,000.00 | \$ 27,500.00 |
| Corporate Gifts | \$ 2,500.00 | \$ 3,000.00 | \$ 4,000.00 | \$ 5,000.00 | \$ 6,000.00 |

| | | | | | | |
|---------------------------------------|------------------|------------------|-------------------|-------------------|-------------------|----------------------|
| Total Benefits (Future Value) | \$ 37,500 | \$ 88,000 | \$ 147,000 | \$ 214,500 | \$ 290,500 | \$ 777,500.00 |
| Total Benefits (Present Value) | \$ 37,500 | \$ 86,275 | \$ 141,292 | \$ 202,128 | \$ 268,377 | \$ 735,571.56 |

Present Value Discount Rate 2%

With extra campaign staff

| | | | | | |
|--------------------|--------------|--------------|--------------|--------------|--------------|
| Amount raised | \$ 2,572,023 | \$ 2,660,023 | \$ 2,807,023 | \$ 3,021,523 | \$ 3,312,023 |
| cost/dollar raised | \$ 0.25 | \$ 0.24 | \$ 0.24 | \$ 0.23 | \$ 0.21 |

*These amounts are increased only by amounts expected to be raised with additional campaign staff and budget increased by cost of add'l camp. staff.

Without extra campaign staff

| | | | | | |
|--------------------|-----------|-----------|-----------|-----------|-----------|
| Amount raised | 2,529,000 | 2,562,333 | 2,595,667 | 2,629,000 | 2,662,333 |
| cost/dollar raised | \$ 0.22 | \$ 0.22 | \$ 0.23 | \$ 0.23 | \$ 0.24 |

*These amounts are based on our average increase over the last 3 years (\$33,333/year) and budget is based on not having add'l campaign staff.

*Average fundraising and admin costs increased \$22,300 each year over the past 3 years.

1. What is cost of campaign director plus benefits? See above chart
2. & 3. How many accounts do the two current directors manage each and how many dollars raised each?

| Staff | # Accounts | \$ Raised | |
|--------------|-------------------|------------------|--|
| Mike | 75 | \$890,532 | |
| Russ | 62 | \$635,193 | |
| Robin | 46 | \$105,925 | Also in charge of individual, corporate and small business letters |
| Melinda | 4 | \$ 711,280 | Also in charge of leadership giving letters |

4. Any other UW's to compare to on # 2 & 3

| United Way | # Full Time Staff | # FT Campaign | \$ Raised-2016 | |
|---------------------|--------------------------|----------------------|-----------------------|---|
| Jackson | 10 | 0 | \$1,794,122 | CEO and Board handles the entire campaign. |
| Gulfport | 9 | 2 | \$1,602,579 | |
| Hattiesburg | 4.5 | 0 | \$977,341 | CEO handles the entire campaign with support of 1 administrative person |
| Pascagoula | 4 | 0 | \$1,444,494 | |
| Northeast MS | 6 | 2 | \$2,245,130 | |
| Dothan, AL | 7 | 4 | \$2,871,711 | |
| Decatur, AL | 3 | 1 | \$1,857,432 | |
| Lafayette, LA | 17 | 2 | \$2,316,216 | |
| Shreveport, LA | 10 | 4 | \$1,538,620 | |
| Cleveland, TN | 15 | 3 | \$2,317,970 | |
| Kingsport, TN | 8 | 2 | \$3,654,648 | |
| Murfreesboro, TN | 10 | 3 | \$2,348,604 | |
| Maryville, TN | 7 | 0 | \$2,014,134 | |

5. How many potential accounts for the new position?

My goal with this new position would be to concentrate on relationship building, particularly with leadership donors and prospects. They would not be assigned accounts who are currently conducting campaigns.

When we conducted the CAN-DO with Patrick, our greatest need for improvement was our relationship with donors.

The latest research with United Way Worldwide indicates that United Ways who are intentionally building relationships with donors, segmenting donors by their interests and targeting communications that are donor specific are having the most success in both retaining donors and attracting new donors.

6. What would expectation of dollars raised years 1, 2, and 3 of new position? See chart above

7. Can we guarantee we will raise more \$'s than cost by the end of year 2/3 or eliminate job?

Sure, if we aren't satisfied with the outcome we can always eliminate the job.

8. If a job candidate knows they must produce or they will be terminated, how might this affect some good candidate from taking the job?

I think it would make it somewhat more difficult to find a good candidate. I guess it would depend on how badly they need a job, but a good candidate will probably have more options.

9. Benefit in starting with part time job and letting it grow?

I have some concerns with hiring a part time rather than full time person for this position.

1. This needs to be a high quality individual with impeccable people and communication skills. I'm not sure we can find someone of this caliber who is willing to work part time.

2. I want this person to attend UWW training and really know how to connect relationships to donations. I'm not sure investing in that kind of training for a part time person, who may leave as soon as they can find a full time position, would be the best use of our training budget.

3. I think it will take some time for this person to gain traction and begin to produce. If that person is part time, it will take twice as long.

10. Downside of delaying?

Over the last 3 years we have lost 11% of our donors. That's a total of 908 donors (Philips-237), netting gains and losses. According to national trends, reported by UWW, the numbers of donors system wide is decreasing at a rapidly increasing rate. In my opinion, we have to find a way to at least slow the loss down, and if possible turn it around. Research conducted with a group of 22 United Ways, who used a relationship building approach that allowed them to tailor communications to thank, inform and encourage donors based on that donors interests, showed slower declines than the rest of the United Ways across the country. The longer we delay, the more donors we potentially lose.