

Mountain Advancement Update

April 25, 2020

Due to the impact of COVID-19, and being sensitive to our benefactors, the Mountain Development Committee along with staff continues to monitor our approach to donor solicitation during this time period. Putting people first, the challenge will be to strike a balance of acknowledging the current hardships faced by many while encouraging giving if people are able to do so.

Mountain Fund

2019-20 Budgeted Goal: \$235,000

2019-20 Marv's Stretch Goal: \$250,000

As of 4/17/20- \$ 218,695.68 from 1017 gifts (93.06 % of goal of \$235K)

*** (committed figures which include unpaid pledges)**

As of 4/17/19 \$209,994.15 from 1049 gifts (89.36 % of goal of \$235K)

As of 4/17/18- \$199,568.44 from 997 gifts (86.77% of goal of \$230K)

- **Strategy: a letter from Dan, Kevin, Lou, Joe and Mike- the Mountain is here for you.... soft ask.**
- We have put a pause on soliciting via donor calls. Strategy: call targeted donors to check in....is there anything the Mountain can do for you? Soft ask only if appropriate.
- An appeal envelope was included in the spring newsletter. To date, we have received \$1,255.
- Spring Board Campaign, asking members for 100 % participation if able. Would you like a breakout report?
- **To date, 329 Alumni gave 592 gifts for a total of \$127,510.94 and 229 Non-Alumni gave 398 gifts for a total of \$80,741.37.**
- **New Initiative**— To launch in late summer, when students are headed back to school (hopefully), we are creating a recurring giving campaign that asks our friends to support covering the costs of feeding one student per month (the baseline). The messaging and imagery fit in well with our mission. The objective is to grow our online presence and younger donor market. FYI: Approx. \$20k of Mountain budget goes toward food each year.
- Increase donor retention from 60% to 75% through segmented, personalized approaches. **Currently, we have about a 53% retention rate – 685 people gave in 18-19 and of those, 365 have already given a gift and 320 have yet to give a gift.**

Overnights

Budgeted Goal: \$37,500 (same as last year) As we have been shut down to visitors since early March, our overnights and other money given at the Mountain (i.e. Sunday Mass) will be significantly affected. From March through June of 2019, we received about \$14,000 in this category.

As of 4/17/20 - \$24,510 from 122 gifts (65.36% of goal of \$37,500)

As of 4/17/19- \$30,693 from 153 gifts (81.85% of goal of \$37,500)

As of 4/17/18 - \$29,062.45 from 139 gifts (77.5% of goal of \$37,500)

Fr. Dan Riley Sustainability Campaign (Endowment/Major Giving)

Major gift: Contribute \$10,000 or more over a period of no longer than 5 years in addition to annual gifts (Mountain Fund and Auction).

Budgeted Goal: \$3.1 Million

Current Endowment Total to Date: \$627,591.67 currently \$710,320.26 committed from 597 gifts.

(These numbers are from our current endowment campaign which began in 2012)

- **4/17/20: \$68,323.45 received but committed=\$ 79,073.45 from 44 gifts**
- **4/17/19: \$91,980 received but committed=\$141.039 from 67 gifts**

- 4/17/18: \$109,461.96 received but committed=\$125,461.96 from 50 gifts
- Although we continue to reach out to donors, we are waiting for our strategic plan to be in place before we move forward with major asks. Strategy: to **communicate** now with major donors asking them to be involved with the strategic planning process (stewardship/outreach).
- FYI: Other historical sources of contributions to our current Endowment Account:
In an endowment campaign that began in 2003 and ended in 2011, we raised \$1,350,000. For over 20 years and ending in 2015, 10% of all Mountain Fund Donations were allocated to this endowment account.

Stewardship

- A letter will be sent to major donors with a Mountain update highlighting our mission, strategic planning process and Living Stones Weekend planned for 2021.
- Is there any interest from the Board to make a small number of calls to check in on people during this crisis? We would provide talking points— (ex. Are they aware of our online mission-focused resources? ...).

SBU Endowment for Mt. Irenaeus

(Started with St. Bonas 150th campaign 2008)

***April, 2020- \$18,968.73 with no outstanding unpaid pledges made in this time period from 27 gifts**

April, 2018 2019- \$4,534.30 with \$60,000 unpaid pledges made in this time period from 41 gifts

April, 2017 2018- \$4,200 with no outstanding unpaid pledges made in this time period from 7 gifts

*Total reflects new donor dollars from current Bonas campaign (June 1 to Jan 31 of that fiscal year).

The Daniel A. Hurley, ofm Legacy Society- Planned Giving

- A mailing to people age 45 to 55 is slated to be sent in May.
- To date, we received three responses indicating that the Mountain is in Estate Plans, two responses with paperwork including the Mountain in Estate Plans, other responses asking for more information.
- Populate website and promote website link to info page about society in all communication vehicles. Exploring a video promoting the Legacy Society.

On-Line Auction

Committee will be meeting to take a look at current climate in moving forward with this event in the fall of 2020 in light of COVID-19.

2019: \$22, 500 (Gross) * Number not yet final

2018: \$ 23,785 (Gross)

2017: \$21,000.00 (Gross) (online only)

2016: \$14,203.00 (online only)

2015: \$7,769.30 (online only)

2015: \$34,792 (online and live)

2014: \$6,320.64 (online only)

2014: \$31,706 (online and live)

2013: \$1,890.71 (online only)

2013: \$44,013.42 (online and live)

Grants

- In need of volunteer to help us with grant writing and finding additional resources for grants.