

# Mountain Advancement Update

## October 13, 2020

### Mountain Fund

2020-2021 Budgeted Goal: \$245,000

2020-2012 Marv's Stretch Goal: \$250,000

**As of 10/9/20- \$83,843.11 from 389 gifts (34% of goal of \$245K)**

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

As of 10/9/20- \$72,633.11 from 366 gifts (30% of goal of \$245K)

As of 10/9/19- \$65,407.38 from 288 gifts (28% of goal of \$230K)

- ***To date, 93 Alumni gave 188 gifts for a total of \$26,009 and 103 Non-Alumni gave 178 gifts for a total of \$45,624.11.***
- Continue to increase donor retention from 60% to 75% through segmented, personalized approaches. ***Currently, we have about an 18 % retention rate – 716 people gave in 19-20 and of those, 130 have already given a gift and 586 have yet to give a gift. 92 people were either recaptured or new donors. (We have had many memorial gifts this year.)***

### Overnights

Budgeted Goal: \$15,000 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.

**As of 10/09/20 - \$10,960 from 13 gifts and 9 donors (73% of goal of \$15,000)**

As of 10/09/19- \$11,705 from 61 gifts and 51 donors (31% 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: \$635,501.67 currently with \$710,309.51 committed from 588 gifts and 179 donors.

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

- **6/1/20 to 10/9/20: \$5,810 received but committed=\$14,975 from 19 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 was sent to major donors with a Mountain update highlighting our mission, strategic planning process and Living Stones Weekend planned for April 23-25th, assuming a vaccine is available.

## SBU Endowment for Mt. Irenaeus

(Started with St. Bonas 150<sup>th</sup> campaign 2008)

**Total balance: \$580,844.53 paid with \$50,100 more in outstanding pledges from 323 gifts.**

**\*June 1 to Oct 9, 2020- \$400 with no unpaid pledges made in this time period from 8 gifts**

June 1 to Oct 9, 2019 - \$1,950 with no unpaid pledges made in this time period from 10 gifts

June 1 to Oct 9, 2018- \$764.30 with no unpaid pledges made in this time period from 16 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 was sent out in May.
- To date, we have received five 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

*The committee is hard at work developing our Mountain Auction scheduled for **November 6-15, 2020**. This year's auction includes a variety of unique items, including original artwork and photography by Fr. Dan and delectable treats, hand carved crosses and wood carvings created and donated by Br. Kevin, Br. Joe and Fr. Lou! St. Bonaventure University apparel and gifts, along with autographed pro sports memorabilia, will also be featured. Board members can help through donations of items or dollars to help us round out packages. This year we will be using a new **auction software** that should make it easier for donors to bid on items.*

**2019: \$22, 500 (Gross)**

2018: \$ 23,785 (Gross)

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

2016: \$14,203.00 (online only)

2015: \$7,769.30 (online only)

2014: \$6,320.64 (online only)

2013: \$1,890.71 (online only)

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

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

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

## Grants

- In need of volunteer to help us with grant writing and finding additional resources for grants. In the interim, Mary Schlosser has been assigned the role of exploring opportunities. We will focus our efforts to see what is available in the area of renewable energy, given our strong interest in solar power and backup battery storage.