



# Mountain Advancement Report

## February 6, 2021

### Mountain Fund

*We have received **an unprecedented amount of support** this year which is especially noteworthy due to the Covid crisis. A tremendous shout out to those who helped with our matching gift campaign, Marv and team for the continued donor asks and follow through thank you's, Greg and team for help with Giving Tuesday and all who have helped us achieve this level of giving to date!*

**Our full year goal is \$250K, and we have exceeded that number.** The number of gifts is also growing---currently running at 245 more gifts than last year. The median gift amount doubling from \$50 to \$100 is an important show of commitment as well.

Our focus on improving our ability to give online, is showing in the numbers---with almost a third of all gifts coming from our website vs. a quarter last year.

We have 77 new donors this year, or 11% of all donors. Finding new friends, or asking friends that haven't given in the past has been an important objective for us.

Even though we have surpassed our goal, **there is still great opportunity.** About 57% of the folks that gave last year have given this year, so an area for us to target for the balance of the fiscal year would be the remaining 306 people who gave last year but not this year.

**2020-2021 Budgeted Goal: \$250,000**

**As of 2/1/21- \$269,845.11 from 1110 gifts (107.94% of goal of \$250K)**

**\* (committed figures which include unpaid pledges and recurring gifts totaling \$21,695)**

As of 2/1/20- \$196,654.35 from 865 gifts (81.19% of goal of \$250K)

As of 2/1/19 -\$167,052.32 from 877 gifts (72.63% of goal of \$230K)

To date, 364 Alumni gave 619 gifts for a total of \$138,591 and 263 Non-Alumni gave 403 gifts for a total of \$85,009 and 41 "other" gave 46 gifts for a total of \$24,550.11.

Continue to increase donor retention from 60% to 75% through segmented, personalized approaches. *Currently, we have about a 57% retention rate – 712 people gave in 19-20 and of those, 406 have already given a gift and 306 have yet to give a gift.* 261 people were either recaptured or new donors. (We have had many memorial gifts this year.)

### Overnights

Budgeted Goal: \$15,000 (lower than in past years as we have been shut down to visitors since early March 2020).

**As of 2/1/21 - \$15,855 from 38 gifts (105.7% of goal of \$ 15,000)**

As of 2/1/20 - \$22,760 from 114 gifts (60.69% 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: \$721,929.67 committed from 633 gifts and 180 donors. This includes \$66,570.82 in pledges that are still due.

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

- **6/1/20 to 2/1/21: \$34,902.18 committed from 33 gifts and 18 donors. These were all pledge payments with the exception of \$100.**
- 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/steward** major donors, ask for involvement with the strategic planning process (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**

- Due to the pandemic, we will push out the Living Stones weekend scheduled for April to a later date. Living Stones will continue to be an important vehicle for us to stay connected and steward those who have been highly committed to the life of the Mountain.

## **SBU Endowment for Mt. Irenaeus**

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

**Total Balance: \$632,744.53 committed from 330 gifts and 74 donors. There is still \$50,100 in pledges to be paid but counted in that total.**

**\*June 2020- February 2021- \$2,200 from 15 gifts from 2 donors**

June 2019 to February 2020 - \$19,018.73 from 23 gifts from 7 donors.

June 2018 to February 2019- \$3,354.30 from 29 gifts from 7 donors

\*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 ages 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.
- Scheduling a meeting with Advancement committee to decide on the right next steps to expand the members in our Hurley Society

## On-Line Auction

*We have had our best year ever with our online auction, with tremendous support from our donors—especially this year in the midst of the Covid crisis.*

A new online auction software was well received by participants and helped contribute to ease of making bids.

**2020: \$ 31,478 \*still finalizing**

2019: \$22, 608 (Gross)

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. In the interim, Mary Schlosser has been assigned the role of exploring opportunities. We continue our efforts to see what is available in the area of renewable energy, given our strong interest in renewable energy