

# Mountain Advancement Report

## April 24, 2021

### Mountain Fund

*Our Mountain Fund donations continue to increase making this the most successful Mountain Fund effort we have had in our history. Once again thank you to all who have donated and to Marv, Mary G. and the entire advancement team for all your dedication and effort to help us achieve this level of giving. To date, we have far exceeded our financial goal (\$245K) and our stretch goal (\$250K), as well as the number of gifts donated--- 320 more than the prior year.*

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

**As of 4/14/21- \$311,181.11 from 1337 gifts (124% of goal of \$250K)**

**\* (committed figures that include unpaid pledges totaling \$10,750, not including unpaid recurring gifts)**

As of 4/14/20- \$218,420.69 from 1017 gifts (93% of goal \$250K)

As of 4/14/19 - \$205,522.15 from 1030 gifts (89.4% of goal \$230K)

Our focus on improving our ability to give online, is showing in the numbers---with almost a quarter of all gifts coming from our website vs. a fifth last year. (We have had many memorial gifts this year).

We currently have 100 new donors this year, or 14% of all donors. Importantly, the median gift amount has gone from \$50 to \$87.

We currently have a 62% donor retention rate.

To date, 404 alumni gave 772 gifts for a total of \$175,115 and 346 non-alumni gave 558 gifts for a total of \$125,366.11.

Even though we have surpassed our goal, ***there is still great opportunity***. Our objective between now and the end of the fiscal year: to target 267 individuals that gave last year but not this year.

### Overnights

Budgeted Goal: \$15,000 (lower than in past years as we have been shut down to visitors since early March and our overnights and other money given at the Mountain (i.e. Sunday Mass) will be significantly affected)

**As of 4/14/21 - \$19,155 from 52 gifts and 44 donors (127.7% of goal of \$15,000)**

As of 4/14/20- \$24,510 from 122 gifts and 102 donors (65% 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: \$720,500.67 committed from 645 gifts and 180 donors. This includes \$58,315.82 in pledges that are still due.

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

- **6/1/20 to 4/14/21: \$40,656.18 committed from 44 gifts. 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). Several major gift donors were involved in the interview process with our strategic planner.
- 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, tentatively Spring 2022. 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: \$631,144.53 committed from 338 gifts and 74 donors. There is still \$50,100 in unpaid pledges.**

**\*June 2020- April 2021- \$3,600 from 24 gifts from 3 donors.**

June 2019 to April 2020 - \$18,268.73 from 27 gifts from 6 donors.

June 2018 to April 2019- \$55,034.30 from 40 gifts from 11 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**

- Recently received a \$10,000 pledge from a member of Fr. Dan Hurley's family
- 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.

- 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.***

**2020: \$30,824**

2019: \$22, 313

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 continue our efforts to see what is available in the area of renewable energy, given our strong interest in renewable energy