

# Mountain Advancement Report

## April 12, 2022

We are looking for new members to join our Development Committee as we begin to advance our Strategic Plan and work with a new advancement person.

We meet every other month in the early evening for approximately one hour.

### Mountain Fund

**2021-2022 Budgeted Goal: \$270,000**

- 3% growth from 2019-20

**Summary:** We have raised more than \$300,000! This dollar amount puts us over our goal with a few months to go until the end of our fiscal year! Thank you to all who have helped with calls and donated to our Mountain Fund.

**As of 04/07/22 - \$300,869.57 from 1430 gifts and 730 donors (111.43% of goal of \$270K)**

As of 04/07/21 - \$301,823.72 from 1342 gifts and 750 donors (120.07% of goal of \$250K)

As of 04/07/20 - \$217,120.68 from 1011 gifts and 573 donors (80.42% of \$230K)

To date, 392 alumni gave 794 gifts for a total of \$179,460 and 337 non-alumni gave 628 gifts for a total of \$119,009.57.

### Overnights

**2021-2022 Budgeted Goal: \$25,000** (our goal remains "flat" as we are just opening back up and are not sure how the year will progress.)

**As of 04/07/22- \$28,076 from 110 gifts and 87 donors**

As of 04/07/21- \$19,655 from 53 gifts and 44 donors

As of 04/07/20- \$24,510 from 122 gifts and 102 donors

### 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). Coming out of strategic planning process will kickstart this campaign. Need help from friends.*

**Summary:** As we continue to move forward with our Strategic Plan, our development committee is recommending now is a good time to reach out to our largest donors and share the plans progress in order to keep them engaged and informed.

Budgeted Goal: \$3.1 Million

Current Endowment Total to Date: \$873,729.99 committed from 690 gifts and 182 donors. This includes \$26,327.20 in unpaid pledges.

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

- **04/07/22 \$182,171.62 from 39 gifts and 19 donors**
- We will begin reaching out to major donors regarding our Strategic Plan.
- 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**

- Mike Fenn has helped prepare a letter that will be mailed to our “Living Stones” providing them with an update on important Mountain initiatives.
- Our Second Living Stones weekend will be held October 14, 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.
- We will be looking for volunteers to help us with the planning out of that day.

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

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

**Total Balance: \$636,065.43 committed from 367 gifts and 75 donors. We receive a 5% draw from the principal.**

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

- Our website has been updated promoting the Legacy Society. A wonderful video of Fr. Dan Hurley is a highlight on the page.

## **On-Line Auction**

**2021-2022 Budgeted Goal: \$25,000**

Summary: Our 2021 Auction was our highest grossing ever, thanks to the tremendous support from our donors. Save the Date for our 2022 auction: November 4-13.

2021: \$35,692 (Gross)

2020: \$30,805.73

2019: \$22,608

## **Grants**

We are still in need of volunteer to help us with grant writing and finding additional resources for grants.