

Mountain Advancement Report

October 29, 2022

Mountain Fund

2022-2023 Budgeted Goal: \$325,000

Summary:

As of 10/24/22 - \$59,558.22 from 449+ gifts and 201+ donors (18.3% of goal of \$325K)

As of 10/24/21 - \$69,390.07 from 445 gifts and 227 donors (25.7% of goal of \$270K)

As of 10/24/20 - \$76,570.10 from 402 gifts and 234 donors (30.6% of goal of \$250K)

As of 10/24/19 - \$75,582.38 from 328 gifts and 179 donors (32.9% of goal of \$230K)

The Mountain fund drop off is due to timing of an annual \$10K gift from a major donor, usually at the beginning of the fiscal year, but we received at the end of last fiscal year. In the past we have also received a \$5K Galasso foundation gift in the fall. This year we received it in the prior fiscal year. To date, 102 alumni gave 251 gifts for a total of \$31,618 and 89 non-alumni gave 182 gifts for a total of \$16,803. There were also 10 donors under another category who gave 15 gifts for a total of \$5,897.22.

Overnights

2021-2022 Budgeted Goal: \$25,000

As of 10/24/22- \$17,665 from 59+ gifts and 51+ donors

As of 10/24/21- \$18,975 from 68 gifts and 56 donors

As of 10/24/20- \$12,240 from 15 gifts and 11 donors

As of 10/24/19- \$8,530 from 46 gifts and 40 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, we will kickstart this campaign.

Budgeted Goal: \$3.1 Million

Current Endowment Total to Date: \$873,729.99 committed from 709 gifts and 182 donors. This includes \$19,045.20 in unpaid pledges.

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

- **10/24/22 \$3,381 from 10 gifts and 6 donors**
- With a strategic plan in place, we begin to work on a master plan that helps envision what the Mountain looks like in the future. This will include a financial estimate of project costs, which will allow us to visit friends and ask for investment into our future.
- 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

On October 14-16 we held our second Living Stones gathering, with approximately 90 people joining us over the weekend. This year we expanded the criteria to include anyone who has donated to the Mountain for 25 years. The reaction to those who were honored was very positive, and achieves the

objective of connecting and stewarding those who helped build and have been highly committed to the life of the Mountain.

SBU Endowment for Mt. Irenaeus

(Started with St. Bonas 150th campaign 2008)

Total Balance: \$637,665.43 committed from 381 gifts and 75 donors.

- *We receive approximately 33K a year—continues/remains flat each year.*
- *We are noted as part of the Bolder Bonaventure campaign that has recently reached its public phase. Any dollars received through that campaign go to this account. We annually receive 5% of the gift after a progressive 5-year vesting period.*

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

Information about the Legacy Society can be found on our website. A wonderful video of Fr. Dan Hurley is a highlight on the page.

On-Line Auction

2021-2022 Budgeted Goal: \$25,000

Planning is underway for our 2022 auction to be held on November 4-13. This year's auction features beautiful artwork by Fr. Dan, a handmade creche by Br. Joe and Br. Kevin's delicious harvested fruits and vegetables from our Mountain Garden. We also have Buffalo Bills items, Bona Gear and unique Mountain items such as a Mountain Snow Globe! Our 2020 Auction was our highest grossing ever, thanks to the tremendous support from our donors. Please watch our webpage, Facebook and eblasts for more information. Please help us spread the word!!

2021: \$35,692

2020: \$30,805.73

2019: \$22,608

2018: \$23,785

2017: \$21,000

2016: \$14,203

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)