

Mountain Advancement Report

April 12, 2023

Mountain Fund

2022-2023 Budgeted Goal: \$325,000

Summary:

As of 4/12/23 - \$273,949.56 from 1255 gifts and 591 donors (84% of goal of \$325K)

As of 4/12/22 - \$294,418.82 from 1398 gifts and 714 donors (109% of goal of \$270K)

As of 4/12/21 - \$294,073.72 from 1342 gifts and 750 donors (118% of goal of \$250K)

As of 4/12/20 - \$217,037.31 from 1011 gifts and 573 donors (94% of goal of \$235K)

Plans to meet our year-end goal continue through direct mail, a spring newsletter, a spring appeal mailing and our fiscal year email appeal. A total of \$51K is needed in the next six weeks to meet our goal of \$325,000. (FYI-- this year's goal is 55k higher than last year's goal of \$270,000).

To date, 305 alumni gave 693 gifts for a total of \$157,560 and 265 non-alumni gave 525 gifts for a total of \$84,186. There were also 21 donors under another category who gave 36 gifts for a total of \$32,453.56.

Overnights

2022-2023 Budgeted Goal: \$25,000

As of 4/12/23- \$28,470 from 127 gifts and 104 donors

As of 4/12/22- \$28,576 from 113 gifts and 88 donors

As of 4/12/21- \$19,655 from 53 gifts and 44 donors

As of 4/12/20- \$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, we will kickstart this campaign.

Budgeted Goal: \$3.1 Million

Current Endowment Total to Date: \$875,829.99 committed from 726 gifts and 183 donors. This includes \$12,220 in unpaid pledges.

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

- **6/1/22 to 4/12/23 - \$12,739.97 from 30 gifts and 11 donors**
- With a strategic plan in place, we now have a plan to guide us. This will enable us to envision what the Mountain will look like in the future and include financial estimates of project costs. Our next step will be to visit friends and ask for an investment into our future.
- We have engaged Dick Tantillo (SBU '78) who is a friend of Rob Buckla and Kathy Colucci. He has been advancement lead at Hamilton University for many years. He has shown a willingness to help us build a strategy for obtaining our Major Gift goals coming out of the Strategic Plan work.
- The SBU VP of Advancement is no longer in the position. There is an interim person in place. We think there is a renewed opportunity to work alongside SBU in terms of making major gift asks. Mike will be meeting with interim person Tuesday April 18th.

- 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. In 2022, 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: \$639,865.43 committed from 396 gifts and 75 donors with \$30,100 in outstanding pledges. This fiscal year we have received \$2,600 from 23 gifts and 4 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

- Notified earlier in the year by a friend of the Mountain, that he has included a significant amount to the Mountain in his estate plan/will.
- 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

Please save the date for our **2023 Mountain Auction --- October 20 – 29!**

2022: \$35,711.32

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)

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)