

Mountain Advancement Report

September 16, 2023

Mountain Fund

2023-2024 Budgeted Goal: \$330,000

Summary:

As of 9/11/23 - \$40,618.00 from 333 gifts and 177 donors (12.31% of goal of \$330K)

As of 9/11/22 - \$42,225.22 from 337 gifts and 167 donors (13.0% of goal of \$325K)

As of 9/11/21 - \$47,303.07 from 311 gifts and 163 donors (17.52% of goal of \$270K)

As of 9/11/20 - \$47,935.10 from 296 gifts and 189 donors (19.17% of goal of \$250K)

More than 700 donors raised over \$328,000 (met goal) at the end of our fiscal year 2023. This year we are tracking just slightly behind last year. Currently, we continue to look at strategies to reach donors. We will use this fall to gauge effectiveness of direct mail vs. phone calls. Few people actually answer the phone and it is becoming harder to find volunteers to make calls. Through a personalized direct mail approach, we will assess how we are doing in January with the option to make calls, if necessary, in the spring.

To date, 92 alumni gave 184 gifts for a total of \$24,230 and 85 non-alumni gave 149 gifts for a total of \$16,388.

Overnights

2023-2024 Budgeted Goal: \$25,000

As of 9/11/23- \$7,205 from 36 gifts and 35 donors

As of 9/11/22- \$10,800 from 43 gifts and 37 donors

As of 9/11/21- \$14,165 from 45 gifts and 42 donors

As of 9/11/20- \$9,220 from 7 gifts and 5 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: \$ 877,079.99 committed from 739 gifts and 183 donors. This includes \$8,385.23 in unpaid pledges.

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

- **6/1/23 to 9/11/23 - \$4,668 from 11 gifts and 5 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 begun meeting to organize around a renewed major gifts campaign, including asking Dick Tantillo, VP of Advancement at Hamilton University to be part of our committee.
- 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

We will continue to plan for another Living Stones gathering in the future. The reaction to those who were honored in the past has been 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: \$646,969.75 committed from 412 gifts and 75 donors with \$25,100 in outstanding pledges. This fiscal year we have received \$350 from 7 gifts and 1 donor.

- *We received ~ 35K this year from this endowment.*
- *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

2023-2024 Budgeted Goal: \$30,000

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)