

Mountain Advancement Report

January 25, 2024

Mountain Fund

2023-2024 Budgeted Goal: \$330,000

Summary:

As of 1/25/24 - \$234,330.92 from 1059 gifts and about 552 donors (71% of goal of \$330K)

As of 1/25/23 - \$240,329.75 from 1026 gifts and 538 donors (74% of goal of \$325K)

As of 1/25/22 - \$236,666.57 from 1109 gifts and 639 donors (88% of goal of \$270K)

As of 1/25/21 - \$254,956.38 from 1067 gifts and 668 donors (102% of goal of \$250K)

As of 1/25/20 - \$184,943.35 from 851 gifts and 534 donors (79% of goal of \$235K) *pre-COVID

More than 700 donors raised over \$328,000 (met goal) at the end of our fiscal year 2023.

To date, approximately

316 alumni gave 624 gifts for a total of \$152,401.91

225 friends gave 418 gifts for a total of \$60,689

8 organizations gave 13 gifts for a total of \$18,516

3 religious orgs gave 3 gifts for a total of \$2,725

We have been using the recurring gift upsell since GivingTuesday and have converted 2% of donors and will now receive \$1,509 vs \$775 in a 1-time gift.

Credit Card Merchant Fees Collected

Mountain Fund Credit Card Fees Covered: \$1,124.77 through 153 gifts and 147 donors

Overnight Credit Card Fees Covered: \$93.92 through 11 gifts and 11 donors

Most (nearly all) of our credit card donors choose to cover the fee.

Overnights

2023-2024 Budgeted Goal: \$25,000

As of 1/25/24 - \$18,016.34 from 86 gifts and 74 donors

As of 1/25/23 - \$19,780 from 77 gifts and 63 donors

As of 1/25/22 - \$24,046 from 88 gifts and 70 donors

As of 1/25/21 - \$15,540 from 34 gifts and 28 donors

As of 1/25/20 - \$21,405 from 108 gifts and 91 donors *pre-Covid

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: \$881,679.99 committed from 750 gifts and 185 donors. This includes \$7,717.23 in unpaid pledges.

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

- **6/1/23 to 1/25/24 - \$9,936 from 22 gifts and 8 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. **A small group has begun meeting to create a 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

An exclusive message will be sent to our Living Stones in the spring.

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 \$2,000 from 17 gifts and 3 donor2.

- *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

- No new legacy gifts.
- 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 **2024 Mountain Auction --- October TBD!**

2023: \$32,566

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)

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)