

# Mountain Advancement Report

## April 27, 2024

### Mountain Fund

**2023-2024 Budgeted Goal: \$330,000**

#### **Summary:**

**As of 4/22/24 - \$286,120.46 from 1349 gifts and about 620 donors (86.7% of goal of \$330K)**

As of 4/22/23 - \$287,838.83 from 1316 gifts and 609 donors (88.6% of goal of \$325K)

As of 4/22/22 - \$305,495.82 from 1472 gifts and 739 donors (113% of goal of \$270K)

As of 4/22/21 - \$314,074.72 from 1411 gifts and 779 donors (126% of goal of \$250K)

As of 4/22/20 - \$221,455.68 from 1046 gifts and 580 donors (94% 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

349 alumni gave 789 gifts for a total of \$191,000

252 friends gave 522 gifts for a total of \$89,000

7 organizations gave 14 gifts for a total of \$2,500

3 religious orgs gave 13 gifts for a total of \$2,700

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. There has been no change since February's report.

For the rest of this fiscal year:

- ❖ We need people who are willing to contact friends/acquaintances via phone, text, email, FB, etc.
- ❖ 100% board participation by end of our fiscal year May 31, 2024.
- ❖ Sent spring mailing to just under 400 constituents on Friday, 4/19/24
- ❖ Do an eblast highlighting honor/memorial cards
- ❖ Follow up with those who usually give a gift of \$150 or more via either phone calls or emails, possibly postcards
- ❖ Finish phonathon calls and follow up with the callers
- ❖ EOFY Eblast on approximately May 21/22

### Credit Card Merchant Fees Collected

Mountain Fund Credit Card Fees Covered: \$1,264.12 through 166 gifts and 135 donors

Overnight Credit Card Fees Covered: \$177.55 through 15 gifts and 13 donors

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

## **Overnights**

**2023-2024 Budgeted Goal: \$25,000**

**As of 4/22/2024 - \$25,756.34 from 111 gifts and 92 donors**

As of 4/22/23 - \$28,470 from 127 gifts and 104 donors

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

As of 4/22/21 - \$19,655 from 53 gifts and 44 donors

As of 4/22/20- \$24,510 from 122 gifts and 102 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: \$882,429.99 committed from 757 gifts and 185 donors. This includes \$6,216.23 in unpaid pledges.

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

- ❖ **6/1/23 to 4/22/24 - \$12,187 from 29 gifts and 9 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.
- ❖ 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.
- ❖ We will be looking to focus more effort in this area, coinciding with the 40<sup>th</sup> anniversary celebration.

## **Stewardship**

In May, we will be sending out a Living Stones update letter. If we are on the 3-year cycle for Living Stones Inductions, we need to be considering an event in 2025 as we had one in 2019 and 2022.

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

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

**Total Balance: \$631,519.75 committed from 432 gifts and 77 donors with \$4,100 in outstanding pledges. This fiscal year we have received \$5,900 from 27 gifts and 5 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**

- ❖ 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.

❖ Michelle has agreed to be the office contact in lieu of Mary Schlosser.

## **Online Auction**

**2023-2024 Budgeted Goal: \$30,000**

Please save the date for our **2024 Mountain Auction --- November 1-November 10!**

We are grateful for Mary Schlosser's years of service with Mt Irenaeus, especially around her work on the online auction. Mary Giardini will be taking on a much of Mary Schlosser's responsibilities moving forward.

**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)

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)

## **40<sup>th</sup> Anniversary Celebration**

A group has begun to meet to plan the celebration of the Mountain's 40 years. The group included Kathy Colucci, Tom Conway, Mary Giardini, Mike Fenn, Mary Freeman, Kevin Kriso, Greg Licamele, Michelle Marcellin, Evan McElroy, and Dan Riley. Rob Buckla and Jackie Lanzillo were unable to attend.

Areas of focus for the year included:

- Local celebration at the Mountain, potentially the last weekend in June
- Content creation throughout the year
- Mountain Day of Giving sometime in the Fall. Discussed expanding this into "40 days of giving." More to be fleshed out.
- On the Road events around the country
- Kick start major gift campaign