

# Mountain Advancement Report

## February 2025

### Mountain Fund

#### **2024-2025 Budgeted Goal: \$375,000**

We exceeded our Mountain Fund goal at the end of FY24 raising \$338,650 (goal: \$330,000). Note: the 2024-2025 goal has increased nearly 14% (\$45,000).

#### Summary:

**As of 1/30/25 - \$318,101.83 from 1271 gifts and 699 donors (84.83% of goal of \$375,000)**

As of 1/30/24 - \$233,684.46 from 1060 gifts and 550 donors (70.8% of goal of \$330K)

As of 1/30/23 - \$242,820.75 from 1041 gifts and 549 donors (74.7% of goal of \$325K)

As of 1/30/22 - \$247,396.57 from 1137 gifts and 655 donors (91.6% of goal of \$270K)

As of 1/30/21 - \$248,971.38 from 1076 gifts and 672 donors (99.6% of goal of \$250K)

As of 1/30/20 - \$186,270.99 from 858 gifts and 535 donors (79.3% of goal of \$235K)

#### FY 24-25 to date:

411 alumni gave 838 gifts for a total of \$217,093.65

272 friends gave 477 gifts for a total of \$82,332.47

10 organizations gave 14 gifts for a total of \$4,507

2 religious organizations gave 2 gifts for a total of \$200

Credit card merchant fees: Nearly all credit card donors choose to cover the fee.

### Overnights

#### **2024-2025 Budgeted Goal: \$25,000**

#### Summary:

**As of 1/30/25 - \$17,961.89 from 74 gifts and 61 donors**

As of 1/30/24 - \$18,141 from 87 gifts and 75 donors

As of 1/30/23 - \$20,760 from 80 gifts and 66 donors

As of 1/30/22 - \$23,826 from 90 gifts and 71 donors

As of 1/30/21 - \$15,540 from 34 gifts and 28 donors

As of 1/30/20 - \$21,545 from 110 gifts and 93 donors

### Targeted Campaigns

#### **40 Hours of Giving 40<sup>th</sup> Anniversary- (September 2024)**

As of January 30, 2025, the total raised is approximately \$125,795 from 307 gifts and 294 donors. Currently, there are \$22,000 in unpaid pledges (donors have until the end of the fiscal year to pay the pledge).

#### **2024 Giving Tuesday – Kitchen Renewal Project (November 2024)**

\$16,152.69 was raised in an online giving campaign in addition to \$20,000 in matching gifts for a total of \$36,152.69.

## **Online Auction**

### **2024-2025 Budgeted Goal: \$30,000**

This year's auction was a tremendous success--- bringing in the most revenue since the online auction began in 2013. The committee streamlined the process from years past, having 100 fewer items, items of higher value, new "fund-a-need" and focusing on Franciscan-themed items especially those made by our Mountain Community. Thanks to the help of all, word spread and resulted in many people having fun bidding and raising needed dollars for the Mountain.

**Please save the date for next year's auction: November 7-16, 2025!**

**2024: \$42,695**

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 (online and live)

## **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. \**

\*On July 24, 2024, we opened up this campaign to include memorial donations made to Fr. Dan. Moving forward, we can break down levels of giving within this campaign for recognition if necessary. A major gift will still be defined as stated above. **As of Jan 30, \$33,380.04 has been received in memory of Fr. Dan from 119 gifts and 107 donors.**

**This campaign that began over ten years ago will close once the few pledges remaining are completed.**

### **Budgeted Goal: \$3.1 Million**

Current Endowment Total to Date: **\$910,844.88** committed from 825 gifts and 277 donors. *(These numbers are from our current endowment campaign, which began in 2012).*

- **6/1/24 to 1/30/25 - \$33,797.04 from 121 gifts and 107 donors**
- 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.

## **2025 Major Gift Campaign**

Since October, Rob Buckla (campaign director) has been working with Kathy Colucci, Mike Fenn and Br. Kevin Kriso on the launch of the leadership phase of a comprehensive endowment-centric campaign for Mt. Irenaeus. Work has focused on three areas:

### **1) Creating the Case for Support and Campaign Communications Materials**

A 13-page Case for Support document has been created and will be tapped for proposals and solicitations. Additional materials are being created including personal profiles on all Mountain friars and those engaged in Mt. Irenaeus ministry. Thanks to Evan McElroy and Mary Freeman who are helping Rob write these profiles.

### **2) Creating Infrastructure for Campaign Success**

Among the items created and reviewed: Campaign Counting Guidelines, Campaign Naming Opportunities, Campaign Gift Agreement templates, Campaign Thank You Letter templates, etc. With the help of Mary Giardini, a variety of campaign donor prospect lists were created and reviewed; the result is the identification of the Top 75 campaign prospects. Kathy, Mike and Rob have been active in visiting, face-to-face, with a number of top campaign donor prospects. Those visits were conducted or are scheduled for Olean, Buffalo, Rochester, Albany, Connecticut, the Tri-State area and the Gulf Coast of Florida.

### **3) Recruiting Volunteer Leadership to Assist with Fundraising**

Our Campaign Cabinet (volunteer leadership team) has been recruiting and is meeting regularly. The Cabinet is energized and hopeful that our working goal will be somewhere \$7 and \$12 million, which includes \$1.68 million in Mountain Fund revenue over the five-year campaign.

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

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

On July 24, 2024 we asked donors to either gift to our FDR Sustainability Fund or to the SBU Endowment for Mt. Irenaeus. As of 1/30/25, 10 donors gave gifts totaling \$1,200.

**Total Balance: \$633,719.75 committed from 429 gifts and 93 donors with \$3,100 in outstanding pledges. This fiscal year we have received \$3,050 from 28 gifts and 12 donors.** Our numbers do not include gains or draws, only gifts made to this Fund.

- *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.*

- **SBU Reported the following to us on Sept 19, 2024:**

- The balance in the **Community Fund** is \$811,161

\$750,972 Balance as of 5/31/23

6,083 Gifts in FY24

36,188 Draw for FY25

90,294 Market Gain!

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\$811,161 Balance

- The balance in the **Dumser Fund** is \$42,854.

\$39,989 Balance as of 5/31/23

0 Gifts in FY24

1,920 Draw for FY25

4,785 Market Gain!

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\$42,854 Balance

## **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.
- Kate Manion O'Reilly who has helped us with our planned giving in the past will be joining us once again to volunteer her help in this area.

## **Stewardship-Living Stones 2025**

Planning has begun for this year's 2025 Living Stones event. There will be an additional 55 tiles added to our Garden Labyrinth of Remembrance. Among those honored are: Paul Aroune, Dianne Kuzia-Hills, Mike New, Dan Riley, Mike Sullivan, Sarino Tropeano and Katie Trosch.

**Please save the date of May 23-25, 2025!**

Rooms at the Mountain will be filled. Please consider a local hotel.