

Philanthropy Board Report February 2023

Mia Axon, Philanthropy Consultant
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2022 Annual Summary

\$1,701,699 was the 2022 year-end total (including grants, excluding estate/land/membership), surpassing the 2022 *budget* goal of \$1,192,099.

2022 saw a large increase of \$307,107 in grant revenues, up from \$52,605 in 2021. Ian and the Conservation Corps program are largely responsible for this terrific gain in grant revenues. License plate revenue was up \$14k over the previous year.

September 1st to Year-End 2022 Summary

September 1 – December 31, 2022 brought in **\$919,584, 66%** of annual philanthropic revenues (excluding estate/land/grant/membership). This reflects the consistent trend at the Conservancy that *the majority of gifts come in during the final months of each calendar year.*

We held a successful **Holiday Gathering** on the first Saturday of November. We welcomed nearly 300 members and donors with a fresh open-house format (no formal presentation this year). Conservancy and Park staff mingled with guests, and leadership provided information about the Conservation Corps, Field Institute and other Park projects.

The **Fall Quarterly** went out later than planned in November, resulting in adjustments to future print schedules and a decision to use different printer-mailing house vendors. A calendar of activities and events was developed (see enclosure) and newsletter and appeal schedules will start earlier. New leadership will provide greater clarity on roles and responsibilities.

Additional year-end activities:

- **Annual Appeal**, 26,024 appeals mailed out, brought in \$513,108.72 from 1135 donors;
- **Colorado Gives Day** brought in \$100,683 from 583 donors;
- **New Years postcard** went to 11,000 members and donors;
- **Member Drive** (email) went out in mid-November, 17,000 emails went out to license plate holders, non-members, and lapsed members. 230 memberships came in during the following two weeks.

Membership

In 2022, membership revenue came in at **\$198,629**, with **3,073** active members. Membership growth has been relatively flat over the past four years. A number of 2023 initiatives will address this situation.

Major Donor Highlights September 1, 2022 – December 31, 2022

- \$50,000+ from Chapman Hanson Foundation, National Park Foundation, and one individual donor
- \$20,000+ from Anonymous Donors, Daniel S. Chillemi Charitable Foundation, 3 individual donors
- \$10,000+ from Athletic Brewing Company, LLC, Discovery Lodge Inc., Donor Advised Fund, Leslie Fidel Bailey Charitable Trust, and 5 individual donors
- \$5,000+ from Naktanis Family Foundation and 21 individual donors
- \$1,000+ from Colorado Gives: Community First Foundation, Evans-Phillips Family Charitable Fund #3, Grant Family Fund, Images of RMNP, Live West Realty, Marino Family Foundation, Mollie Mitchell and John Wilson Foundation, Skratch Labs, De Gregorio Fund for Conservation Education, The Graham Edwin and Sharon Janosik Mitchell Foundation, Wild Tribute, 120 donors
- \$500+ from North Drinkware, Scheels, Terry J. and Susan K. Hanson Foundation, The Peterson Charitable Lead Trust, Webstop.com, and 157 individual donors

Staffing update

The philanthropy department continued to be short-staffed through the end of the year and into 2023. Madison has done a terrific job being the only full-time staff member in the department. Estee has stepped up to handle major donor activities during this period. Mia Axon, philanthropic consultant, kept a steady presence through the fall and winter, helping to keep activities and appeals moving forward. Mia has completed her assessment of the Conservancy's philanthropy program, highlights will be shared at the board meeting. The Member and Donor Services Associate full-time position has been reposted, interviews are underway. The Director of Philanthropy position will be posted by the end of February.

2023 Planning

In 2023, the Rocky Mountain Conservancy's philanthropic program will increase events and activities, become more systemized regarding record keeping, and increase focus on donors with capacity to make significant gifts. 2023 key initiatives, in priority order, are as follows:

1. Refill two full-time philanthropy staff positions;
2. Focus on the major and principal gift donor program;
3. Systematically document all fundraising activities and increase communication between departments;
4. Support Board of Directors in fundraising activities;
5. Assess membership program;
6. Develop grants program;
7. Launch planned giving program;
8. Explore launching major campaign, following strategic planning session.

See accompanying 2023 Philanthropy Department Calendar