THE HILL SCHOOL
THE FAMILY BOARDING SCHOOL™

Gift Planning Officer
Pottstown, PA
www.thehill.org

THE INSTITUTION

Founded in 1851 as The Family Boarding School, The Hill School prepares young men and women from across the country and around the world for college, careers, and life. Within a family school environment and a rigorous liberal arts curriculum, we challenge our young people to work hard, think and reason, be fulfilled, serve the common good, and be prepared to lead as citizens of the world, uniquely guided by our motto: "Whatsoever things are true." The student enrollment is 531 students, third form through post-graduate with 51% boys and 49% girls. There is a 79% to 21% boarding-to-day student ratio; all students must board for one year. Hill students are drawn from 26 states and 25 foreign countries.

The Office of Institutional Giving

The Hill School's Office of Institutional Giving (OIG) is located in The Class of 1960 Alumni House at 715 East High Street in Pottstown. OIG is comprised of 17 full-time staff. This office is responsible for fostering relationships with alumni, parents, foundations and friends to encourage their support of The Hill's mission and secure the School's future. Specific areas addressed by OIG, led by the Assistant Headmaster for Institutional Giving, include capital giving (major and estate charitable giving) from alumni, parents, foundations and friends and The Hill Fund (annual giving to support the operating budget); and advancement services (gift processing, database management, stewardship, donor research and gift reporting). Objectives include encouraging volunteer service to the School and raising funds to support capital projects, programs, operating support, student aid, and the School's endowment; encouraging a culture of philanthropy among all constituencies; and creating opportunities for alumni/parents to stay connected with the School and network with peers.

The OIG is also leading the largest, most ambitious and comprehensive fundraising campaign in The Hill's history - started on July 1, 2014 - *The Strength of All* Campaign. Seeking to raise at least $130 million, the campaign is expected to last until July 2024 and bolster the endowment, Hill Fund, campus, and the greater Pottstown community. The Campaign is recording $91 million in gifts, documented pledges and net present value estate commitments as of July 1, 2019 – the beginning of the 6th year of the effort. Of the $91 million, $6 million are documented revocable and irrevocable new estate commitments, discounted to net present value.

For additional information about The Hill School, please visit www.thehill.org.

THE POSITION

Reporting to the Assistant Headmaster for Institutional Giving, the Gift Planning Officer (GPO) oversees a comprehensive estate giving program; serving as the main point of contact for donors interested in estate gifts, including bequests, gift annuities, charitable remainder trusts, lead trusts, life insurance gifts, IRA gifts, and gifts of real estate to The Hill. The GPO will play an important role in the current comprehensive campaign. Importantly, the successful candidate inherits an estate giving program in strong health and depth, established by a former OIG staff person who spent three years building the program from scratch into a best in class operation at the boarding school level.

Specific Responsibilities

- Manage a donor pool of approximately 125 individuals capable of primarily considering estate gifts; cultivate, solicit and steward donors as appropriate. Maintain an average of 12 to 15 visits or significant contacts per month.
- Create and manage the marketing efforts for the estate giving program, including the development of estate giving materials such as donor testimonials, brochures, newsletters, postcards and oversight of the estate giving website.
- Manage *The Matthew Meigs Society's* membership and communications. *The Meigs Society* is the School's recognition group for estate giving donors.
- Oversee the administration of life income gifts, in collaboration with the Business Office. This oversight includes stewardship and state registrations of gift annuities, specifically.
- Serve also as an adjunct Hill Fund/major gifts officer with donors in his/her donor pool, beyond their estate giving potential, if those gift scenarios surface.

- Lead the estate giving program within the overall Campaign, and assist other fundraisers with completing and closing estate gifts from their donor pools.
- Serve as the key OIG leader in charitable estate giving for the Campaign and The Hill School overall.
- Work closely with Capital Giving and Hill Fund staff to provide technical support, to increase awareness of complex and deferred gift vehicles, and to cultivate new donors.
- Provide training for OIG staff in matters related to gift planning.
- Collaborates with OIG staff to prepare estate gift agreements, Registry form completion, calculation of net present value statements, estate gift illustrations, and ensures compliance with The Hill's gift acceptance policy.
- Ensure proper receipt of and accounting for charitable estate gifts.
- Maintain strong knowledge of current tax laws and rules related to charitable estate gifts.
- Develop and manage program budget.
- Manage the trusts and estates administration process for realized gifts, including review and interpretation of wills, trusts, accountings, and other estate documents; maintain digital records and produce reports related to realized charitable estate gifts and expectancies.
- Manage the estate gift acceptance process for new bequest intentions and life-income gifts, including documenting and recording new gifts, maintaining and reporting on a book of planned giving expectancies, and on-boarding new members of The Meigs Society.
- Manage The Hill's relationship with fiduciary partner, Wilmington Trust, including assisting with the on-boarding of new charitable gift annuities and charitable trusts, ensuring regular and timely communications with benefactors, oversight of income payments, tax reporting and state filings.
- Coordinate the administration of life insurance gifts, including payment of annual premiums and facilitation of regular policy reviews by outside advisors.
- Respond to inquiries from individuals who are interested in learning about planned giving, or who have included The Hill in their Will or estate plan.
- Support estate giving events, including development of invitation/mailing lists, coordination and distribution of invitations, and on-site event support.
- Perform other duties and assist with projects as assigned.

Qualifications

- Commitment to embracing the mission of The Hill School.
- Clear understanding and deep appreciation of the mission, values, organization and traditions of an independent school.
- Minimum one to three (1-3) years of fundraising, financial planning, practicing law in the area of estate planning, client relations or accounting/banking experience.
- Working knowledge of PG Calc, Raiser's Edge, InDesign, and Excel – or similar programs – is highly preferred and required for GPO to be successful.
- Knowledge of estate giving vehicles and software, such as PG Calc and Bequest Manager preferred.
- Excellent organizational, interpersonal, verbal and written communication skills are essential.
- Excellent social skills, with large groups as well as with individuals, are required.
- Ability to work independently and as part of a team.

- Detail oriented, well organized, focused and goal-oriented, with a high level of initiative and energy, as well as adept at problem solving and using judgment in situations requiring independent initiative and tact.
- Must have a high level of independence in accomplishing the responsibilities of the position. Goals, priorities, and major projects are reviewed and discussed on an on-going basis.
- Ability to interact comfortably, tactfully, and effectively with varied internal and external constituencies.
- Must display a high level of maturity and personal integrity and ability to understand, develop, and sustain resilient and dynamic relationships with donors, colleagues, and senior management.
- Must be able to effectively communicate both verbally and in writing.
- Self-starter, able to work independently and take initiative.
- Ability to domestic travel significantly and work occasional weekends and evenings, as needed.
- Bachelor's degree required, Master's and/or law degree preferred; paralegal degree or certification also considered valuable.

For inquiries, nominations and applications, please contact:

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