



Advantage Plus’s Legacy Calls Program Secures over \$7,500,000 in Planned Gifts for The Hill School

The Situation: The Hill School is a private, traditional boarding school located in Pottstown, Pennsylvania. Due to their high volume of loyal donors, Advantage Plus partnered with The Hill School to assist in cultivating relationships with those donors with the highest planned giving potential. As stated by Christian Sockel, Assistant Headmaster for Advancement, “It would take about 8 years for one Director of Planned Giving to visit 1,000 donors; it took Legacy Calls 3 months.”

The Solution: Advantage Plus created a highly personalized planned giving telephone outreach program and selected 1,000 of the Hill School’s most loyal donors to contact. Donors were initially called by Advantage Plus’s Tier 1 callers who thanked the prospect for their years of loyal support and determined the prospect’s interest in making a planned gift. Depending on the prospect’s level of interest, an additional phone call was made by a Tier 2 caller, a planned giving specialist with more than 20 years of planned giving experience. Tier 2 callers informed prospects of planned gift options and confirmed and quantified planned gifts.

The Goals: The planned giving calling program had four broad goals:

1. To thoroughly thank the donors for their loyal support over the years
2. To determine interest in including The Hill School in their estate plans
3. To confirm and quantify gifts already completed and thank/recognize these donors
4. To educate/assist donors about planned gift options

The Result: Of the 1,000 prospects called, 518 were reached. Of these, 28% expressed a current interest in planned giving or had already completed a planned gift. Tier 2 callers followed up with each of these individuals to secure the gift. An additional 70 prospects expressed interest in exploring options for a planned gift in the future. The Hill School will follow up with these prospects in the future.

Tier 2 callers secured and received written/verbal confirmation of 41 planned gifts, totaling \$2,166,000. There is potential of an additional \$90,000 from prospects with short-term planned giving/outright interest, a potential \$180,000 in long-term planned giving interest, a potential \$350,000 from prospects with possible future interest and a potential \$92,500 from prospects who would like to continue to receive planned giving marketing materials.

Total confirmed gifts:	\$2,166,000
Total potential gifts:	\$712,500
Total gift potential/confirmed gifts:	\$2,878,500

Phase two: Because of the great success of the planned giving calling program, The Hill School partnered with Advantage Plus on a second phase of calling that was conducted in the summer/fall of 2013.

The Result: Of the 501 prospects called, 121 were reached. Of those reached, 36 prospects expressed a current interest in planned giving or had already completed a planned gift. The pre-call letter was the catalyst for another prospect to reveal a previously unknown \$1,000,000 gift commitment. An additional 22 prospects expressed interest in exploring options for a planned gift in the future. The Hill School will follow up with these prospects.

Tier 2 callers secured and received written/verbal confirmation of 6 planned gifts, totaling \$5,500,000. One prospect is in the process of completing his gift (\$50,000 potential). There is potential of an additional \$80,000 from prospects with short-term planned giving/outright interest, a potential \$220,000 in long-term planned giving interest, a potential \$110,000 from prospects with possible future interest and a potential \$40,000 from prospects who would like to continue to receive planned giving marketing materials.

Total confirmed gifts: \$5,500,000

Total potential gifts: \$500,000

Total gift potential/confirmed gifts: \$6,000,000

Phase 1 and 2 Grand totals:

Phase 1 & 2 total confirmed gifts: \$7,666,000

Phase 1 & 2 total potential gifts: \$1,212,500

Phase 1 & 2 total gift potential/confirmed gifts: \$8,878,500