

CASE STUDY | **PLANNED & SMART GIVING**

Legacy In a Time of Need:

# How Connecticut Foodshare Raised **\$1.4M** Through Planned Giving



## THE OPPORTUNITY

Connecticut Foodshare has served as a lifeline for communities across the state for more than 40 years. But like many food banks, they face a unique challenge: when times get tough economically, demand for their services rises often just as traditional funding sources become less predictable.

This past year was a prime example. As inflation and federal funding cuts strained budgets, Connecticut Foodshare remained focused on delivering on its mission. With food costs climbing and more neighbors turning to the charitable food system, the organization needed to find sustainable ways to meet growing needs while maintaining stability.



Realized planned gifts allowed us to maintain programming for our neighbors that we might not have been able to otherwise.”

**Kathryn Mastandrea**  
Senior Director of Strategic Giving

## THE OPPORTUNITY (continued)

Connecticut Foodshare recognized this as both a moment of challenge and an opportunity to deepen relationships, build trust, and invite supporters to be part of their future through planned giving.

At the same time, an important trend was emerging: more donors were thinking long-term. In moments of uncertainty, estate and legacy planning tend to rise in relevance.

## THE SOLUTION

To future-proof their mission and continue serving neighbors in need, Connecticut Foodshare emphasized planned giving as a key part of their development strategy. Realized legacy gifts, as a result of past pushes for planned giving, were playing a critical role in helping them continue essential programs this year filling gaps left by reduced federal support and increased food costs.

By partnering with FreeWill, the team was able to access the tools, guidance, and capacity needed to scale their planned giving efforts without requiring a dedicated planned giving officer. Through FreeWill's Planned Giving Suite and Smart Giving Suite, they were able to make all kinds of giving, from bequests to stock gifts, more accessible and user-friendly for their community. As Kathryn Mastandrea, Senior Director of Strategic Giving at Connecticut Foodshare explained, "We do not have the ability to take on another full-time staff member to devote to planned giving. But the resources and guidance and support that we get from FreeWill allows us to tap into planned giving in a way that we hadn't previously."



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## THE SOLUTION (continued)

Key to their success was a foundation of consistent, authentic donor communication and a strong community presence. Many of the bequests they received came from small-dollar donors, supporters who weren't on their radar for planned gifts, but who had developed deep trust in the organization over years of engagement.

To further deepen that connection, Connecticut Foodshare hosted a legacy luncheon, bringing together donors for in-person and virtual presentations, a preview of their upcoming strategic plan, and a peer-led ask from a board member who's also an estate attorney. The result: stronger relationships, new gift commitments, and more meaningful conversations with both longtime supporters and brand-new prospects.

With FreeWill's support and a thoughtful approach to stewardship, Connecticut Foodshare has created a sustainable, scalable pipeline of planned gifts, one that strengthens their mission today while building resilience for tomorrow.



Our board has come to see that by promoting legacy giving, we're also unlocking and driving growth in real-time giving."

**Kathryn Mastandrea**  
Senior Director of Strategic Giving

## RESULTS

**\$1.4M**

in primary bequest commitments

**83**

primary bequest commitments