

# How Conservation NW raised over \$90K with FreeWill's Smart Giving Suite



## THE OPPORTUNITY

Conservation NW is a nonprofit based in Washington state that protects Pacific Northwest wildlife and wildland conservation. Their focus is on threatened native species and preserving sufficient land for their survival. To sustain this mission, Conservation NW turned to FreeWill to implement its Planned Giving Suite, aiming to expand their legacy giving program.

After securing over \$1M in bequest commitments within the first two years, Conservation NW decided to adopt the Smart Giving Suite to address challenges across other fundraising streams.

Meghan Madden, Director of Philanthropy and Operations, highlighted the pre-existing issues: “We were working with a lack of information, a lack of transparency, and a lack of good customer service.”

Previously, the organization had not promoted tax-smart giving methods beyond a handful of regular stock donors. This limited approach caused frustrations for donors and staff due to a cumbersome donation process, and many gifts arriving anonymously, which complicated proper attribution and donor stewardship.



With FreeWill, we instantly had 100% more information about the gifts that we were getting than we had before.

## THE SOLUTION

FreeWill's Smart Giving Suite has allowed Conservation NW to enhance and systematize their non-cash giving processes. The Partner Portal has provided valuable insights into donor activities, ensuring that no gift has gone unrecorded or unrecognized, and has allowed their team to steward donors in a time-efficient manner.

Through promotion on their site and targeted Smart Giving Suite campaigns, they have been able to solicit gifts of stock, Qualified Charitable Distributions, cryptocurrency, and Donor-Advised Fund grants just as easily as cash donations, leading to an increase in non-cash gifts for the organization.

The suite has not only streamlined administrative tasks but has also enriched the donor experience at Conservation NW. With the support of a dedicated Partner Success Strategist, they have sent customized email campaigns and have actively solicited non-cash gifts at in-person events. Major donors have proactively reached out to the team, praising the clear communications and accessibility of new giving options. At their annual auction, they introduced a QR code attendees could scan to donate stock instantly, avoiding credit card fees and offering tax-smart options to their major donors.

Conservation NW considers the partnership a pivotal piece of the organization's long-term strategy.

According to Madden: "The Smart Giving Suite adds a significant amount of capacity beyond even adding an additional staff person because we have data, a copywriter, and strategy. We just have to take the resources that FreeWill creates for us and integrate it into our plan, which makes a huge difference for us and how we're approaching communications going forward."



The really compelling thing about the Smart Giving Suite is that we could add so many different resources all together, have them connected to each other, and fit within a broader strategy of non-cash gifts and how we're communicating about those to donors.



**Meghan Madden**  
Director of Philanthropy  
and Operations

## RESULTS

**\$91K+**

in real-time gifts

**\$1M+**

in primary bequest commitments