

How Pierce County Library Foundation promotes community literacy and invests in planned giving with FreeWill



THE OPPORTUNITY

The Pierce County Library Foundation (the Foundation) supports the work of the Pierce County Library System in the western region of Washington State. The Library System serves approximately 300,000 cardholders at 19 branch locations.

The Foundation had a legacy society in place, and the fundraising team was actively pursuing ways to engage more donors with planned giving. However, bequests to the Foundation were sporadic and often a surprise, with few intentions communicated in advance.

Their small but mighty team of five recognized the need for a more structured, proactive strategy and sought a solution that would make the process more accessible for their donors.

Foundation Director Dean Carrell wanted to be an early partner with FreeWill to benefit the Foundation's planned giving efforts:

There is a huge transfer of wealth happening, and I didn't want to be on the back end of that wave.

He was inspired to use FreeWill.com to draft his own will for his lawyer's review, citing that FreeWill's language and self-guided approach to estate planning was simple to use and aligned with the Foundation's mission to promote literacy and access to information.

THE SOLUTION

The Foundation recognized FreeWill as a capacity-building resource that could serve the library community by offering estate planning education, tools, and resources.

The Foundation partnered with FreeWill's Planned Giving Suite to provide an online estate planning tool that made the will-making and bequest notification process less daunting for their donors.

"Dean was really doing a lot of work to move the Foundation forward and engage more donors in planned giving, but the Planned Giving Suite really just knocked it out of the park for us. It gave our team some easy-to-use language to lock into," shares Foundation Officer for Operations and Engagement, Christina Greene.

Through insights from FreeWill's Partner Portal, the Foundation team can identify potential donors and steward them effectively, leading to more cultivated planned gifts to benefit the library.

Beyond dollars secured for the library's future, the partnership has helped mature the work of the Foundation and increased team comfort with planned giving, both internally and externally. The Foundation has seen an internal shift in perception around planned giving, with many finding it less scary and more accessible. FreeWill's Planned Giving Suite has also been made an optional planned giving avenue for Library employees.

Leveraging the Planned Giving Suite resources, the Foundation includes the Gift Intent Form in dedicated communications to discover information from a donor's previously made bequest. This tool allows the Foundation to discover donors who have included them in their estate plans, allowing for improved stewardship and engagement.

The Foundation is now looking forward to expanding its outreach by incorporating FreeWill content in their annual giving communications and at all branches during select planned giving campaigns.



FreeWill's language was simple and effective, adopting the approach of Dr. Russell James.



Dean Carrell
Foundation Director



There's this transfer of wealth that really can serve to benefit the community broadly. Libraries play an important role in civil society, and are a contributor to improving and promoting literacy throughout the region. We have a keen desire to support those pillars of learning and make our community a better place. We want the library and the library foundation to be a key player in that work throughout our community.



Christina Greene
Foundation Officer for
Operations and
Engagement

RESULTS

\$39K+

in primary bequest commitments

\$700K+

in tertiary bequest commitments