

How the YWCA USA raised over **\$8M** in legacy gifts through a partnership with FreeWill



THE OPPORTUNITY

YWCA USA is a 165-year-old organization committed to eliminating racism, empowering women, and promoting peace, justice, freedom, and dignity for all. As one of the nation's largest providers of services like domestic violence housing and childcare, YWCA USA operates nearly 200 grassroots community-based organizations called "local associations" nationwide, serving over a million women, girls, and families annually.

Despite their extensive network, YWCA USA faced significant challenges in engaging and promoting legacy giving with their supporter base. The organization's approach to planned giving was reactive rather than proactive, lacking the technological tools necessary to nurture and expand their program. They often only realized they were included in a bequest posthumously after being notified by an attorney.

This reactive approach to legacy giving results in countless missed opportunities to secure planned gifts.



When adopting new technology, it's crucial to trust the team behind it, particularly in a virtual setting. FreeWill excels at fostering a partnership that builds trust both in the relationship and in the product. They have consistently been responsive and proactive in addressing challenges, ensuring any issues or concerns are effectively resolved.

Sabrina W. Horton
Chief External Affairs Officer
YWCA USA

THE SOLUTION

YWCA USA recognized the need for a tool that could enhance their planned giving program. In their search for the right technology, they focused on finding solutions that were not only easy to use and intuitive but also significantly reduced the workload for their staff.

In June 2023, YWCA USA partnered with FreeWill at the national and local levels to enhance their planned giving program, focusing on both donor cultivation and acquisition.

To tap into their existing base, they launched the Planned Giving Suite, which allows any supporters of YWCA USA or participating local associations to create an estate plan for free with the option of naming YWCA USA or their local YWCA as a beneficiary.

YWCA USA also launched a National Featureship on the FreeWill site, prominently featuring the organization as a beneficiary option for thousands of will-makers across the United States. This Featureship extends to participating local associations, who are highlighted as potential beneficiaries for will-makers within specific zip codes, expanding their donor pool.

Both the Featureship and Planned Giving Suite provide a straightforward way for supporters to leave a legacy gift. Through FreeWill's Partner Portal, they are able to track gift and donor information, empowering their team to promptly steward legacy donors.

This partnership has not only streamlined operations but has also reinforced YWCA USA's commitment to its foundational goals of empowerment and service, setting a precedent for how large networks can effectively manage and enhance legacy giving.



FreeWill is the real bonus to our work as a federated model. It has been a key tool in providing tangible solutions that drive revenue and help local associations address their challenges effectively. FreeWill has been a key tool in transforming these challenges, especially in planned giving. It serves as a conversation starter to bring supporters back to our work, simplifying the process by providing a clear script and actionable steps to drive gifts.

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RESULTS

132

new bequest commitments

\$930K

in primary bequest commitments

\$3.96M

in secondary bequest commitments

\$3.3M

in tertiary bequest commitments