

Starting with staff:

# How Susquehanna Health Foundation has created a culture of **legacy giving**



## THE OPPORTUNITY

As the philanthropic arm for the five hospitals of UPMC (University of Pittsburgh Medical Center) in North Central Pa., Susquehanna Health Foundation supports both immediate and future site needs, including programs, equipment, and facility upgrades.

While they have used several strategies to raise these critical funds, planned giving remained a passive focus for many years. The Foundation's small major gifts team's bandwidth was stretched thin. They often relied on the help of outside vendors, who limited planned giving campaigns to direct mail solicitations. But these efforts didn't meet the Foundation's needs, and didn't help move donor conversations forward.

Foundation leadership knew they needed a new solution to boost staff capacity, create a focused strategy, and develop personalized messaging to build an effective planned giving program. They found the support they needed in FreeWill.



It's not necessarily extra work, it's just being smarter in the work we do. I think FreeWill has challenged us in that way. And our results since our FreeWill partnership have been tremendous. Having that relationship with your strategist to make sure you're doing what's best for your organization has paid off.



**Stephanie Steinbacher, CFRE**  
Major and Planned Gifts Officer, Susquehanna Health Foundation

## THE SOLUTION

Since launching FreeWill's bequest tool, Susquehanna Health Foundation has been able to engage more donors in strategic, purpose-driven conversations around legacy planning. And they started close to home, by sharing the bequest tool with the UPMC staff.

After several challenging years in the healthcare sector, the Foundation wanted to give back to the North Central PA hospital employees in a meaningful way. They decided to use the bequest tool to celebrate and reward the incredible work UPMC employees do each day by offering them an easy and accessible way to secure their futures — and their legacies.

Within the first two years of their FreeWill partnership, the Foundation has raised over \$110K in primary bequest commitments, all from UPMC employees.

"It has made people think differently," shares Trego. "We've had people that are just starting new families take advantage of doing this, and we've had people that are nearing retirement and just starting to think about it. And that's been exciting."

Moving forward, they're looking to expand their reach, starting with Board members and current donors. They've reinstated a planned giving committee to advise on legacy fundraising, with a member of their Board as the chair. They also plan to increase outreach to wider audiences in the coming years. In addition, they hope to grow their endowment by encouraging donors to leave a charitable bequest to their endowed funds.

As Susquehanna Health Foundation's planned giving program expands, so will their impact — meaning they'll be able to support the UPMC sites in their region for years to come.



This has really been our 'thank you' to our employees. They've gone through a lot these last couple of years, and we wanted to do this for our donors — and a lot of our employees are donors. So, it felt like the right thing. Even if they're not giving, if they take advantage of this and establish a will, it's a win, because they deserve so much after the last couple of years in healthcare.



**Valerie Trego**  
Senior Development  
Officer, Susquehanna  
Health Foundation

## RESULTS IN 2 YEARS

**\$110K+**

in primary bequest commitments

**\$1M+**

in contingent bequest commitments