


# WINDS OF CHANGE

AN ORGANIZATIONAL SHIFT  
IN NONCASH ASSETS FUNDRAISING

Jackie W. Franey, Director of Gift Planning Fundraising  
Stelter Webinar – July 28, 2021

The Nature Conservancy 

## PRESENTER



Jackie W. Franey, CPGS, CAP®  
Director of Gift Planning Fundraising  
The Nature Conservancy


- Responsible for the management and leadership of a team that has raised \$1.2B in planned gifts
- Has almost 30 years of experience in planned giving
- Certified Planned Giving Specialist and a Chartered Advisor in Philanthropy (CAP)
- Served on the editorial advisory board of *Planned Giving Today*, the national board for the *National Association of Charitable Gift Planners (CGP)* and on the Steering Committee for the *Leadership Institute of CGP*
- She was inducted into the CGP Hall of Fame in 2020

## GOALS FOR TODAY



### EMPOWER

Deliberate conversations with donors regarding giving from wealth (assets) rather than disposable income (cash)



### EQUIP

Data and research findings to strategically grow your program and close more transformational gifts



### ENABLE

Navigate challenges to shift the organizational culture to noncash assets fundraising



28,564

legacy club members



\$165M

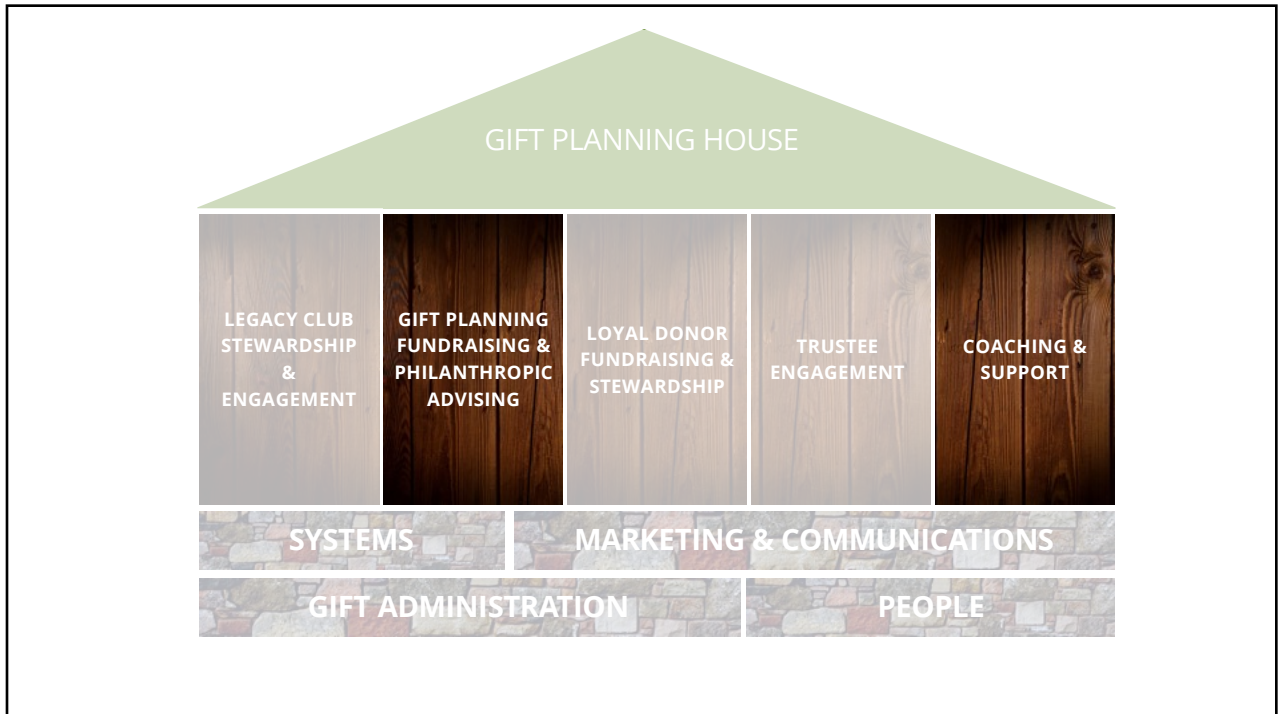
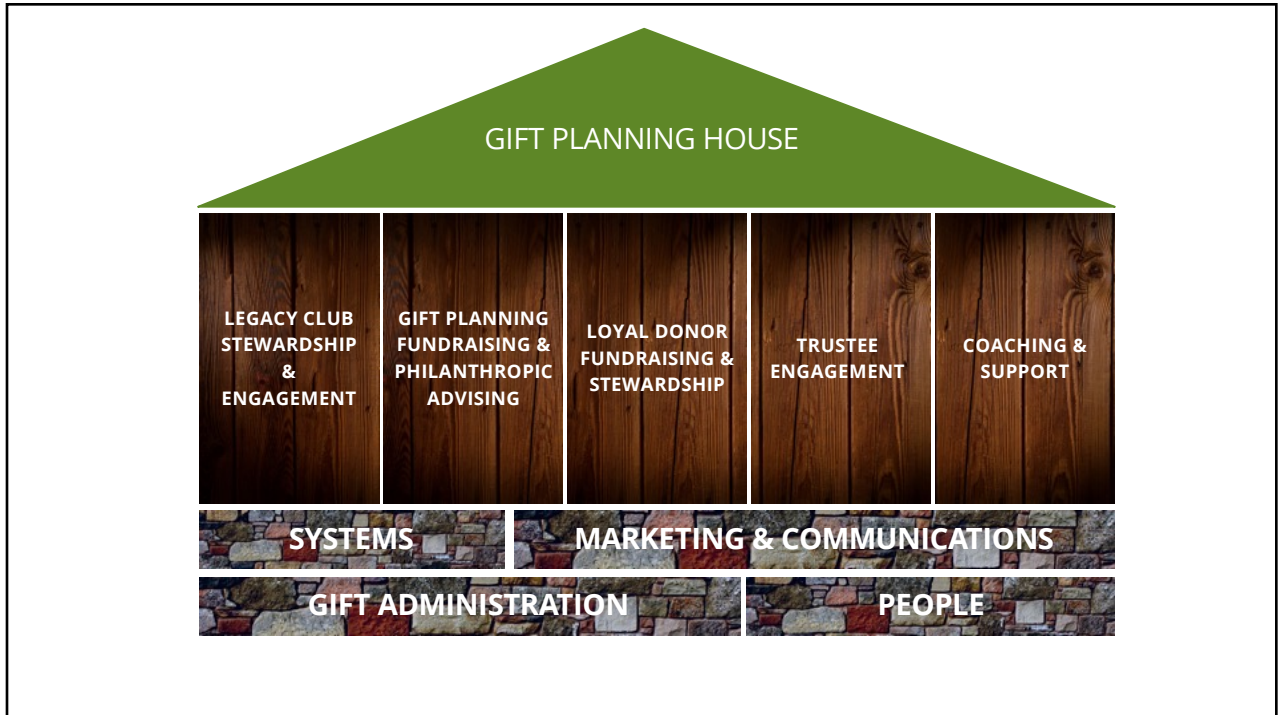
in realized planned gifts



\$200M

in deferred gifts

supported by **74** staff members



FUNDRAISING

**TECHNICAL EXPERTISE**  
in noncash assets and complex gifts



**COLLABORATIVE PARTNERSHIP**  
with fundraisers to close outright, blended and deferred gifts

Nonprofit organizations consistently receiving gifts of stocks or bonds **grew their contributions six times faster** than did those receiving only cash

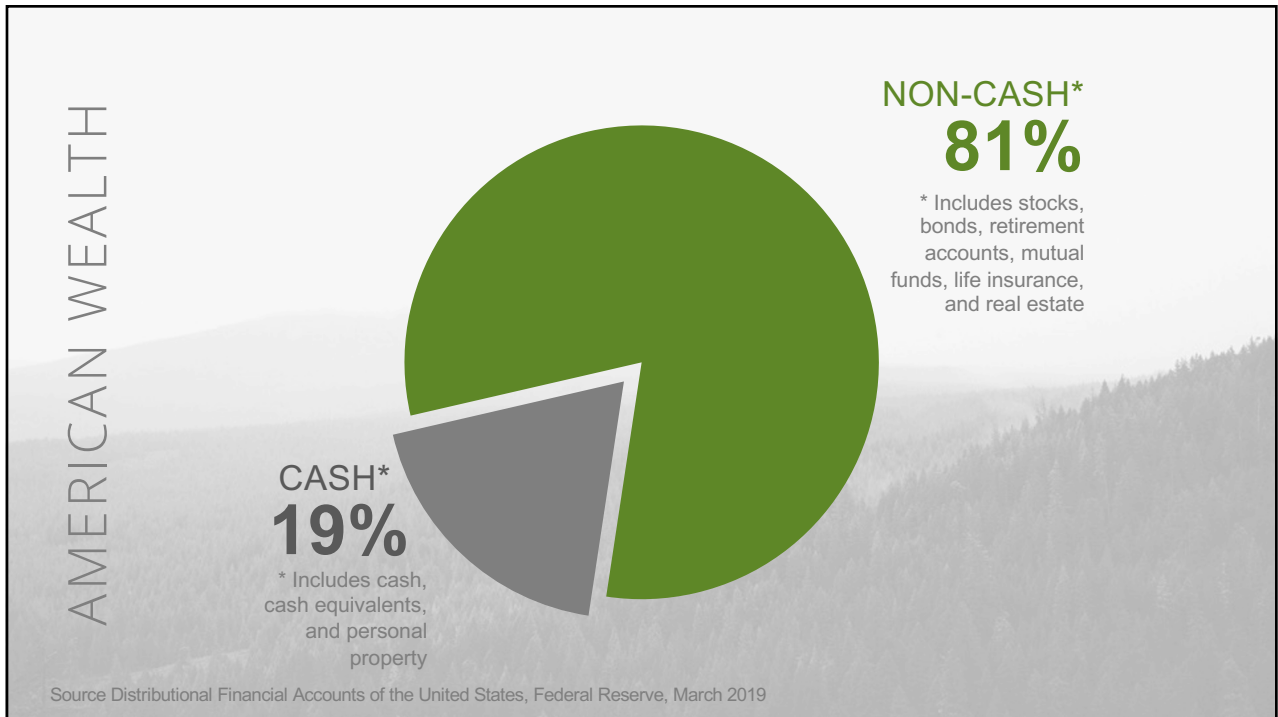
Noncash gifts **predict long-term fundraising growth**; organizations raising gifts of noncash assets grew total contributions much faster than those raising only gifts of cash

When fundraisers ask for cash, they are asking from the **“small bucket”**



**CASH IS NOT KING  
IN FUNDRAISING**

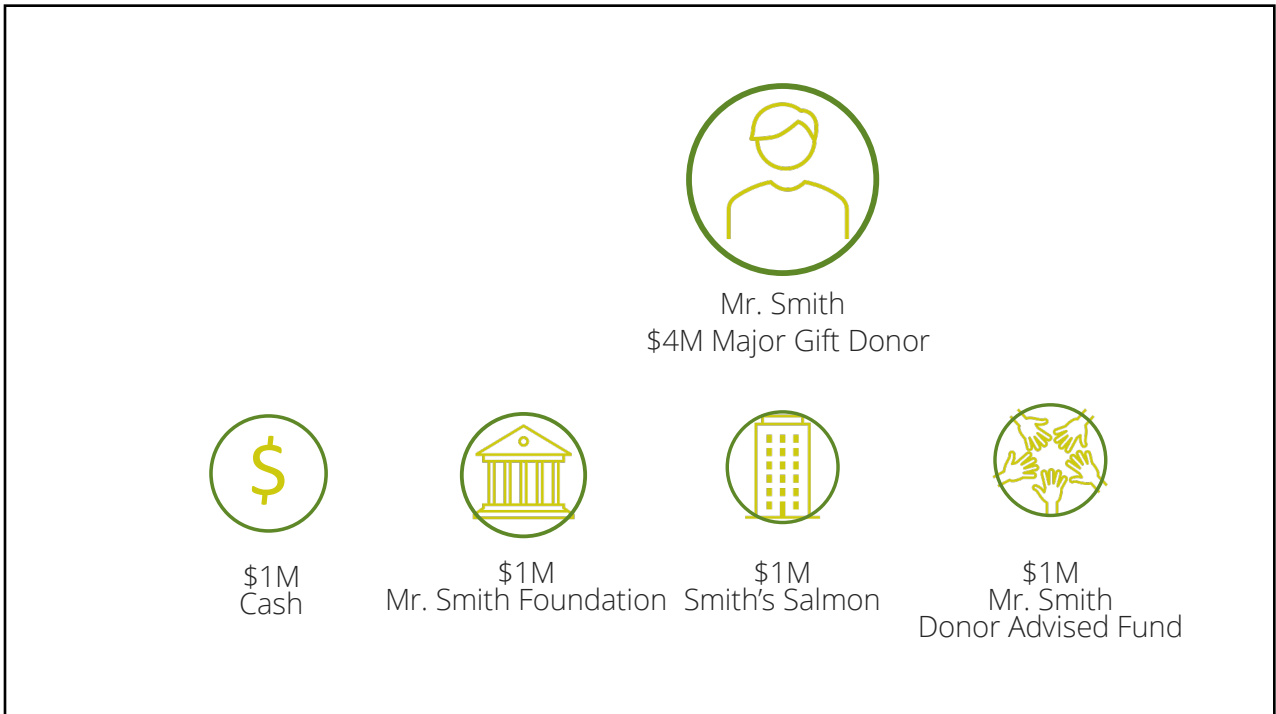
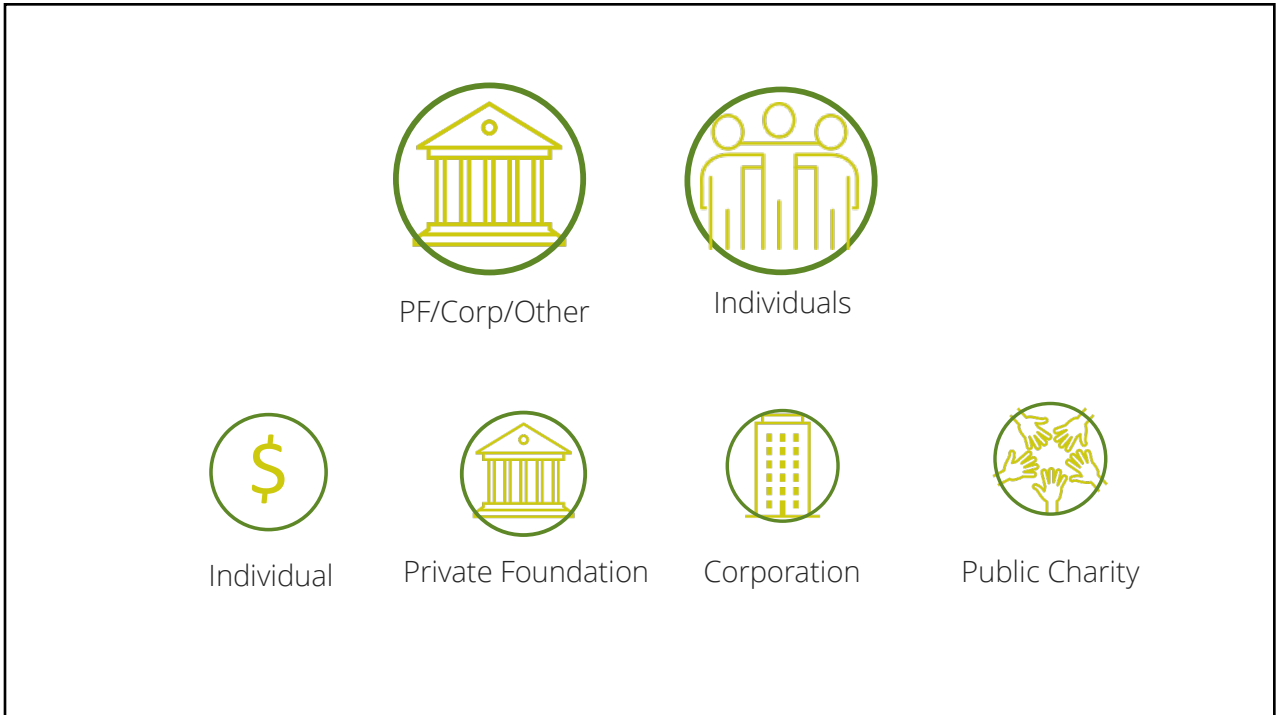
Source: Dr. Russell James



OUR WORLD CAMPAIGN

**\$1.68B**  
from donors contributing \$100K to \$4.99M (major gifts)

**\$1.4B**  
from donors contributing \$5M+ (principal gifts)

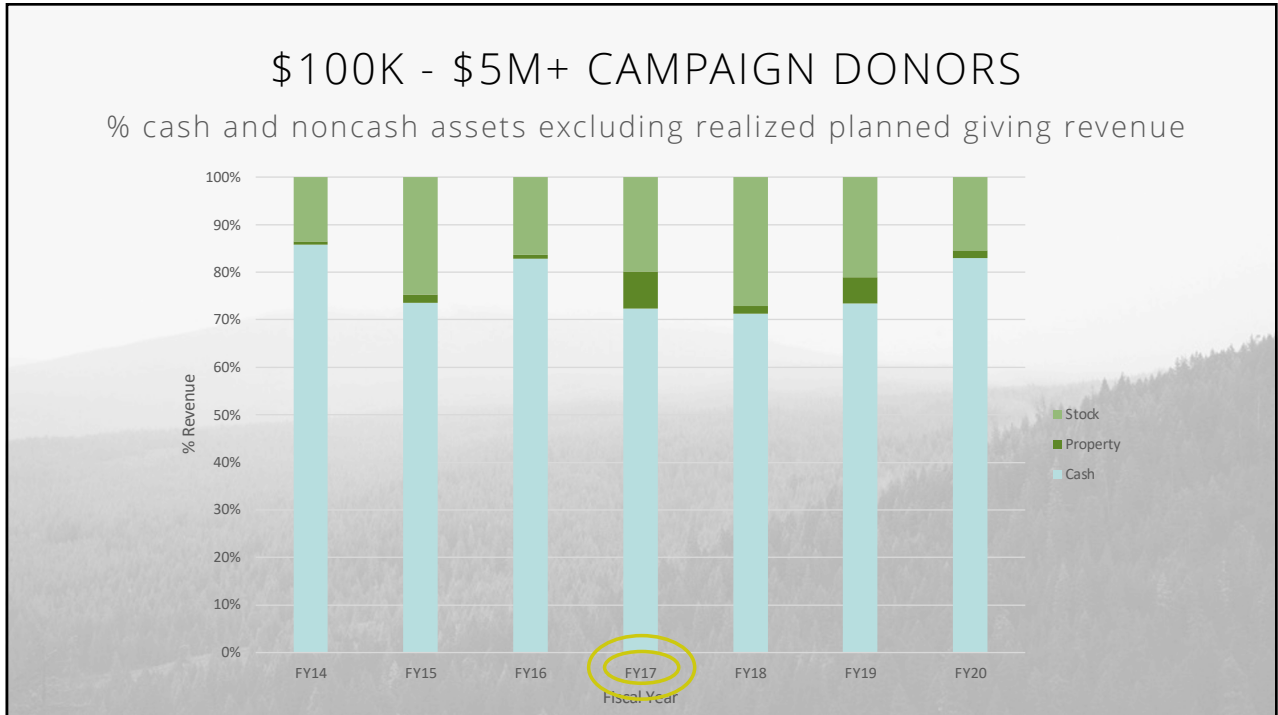




### % OF GIFTS RECEIVED BY ACCOUNT TYPE

	\$5M+	\$100K – \$4.99M
GAVE INDIVIDUALLY	58%	77%
GAVE THROUGH PF OR TRUST	28%	12%
GAVE THROUGH PUBLIC CHARITY OR CORPORATION	14%	11%







## Additional Questions

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## Webinar Resources

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Recording  
Presentation handouts

[www.stelter.com/webinars](http://www.stelter.com/webinars)

THANK YOU

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