

2025 Financial Management Conference

Foundation and Private Funding Sources

Moderator: Frances Ferguson, Mueller Foundation
Stacy Jurado-Miller, Walton Family Foundation
Jennifer McAllister, Housing Assistance Council (HAC)
Connie Rule, Mercy Housing

Sept. 17, 2025

STRENGTHMATTERS[®]



Continuing Professional Education (CPEs) Requirements for CPAs

- Please find the **SESSION HOST** to **SIGN IN** at the beginning and **SIGN OUT** at the end of every session. We use that attendance log to verify your participation for CPE credits.
- Please **submit all conference evaluations**. Evaluation links are emailed to registrants daily. The session host monitoring the sign-in process has paper evaluations if you prefer.
- For more information on CPE credits, contact Lindsay Wells at consult.lwells@gmail.com.

Agenda

- Introductions
- Review **Learning Objectives**
- Overview of session plan and timing
- Q&A
- Wrap up

Learning Objectives

- Explain the funder perspective of a strong, durable grantee relationship.
- Discuss the process of designing a new organizational funding strategy and identifying communications strategy to match funder goals/trends.
- Describe how to evaluate a funder as potential fit for your organizational fundraising campaigns.
- Explain how to assess funder needs, including CRA exam needs for banks.

Engagement Activity: Poll or Exercise

- *Introduction to your neighbor and*
- *What is your current major charitable fundraising goal/challenge*

Questions

- We will pause during presentation and again at the end for Q&A.

Beyond The Photo Opp



**Building Funder
Relationships to
Build Communities.**



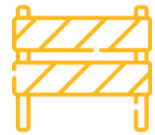


Mission Aligned, Trust Driven:

- Be honest about risks. Communicate problems along with successes.
- Understand the funders strategy and objectives.
- Speak a common language.



THE NUMBERS



What story is the capital stack telling?



Show sustainability beyond the grant term.

Look for a non-traditional ROI. What value add is your deal creating for the funder?

In a nutshell?

Be That Grantee.

Questions

- We will pause during presentation and again at the end for Q&A.
- Please also on your “goal/challenge” notes – what 1-3 items will you consider doing as a result of this information toward meeting your goal/challenge.

Reimagining Philanthropy in a Shifting Landscape

Connie Rule

Chief of Strategic Partnerships Mercy Housing, Inc

Connie.Rule@MercyHousing.org 303-886-9700

The Challenge

- Declining government resources and unpredictable policy
- Increased competition for philanthropic dollars and great transfer of wealth
- Rising cost of capital and services
- Pressure to sustain impact while scaling

The cheese has moved — how do we realign strategy when the old models no longer work?



Mercy Housing's Response

- Strategic Partnerships: banks, healthcare systems, faith communities, national foundations
- Culture of Philanthropy: coaching and capacity-building to double philanthropic revenue in 10 years
- Endowment Campaign: \$25M goal

Shift: From reactive → proactive strategy



Lessons Learned

- Lead with mission and resident stories to inspire giving
- Build diversified revenue models: comprehensive campaigns, endowment, major gifts, partnerships
- Balance bold vision with practical infrastructure: KPIs, dashboards, RACI frameworks

Vision: Double impact from 25,000 → 50,000 homes in 10 years



Disruption is not an obstacle -
it's an opening to innovate.



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Foundation and Private Funding Sources

Strength Matter Conference

Jennifer McAllister

About HAC

- National Nonprofit
- Rural housing and community development
- Persistent poverty areas and populations



Photo: Jennifer Emmerling / [*There is More Work to be Done*](#)

Build Rural: A Capital Raising Story

- Where We Started in 2018
 - Leadership Transition
 - Outdated Revenue Model
 - Millions in undeployed capital
 - Only \$13million interest-bearing portfolio
 - No Fundraising Staff



Photo: Rory Doyle / *There is More Work to be Done*

Build Rural: A Capital Raising Story

- Where We Are in 2025
 - \$62million interest-bearing portfolio
 - \$36million in new borrowed capital
 - CRA-motivated capital
 - Mix of EQ2 and Debt
 - Non-financial institution investments
 - Investors turned into Donors

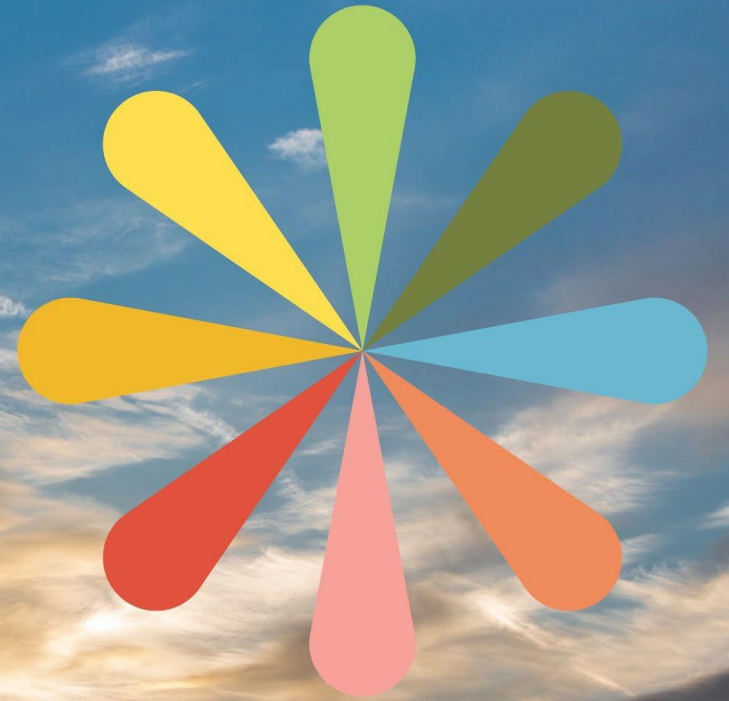


Save the Date Build Rural

Housing Assistance Council's
2025 National Rural Housing Conference

2025 Conference

NOV 4 - 7



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Engagement Activity: Poll or Exercise

- *With your neighbor: what is your most important “to do” that you will take home from this session toward meeting your goal /challenge?*

Evaluation Reminder

- Please submit all conference evaluations.
- Look for the electronic evaluation link in your email.
- Contact consult.lwells@gmail.com if you do not receive the link.

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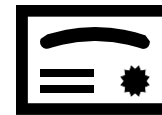
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