



Habitat for Humanity Regional Conference

Unlocking Secrets of
Foundations, Banks and
Corporate Relationships

April 1, 2025
Rochester, MN

Goals For Today

1. Gain insights into giving by foundations, banks and corporations
2. Learn do's & don'ts for each type
3. Workshop successful examples
4. Determine your value proposition
5. Develop winning strategies

WE NEED YOUR HELP
TO REACH THESE GOALS

Ask Questions

Interrupt Freely

Request "Go Back"

Provide Input

Meeting Agenda

- | | |
|----------------------------|------------|
| 1. Quick Introductions | 10 minutes |
| 2. Best approaches by type | 30 minutes |
| 3. Successful examples | 15 minutes |
| 4. Your value proposition | 15 minutes |
| 5. Putting it all together | 5 minutes |



Introductions

MEET YOUR PANELISTS



Susan Hammel, CFA

- Executive in Residence, MCF
- Impact Investing pioneer, founder of Cogent Consulting PBC in 1998
- Entrepreneur, investor, connector, board member, advisor
- Sailor, sapper, power-walker



Ed Paine

- Busey Bank – SVP | Specialty Finance and Community Investments Director
- Habitat for Humanity of IL – Board Member



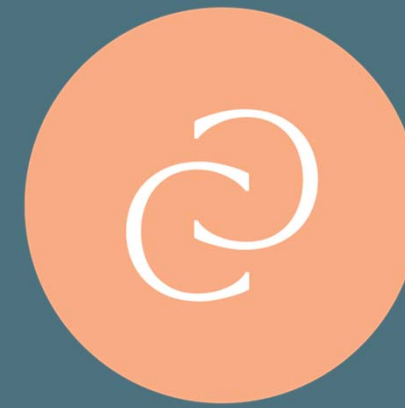
Eric Veltstra

- **Development Director –Two Rivers Habitat for Humanity**
- **Involvement with Habitat as volunteer, committee member, board member, executive director**
- **Enjoying 20 yrs experience in nonprofit management after working in corporate Europe and US**



Introductions

NAME, ORGANIZATION, ISSUE AREA ON YOUR MIND TODAY



To Do: Foundations

+ JUST DON'T

Establish Relationships with Foundations



FIND YOUR BULLSEYE PARTNERS

- Purpose, priorities, and scope



RESEARCH THEIR STRATEGIES

- Review funding priorities, amounts, timing
- Guidance from leadership
- Input from community
- External context

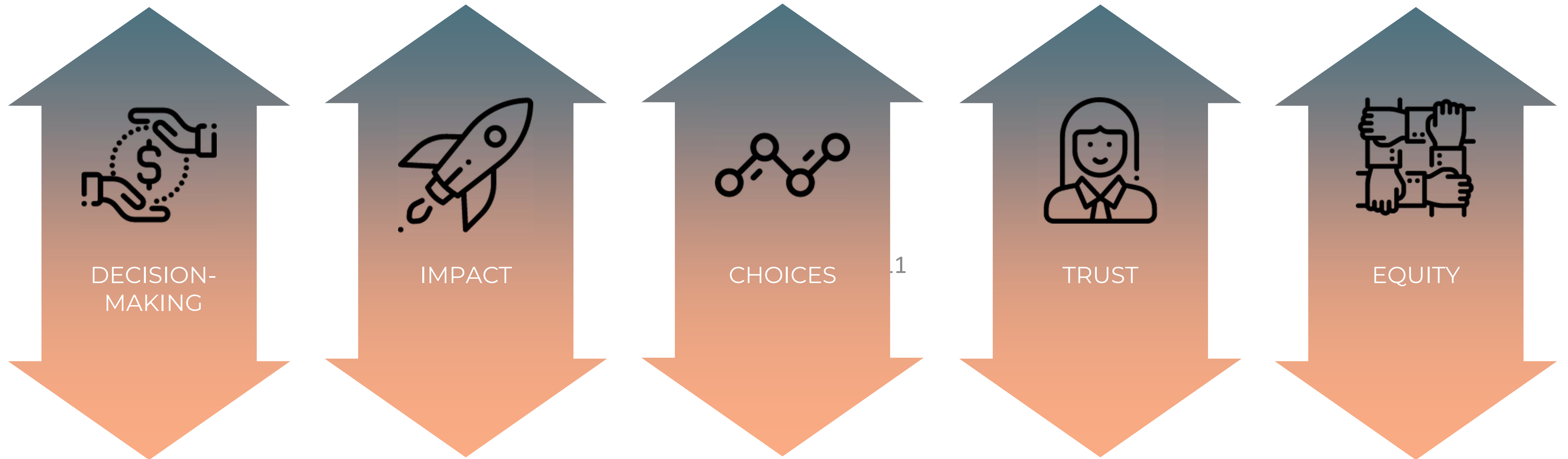


DETERMINE MATCH

- Your approach
- Results
- Partnership

Foundation Fundraising Challenges

OPPORTUNITY



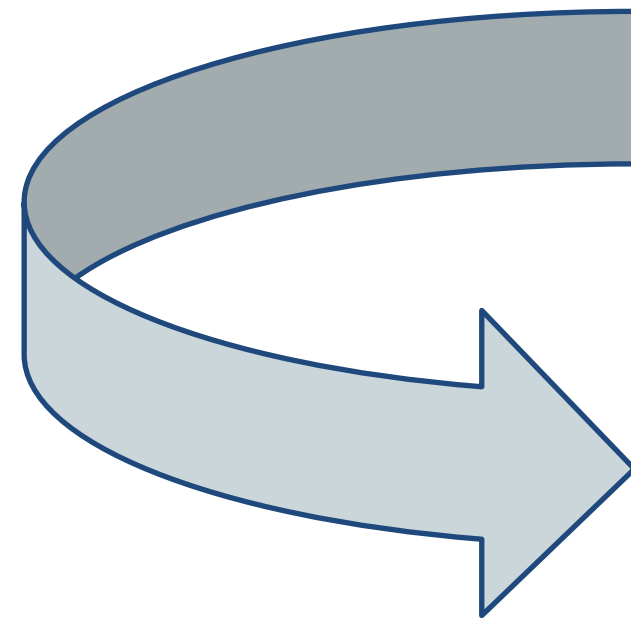
RISK

Foundation Faux Pas

LISTEN MORE THAN YOU TALK



- What are their priorities this year?
- Any big changes within the foundation?
- Which challenges are they facing and where are they feeling pain?
- How do they feel about Habitat for Humanity?



needs

Target your pitch to their current

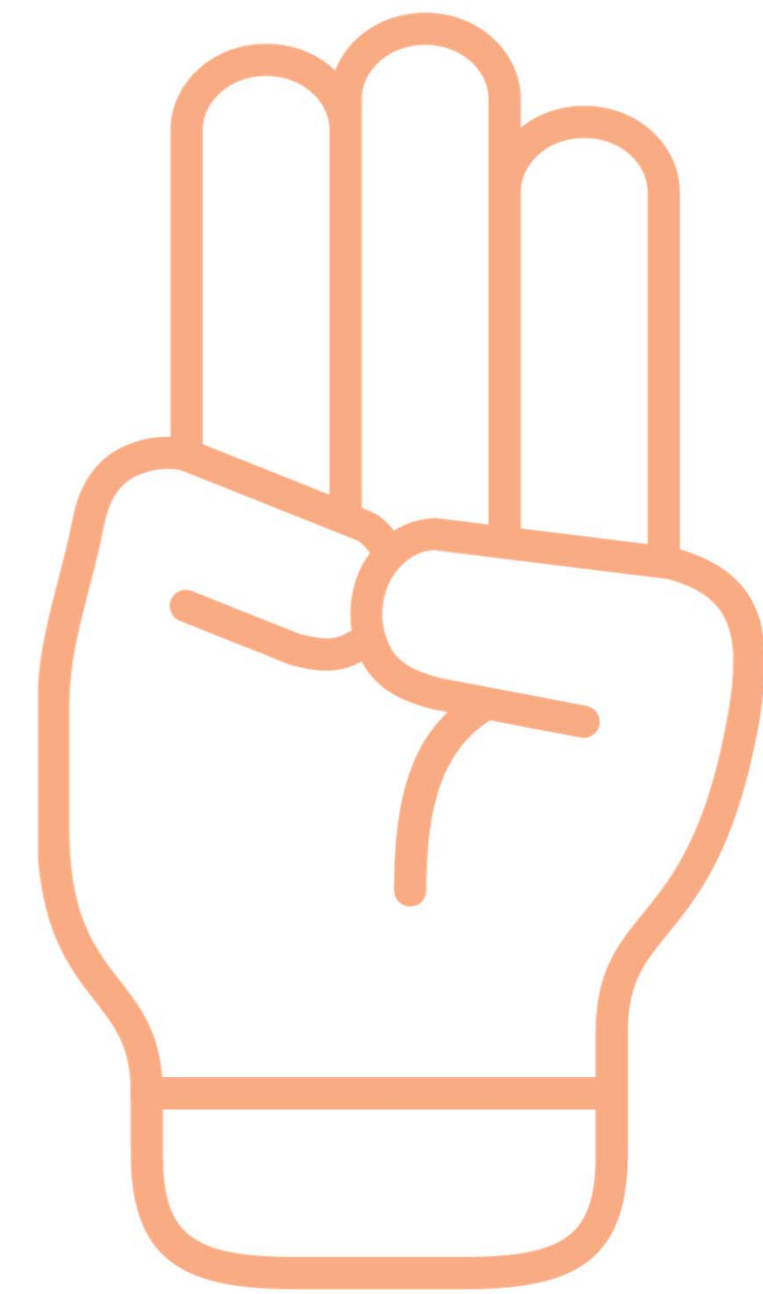
Checking-in: Any Questions?



“I have a
few
questions”



“I’m getting
it, but this is
fairly new”



“Let’s keep
going”



To Do: Banks

+ JUST DON'T

Do



- Make it mutually beneficial
- Determine key financial institutions
- Focus on a couple and go deeper
- Include written details with ask
 - Who is helped
 - How are they helped

Mutually Beneficial



- Benefits to Partners
 - Deposits / Loans
 - *Economic value*
- Home borrower referrals
 - *CRA Lending test value*
- Media / Thank you letters
 - *Community image / CRA*
- Board member / Volunteers
 - *CRA Service test value*

CRA – Community Reinvestment Act

Mutually Beneficial



- Benefits from Partners
 - Donations
 - Cash
 - In-kind
 - Board Member / Volunteers
 - Financial Knowledge / Skills
 - Internal Advocates
 - Community Connections

Just Don't

- Forget to ask
- Spread relationships too thin
- Forget to write a Thank-you

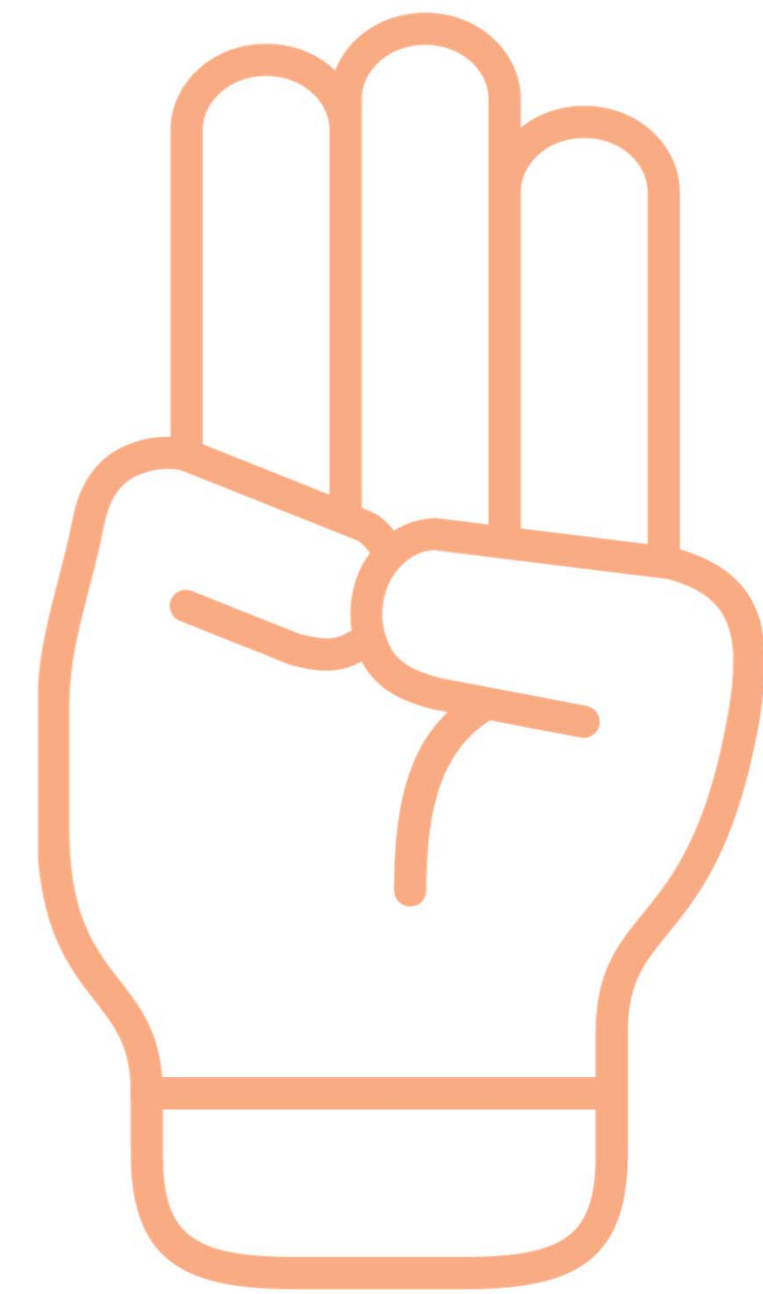
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To Do: Corporations

+ JUST DON'T

Do: Follow the process

- **Prospect ID and Research**
- **Cultivate and Consult**
- **Develop your Case for Support**
- **Making the Ask**
- **Creating the Experience**
- **Stewardship and Renewal**

Goals and Year 1 Tactics

- **Prospect ID and Research**

identify the right corporate sponsor category with interest and alignment to the values and mission of Habitat for Humanity

- **Cultivate and Consult**

begin cultivating a relationship to see if a partnership is possible

- **Develop your case for support**

understanding of the corporate partner's motivations for support

- **Making the Ask**

discuss which option best fits the expectations of your corporate partner

- **Creating the Experience**

Ensuring that the build day experiences and event participation run smoothly, are on brand, and are aligned with the recognition

- **Stewardship and Renewal**

The first step to successful stewardship is a prompt, meaningful, and personal thank-you for all donors

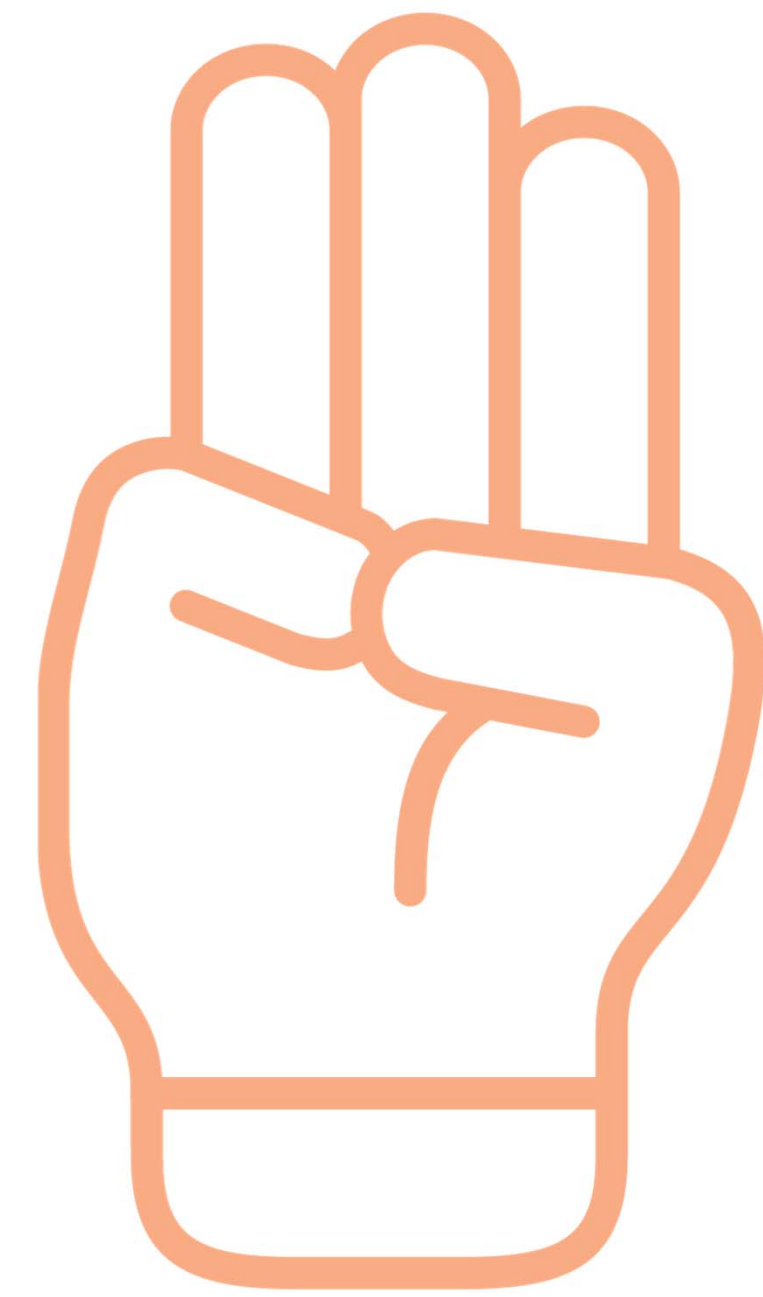
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Successful Examples

FOUNDATIONS, BANKS, CORPORATIONS



Your Value Proposition

Roles Foundations Can Play for Impact



Investor
*Financial
Capital*



Partner
*Social and
Organization
Capital*



Capacity Builder
*Grants, technical
assistance,
investment capital,
offer of
space use*



Engager
*Awareness,
opportunities,
networks*



Informer
Partnerships

Source: Essentials of Impact Investing: A Guide for Small Staffed Foundations by Mission Investors Exchange

NeighborWorks Home Partners

IMPACT REPORTING

ACTIVITY IN Q3 2024:

135	21	8	242
Homeowners Created	Homeowners Preserved	Homeowners Workshops	Individuals Engaged

PORTFOLIO STATUS	DOLLAR AMOUNT	NUMBER
Purchase Mortgages	\$2,269,768	81
Home Repair Mortgages	\$753,222	19
Single Family Home Development	\$32,787	1

Your Value Proposition



Your Value Proposition clearly defines how your nonprofit addresses the problems the foundation seeks to address.

Value Proposition Exercise

Getting Ready to Pitch

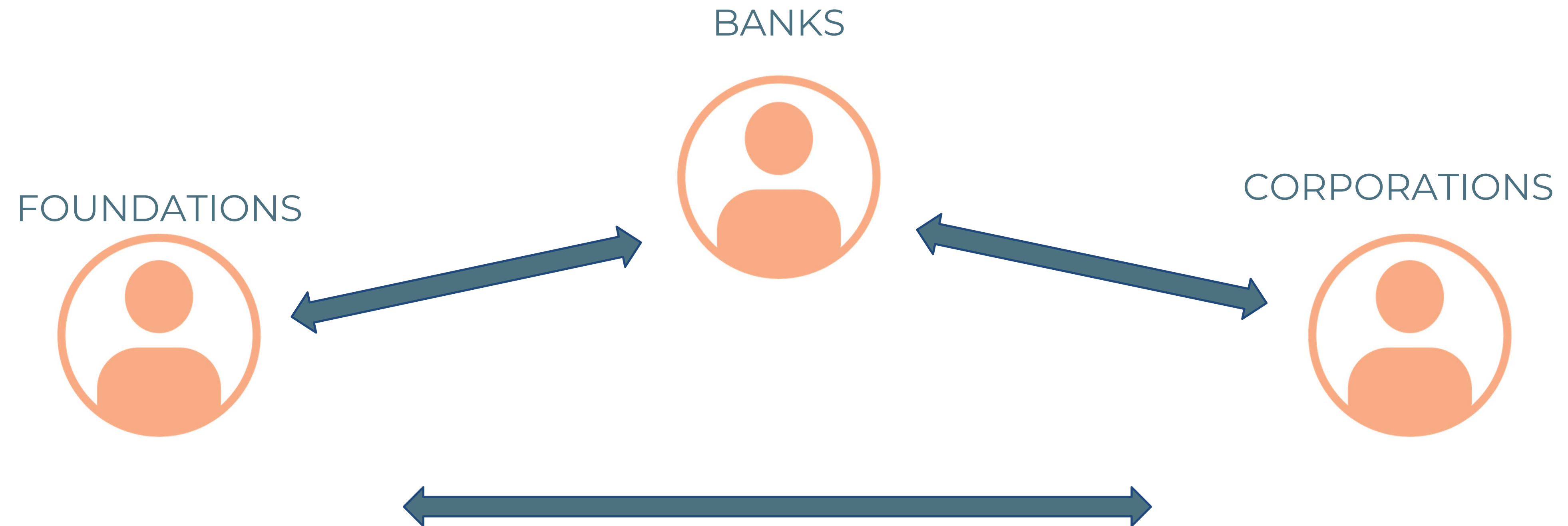
KEY QUESTIONS

1. What does your organization do?
2. Why do donors give to your organization?
3. What makes your organization different?



Putting it all together

FINAL THOUGHTS





Questions and Closing