



Effective Reporting: Stories from the Field



**ROOTED IN
COMMUNITY**

6th Annual Native CDFI
Capital Access Convening
June 22-24, 2021 • A Virtual Event

Sponsored by:



This Session

- What data is needed to produce an effective report
- Helpful steps, processes, and systems in producing reports
- Graphic tips in creating engaging reports
- Effects of sharing data to stakeholders
- Get some new insights, strategies, and inspiration for your own reporting efforts for your CDFI!



Our Panel



NACDC FINANCIAL SERVICES
Angie Main,
ED



NIMIIPUU FUND
Jonelle Yearout,
ED



CHEHALIS TRIBAL LOAN FUND
Diana Pickernell,
ED

SWEET GRASS CONSULTING
Andrea Mader
Mary Sienko
Alyssa Camp



TIWA LENDING SERVICES
Sheila Herrera,
ED



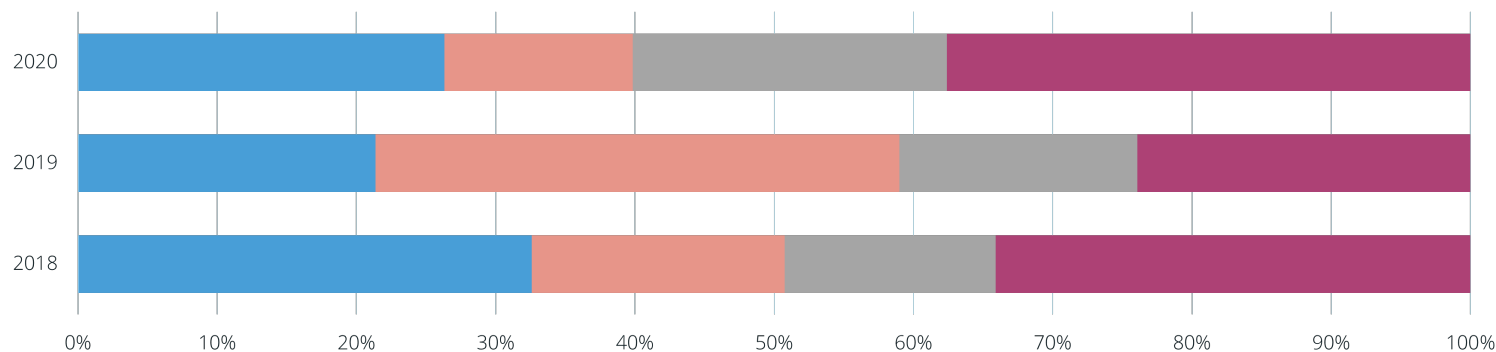
HAWAIIAN COMMUNITY ASSETS

Jeff Gilbreath,
ED



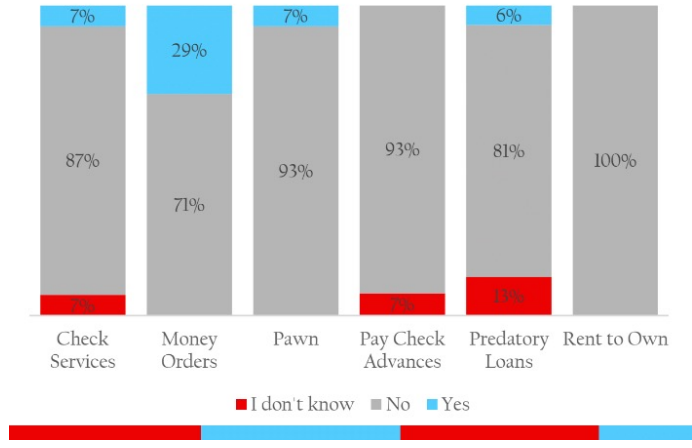
What Data is Needed for Effective Reporting?

- Ask yourself:
 - Who is the **audience** for the report?
 - What is the **goal** of the report? What is its **purpose**?
 - How will you use the data to tell **your story**?

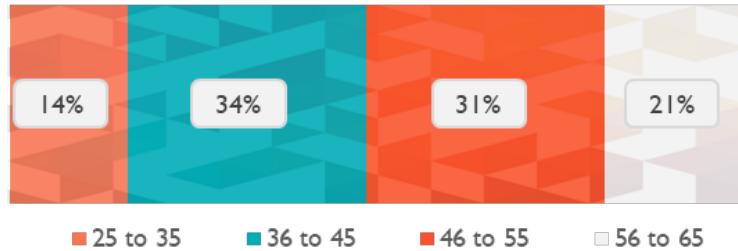


Native CDFI Case Studies

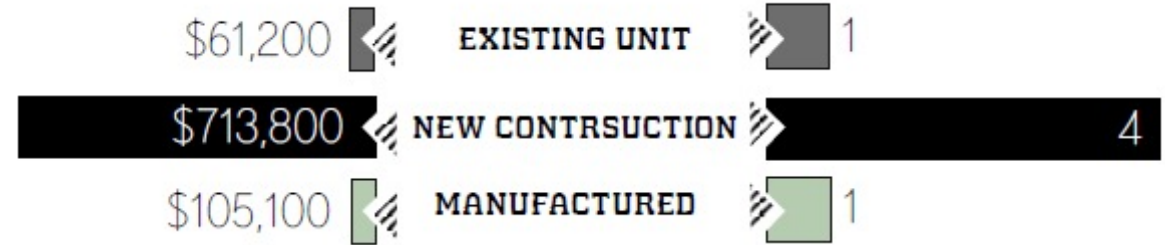
USE OF PREDATORY SERVICES



AGE RANGES

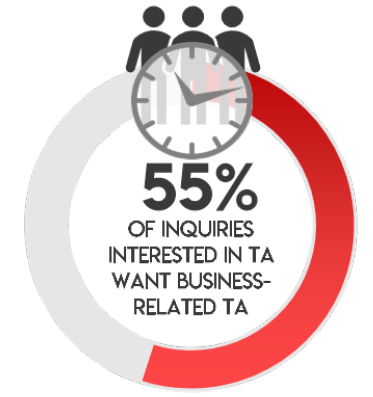


USING THE AVERAGE HOUSEHOLD SIZE OF 5.8, WE KNOW THIS FUNDING SUPPORTED **OVER 140 PEOPLE**



ZERO FORECLOSURE

# Household Members	# Dependents	Hawaiian Homelands Beneficiary?	First Time Homebuyer?	Disability	In School/Training at Program Entry?	Highest Grade Completed	Working at Program Entry?	Primary Interest at Program Entry	Monthly Housing Expense	Total Monthly Income	Total Monthly Income Supports	Annual Gross Household Income
3	1	No	Yes	No	No	Master's Degree	Employed full time		\$90,750.00	\$7,083.33	\$0.00	\$85,000.00
3	2	No	Yes	No	No	Some College	Other		\$7,791.00	\$2,700.00	\$3,047.00	\$16,000.00
3	1	No	Yes	No	No	Master's Degree	Employed full time		\$90,750.00	\$4,194.67	\$0.00	\$50,336.00
2	1	No	Yes	Yes	No	High School Equivalency (GED, HiSet, TASC)	Employed full time			\$4,450.00	\$0.00	\$84,400.00



Data Visualization & Graphic Tips

infographic vs narrative

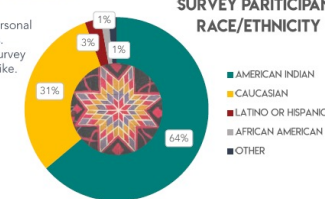
infographic

SNAPSHOT OF 2019 REDCAN ATTENDEES

The snapshot survey was created for CRYP to identify the basic demographics of RedCan attendees, how people heard about CRYP, and to evaluate attendees' personal experiences of RedCan. Sweet Grass collected a total of **72 SURVEYS** over 4 days. Although these figures are not representative of all 2019 RedCan attendees, the survey participants provided a decent snapshot of what attendee demographics looked like.

39% OF SURVEY PARTICIPANTS IDENTIFIED AS CRYP VOLUNTEERS, 33% AS COMMUNITY MEMBERS, 20% AS YOUTH ATTENDEES, AND 3% EACH AS A MENTOR, CRYP STAFF, OR AN ARTIST

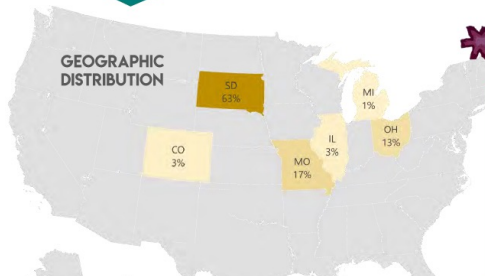
SURVEY PARTICIPANT RACE/ETHNICITY



61% OF SURVEY PARTICIPANTS WERE COMMUNITY MEMBERS LIVING IN EAGLE BUTTE, SD

64% OF SURVEY PARTICIPANTS IDENTIFIED AS AMERICAN INDIAN. OF THOSE WHO ARE CRST, **81%** IDENTIFIED AS CHEYENNE RIVER SIOUX. OF THOSE WHO ARE CRST, **68%** IDENTIFIED AS MNICOUJOU, 13% ITAZIPCO, 10% OOHENUMPA, & 3% SHASAPA

GEOGRAPHIC DISTRIBUTION



66% OF SURVEY PARTICIPANTS WERE FIRST-TIME REDCAN ATTENDEES.

FOR THOSE WHO WERE REPEAT ATTENDEES (44%), THEY ATTENDED AN AVERAGE OF 2 YEARS

SURVEY PARTICIPANT AGE RANGES



narrative

A FOOD HUB

Since 2008, food hubs have been gaining popularity across the U.S. because of their ability to create more sustainable food systems and meet growing consumer demand for local and regional foods.⁷⁴ Simply put, a food hub connects locally produced foods with businesses, schools, and consumers which helps a community become healthier and more resilient.⁷⁵ Food hubs consist of businesses or organizations that actively manage, distribute, and market the aggregation of origin-known food products, and they are avenues for rural economic growth, as well as social and environmental change.⁷⁶

Food hubs play an important "middle man" role by carrying out several core functions: aggregation, distribution, marketing, and sales. On average, they gather products from over 80 different suppliers within a 400-mile radius to meet their needs.⁷⁷ The number of producers required depends on the needs of the hub itself, as well as on the availability of suppliers. Food hubs also store goods from producers and then transport them to a variety of customers. Lastly, food hub staff take on the marketing responsibility of finding buyers, selling and advertising products, and promoting farms' brands. Each food hub is a unique operation that tailors the products and services it offers to meet the diverse needs of the communities it belongs to.

The majority of food hub sales come from fruits and vegetables. 92% of hubs carry fresh produce and herbs, and most carry eggs, dairy, meat or poultry, flours and grains, and value-added products like preserves and organics.⁷⁸ Baked goods such as breads, desserts, and pies are becoming more popular, but are less common. Food hub sales generally have a distribution of 70% fresh produce, 10% dairy products including eggs, and 20% other.⁷⁹ If a food hub offers meat, fluid milk, or cheese it must consider processing facilities, food safety, and more complex logistics.⁸⁰ To be successful, a food hub should seek to provide a range of products that satisfy consumer demand, which could include the sale of non-local items, if that aligns with the hub's mission.



Credit of Food Hub Basic Operations Australian Food Hubs Network. (n.d.). What are Food Hubs. Retrieved from <http://www.foodhubs.org.au/what-are-food-hubs/>

⁷⁴ Fischer, M., Hamm, M., Pirog, R., Fisk, J., Fairman, J., & Kraly, S. (2013). Findings of the 2013 National Food Hub Survey. Michigan State University Center for Regional Food Systems & The Wallace Center at Winrock International. Retrieved from <http://foodsystems.msu.edu/activities/food-hub-survey>

⁷⁵ Ibid.

⁷⁶ Hardy, J., Hamm, M., Pirog, R., Fisk, J., Fairman, J., & Fischer, M. (2016). Findings of the 2015 National Food Hub Survey. East Lansing, MI: Michigan State University Center for Regional Food Systems & The Wallace Center at Winrock International. Retrieved from <http://foodsystems.msu.edu/activities/food-hub-survey>

hybrid

YOUTH DEVELOPMENT

When discussing what makes RedCan unique, not only in terms of graffiti jams, but also in terms of art programming generally, one theme became more prominent than anything else – youth development. The focus of the event is all about developing youth and providing exceptional opportunities for them in a multitude of ways. The event provides outlets for youth to enhance and develop their artistic abilities by broadening horizons with a diversity of art mediums. Offering these educational and often times intergenerational mentorship opportunities to youth, whether experienced in the arts or not, has been shown to enhance their artistic confidence and self-identity as well.

Additionally, through the event, youth are exposed to, and even work beside, established artists from all over the world, many of whom have made art a full-time career. This opportunity shows youth who are invested and excited by art that it doesn't have to just be a hobby. The youth inspiration this event provides has been reflected on over the last five years and is described in the following section.

In addition to RedCan and the overall art programming, CRYP's focus in all of their programs always traces back to youth development. Therefore, other pieces of this section have been aligned with youth development in other areas of CRYP such as professional development through their social enterprise internships at the Keya Café. Providing valuable work experience to youth in Eagle Butte for the last five years has had major impacts in workforce development and preparing the younger generations for applying for jobs, developing resumes, and being more confident in the workplace. It has shown youth positive work ethic, customer service skills, and even enhanced their financial capacity by educating them on budgeting and saving. The impacts of this program in relation to youth development is described in this section as well.

Youth development is the main driver of CRYP's programs. Everything they do intentionally cultivates opportunities for youth that may not exist anywhere else in their communities. This is something that makes CRYP a tremendous asset to Eagle Butte and the Cheyenne River Reservation – and could even provide similar communities with an innovative model for youth development.



Data Visualization & Graphic Tips

the big picture & theme

flow

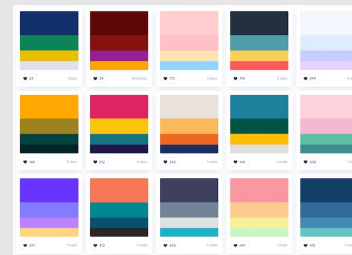
- Think about how the audience will read it and what draws their attention
- Think about what data sets should flow into each other (e.g. all demographics on 1 page, all info about loans in one section and TA in a separate section)

balance

- Don't cram too much on one page
- Balance of fonts and colors used
- Balance of using punch numbers, bullet points, charts, and images
- Balance of types of charts (pie, column, stacked, etc.)

color theme

- Use your organization's color scheme
- Google color schemes and color palettes
- 4 colors is the sweet spot



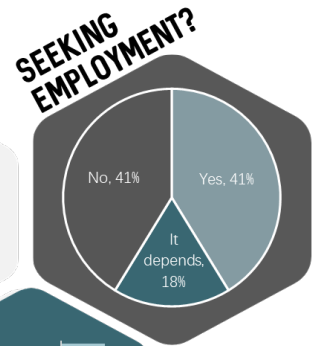
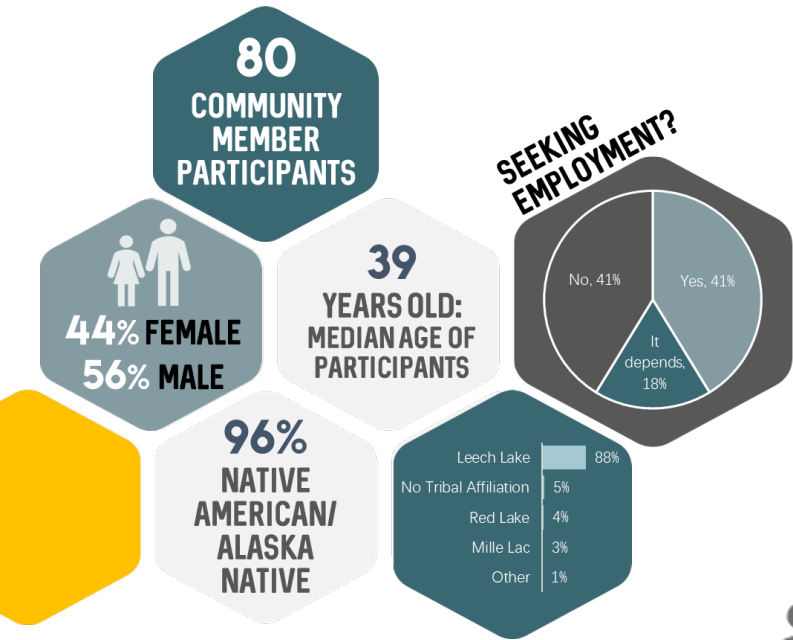
font set

- Use the same size of font for the same text types (e.g. all headers should be the same size font)
- You can download cool fonts for free!
- 2-3 fonts is the sweet spot



Data Visualization & Graphic Tips

data visualization



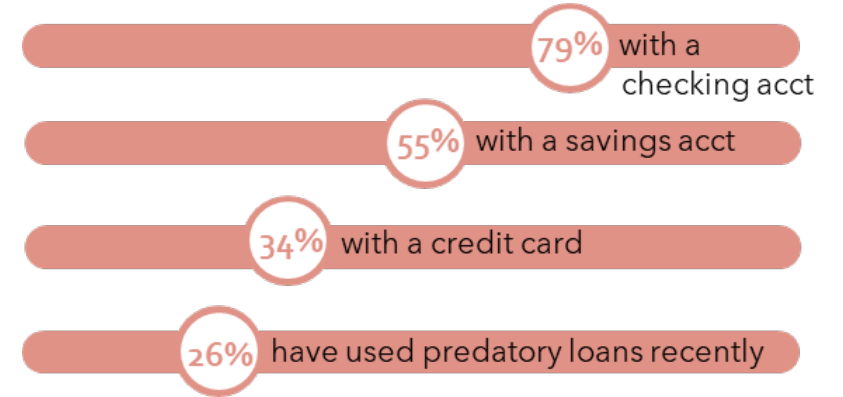
38% experienced increased business expenses due to COVID-19

Of those, the increase was on average **\$1,023.29**



17 HOUSEHOLD MEMBERS SUPPORTED

651 ART INTERNS SINCE 2013



Data Visualization & Graphic Tips

getting started

- PowerPoint – most of us have it, and it's easy to create graphic reports
- Canva – free version and easy to use
- Mimicking – Find graphic reports you like and try to recreate them



Data Visualization & Graphic Tips

share it!

- PDF it – best way to share
- Create a hyperlink for the PDF on your website
- Create images of it to capture certain sections/highlights
- If you're like Angie, you can bring copies of it with you everywhere



QUESTIONS?



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