



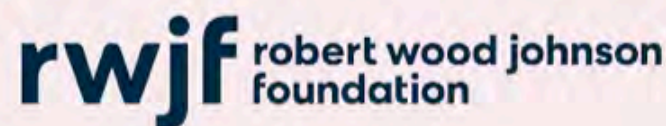
Resilience. Abundance. Kōkua.
10TH ANNUAL
Native CDFI Capital Access Convening



Aligning Workforce Development & Curriculum Design



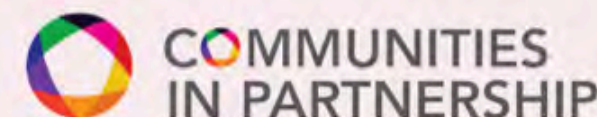
Sponsors:



**Kaiser Permanente
Fund at East Bay
Community Foundation**



**Tamalpais Trust
Fund of RSF
Social Finance**



Panelists

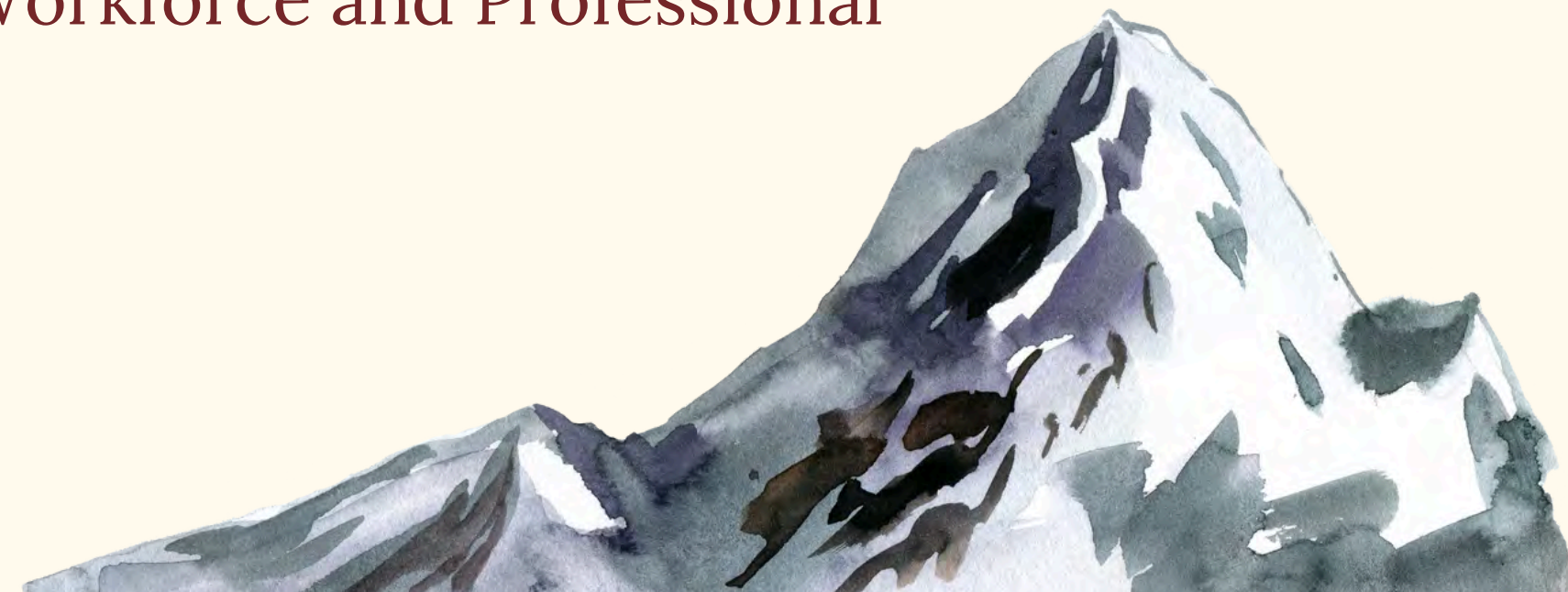
Angie Main (Moderator) | Executive Director of NACDC and Lead on the BBBRC EDA Workforce and Professional Development Grant

Maria Valandra | NACDC Board Member & Vice President of Community Partnerships at Clearwater Credit Union

Leona Antoine | Lead of Project 2-Workforce and Professional Development

Ginna Arguello | Project Coordinator- Project 2 Workforce and Professional Development

Emily Norum | Project Assistant - Project 2 Workforce and Professional Development



Overview | NACDC Financial Services, Inc.



Our mission is to provide alternative financing opportunity for Native American Entrepreneurs and small businesses in communities on and near Indian Reservations in Montana



- Founded in 2010
- Loan Products
 - small dollar
 - consumer
 - business
 - agriculture
 - artist line of credit
 - home loans
- Developing the workforce | Grown from 3 staff to 15 since founding
- Capital deployed | 26 million since founding

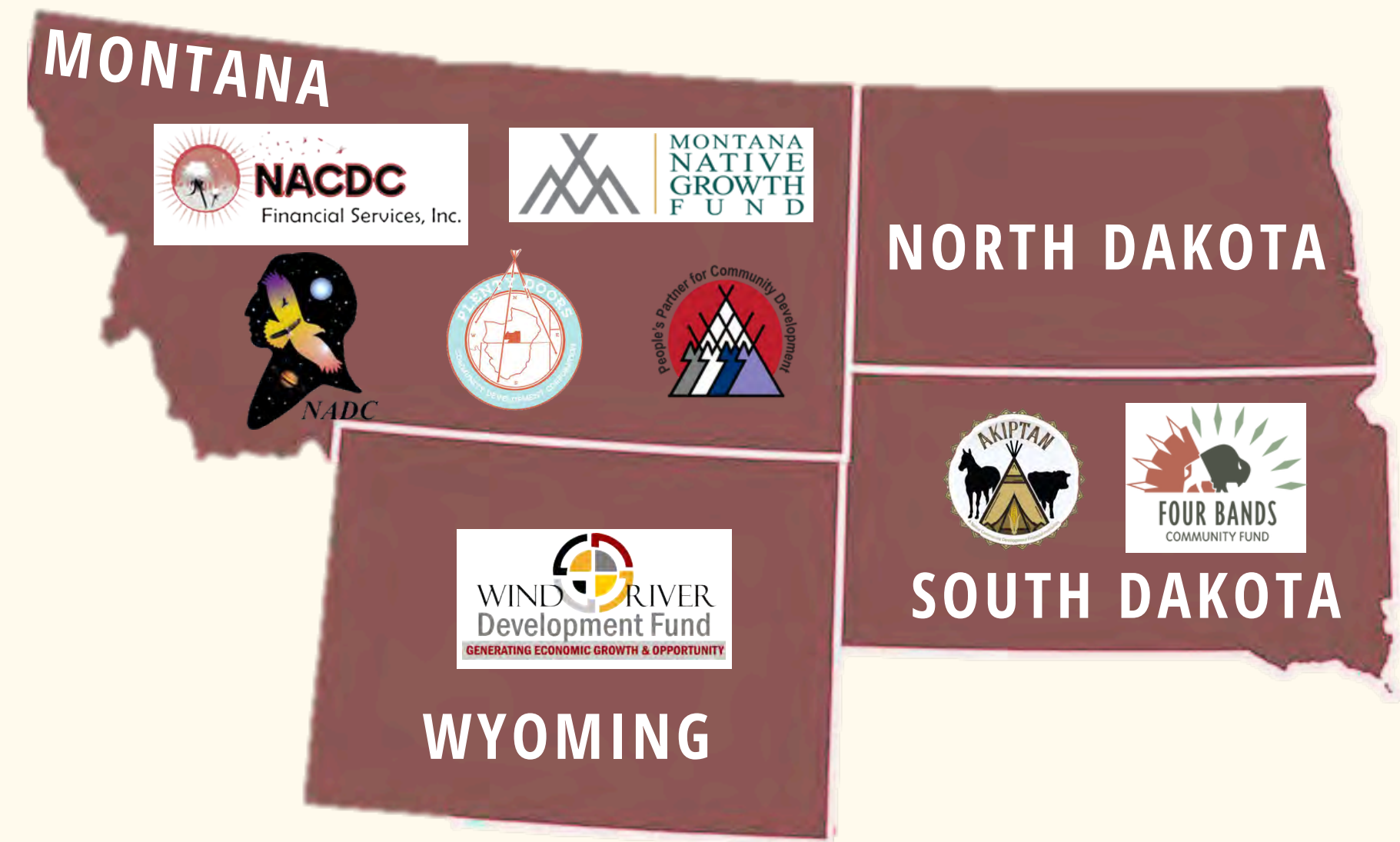
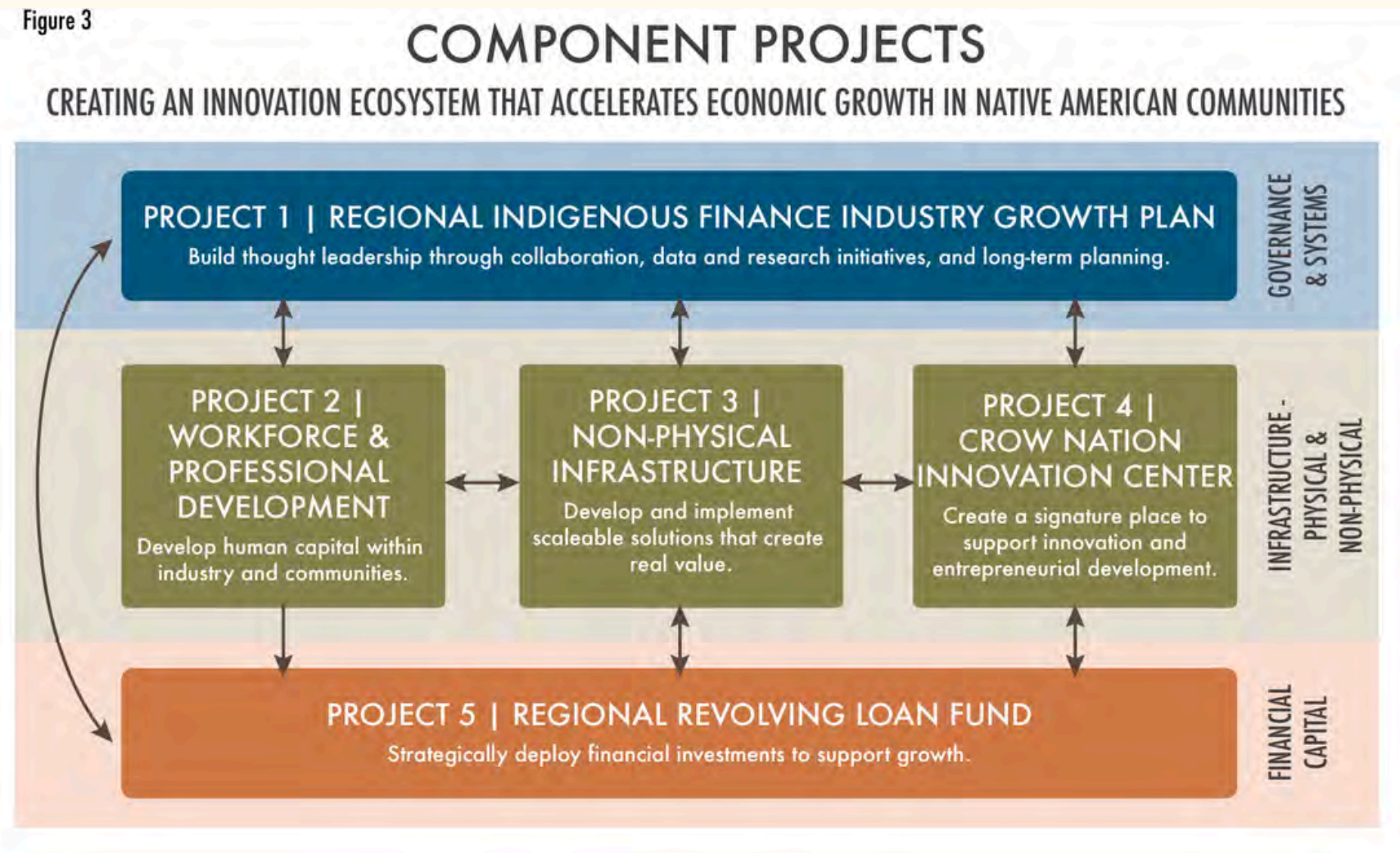


Mountain | Plains Regional Native CDFI Overview

- Founded: February 2020
- Members: 8 Native CDFIs + 1 CDC
- Target Market: MT, WY, SD, ND
- Leadership: 6/8 Executive Directors are Native Women
- Capital | 23 unique investments from private philanthropy, impact investors, and government
- Largest Capital Source: 2022 EDA Build Back Better Regional Challenge Awardee

- Purpose | to fortify the Mountain | Plains Indigenous Finance Industry
- Why | To re-establish traditional, vibrant trade routes
- Strategy | Amplify Strength | Unify Action | Sustain Generations

Figure 3



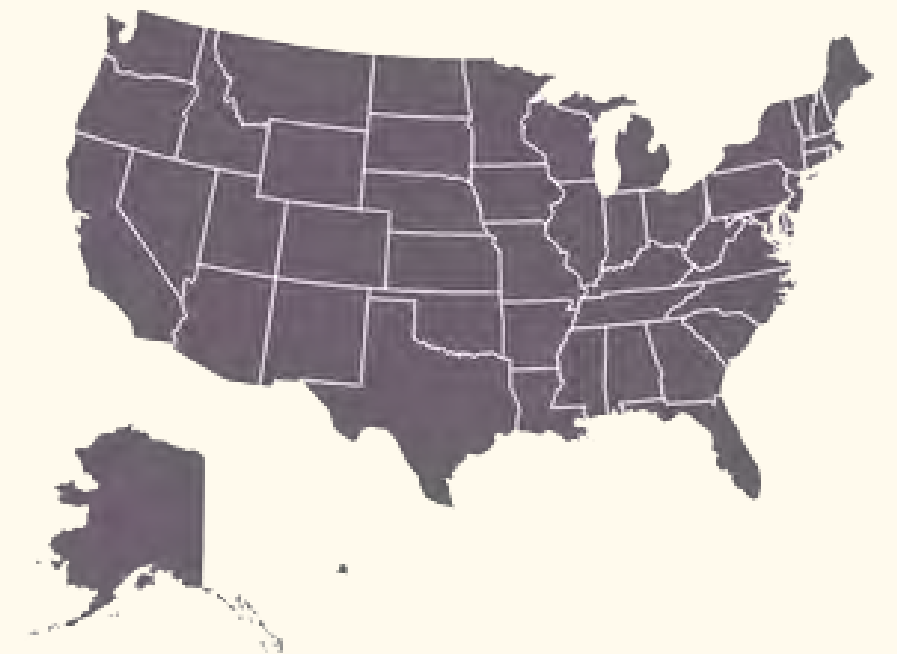
Mentimeter question - What region are you in and what are gaps in workforce development that you have seen in your community?

Board Perspective

Maria Valandra - Vice President of Community Partnerships at Clearwater
Credit Union & NACDC Board Member



NCDFIs have a different goal from banks



Board Perspective

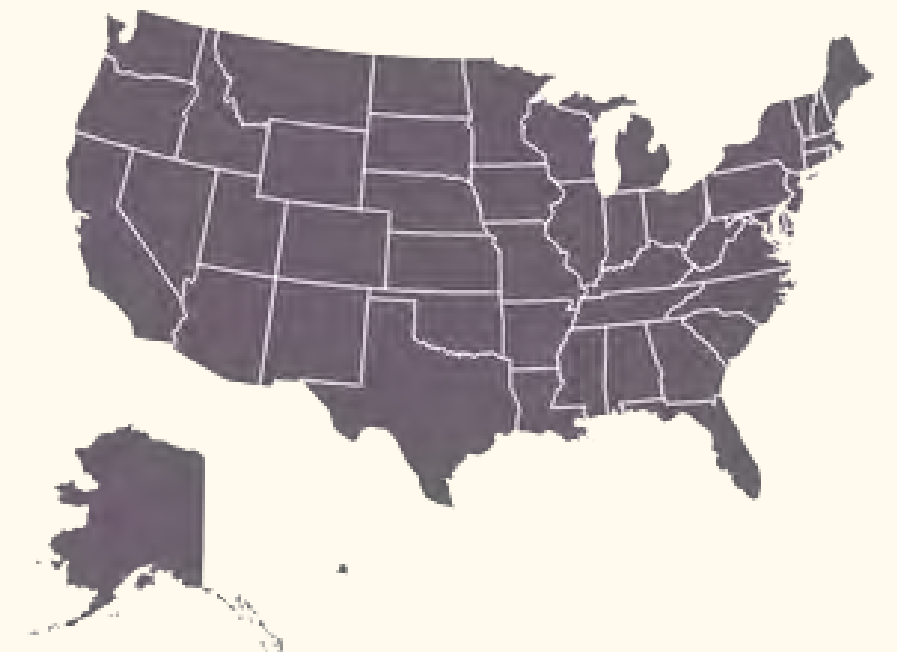
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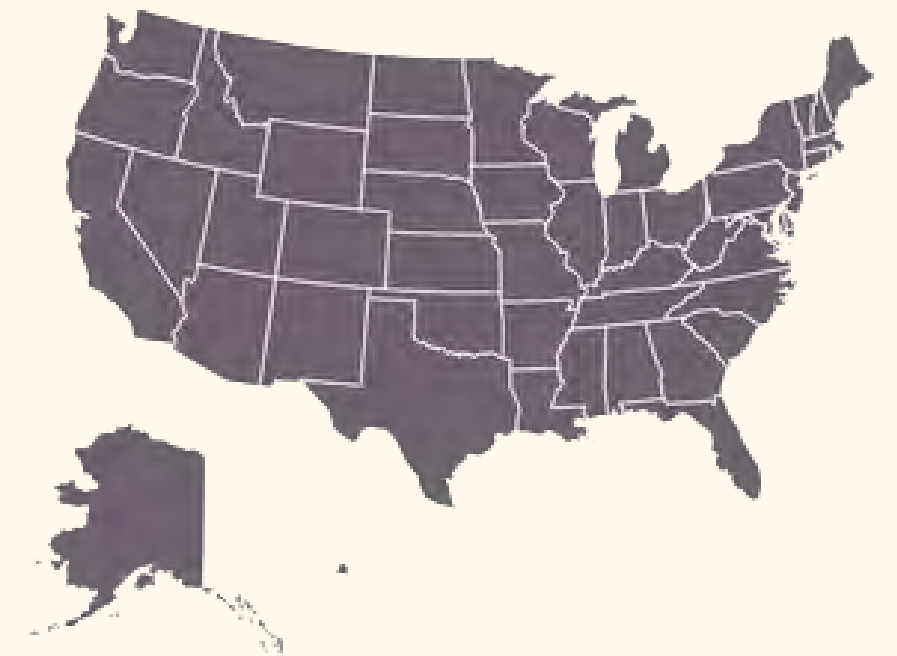
Native CDFIs are an essential part of Native communities yet there is no set career path for
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- NCDFIs have a different goal from banks
- Native CDFIs are an essential part of Native communities yet there is no set career path for community members to enter the field
- NACDC is filling the gap in workforce development for Native CDFIs





Native CDFI Workforce and Professional Development Study | Key Findings

- While there are good deal of resources available, the accessibility and applicability of those resources were limited and the burden on Native CDFIs to train newly onboarded staff impacts efficiency and overall sustainability of organizations.



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 - Underwriting and processing
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 - Loan software specific
 - Pipeline management



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- Native CDFI Executive Directors expressed that professional development needs included business counseling, planning, and management; underwriting; data management and reporting; grant writing; loan process and management; and CDFI creative financing.



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- NCDFIs report onboarding a new officer takes 6 - 12 months and costs \$56,500.

Native CDFI Fellowship



Duration: 1 year (aligned with the academic calendar, from fall to spring)

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Learning Structure: A mix of in-person (3 meetings over the year) and virtual sessions (weekly) designed for relationship-building and knowledge-sharing.

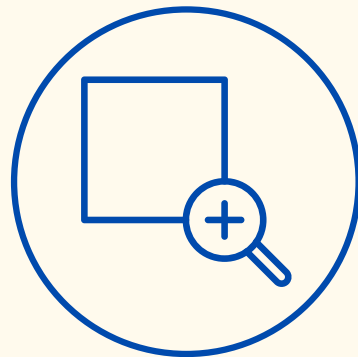
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Key Focus Areas:

- Native CDFI Industry and Broader Finance
- Support for Native Women
- Resources

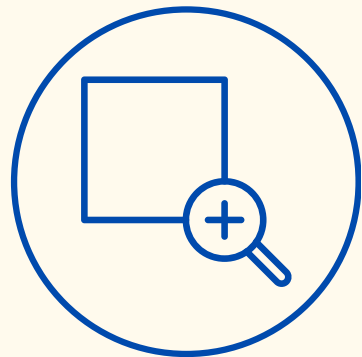
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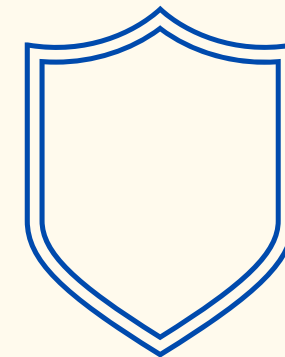


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Completion: Fellows will receive micro-credentialing and Digital Badges for their accomplishments within the Fellowship.

Guiding Principles

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- This program must have a grassroots focus and be place-based and accessible to tribal members.
- Because Native women are the most successful employees in this field, the program needs to be accessible for Native women - who are by default caretakers.
- Understanding the Native CDFI mission and having a passion for supporting tribal economic development are equal requirements as having skills and a background in the financial sector.

Fellowship Framework

- In person connections (three over the year)





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- Mentoring/coaching

Mentimeter question - What are the top priorities for workforce development in your CDFI/region?



In-person Orientation & Introduction to Coursework – **Browning, MT**



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Virtual Learning: Community Development in Native Communities





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Special Project/Practicum





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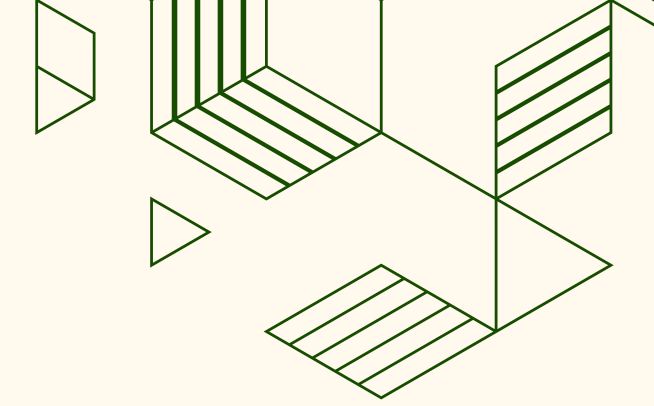
Virtual Learning: Native CDFI Lending

Special Project/Practicum

In-person Convening - Oweesta CAC - **Location TBD**

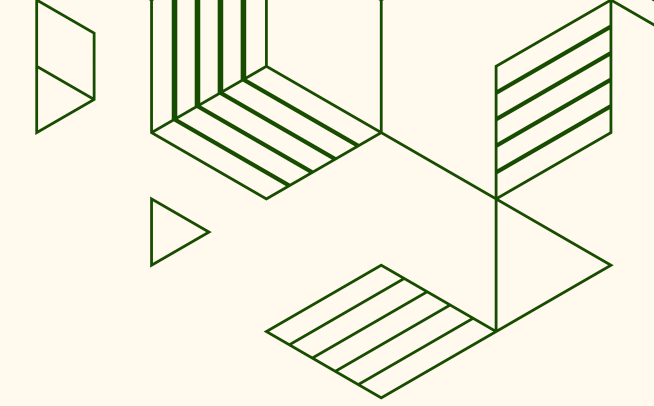


Workforce Innovation Projects



Each MP Coalition member organization is actively working on their own Innovation Projects to help fortify workforce capacity in the Mountain Plains regions.

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The top 3 deliverables from participating organizations are:

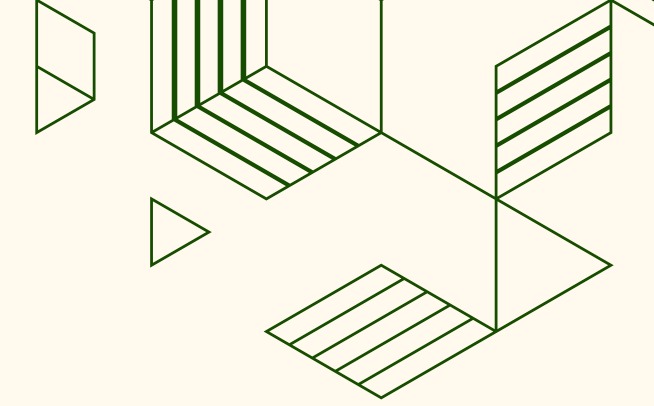
Staff Capacity

**Team Building
Documentation**

Leadership Training



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The top 3 deliverables from participating organizations are:

Staff Capacity

**Team Building
Documentation**

Leadership Training

Across the region **620 individuals** have been impacted by workforce innovation projects, with individuals receiving **1,925 hours of training and peer to peer learning.**

MONTANA

- **Housing Strategy as a Wrap around service for Workforce Development**
- **Succession Planning**
- **Trauma Informed Professional Development Resources**
- **Building community capacity**

NORTH DAKOTA

- **Daycare as Workforce Wrap Around Service**
- **Oyate Studio**
- **HR Professional Development Resources for Remote Work**

SOUTH DAKOTA

- **Onboarding Toolkit**

WYOMING

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Eagle Butte, SD
Akiptan, Inc.
Skya Ducheneaux
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Wyoming

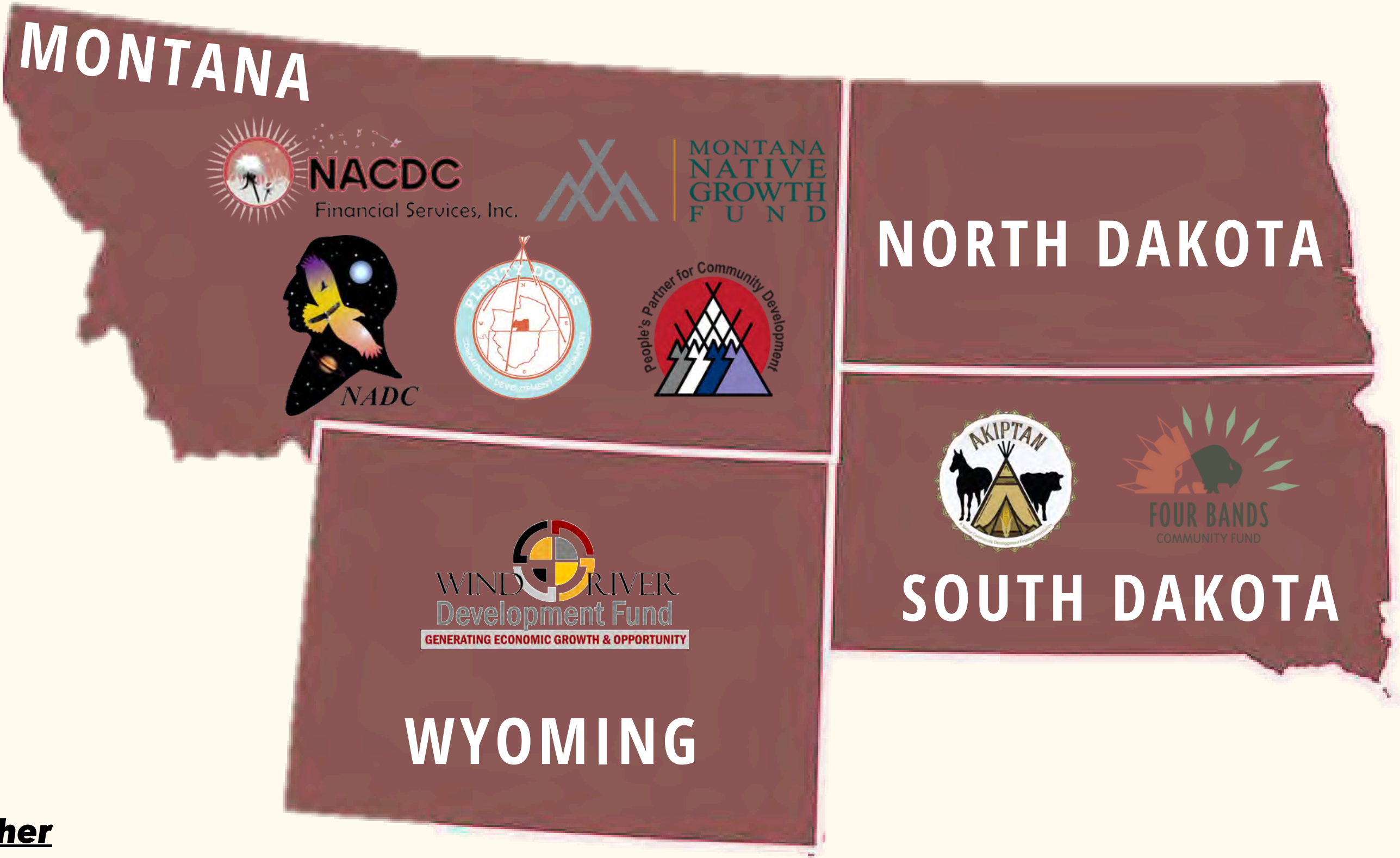
Fort Washakie, WY
Wind River Development Fund
Paul Huberty
paul@wrdf.org

Other

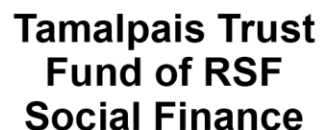
Mountain Plains CDC
Eric Swack
eric@mountainplainscdc.org



Mountain Plains Regional Native CDFI Coalition



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OWEESTA'S 10TH ANNUAL
Native CDFI Capital Access Convening

Waikoloa, Hawaii

May 13-15, 2025