

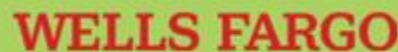


# Building a Better Native CDFI Salesforce Experience Together

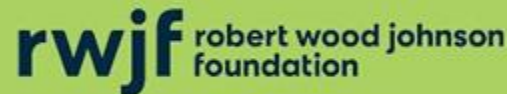
Capital Access 2026



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# Presenters



**Andrea Mader**

*Strategy Director*  
Sweet Grass Consulting



**Megan Andrews-Sharer**

*Associate Implementation Director*  
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**Mary Sienko**

*Implementation Director*  
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**Sayre Savage**

*Director of Programs*  
Oweesta Corporation



**Jackie Carter**

*Associate Research Director*  
Sweet Grass Consulting

# About Sweet Grass



## Data doing good.

Sweet Grass provides professional consulting services around evaluation, research, and strategy that promote and support asset-based initiatives in economically burdened communities.

- Feasibility and market studies
- Impact measurement, evaluation reporting, and graphic design
- Database builds and implementation support
- Strategic planning



*Challenges to sustainability:*

## **Time and money**

- Salesforce requires ongoing financial investment, not only for subscriptions and integrations, but also for consulting fees and staff time.
- Conducting evaluations and using Salesforce take dedicated staff time that often competes with other operational priorities.

*Challenges to sustainability:*

## **Specialized knowledge and accountability**

- Just like a loan officer requires in-depth underwriting and processing knowledge, administrating a Salesforce database requires consistent and ongoing specialized knowledge.
- Sustainable data systems require an organizational culture where both leadership and staff understand the purpose and benefit of the work, not simply viewing it as a compliance requirement.

An aerial photograph of a vast, flat, brown landscape, likely a prairie or steppe. The terrain is mostly flat with some low, rolling hills. In the lower-left quadrant, there is a small, dark pond. Scattered across the middle ground are numerous dark spots, which appear to be a herd of cattle grazing. The sky is filled with soft, white clouds, and the overall lighting is natural, suggesting a bright day.

AKIPTAN

EAGLE BUTTE, SD

An aerial photograph of a residential neighborhood in Browning, Montana. The houses are mostly single-story with tan or brown siding and dark roofs. The streets are paved, and there are some parked cars. In the background, there are rolling hills and mountains under a clear sky. The text is overlaid on the image in a large, white, sans-serif font.

NACDC

Financial Services

BROWNING, MT

# Roundtable activity





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**Thank you!**



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June 2-4, 2026



11<sup>th</sup> Annual Oweesta Native CDFI Capital Access Convening



Bangor, Maine