



11<sup>th</sup> Oweesta Native CDFI  
 Capital Access Convening  
 June 2-4, 2026 | Bangor, Maine



Investing in Relationships: Stronger Together



# Designing Data Collection for Growth

Akiptan & Sweet Grass Consulting



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# Presenters



**Megan Andrews-Sharer**  
*Associate Implementation Director*  
Sweet Grass Consulting



**Skya Ducheneaux**  
*Executive Director*  
Akiptan Inc.

# About Akiptan

Akiptan's mission is to transform Native agriculture and food economies by delivering creative capital, leading paradigm changes, and enhancing producer prosperity across Indian Country.



# 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



# Akiptan's implementation journey

## DATA ENTRY: PHASE 1

**2021**

- ✓ Implement Salesforce
- ✓ Focus on lending and programs

**2022**

- ✓ Implement Formstack

**2024**

- ✓ Revamp/ add key performance indicators

## DATA ENTRY: PHASE 2

**Spring  
2025**

- ✓ Add timesheets
- ✓ Integrate staff time with grant tracking
- ✓ Integrate grants with existing programs

**Fall  
2025**

- ✓ Complete a strategic plan with focus on KPI tracking in Salesforce
- ✓ Use Salesforce more heavily
- ✓ Use tools like tasks and calendar visuals
- ✓ Build personal dashboards for each staff member.

2026

# Strategic planning & Salesforce

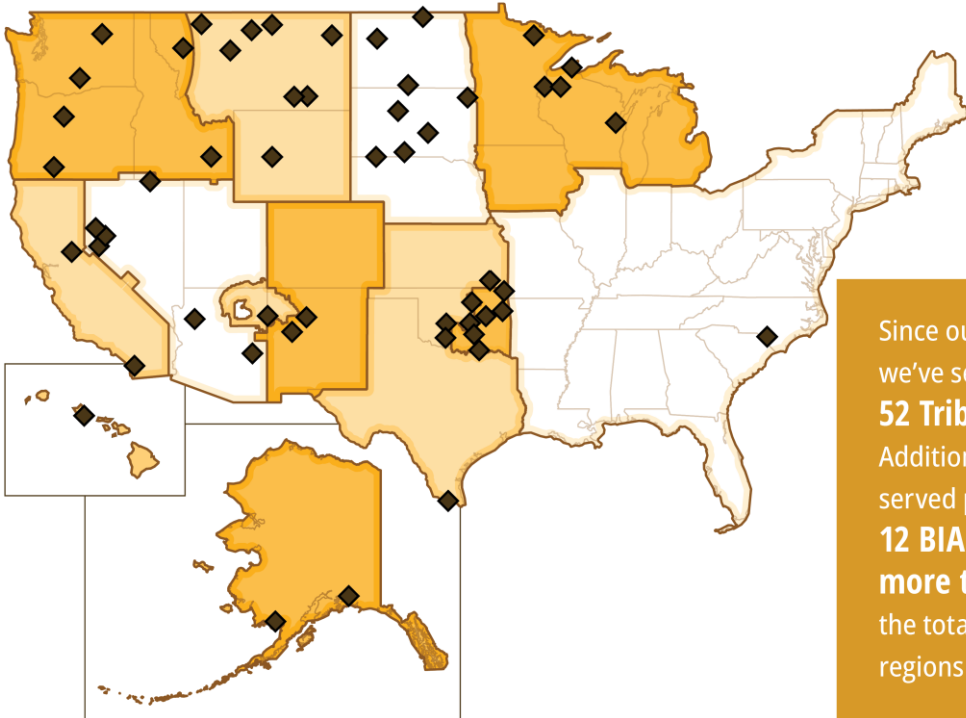
With goals from the strategic plan in mind, we further configured Salesforce:

- ✓ Added fields to current objects
- ✓ Integrated Zoom to collect outreach data
- ✓ Started working on a digital loan app
- ✓ Boosted dashboard use
- ✓ Created dashboards that visually show our progress toward board-approved goals.
- ✓ Imported historic loan data

# Akiptan's data today

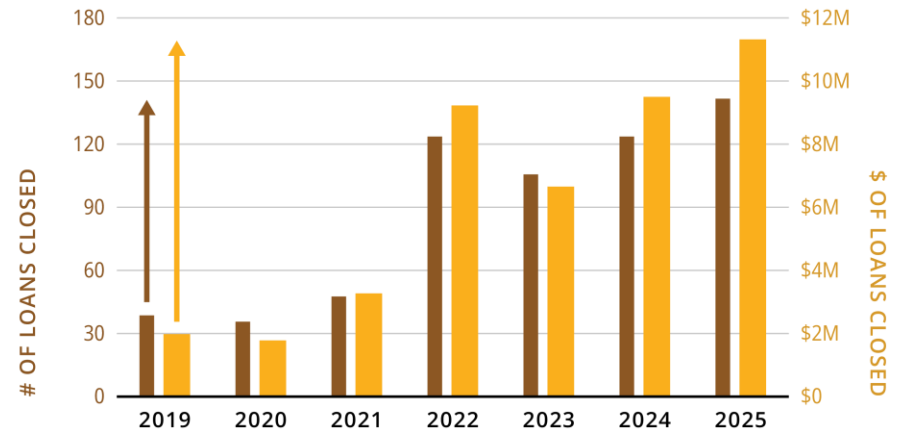
Year to year, this was an average annual growth rate of **34%** in the number of loans closed,

and a **49%** growth rate in dollars closed.



Since our inception, we've served a total of **52 Tribal Nations**. Additionally, we've served producers in **all 12 BIA regions** and **more than doubled** the total number of regions served.

Number and amount of loans closed by lending year



Since we started tracking technical assistance (TA) hours in 2022, we've provided a total of **3,052 hours**.

During that time, our average loan-closed growth rate was



and our growth rate in total TA hours was



# How do you decide what to implement?



# Salesforce dashboards

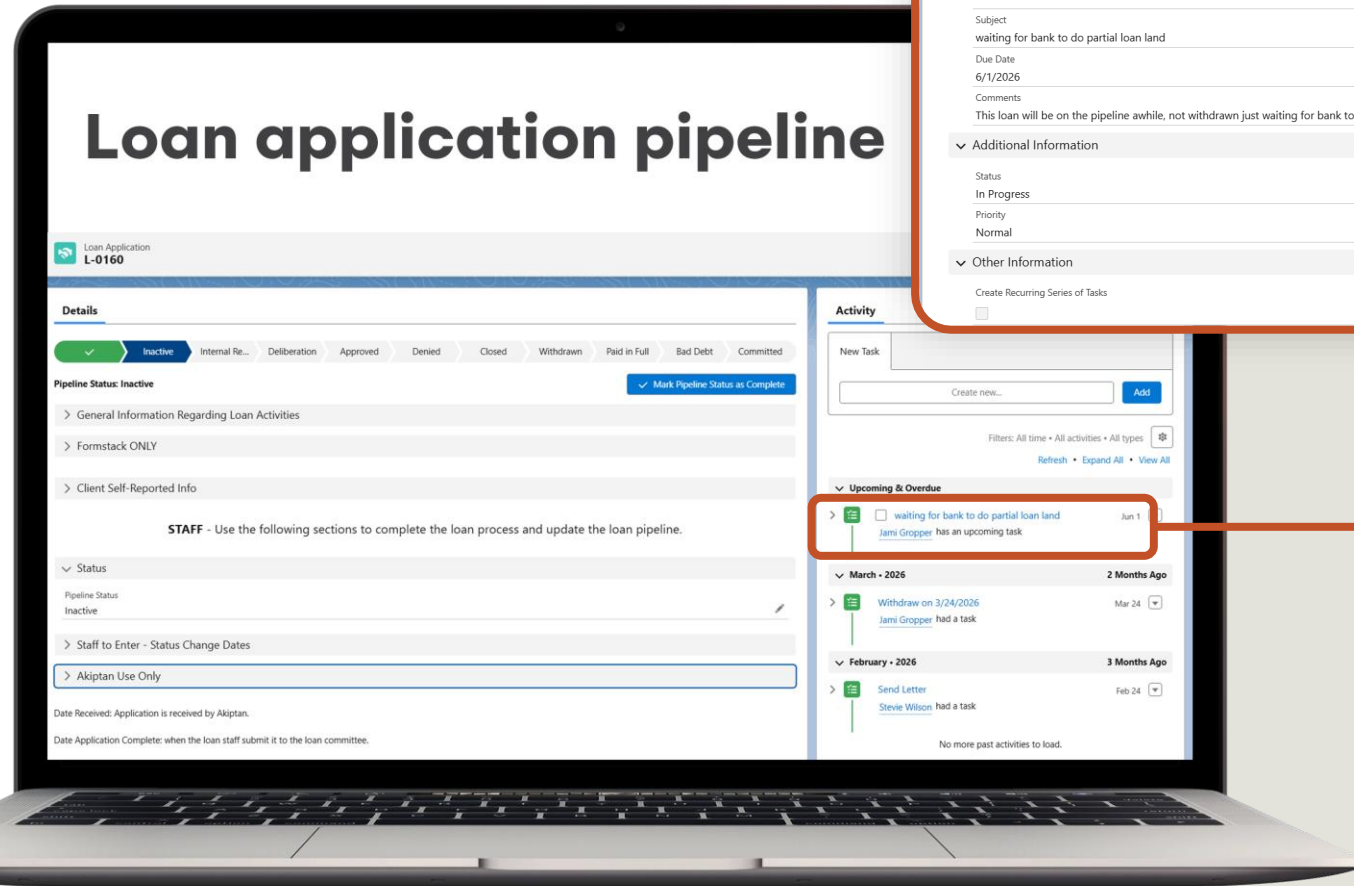
## Loan department pipeline report

Report: Loan Apps with /without Tasks  
New Loan Apps with /without Tasks Report

Enable Field Editing 🔍 Add Chart 📉 Edit 📄

Loan Application Name	Jan	Date Application Complete	Pipeline Status	Loan Officer	Assigned To: Full Name	Subject	Date	Tribal Nation	BIA Region
L-0130 (1)		-	Application Development	Jami Gropper	-	-	-	Cheyenne River Sioux Tribe	Great Plains
L-0134 (1)		1/12/2026	Application Development	Whitney O'Rourke-Risse	-	-	-	Ogala Sioux Tribe	Great Plains
L-0143 (1)		-	Application Development	Garrett Gollher	-	-	-	Shoshone Bannock Tribe	Northwest
L-0160 (1)		-	Inactive	Jami Gropper	Jami Gropper	waiting for bank to do partial loan land	6/1/2026	-	Southwest
L-0163 (1)		10/22/2025	Application Development	Kole Fitzpatrick	-	-	-	Black Feet Tribe	Rocky Mountain
L-0177 (1)		2/3/2026	Application Development	Kole Fitzpatrick	-	-	-	Chippewa Cree	Rocky Mountain
L-0179 (1)		7/25/2025	Internal Review	Whitney O'Rourke-Risse	-	-	-	Ogala Sioux Tribe	Southern Plains
L-0180 (1)		11/19/2025	Application Development	Whitney O'Rourke-Risse	-	-	-	Lumbee Tribe	Eastern
L-0186 (1)		12/30/2025	Deliberation	Garrett Gollher	-	-	-	Black Feet Tribe	Rocky Mountain
L-0189 (1)		5/18/2025	Approved	Garrett Gollher	-	-	-	Yering Paute Tribe	Pacific
L-0324 (1)		2/17/2026	Application Development	Phannette Gray	-	-	-	-	Southern Plains
L-0357 (1)		10/8/2025	Application Development	Phannette Gray	-	-	-	Muscogee Creek Nation	Eastern Oklahoma
L-0366 (1)		-	Inactive	Kole Fitzpatrick	-	-	-	Little Shell Tribe of Chippewa Indians	Rocky Mountain
L-0377 (1)		5/15/2024	Approved	Garrett Gollher	-	-	-	Northern Cheyenne	Rocky Mountain
L-0420 (1)		4/24/2026	Application Development	Sarah Frelsi	-	-	-	Ogala Sioux Tribe	Great Plains
L-0510 (1)		3/20/2026	Application Development	Phannette Gray	-	-	-	Keeweenaw Bay Indian Community - Lake Superior Band of Chippewa Indians	Great Lakes
L-0511 (1)		2/26/2026	Inactive	Whitney O'Rourke-Risse	-	-	-	Ogala Sioux Tribe	Great Plains
L-0525 (1)		4/2/2026	Inactive	Kole Fitzpatrick	-	-	-	Chippewa Cree	Rocky Mountain
L-0566 (1)		4/2/2026	Application Development	Phannette Gray	-	-	-	Lipan Apache Band of Texas	Southern Plains
L-0613 (1)		3/18/2026	Application Development	Garrett Gollher	-	-	-	Salish-Flathead Nation	Rocky Mountain
L-0614 (1)		-	Inactive	Garrett Gollher	Garrett Gollher	Withdraw on 5/14/2026	5/14/2026	-	Great Plains
L-0630 (1)		3/20/2026	Application Development	Sarah Frelsi	-	-	-	Black Feet Tribe	Rocky Mountain
L-0654 (1)		4/28/2026	Application Development	Melissa Swan	-	-	-	Cheyenne River Sioux Tribe	Great Plains
L-0673 (1)		-	Application Development	Whitney O'Rourke-Risse	-	-	-	Cheyenne River Sioux Tribe	Great Plains
L-0677 (1)		3/27/2026	Application Development	Garrett Gollher	-	-	-	Crow Nation	Rocky Mountain

# Salesforce dashboards



Task **waiting for bank to do partial loan land** Mark Complete Edit Comments Change Date Create Follow-Up Task

Name Related To  
[L-0160](#)

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**Details** Related

**Task Information**

Assigned To Related To  
[Jami Gropper](#) L-0160

CC this staff member: Name

Subject  
waiting for bank to do partial loan land

Due Date  
6/1/2026

Comments  
This loan will be on the pipeline awhile, not withdrawn just waiting for bank to do other part of land loan and purchase agreement.

**Additional Information**

Status  
In Progress

Priority  
Normal

**Other Information**

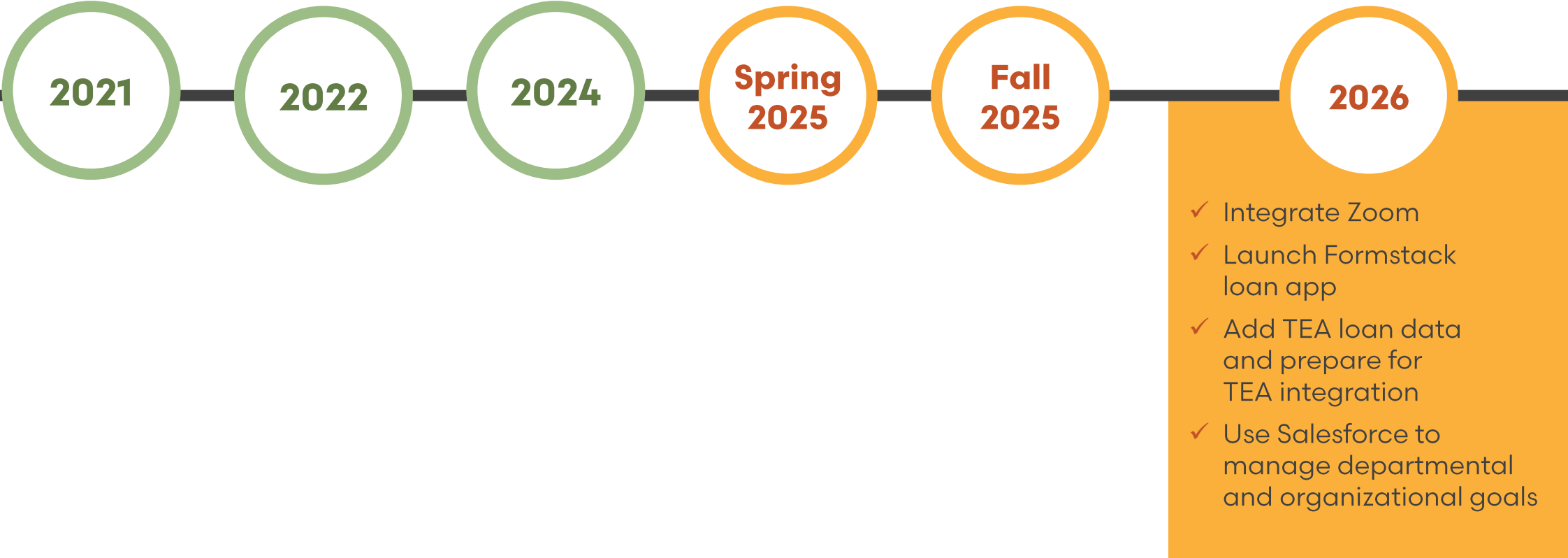
Create Recurring Series of Tasks



# Akiptan's implementation journey

## DATA ENTRY: PHASE 1

## DATA ENTRY: PHASE 2



# Feedback from staff



**“I was skeptical about integrating our timesheets into Salesforce since they are so data-heavy. However, after the transition, the time saved by pulling more detailed reporting is amazing.”**

—Stephanie Janis, Finance Manager



**“I was very skeptical on the loan pipeline and how that would all play out, but now I really like it. It's clean, tracks really good stats, and it's better than an edit-able excel!”**

—Melissa Curley, Senior Loan Officer



**“Overall, I was eager to see our initiatives and programs moving in salesforce! As with any new platform transition, I was a little uneasy about adapting but in true Sweet Grass form, their team did an incredible job of setting our initiatives up and supporting our team when we faced challenges”**

—Dawn E. LeBeau,  
Senior Program Officer

# Akiptan's data today



# Strategic plan



# Salesforce dashboards

## Homepage with quick links to custom dashboards

Dashboard: **Homepage Dashboard**  
Last refreshed 6 days ago. Refresh this dashboard to see the latest data.  
As of May 6, 2026, 1:29 PM. Viewing as Sweet Grass

**AKIPTAN**  
A Native Community. An Financial Institution.

### Intakes Completed - year over year

Year	Sum of Head of Household
CY2021	6
CY2022	50
CY2023	49
CY2024	53
CY2025	49
CY2026	27

### All Loan Applications (Sum of Approved Loan Amount)

Year	Sum of Approved Loan Amount
CY2021	\$90k
CY2024	\$0
CY2025	\$3.7M
CY2026	\$4.8M

### All Loan Applications (Record Count)

Year	Record Count
CY2021	2
CY2024	1
CY2025	42
CY2026	47

**Manager Dashboards**  
Dawn  
Melissa  
Stephanie  
Skya

**Admin SOP**

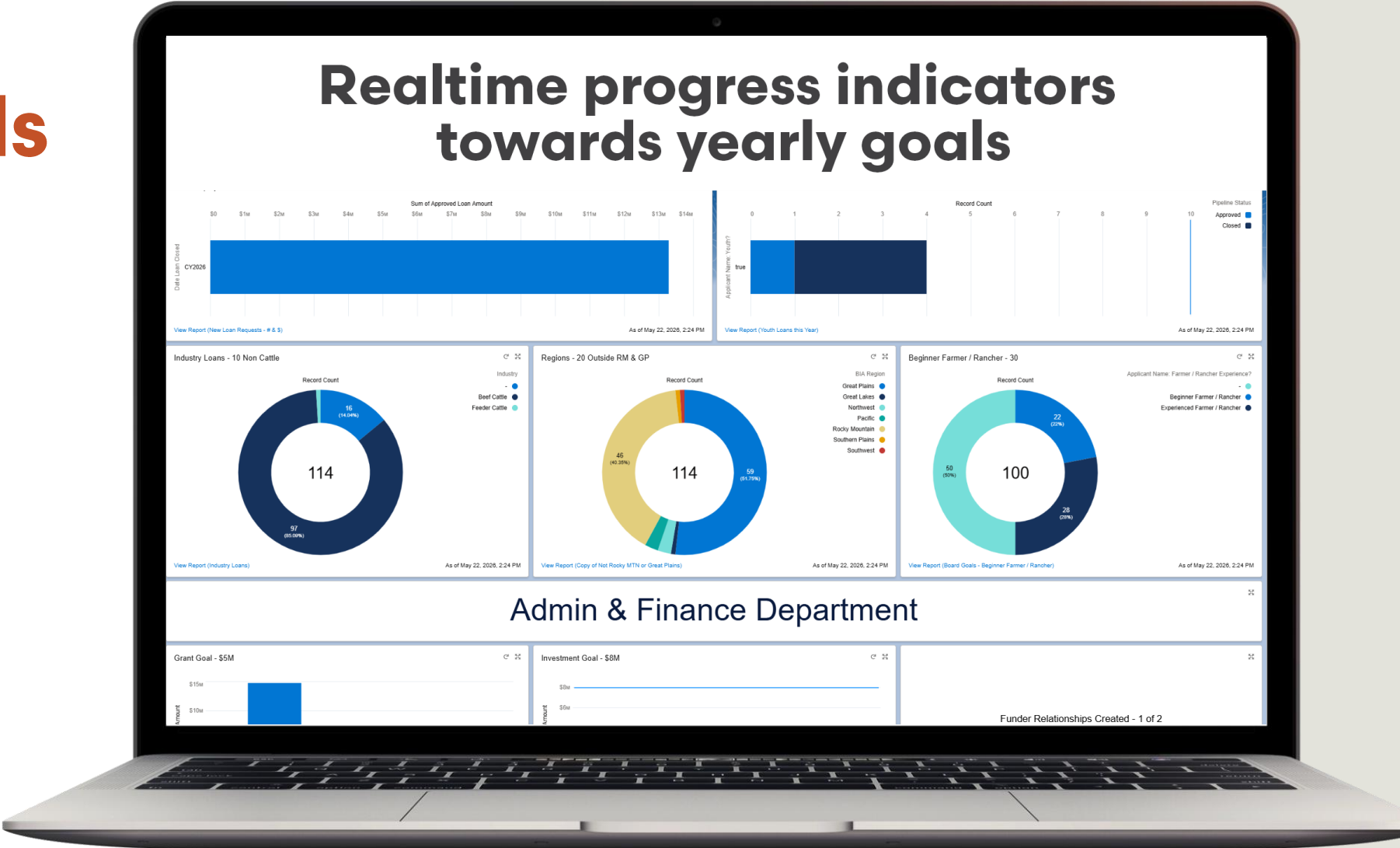
**Program Supplement Report**  
[View Report](#)

**Deliverables Due**  
[View List](#)

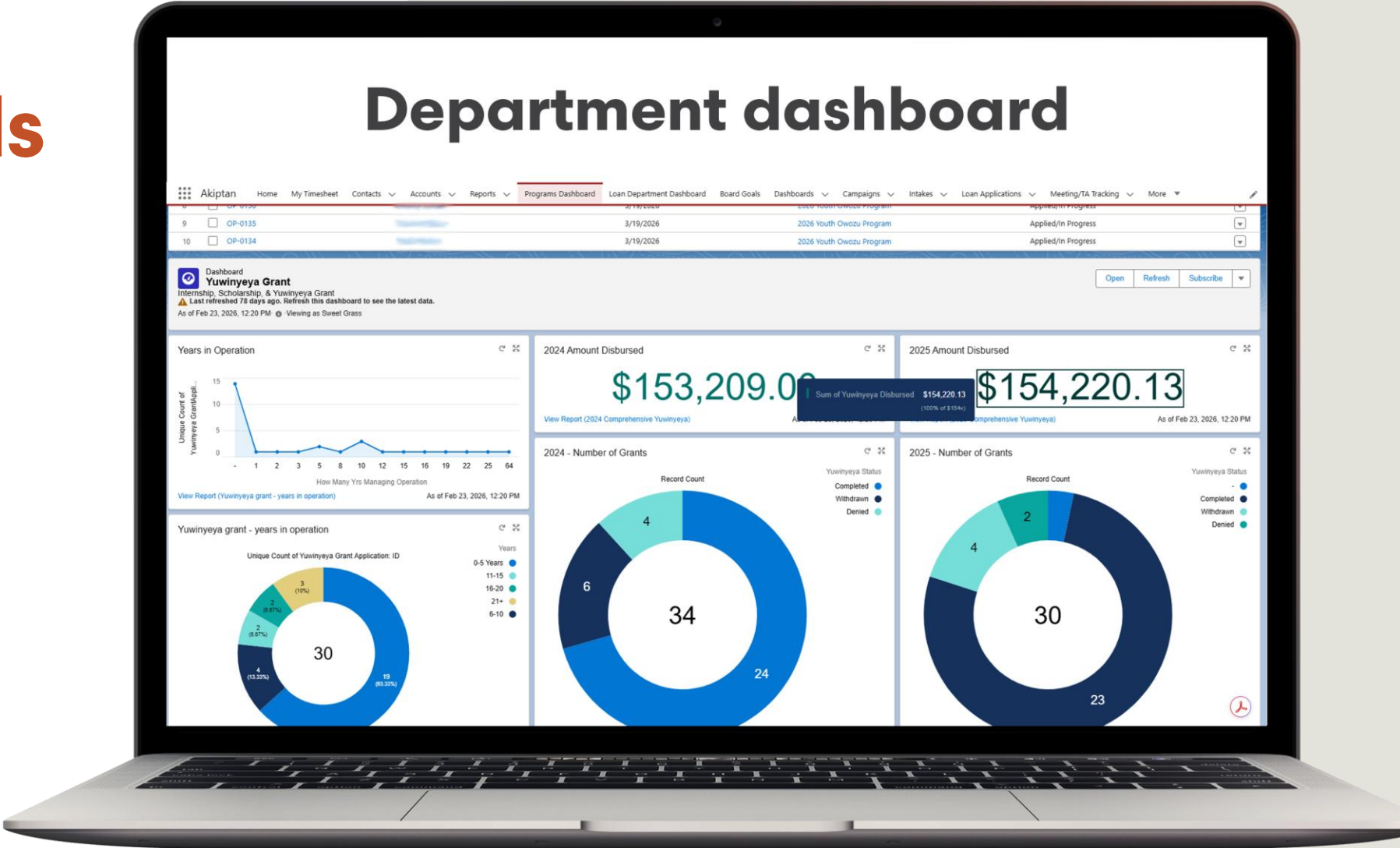
**New! working Standard Operating Procedure for Salesforce:**  
[https://docs.google.com/document/d/1pTQNAz1rL2TbprzZAwDo\\_6FXU6LDQsHg18wknivQU/edit?usp=sharing](https://docs.google.com/document/d/1pTQNAz1rL2TbprzZAwDo_6FXU6LDQsHg18wknivQU/edit?usp=sharing)

(\* This document combines your AMI SOP, all-staff Timesheets SOP, and new SF additions for 2026. Staff are welcome to comment where they'd like clarification / additional instruction. Please note it is a work in progress. Thanks! Megan/ Sweet Grass).

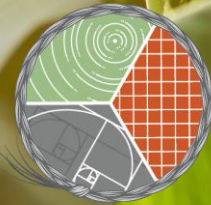
# Salesforce dashboards



# Salesforce dashboards



**Thank you!**



**SWEET GRASS**  
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