



SWEET GRASS
CONSULTING

Data implementation for Native CDFIs

Examples of our work with Native community development financial institutions building customized impact measurement systems that capture the whole client journey, from intake through training, technical assistance, loan applications, and ongoing support



Building Akiptan's Impact Measurement System

AKIPTAN

Sweet Grass partnered with Akiptan to develop a customized impact measurement system in Salesforce, building on earlier collaboration in impact reporting. The system tracks the full client journey—from intake through training, technical assistance, loan applications, and follow-up support. In addition to designing the system and structuring the data, Sweet Grass trained staff and created tailored dashboards to monitor client outcomes and internal performance.

Our ongoing work with Akiptan includes technical assistance, staff training, and continued system enhancements. Recent additions have included staff time tracking, grant and funder management, and loan pipeline tracking.

“Sweet Grass is dedicated to getting it right. Customer satisfaction and producing a quality Salesforce build that will improve efficiency and impact is at the core of their services. I love working with Sweet Grass for any project. They easily “get” what I’m trying to convey and make my ideas 10x better! They know how to listen to understand your goals as well as contribute valuable ideas you may not have thought of yet. They are dramatically increasing our ability to track key performance indications which will lead to increased funding as well as increased programming and success for producers.

They are also operationalizing internal systems to help us with our efficacy.”

—Akiptan

Strengthening Lending Systems with Lakota Funds

LAKOTA FUNDS

Since 2015, Sweet Grass has collaborated with Lakota Funds to plan, customize, and implement a Salesforce CRM for tracking loan applications, technical assistance, training, events, and other impact data. In 2024, we helped enhance and optimize their Salesforce instance, specifically tailoring it to bolster their lending and development service activities as well as reporting capabilities. Ongoing efforts include comprehensive training and technical assistance for both new and existing staff, report construction, development of additional data collection tools, and diligent system administration. Sweet Grass continues to provide ongoing technical assistance and training for Lakota Funds staff.

Designing Spruce Root's Impact Tracking CRM

SPRUCE ROOT

Sweet Grass is designing and building a Salesforce CRM to support Spruce Root's impact tracking, client services, and internal operations. The system allows for seamless data migration

from Outcome Tracker and includes customized reporting, training, and integration with additional tools. The system has been designed with plenty of room to grow as Spruce Root determines additional programming and impact tracking for their system. Sweet Grass continues to collaborate and provide ongoing technical assistance to help Spruce Root maintain, expand, and optimize their Salesforce CRM.

“Due to our work with Sweet Grass we have been able to offer portals to our clients. This creates a safe place for applications to be filled out. They like to be able to review past loans and to review the details that come with it. We enjoy the line of communication with Sweet Grass. Being that it is a new program for us to use, it has been so easy to approach the staff and ask any questions.”

—Westwater Financial

Salesforce Solutions for the Mountain | Plains Native CDFI Coalition

MOUNTAIN PLANS COMMUNITY DEVELOPMENT CORPORATION

Sweet Grass is supporting the Mountain | Plains Native CDFI Coalition, which includes NACDC Financial Services, Four Bands Community Fund, Montana Native Growth Fund, Plenty Doors Community Development Corporation, Native American Development Corporation, People's Partner for Community Development, Akiptan, and Wind River Development Fund, in customizing and implementing Salesforce for lending and development services. Each system includes custom forms, data migration, loan software integration, grant and donor tracking, and staff training. These dynamic databases are designed to evolve with each Native CDFI, supporting new programs, integrations, and expanded reporting needs.

“The best part of working with Sweet Grass is that they are very responsive, attentive but not buggy, clear communication and explanation of capability, set clear expectations and met them, quite timely. There was very clear communication regarding expectations and timelines. They

followed through with everything they said they would do. Our work with them has resulted in our ability to report metrics better, easier to track services rendered, and streamlined processes.”

—Mountain Plains CDC

Strengthening Data Systems for Nimiipuu Fund

NIMIIPUU COMMUNITY DEVELOPMENT FUND

Sweet Grass worked with Nimiipuu Community Development Fund to build a customized impact measurement system in Salesforce to house their loan applications, development services data, and program management. This process included migrating data from their previous system, Outcome Tracker, to Salesforce. The new system allows them to track their entire client process as well as the impacts they have on their clients over time. Sweet Grass provided guidance and recommendations for additional integrations with other tools and software Nimiipuu utilizes to ensure their processes are as streamlined as possible. Sweet Grass continues to support Nimiipuu Fund with technical assistance, training, and reporting needs.

“Migrating all of our data to a central location to ease on communication and costs for organization. The upfront cost is an investment, understanding that cost savings in one system along with staff time or licenses for systems to ‘talk’ to each other.”

—Nimiipuu Community Development Fund

Custom Nonprofit Cloud for Nixyaawii

NIXYAAWII COMMUNITY FINANCIAL SERVICES

Sweet Grass assisted Nixyaawii Community Financial Services to migrate their data from Outcome Tracker to Salesforce Nonprofit Cloud. The new system includes custom public forms, tailored dashboards, and workflow automation to streamline business lending and technical assistance processes. Staff continue to receive detailed training and stand operating procedures (SOP) documentation.

Building Scalable Data Solutions with Mazaska

MAZASKA OWECASCO OTIPI FINANCIAL

Mazaska partnered with Sweet Grass to develop an updated impact measurement plan and build a Salesforce system tailored to their reporting needs. The project included database customization, impact logic design, and staff training for long-term use and scalability.

“Working collaboratively, FACC and Sweet Grass staff have persisted to find pathways and workarounds to now efficiently utilize OTIS/ Outcome Tracker to collect, manage, analyze and report out on FACC client impacts.”

—First American Capital Corporation

Supporting Impact Measurement for Native Women Lead

NATIVE WOMEN LEAD

In collaboration with New Mexico Community Capital, Sweet Grass created a Salesforce-based impact measurement system to track Native Women Lead's flagship program, The Future is Indigenous Women. This platform monitors participant journeys through mentorship, business development, and capital access, supporting Native women entrepreneurs. This engagement included additional personalized technical assistance for Native Women Lead's client tracking system, supporting utilization, training, and capacity building in Salesforce to align data practices with organizational goals.

“I love how the data that is captured and the ability to share it with our market. Sweet Grass has been very helpful and professional. They were able to help us generate our graphs for demographics for our clients. As well as what interest the market had, what stage they were with their personal finances, what the need is, and our impacts.”

—Nimiipuu Community Development Fund

Salesforce CRM & Technical Support for New Mexico Community Capital

NEW MEXICO COMMUNITY CAPITAL

In partnership with Native Women Lead, Sweet Grass developed a Salesforce CRM to track New Mexico Community Capital's program, The Future is Indigenous Women. The system monitors participant progress, provides reporting tools, and supports mentorship and business growth services. Additionally, Sweet Grass delivered ongoing technical assistance to New Mexico Community Capital, helping refine client tracking, build reports, and train staff.

Improved Impact Measurement with Formstack for Hopi Credit Association

HOPi CREDIT ASSOCIATION

Sweet Grass is developing a database system using Formstack for Hopi Credit Association (HCA) to support impact measurement and client tracking. The project includes design, implementation, and technical assistance to build internal evaluation capacity. This project enabled HCA to offer electronic, online versions of their data collection tools and loan applications—making it easier for clients to submit information and for HCA to collect and manage data efficiently.

Opportunity Through Impacts System (OTIS): Building Data Capacity for Native CDFI Networks

ORGANIZATIONS INCLUDE:

- Cedar Growth (formerly FNCF)
- Chehalis Tribal Loan Fund
- Council for Native Hawaiian Advancement
- First American Capital Corporation
- First Nations Community Financial
- Hawaii Community Lending and Hawaiian Community Assets
- Hawaiian Lending & Investments

- Hmong Wisconsin Chamber of Commerce
- Leech Lake Financial Services
- Mni Sota Fund (formerly Bii Gii Wiin)
- Montana Native Growth
- Mvskoke
- NACDC Financial Services
- Native Community Finance
- Native Partnership for Housing
- NDN Collective
- Nimiiipuu Community Development Fund
- Nixyaawii Community Financial Services
- Northwest Native Development Fund
- Oweesta Corporation
- Spruce Root
- Taala Fund
- Tatanka Funds
- Tiwa Lending Services
- Westwater Financial
- Wisconsin Native Loan Fund
- Woodland Financial Partners
(formerly NJCP)

Sweet Grass provided customization, builds, and ongoing technical assistance to a network of Native CDFIs. Services included database utilization training, system troubleshooting, customization guidance, and capacity-building support. Each engagement ensured that client organizations could independently manage and optimize their data systems. Sweet Grass also assisted a number of network Native CDFIs with impact reports and infographics from the data collected and stored in their system

“Sweet Grass streamlined our processes and configured our database to fit our needs. Their responsiveness and support was the best part of working with them. Whenever we have a question or run into an issue, it has been very easy to communicate and get answers.”

—Homestead Community Development Corporation/
Hawaiian Lending & Investments



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