



Native CDFI Practitioner Certification Program

Strengthening Native CDFI Institutions

Oweesta Corporation offers a Native CDFI Practitioner Certification Program uniquely adapted to the cultural context of Native CDFIs. This training provides an overview of all areas of Native CDFI operations, including basic financial management, lending, development services, impact tracking, marketing, capitalization, and more. The Certification Program offers four tracks (with additional options for Native CDFI Board members) to specialize in Lending, Executive Management, Development Services, and/or Financial Management; each of which include a series of trainings.

This training program is unmatched. It was developed following extensive key information interviews with Native CDFI practitioners, consultants, and Oweesta partners and teaches on activities specific to Native CDFI practitioners, such as performing collateral perfection on Indian trust land or leveraging resources available only to Tribal nations.



Certification and Course Outline



To receive Certification, practitioners must complete the fundamentals week training, plus the required courses within the specialization track. Oweesta seeks to provide these specializations over a two-year period, so that ideally, a Native CDFI practitioner could get certified over that period. Native CDFI Board members are encouraged to take the fundamentals week, plus the financial statement analysis and fraud prevention course.



| **Executive Specialization Track**

- Fundamentals Week
- Effective Fundraising and Capitalization
- Executive Training
- Financial Management I, II and III



| **Financial Management Specialization Track**

- Fundamentals Week
- Financial Management I
 - Accounting Principles, Nonprofit Financial Statements, Fund Accounting
- Financial Management II
 - Asset/Liability Management, Financial Statement Analysis & Reporting, Budgeting
- Financial Management III
 - Payroll, Policies, Internal Controls, Cash Management, Grant Management, Use of Federal Funds, Auditing



| **Lending Specialization Track**

- Fundamentals Week
- Underwriting – Consumer and Business
- Loan Portfolio Management
- Underwriting – Housing (not required for Lending Certification)



| **Development Services Specialization Track**

- Fundamentals Week
- Three of the following *Building Native Communities (BNC)* trainings:
 - BNC Financial Skills (Adult, Youth and Elder)
 - BNC Coaching (Coaching 1.0, Coaching 2.0, Coaching for Credit Building)