

COUNCIL OF THE CHEROKEE NATION  
EXECUTIVE & FINANCE COMMITTEE REPORT

**Group:** Financial Resources

**Month/Year of Report:** March 2019

**Treasurer:** Lacey Horn

**Phone:** 207-3902

**E-mail:** [lacey-horn@cherokee.org](mailto:lacey-horn@cherokee.org)

- I. Budget Highlights – through February
  - a.) Financial Resources – 36% spent
  - b.) Treasurer – 25% spent
  - c.) IIM – 41% spent
  - d.) Acquisition Management – 39% spent
  - e.) Records Management – 26% spent
  - f.) Support Services – 40% spent
  - g.) Grant Services – 48%
  - h.) Fleet Management – 28%
  - i.) Employee Performance Incentive – 47% spent
  - j.) Grant Development for CNB – 0% spent
  - k.) DOJ CTAS 2017 – 48%
- II. Program Highlights
  - a.) Departmental Goals
    - 1. Complete FY18 Audit – 100% Complete
    - 2. Obtain Unmodified Audit Opinion – 100% complete
    - 3. No Material Weaknesses on Single Audit – 0% complete
    - 4. Obtain GFOA Award for FY17 CAFR – 100% complete
    - 5. Reports completed & submitted for March 2019 – 99% completion
  - b.) Compliance
    - 1. Line of Credit – no outstanding borrowings
  - c.) Accomplishments
    - 1. Staff attended multiple webinars, trainings and conferences for grants management
    - 2. FY18 Audit completed
  - d.) Upcoming Events
    - 1. Various grant trainings scheduled for April 2019
    - 2. Staff will attend the 2019 Tribal Self Governance Conference

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	A	B	C
1	<b>Cherokee Nation Acquisition Management Year-To- Date Bid Report Over \$5,000 Transactions October 1, 2018 through September 30, 2019</b>		<b>% of sub-total - TERO vendor submitted Bid</b>
2	Award to TERO Vendor	\$ 5,272,054.53	97.95%
3	Award to non-TERO Vendor	\$ 110,110.00	2.05%
4	<b>Sub-total bids with a TERO vendor participating</b>	<b>\$ 5,382,164.53</b>	<b>100.0%</b>
5	Bid - no bids submitted by TERO Vendors	\$ 1,529,731.08	
6			
7	October 1, 2018 through February 28, 2019		

**Executive & Finance Committee  
Career Services  
March Monthly Report  
Diane Kelley, Executive Director**

The **Day Training Program** had 18 participants enter unsubsidized employment. Five were with Cherokee Nation, six were externally, and seven were with CNB/CNI. Sixteen participants attained the Food Handler Certification.



Marsha White, **DEI Program** Manager and Career Services staff attended the Manufacturing Externship at American Castings in the Mid America Industrial Park in Pryor. We toured the facility, learned about the operations of the plant and visited with Human Resources about partnerships and job openings.

Jordan Holderbee, Travis Gulley, Marsha White, Brandy Whaler

Lindsey Williams, Brenda Fitzgerald, Ryan Reed, Diane Kelley, Marsha White, Joshua Drywater at the **Trade and Economic Transition (TET)** Conference. Ryan is a client on the **DEI** Grant and shared his inspirational story with attendees at the conference.



**DEI** has contracted with the American Dream and Employment Network to serve ticket holders with the Social Security Administration. **DEI** Staff will be taking the required certification class in June.

The **DEI** Program will be partnering with Pelco Manufacturing for a Welding Apprenticeship. We hope to have a potential client that will be eligible for the apprenticeship program.

Marsha White, **DEI** Program Manager, attended the National Association of Workforce Boards in Washington DC. The conference focused on workforce strategies with education and economic development within local communities to ensure that state and local workforce development and job training programs meet the needs of employers.



The **DEI** Program was able to provide a golf cart (renting during his time on Work Experience) to a client who has limited mobility functioning. Danny Adair is on the work experience program at the Heritage Center. This cart allows him to move around the grounds and the village while he is at the center.

Danny Adair, **DEI** Client at the Heritage Center



The **Trade and Economic Transition** program officially has professional staff hired to work in the four operational hubs of Tulsa, Pryor, Tahlequah, and Sallisaw. The Trade and Economic Transition team held a National Dislocated Worker Grant training program from February 27<sup>th</sup>-March 1<sup>st</sup>. All new staff and selected seasoned Career Specialists were invited to the training to introduce an overview of the grant and the standard operating procedures for Career Services. The veteran staff that attended the training provided essential training that was instrumental in creating the team work that is necessary in Career Services with overlapping services and one-stop abilities to ensure applicants receive all services available to them. Topics discussed were best practices on interviewing and operating a dislocated worker grant, the specifics of federal applications, and business and client outreach. Multiple presenters and partners of the Cherokee Nation provided instruction and information on their companies, including Scott Fry, Director of Workforce Development for Mid-America Industrial Park, and Jeanine Coleman, Director of Human Resources for Pelco Structural. Round table discussions sealed needed network connections for the new participants and strengthened the partnerships that Cherokee Nation has with businesses in our jurisdictional boundaries.

The **Trade and Economic Transition** team's next goal is providing outreach to individuals who may qualify for our grant but are unaware of our services. Since the grant operates outside of the standard Cherokee Nation jurisdictional area and aids both Native Americans and Non-Native individuals, expansive outreach will begin to include the entirety of Wagoner, Muskogee, Ottawa, and McIntosh counties. Additionally, in an attempt to reach individuals that qualify for our services but have trouble with transportation to the four mentioned hubs, the Trade and Economic Transition program is currently creating a way to office in, or be available to, different areas within the Cherokee Nation districts where Career Services staff are not currently located. When the map is completed and scheduling of different offices are confirmed, the information will be disseminated to increase Career Services and the Trade and Economic Transition grant's ability to reach all our citizens with our services.

The **Coming Home Reentry** staff attended various events and trainings all aimed at increasing the knowledge and services of the program. Staff attended, and received a completion certificate, on Diversity training presented by the State of Oklahoma Workforce. Reentry staff also presented program details to the 4 County Partner Meeting at Indian Capital Technology Center in Muskogee. Reentry staff took part in a daylong Workforce event, which took place at a partnering business, focusing on workforce development and internships. Reentry staff also took part in Cherokee Nation Legislative Day at the capital to discuss and promote the Reentry and other Career Services programs. Reentry staff also attended Claremore Reboot/Rebuild, an event helping individuals with services aimed at helping them gain, or regain, employment.

#### **Job Fairs and Other Events:**

Keep up to date with future Job Fairs at: [www.cherokee.org/jobfairs](http://www.cherokee.org/jobfairs)

Brad Eubanks is point of contact for Community Meetings.

#### **ICTC Stilwell Career Fair**

Friday, April 5th from 10 am – 2 pm

ICTC Conference Center - Stilwell

Building A, Hwy 59 North, by Maryetta School, Stilwell, OK

#### **Reading Truck Equipment Job Fair**





Wednesday, April 10<sup>th</sup> from 10 am – 4 pm  
Cherokee Nation Career Services – Pryor Office  
2945 Hwy 69A  
Pryor, OK 74361

### **Health Recruitment Fair**

Thursday, April 11<sup>th</sup> from 10 am – 4pm  
West Siloam Spring Hotel & Casino – Mingo Room

### **Health Recruitment Fair**

Thursday, May 9<sup>th</sup> from 10 am – 4pm  
Three Rivers Health Clinic – Muskogee, OK

### **Sofidel Job Fair**

Wednesday, May 15<sup>th</sup> from 10 am – 4pm  
Tulsa Tech – Broken Arrow Campus  
4000 W Florence St, Broken Arrow, OK 74011





# Commerce Group

*Securing and enhancing the financial well-being of Cherokee people, businesses and communities*

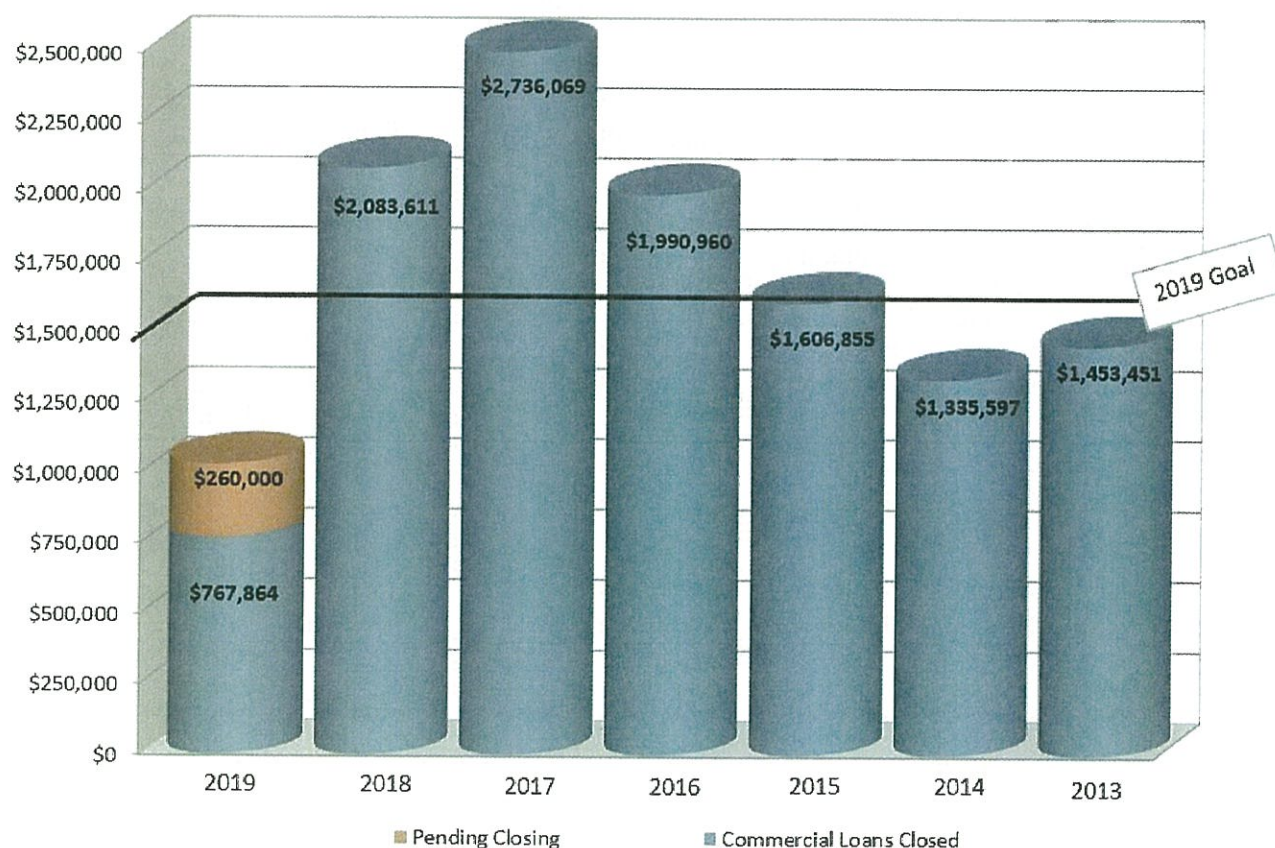
Anna Knight, Executive Director  
918-453-5532  
anna-knight@cherokee.org

## Community and Economic Impact



**Since 2010 Cherokee Nation Community  
Investment: \$15,030,629.51 in 308  
Privately-owned Small Businesses**

### Dollars Invested in the Local Economy Through Small Business Lending



## Small Business Loans Closed March 2019

Community	Loan Purpose	Project Costs	Owner Equity	Jobs
Tahlequah	Service	\$270,509	45%	4
Tulsa	Service	\$234,000	79%	4

*"A much more customer friendly process than would be utilizing a traditional bank or business start-up lender. Early questions answered promptly, a solid business plan, application, and a timely transition to closing with fair and accountable terms. We could not be happier with our treatment."*

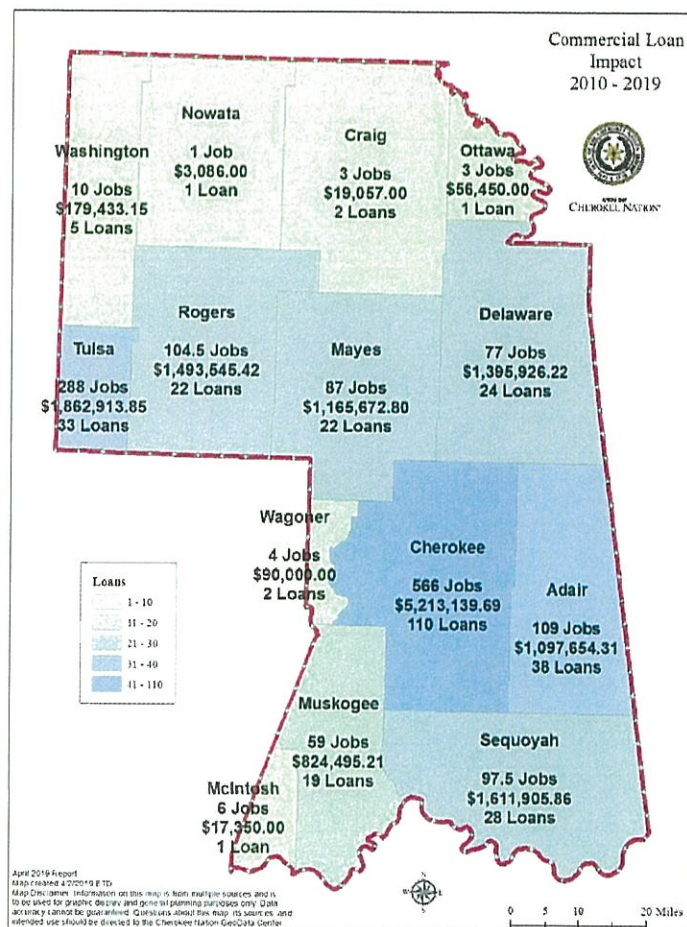
**Lisa Galli**  
**Galli Plumbing Services, Inc.**

## Commercial Lending Pipeline (Commercial requests submitted)

Community	County	Business Type	Startup or Expansion
Welling	Cherokee	Retail Service	Start-up
Tahlequah	Cherokee	Child Care Service	Start-up
Stilwell	Adair	Construction	Expansion
Tahlequah	Cherokee	Lawn Care Service	Expansion
Claremore	Rogers	Auto Care Service	Expansion

## Commercial Lending Impact 2010 through 2019 by County

County	Economic Investment	Loans	Jobs
Adair	\$1,097,654	38	109
Cherokee	\$5,213,140	110	566
Craig	\$19,057	2	3
Delaware	\$1,395,926	24	77
Mayes	\$1,165,673	22	87
McIntosh	\$17,350	1	6
Muskogee	\$824,495	19	59
Nowata	\$3,086	1	1
Ottawa	\$56,450	1	3
Rogers	\$1,493,039	22	104
Sequoyah	\$1,611,906	28	98
Tulsa	\$1,862,914	33	288
Wagoner	\$90,000	2	4
Washington	\$179,433	5	10
Totals	\$15,030,630	308	1415

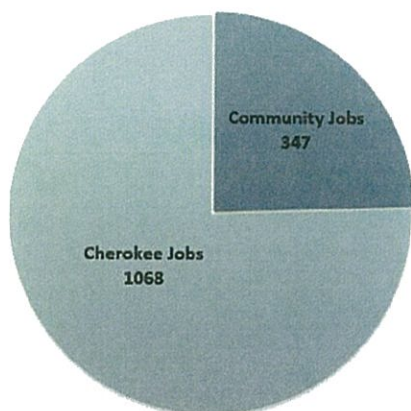




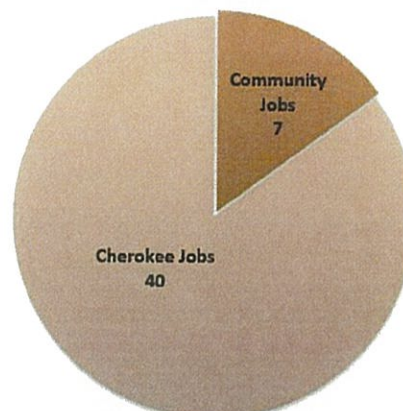
## Businesses Create Community Based Jobs

Private Sector Jobs Created or Retained by Small Business Lending

Jobs Created FY10-19



Jobs Created FY 2019



## Cherokee Nation Economic Development Trust Authority

A Cherokee Nation chartered nonprofit corporation  
Certified as a Community Development Financial Institution

### Lending Assets

Available Commercial Capital	\$1,886,481
Available Consumer Capital	\$982,297
Approved Grants Pending Distribution	\$519,731
Approved Grants Pending Receipt	\$0
<b>Total Available Capital</b>	<b>\$3,388,509</b>
Outstanding Commercial Loans	\$8,948,873
Outstanding Consumer Loans	\$1,971,031
<b>Total Outstanding Loans</b>	<b>\$10,919,904</b>

CNEDTA small business loans not only create jobs and but spur private sector economic investments at an approximate rate of 2 private dollars for every CNEDTA dollar: **FY19 loans leveraged \$3,967,622 in private dollars and since 2015 CNEDTA loans have leveraged \$28,158,843 in private dollars.**



## Entrepreneurial and Small Business Training

Entrepreneurial capacity building, through one-on-one assistance and in workshops settings, is available throughout the year to help entrepreneurs with business planning, strategic growth, marketing assistance, social media marketing, cash flow management, procurement and affordable financing.

**In 2019, Business training workshops attracted 1,892 people** representing Indian owned businesses. Additionally, **93 entrepreneurs** received **one-on-one business coaching**.

Business/Entrepreneur Workshops			
Date	Location	Time	Workshop
April 11	Lawton	1:00 pm	DOL, Fair Labor Standards Act for Public Agencies
April 13	Tahlequah	9:30 am	Etsy Craft Entrepreneurship
April 18	Claremore	10:00 am	SBAC Entrepreneurship Day
April 22	Muskogee	12:30 pm	ICTC, Microsoft Excel 2
April 24	SHS	10:00 am	SBAC Entrepreneurship Day at Sequoyah High School
April 24	Woodward	TBD	DOL, How to Survive a Wage & Hour Investment
April 30	Tulsa	6:00 pm	FORWARD Classes for New Businesses
May 6	Muskogee	12:30 pm	ICTC, Microsoft Excel 3
May 20	Stilwell	12:30 pm	ICTC, Microsoft Excel 1
June 4	Oklahoma City	9:30 am	DOL, Family and Medical Leave Act
June 4	Oklahoma City	1:30 pm	DOL, Fair Labor Standards Act for Public Agencies
June 4	Tulsa	6:00 pm	FORWARD Classes for New Businesses
June 6	Ardmore	9:30 am	DOL, Family and Medical Leave Act
June 6	Sulphur	1:30 pm	DOL, Family and Medical Leave Act
June 11	Wagoner	8:00 am	ICTC, REI Business Breakfast
August 13	Wagoner	8:00 am	ICTC, REI Business Breakfast
October 8	Wagoner	8:00 am	ICTC, REI Business Breakfast
December 10	Wagoner	8:00 am	ICTC, REI Business Breakfast

Community Based Business Coaching		
Community	Address	Dates
Pryor	Cherokee Nation Career Services - 2945 Hwy 69A	1st Tuesday Each Month
Bartlesville	Rogers State University - 401 S Dewey - Room 808	2nd Thursday Each Month
Sallisaw	Cherokee Nation HACN - 100 E. Choctaw	3rd Tuesday Each Month
Tulsa	Cherokee Nation Career Services - 10837 E Marshall St., Ste. 101	2nd Tuesday Each Month
Claremore	Cherokee Nation HACN - 23205 S Hwy 66	4th Thursday Each Month
Jay	Cherokee Nation HACN - 109 13 <sup>th</sup> St.	4th Monday Each Month

Commerce Business Coach Brian Wagon [brian-wagon@cherokee.org](mailto:brian-wagon@cherokee.org) or 918-506-9168



## Kawi Café a model experiential entrepreneurship training program

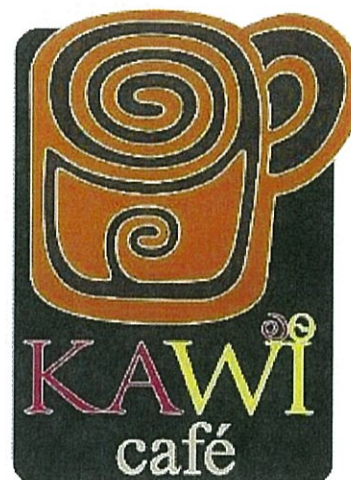
Managed by Commerce business coaches, we partner with Career Services Day Training and Re-entry Programs to find Kawi participants. *This is not a culinary arts program.*

- Total Graduates 82
- Total Re-entry/Recent Offenders 42
- Total Day Training 40
- Total Opening Small Business 5

**\*\*All participants have been low income American Indians. Stipends for participants paid mostly by Career Services and in part by Commerce grant.**

***Well, so far working at the Kawi Café has given me a sense of self-worth. Starting with structure. Also, it feels great to have financial stability. And the great crew that I work with makes learning fun.***

***Laura Ferrell, Stilwell, OK***



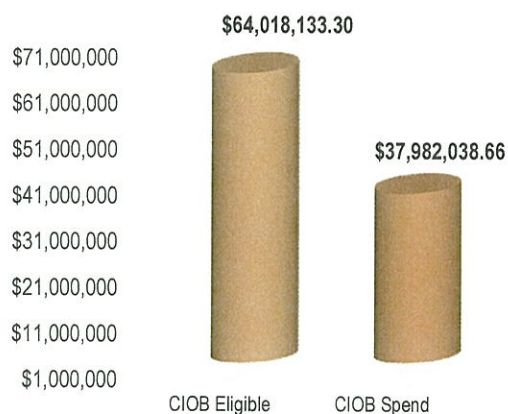
## Entrepreneur Skills Learned by Kawi Participants

	<b>Small Business Ownership</b> <ul style="list-style-type: none"> <li>• Business Planning</li> <li>• Marketing</li> </ul>
	<b>Business Management</b> <ul style="list-style-type: none"> <li>• Staffing</li> <li>• Marketing</li> </ul>
	<b>Job Skills</b> <ul style="list-style-type: none"> <li>• Interpersonal Skills</li> <li>• Work Hours</li> </ul>



## CN Procurement Awarded to Certified Cherokee/Indian-Owned Small Business

59.33% of CIOB Eligible Procurement Opportunities were awarded to CIOBs



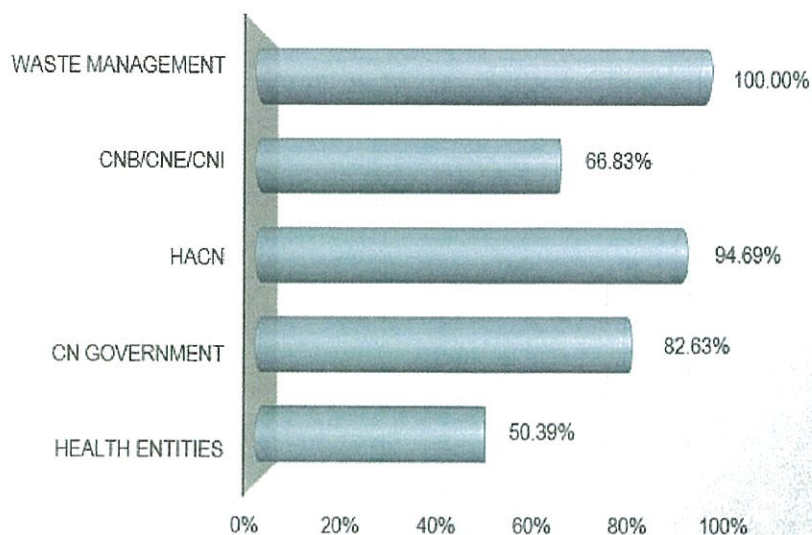
TERO Procurement Opportunities	
Entity	% Awarded
CN Government	97.95%
CNE	55.54%
Health Entities	100%
CNI	41.84%
Waste Management	0%

Health Entities are PACE/Elder Care and Cherokee Nation Home Health

### CNB Procurement by the Numbers: TERO Opportunities, TERO Bid Submissions and TERO Bid Awards

Eligible Opportunities	TERO Bid Submissions		Bids Awarded With Participation	
October 2018 - September 2019	% bids submitted	# bids submitted	% of submissions	# of submissions
106	54.72%	58	70.69	41

73.57% of Employees are registered Cherokee Nation Citizens



Includes companies majority owned; does not include temporary or government contract employees

## Artists as Entrepreneurs and Community Tourism as Economic Development

*Increasing the business capacity of our artists and tourism capacity of our communities*

The Cherokee Arts Center provides teaching space and specialized equipment for artists to increase their revenues. Year to date, **587 people have attended 144 artist taught classes** and the **equipment has been used 520 times by 234 artists**. One artist space is used exclusively by the National Treasures to both work and to teach class. Year to date artists have taken advantage of the **Cherokee Arts Center 1,048 times**.

*"Being represented by the Spider Gallery has brought me home to my Cherokee roots, after living outside Oklahoma for many years. I feel grounded in the Cherokee Nation more so than I ever have before, and I'm proud to show my Native themed artwork through the gallery. I lived in New Mexico for a time and found that the Spider Gallery compares quite favorably to any gallery I've visited in Santa Fe."*

*-DeAnn McDaniel  
Tahlequah, OK*

Cherokee Arts Center		
Registration is necessary and all classes are fee based, paid directly to artists		
Date	Time	Class
Every Monday	6:00-8:00 pm	Jewelry Making Class
Every Tuesday	6:00-8:00 pm	Jewelry Making Class
Every Tuesday	4:00-5:30 pm	ICW Cultural Art Class
Every Wednesday	4:00-5:30 pm	ICW Cultural Art Class
Every Thursday	6:00-8:00 pm	Metalsmithing with Steve
Every Friday	7:00-9:00 pm	Life Drawing with Matt
Every Saturday	10:00-1:00 pm	Watercolor with Paula Hefley
Every Saturday	1:00-3:00 pm	Beginners Metalsmithing Class
Every Sunday	10:00-3:00 pm	Jewelry Making Class
April 9 <sup>th</sup> (2 <sup>nd</sup> Tuesday)	6:30-9:00 pm	SEIAA Monthly Meeting
April 14 <sup>th</sup> (2 <sup>nd</sup> Sunday)	2:00-3:00 pm	Arts & Humanities Lecture

The Spider Gallery currently represents **133 Cherokee Nation artists, 20** of which are National Treasures.

Cherokee Nation Proudly Presents



- Year to date 964 visits have been made to the Gallery
- Framing services are available to artists and CNB for a fee
- Artists have earned \$29,901.74



## 2019 Grant Applications Underway and Recently Submitted: Pending, includes 2018, and Approved

*Please note some grants are submitted under the  
Cherokee Nation Economic Development Trust Authority (CNEDTA)*

Grant Submitted	Purpose	Funding Year	Amount Requested	Status	Notes
USDA Rural Business Development (RBDG)	Small Business	2019	\$500,000	Informal Award Notification	Commercial Lending
US Treasury CDFI	Small Business	2019	\$770,000	Awarded	CNEDTA – Commercial Lending
USDA Rural Business Development (RBDG)	Retail Center Road Access	2019	\$250,250	Awarded	Partnership with City of Stilwell
USDA Rural Business Development (RBDG)	Small Business	2019	\$149,520	Awarded	Increasing staff capacity
SBA PRIME	Small Business	2019	\$150,000	Awarded	Continue Kawi Operations – re-entry/ex-offenders
National Endowment for the Arts	Cherokee Arts Center	2019	\$30,000	Pending	Expand child Art Therapy Classes in partnership with ICW
USDA Socially Disadvantaged Grant	Community - Capacity Building for Community Nonprofits	2019	\$200,000	Awarded	Board Development, Succession Planning and Financial Management
BIA – Indian Business Development Institute	Small Business	2019	\$100,000	Pending	Feasibility for blackberry cooperative style business increasing agriculture opportunities in communities
HUD ROSS SC	Financial Education	2019	\$416,377	Awarded	Connect HACN residents with self-sufficiency counseling Partnership with HACN, 3 year project
USDA Rural Business Development (RBDG)	Leadership Training	2019	\$150,000	Submitted	Partnership with NORA for Leadership Training
USDA Rural Business Development (RBDG)	Small Business	2019	\$500,000	Submitted	Commercial Lending
Economic Development Administration EDA	Health Innovation Center	2020	\$569,483	Submitted	Operational funding for Health Innovation Center