



Investing in Indian Country: Funding Needs in Native Agriculture

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About the Report:

This report analyzes the Native American Agriculture Fund's 2020 grantmaking cycle and identifies leverage points, where other funders' investments can have outsized impacts.

ABOUT NAAF

Created out of the settlement from the landmark *Keepseagle v. Vilsack* case, the Native American Agriculture Fund (NAAF) is the largest grantmaking organization dedicated solely to Native agriculture. Since its founding in 2018, NAAF has worked with Native producers, Tribes, educators, financial institutions, and others to help Indigenous agriculture thrive. NAAF witnesses how its grantees leverage their funds to build projects that are financially-sustainable, robust, and impactful. But NAAF alone cannot support this unmet financial need. It is only one organization, and its trust agreement dictates the organization spend down its funds by 2038. To those ends, NAAF is constantly interested in identifying leveraging partners interested in working alongside NAAF and its grantees to support this important work.

NAAF's trust agreement outlines four types of eligible entities (Targeted Areas) to which it can provide funding: 501(c)(3) Organizations, Tribes and Tribal Instrumentalities, Community Development Financial Institutions (CDFIs), and Education Organizations. In its past two granting cycles, NAAF has fulfilled its mission to serve Native farmers and ranchers through four pools of funding, with allocated funding ranging from \$4 million to \$2 million, for each entity type. The allocated funding amounts may change over time.

In addition, each year NAAF selects four additional areas (Special Emphasis Areas) based upon research and demonstrated need. In 2020, NAAF selected Traditional Foods, Advocacy Activities, Ag Extension, and Youth, allocating \$1 million in funding for each category. Note that in 2020, NAAF offered a separate RFA for the Youth Special Emphasis Area only. It did not, however, prohibit applicants from including youth in their work in the General RFA or from applying to both RFAs.

In this report, I evaluate NAAF's 2020 grantmaking, focusing on its General Request for Application (RFA) with additional evaluation of its Youth RFA. I leverage three main methods of analysis: 1) a breakdown by NAAF's Special Emphasis and Targeted Areas, 2) an assessment based upon eleven thematized categories, and 3) a geographic analysis. The results of each help identify leverage points where other funders' investments could have significant impacts.



Photos, from top: 1) NAAF staff visit Ajo Sustainable Agriculture in Arizona, in fall 2019; 2) Cattle at the Blackfeet Nation in Montana; 3) In the fields, at Arizona's Ramona Farms; 4) Staff managing shop at North Carolina's Moore Brothers' Beef retail outlet.

HIGH-PRESSURE CHALLENGES

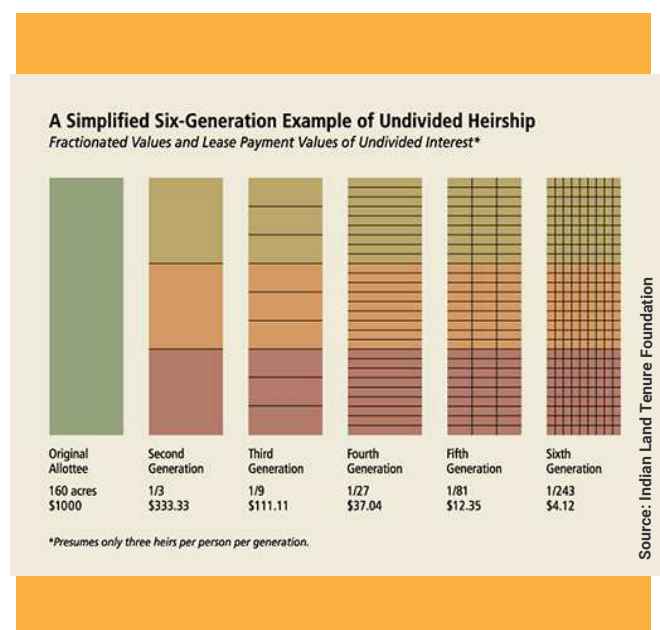
Before diving into the data, it is helpful to understand some of the challenges that Native producers face. This list is non-comprehensive, as the needs of Native farmers, ranchers, and fishers reflect the economic, cultural, historical, and political factors that have shaped Indian Country for hundreds of years. What follows is a brief summary of three high-pressure issues.

Land Ownership:

Land ownership poses a significant challenge for Native producers. Much Native land is not “owned” by individual property owners. Rather, the land title is held in trust by the U.S. government. Trust land can be held by the government for individual property owners and is not necessarily reservation land. According to the Department of Interior, 56 million acres of Native lands are held in trust, roughly equivalent to the size of Minnesota.

Historically, privatization of communally-held Native lands has created deeply negative impacts. Expedited by 1887’s Dawes Act, reservation lands were portioned into individually-held parcels throughout the 1800s and until 1934 (“Native American Ownership and Governance of Natural Resources”). Allotment policies effectively led to the transfer of nearly 100 million acres from Native to non-Native hands. These policies have also created “checkerboard” land ownership patterns, where adjacent parcels of land are owned by Tribes, Tribal members, and non-Native people. The Indian Land Tenure Foundation explains this issue well: **“Checkerboarding seriously impairs the ability of Indian nations or individual Indians to use land to their own advantage for farming, ranching, or other economic activities that require large, contiguous sections of land. It also hampers access to lands that the Tribe owns and uses in traditional ways.”** Checkerboarding has created a torn-blanket fabric of land ownership across many Native communities, which can stymie agricultural production.

Allotment policies also set the stage for “fractionated” land inheritance patterns, wherein estates are divided generation after generation, with dozens—sometimes thousands—of co-owners. This can make meaningful income generation from the land incredibly difficult, for two main reasons: 1) the individual income generated by any one land co-owner is nominal, in some cases pennies on the dollar; and 2) any one of the parcel’s undivided interest co-owners must secure majority consensus among the other co-owners to develop the land, or do anything with it (“Land Tenure Issues”). Note that the land itself is not divided; co-owners do not own a small sub-parcel over which they have full control, but rather own the “undivided interest” of their share of the income generated by the land (“Restoring Indian Lands,” 2). In a 2015 article in *Osage News*, Principal Chief of the Osage Nation Geoffrey Standing Bear explained: **“That’s how you buy land in the Osage. You find an Indian with land with fractionated interest, you find a way to weasel in and jump in on one little fraction and you force everybody out.** It’s called Partition. . . It’s how a lot of ranches got built in Osage County” (Shaw Duty).



For the Quapaw Tribe in Oklahoma, there are 3,735 fractional interest owners and 239 fractionated tracts of land (excluding interests owned by a Tribe, owned in fee, or subject to joint tenancy; and tracts owned 100% by fee interests, under 100% joint tenancy, or that are 100% life estates). This means that, on average, any one fractionated parcel of land is owned by 15.63 co-owners (“Fractionation and Resource Code Statistics Report”). **Imagine trying to get 15 friends—or family members—to agree on the greatest basketball team of all time, what the main dish for a holiday dinner should be, or which city in the U.S. is the collective favorite. Now, imagine that those same 15 friends are scattered across the country; they have not seen each other in months, maybe years; and some are effectively impossible to reach or locate.** The group must come to a consensus around a tract of land, perhaps in a state in which they do not live; or else, watch the viability of the land continue to be whittled away. This is the fate of many parcels in Indian Country.

HIGH-PRESSURE CHALLENGES

Land Ownership, continued:

Further, because much Native land is held in trust by the federal government, it is not easily used as viable collateral in securing loans, mortgages, etc. This significantly disadvantages Native producers who operate on trust land, as other producers are more readily able to leverage their land in financing their farm operations. It also prohibits Native landowners from developing their property as they might wish: a producer on trust land could not, for example, parcel her land, create a subdivision plat, and sell off plots for a housing development. A relevant case study is provided by a 1992 HUD policy change, which was intended to increase mortgage



Crop irrigation system on Blackfeet Nation lands in Montana.

lending in Indian Country. Between 1996 and 2012, mortgage lending indeed grew significantly; in fact, it increased by 2,600% (Collis). But 88% of mortgage lending between 1994 and 2015 occurred on *privately*-held land. *Only 10%* occurred on trust land. This disparity points to the steep challenges faced by Native producers—and people, more generally—in leveraging trust-held land to secure financial services.

Access to Credit:

In Indian Country, credit and lending services can be incredibly difficult to secure. In fact, 63% of the Farm Credit Service agencies interviewed as part of a 2019 Government Accountability Office (GAO) report stated they had reservations around “recover(ing) loan collateral if the borrower defaulted on a loan involving Tribal lands” (“Indian Issues: Agriculture Needs and Barriers to Lending on Tribal Lands,” 16). The 2016 University of Arizona report *Accessing Capital and Credit in Native Communities* discusses how lack of capital has impeded economic development in Indian Country (Jorgensen 1). The report further outlines **underlying factors, such as lack of nearby financial institutions (“credit deserts”), lack of or poor credit history, discrimination, issues around leveraging trust land as collateral, and historic mistrust between Tribes and banks**—hardly the conditions that would enable communities to build traditional wealth.

The GAO report also discusses how **Native producers face administrative delays, as Tribal members liaise between various federal agencies to secure appropriate paperwork for lenders** (2). GAO interviewed two Tribal members who reported that they encountered months-long waits for BIA reports necessary to secure loans, a timeline that could have easily ensured that the growing season concluded before producers had the capital to work their fields (16). In fact, appraisals by the Department of Interior’s Appraisal and Valuation Services Office for agricultural leases are to be completed within 60 days, per Interior policy. A Tribal economic development expert interviewed for the report commented that appraisals are often far lengthier processes than this (16). In addition to outlining administrative barriers, the GAO report echoes the challenges that land ownership situations pose for Native producers attempting to secure loans, stating, **“One difference between the agricultural credit needs of Tribal members and other producers is that Tribal members may have a greater unmet need for long-term loans, which are typically secured by real estate, because of difficulties in using Tribal lands as collateral”** (10).

HIGH-PRESSURE CHALLENGES

Access to Credit, continued:

In an interview with the Federal Reserve Bank of Minneapolis, Executive Director of the Intertribal Agriculture Council and third-generation rancher on the Cheyenne River Sioux Reservation Zach Ducheneaux (Cheyenne River Sioux) offered an account of these challenges:

A loan is perfectly enforceable in Indian Country. It's what the Farm Service Agency (FSA) does on a daily basis. The rules for doing so have been in place since the 1950s. But banks will use trust land as an excuse to offer unfair terms. . . A Native farmer recently had an opportunity to acquire 200 acres of trust land to expand his operations. A typical mortgage on that land would be 20 to 40 years long, and at that time, you could get an FSA loan for 1.3 percent to operate and 2.9 percent to buy land. The lender offered him a 6 percent rate on a 6-year note, even though there were 200 acres of land worth nearly \$200,000 securing the loan. When the average farmer is earning about a 4 percent margin in a good year, and Indian farmers face these higher interest costs, the deck is stacked against them.

Agricultural production is already a high-risk environment for lenders, so barriers to credit only deepen this challenge for Native producers. In fact, for the 2020 calendar year, the USDA estimated that “farm sector assets are expected to increase \$7.6 billion, while farm sector debt is expected to rise \$11.4 billion.” Native-led or -serving Community Development Financial Institutions (CDFIs) play a crucial role in providing gap funding and capital to Native producers. In recent years, the number of Native CDFIs has grown, increasing from 14 in 2001 to 70 in 2016 (Jorgensen 14). Yet as this report will lay clear, there is strong, unmet demand for these lending services.



Coharie Farms in North Carolina.

According to NAAF's 2020 “Reimagining Native Food Economies” report, strategic infrastructure investments in Indian Country agriculture could significantly enhance farm production sales, increasing sales from the current \$3.54 billion to \$45.4 billion, eclipsing the Native gaming industry (3). Again in conversation with the Federal Reserve Bank of Minneapolis, Ducheneaux explained:

Of every food dollar a consumer spends, 10 to 13 cents gets back to the producer. The producer is also selling a commodity, which is much more susceptible to fluctuations in the market. The price we get for our calves can swing by 50 percent in a couple years. That doesn't happen with the end products. **So that [\$3.54] billion represents an opportunity to greatly expand the economic impact and stability of agriculture in Indian Country, if we can get the credit to build an infrastructure to put that food into a package on the reservation.** There are federal programs that support the development of food processing facilities, but they aren't designed in a way that enables Native Americans to access them effectively.

Increased investment in Native agriculture in turn increases the ability for Native producers to feed Native communities. This could allow Tribes and Native producers to reclaim more of the “food dollar,” potentially venturing into value-added production and direct-to-consumer marketing, while creating opportunities for increased cash flow into Indian Country.

HIGH-PRESSURE CHALLENGES

Data and Data Sovereignty:

As defined by the United States Indigenous Data Sovereignty Network, data sovereignty is “the right of a nation to govern the collection, ownership, and application of its own data. It derives from [T]ribes’ inherent right to govern their people, lands, and resources.” Data shapes our daily lives, yet many government and other datasets still fail to accurately, if at all, reflect Native communities. This has serious downstream impacts: when making the case to a data-driven funder, it is impossible to leverage data and statistics to write a compelling application if none exist. Failing to represent populations in national datasets can lead to an effective erasure of a people. Proprietary data, held by private institutions, can be accompanied by a steep price tag, or long lines of red tape.

Accessing Credit and Capital in Native Communities points to several underlying factors, including lack of identification of Native peoples in national data collection due to costs around oversampling and lack of analysis of data that does exist due to low agency capacity or agency inaction (10). In an interview with Washington State’s *Crosscut*, Abigail Echo-Hawk, chief research officer for the Seattle Indian Health Board and director of the Urban Indigenous Health Institute, pointed toward how the prevailing rationale around data collection in Indian Country serves to further a deficit-based narrative:

When we think about data, and how it's been gathered, is that, from marginalized communities, it was never gathered to help or serve us. It was primarily done to show the deficits in our communities, to show where there are gaps. And it's always done from a deficit-based framework. . . What they don't talk about is the strengths of our community. What we know, particularly for indigenous people, is that there was a genocide and assimilation policies and termination policies that were perpetuated against us. If they had worked, we wouldn't be here. And so we were always strength-based people, who passed on and continued knowledge systems regardless of people who tried to destroy us.

It is neither reasonable, nor sustainable, to cut off Tribes, Native producers, or Native communities more generally from quality, accessible data, or to hinder their ability to collect and analyze data of their own.

It is also important to highlight the fact that data collection efforts among Native communities have a freighted history. Data “harvested” from Tribes or Tribal members has been leaked; utilized for additional research initiatives, without Tribal or Tribal member consent; failed to engage a diverse group of community members in survey design and implementation; or leaned heavily on stereotypical depictions of Tribes or Tribal members (Goodluck, Foulks 16). Genetic data collected from a 1989 study on the prevalence of diabetes among members of the Havasupai Tribe was later used—without consent of the Tribe or Tribal members who participated in the original study—for non-diabetes research, including



Seed pod at Ajo Sustainable Agriculture in Arizona.

studies on “schizophrenia, ethnic migration, and population inbreeding, all of which are highly charged topics that are taboo in the Havasupai culture,” (Garrison 201). Dr. Frank Dukepoo (Hopi), a geneticist, explained the relevance of these samples for his and other Tribes: “To us, any part of ourselves is sacred. Scientists say it’s just DNA. For an Indian, it is not just DNA, it’s part of a person, it is sacred, with deep religious significance. It is part of the essence of a person” (203).

In light of this, and on the heels of a lawsuit the Havasupai Tribe filed against the researchers, Garrison interviewed a pool of IRB chairpersons and biomedical faculty researchers at medical schools funded by six top National Institute of Health as to how they would manage or design consent forms for future medical studies (204). She found that the majority of those interviewed preferred consent forms that were tiered or which allowed for broad usage of medical samples obtained, privileging institutional flexibility over cultural-sensitivity (212). Although an example from the medical community, it mirrors the struggles Native producers face in having sovereignty and ownership over the data and research that encompasses analysis of their lands.

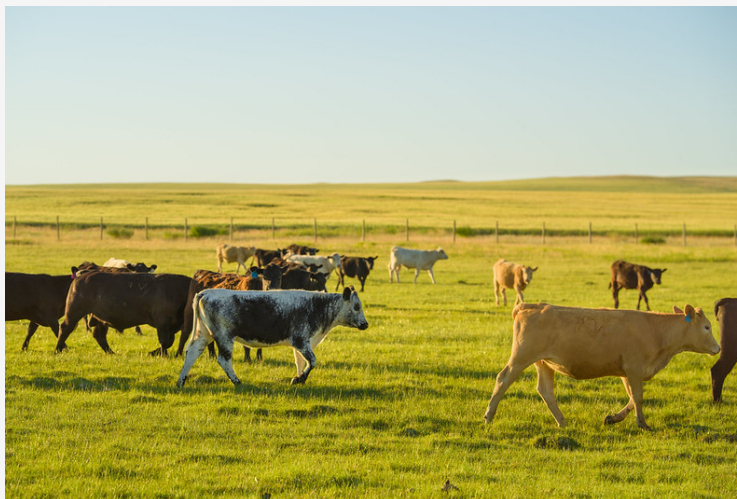
HIGH-PRESSURE CHALLENGES

Data and Data Sovereignty, continued:

In comparison, studies or data collected by Tribes or Native-run organizations can be better poised to integrate culturally-sensitive practices into their methodologies. Tribes or Native-run organizations may also have wider networks as well as personal relationships with community members who would otherwise be reluctant to participate in a survey, which can help facilitate the collection of data. For example, the Intertribal Agriculture Council (IAC) distributed surveys to Native producers in the wake of COVID-19, to track how the pandemic is impacting Native agriculturalists across the country. Analyzing the 383 responses from producers, Tribal/community leaders, foods producers, and community grocers/food hubs/cooperatives, IAC collected granular data, including whether respondents were first-generation college degree holders (9%), retailers (6%), and whether or not respondents had experienced price gouging (68%). IAC also leveraged personal narrative and stories in preparing infographics that summarized their findings, enabling survey respondents to speak for themselves.

Working to achieve data sovereignty, where Native communities generate, manage, analyze, and own their data, is a step in rectifying this challenge. The Swinomish Tribe of Washington has studied climate change and health impacts in their community since 2007, in collaboration with another Tribe as well as non-Native researchers (Carroll 8). Both Tribes served as co-authors on publications generated as a result of the project and have full ownership and control over data from their respective communities. Through the project, the Swinomish Tribe was able to pinpoint relevant community health indicators and create more applicable metrics as necessary.

In addition to enabling greater ownership of data and engagement around data generation/collection, data sovereignty allows for a wider, non-western understanding of knowledge production and analysis (Carroll 4). This is particularly relevant for agriculture and land management practices. Data sovereignty is part and parcel of moving toward greater Tribal sovereignty and in empowering Native communities to “own, access, and control” their lands.



Photos, from top: 1) Cattle grazing on Blackfeet Nation lands in Montana; 2) Bees abuzz as they exit their hive, the honey enterprise one of Quapaw Cattle Company's value-added ventures; 3) Gentle sunlight at Moore Brothers Cattle Company in North Carolina.

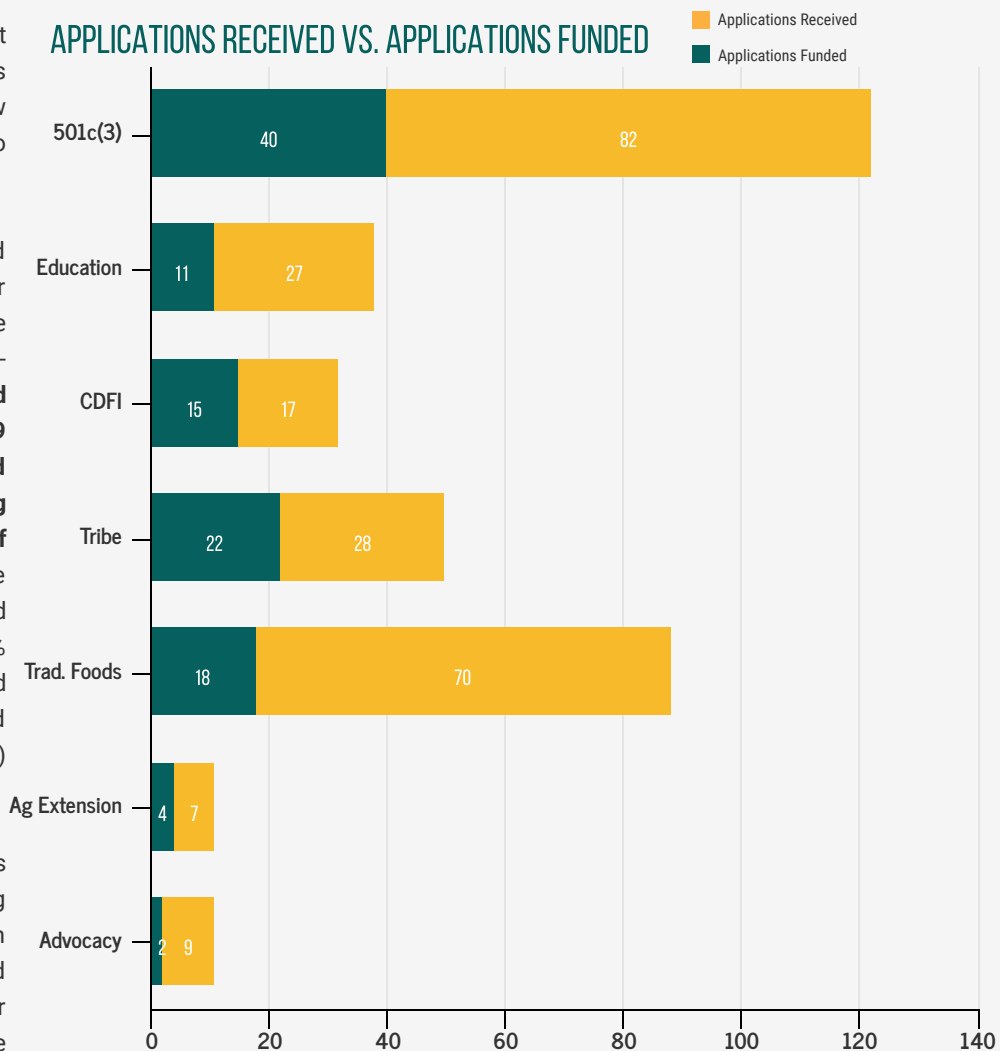
NEEDS & GAPS ANALYSIS: SPECIAL EMPHASIS/TARGETED AREAS

Having established some context around a few foundational issues Native producers face, I will now turn to NAAF's grantmaking data, to identify specific areas of need.

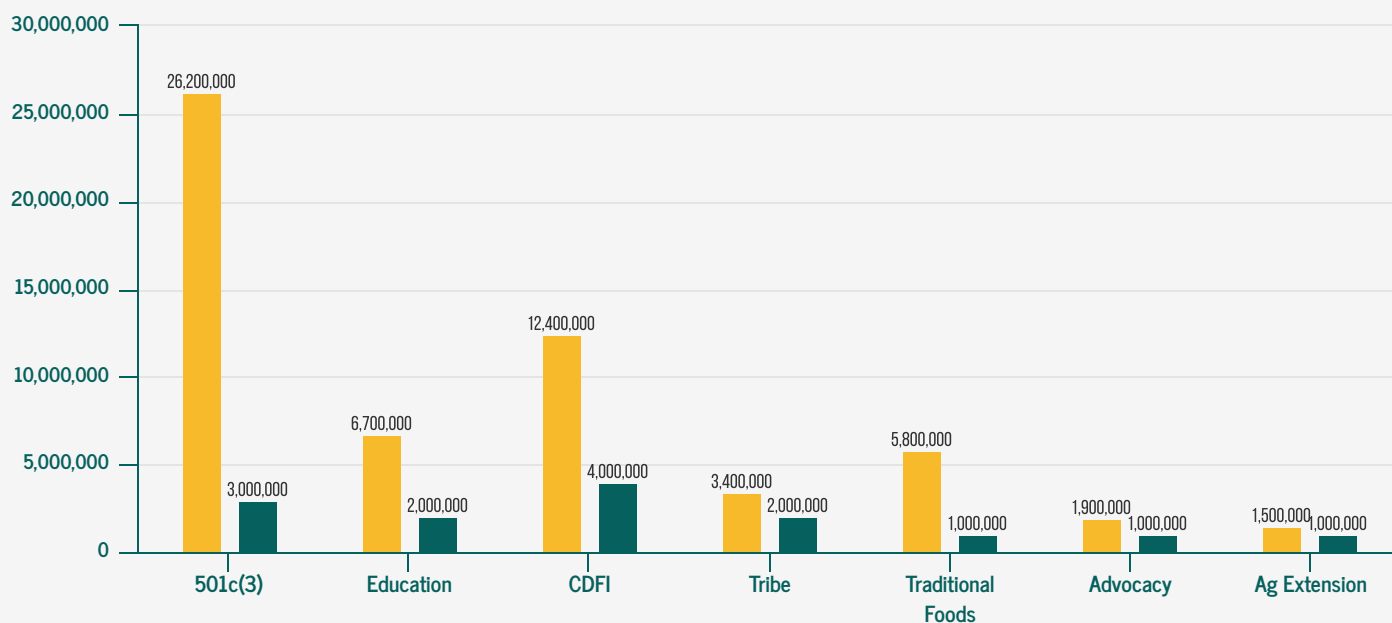
In the 2020 RFAs, NAAF advertised that \$15 million was available for funding: \$14 million across multiple categories and \$1 million for youth-focused activities. **NAAF received grant requests totaling \$57.9 million but was able to fund and disburse \$16 million, including youth projects, meeting 27.6% of project expressed need.** Among the special emphasis and targeted areas, NAAF met as high as 66.7% of any one category's demonstrated financial need (Ag Extension) and as low as 11.5% (501(c)(3) Organizations).

The two figures on this page focus on the 2020 General RFA, providing a visual breakdown of the data from the funding cycle. When reviewed together, they provide a clear understanding of areas in which the funding community can look to invest more heavily.

APPLICATIONS RECEIVED VS. APPLICATIONS FUNDED



FUNDING REQUESTED VS. FUNDING DISBURSED



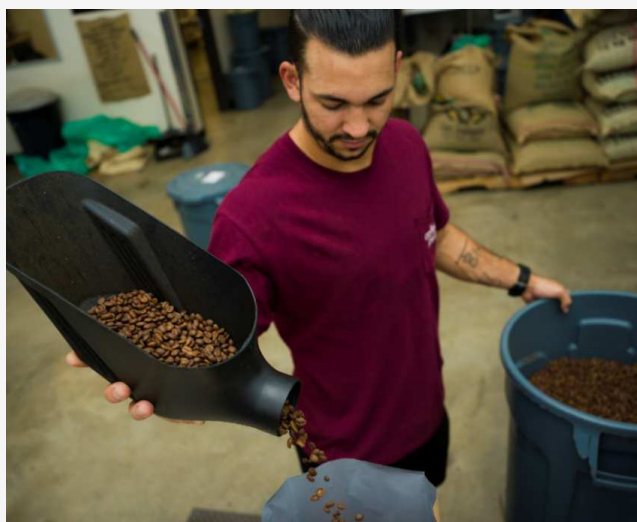
NEEDS & GAPS ANALYSIS: SPECIAL EMPHASIS/TARGETED AREAS

Between the two figures, the data demonstrate that **for 501(c)(3) organizations, only 11.5% of overall funding requested was met** by NAAF's \$3 million investment in 2020. **Traditional food applications were similarly impacted: 17.2% of overall funding requested was met**, while 25.7% of the 70 applications received under this category received grant funding.

Educational Institution applications also shows a wide gap, both in overall funding requested and in the number of applications received. This is compounded by the fact that NAAF's youth RFA was excluded from this analysis, making the need for programs targeting or serving youth and offering educational services all the more important. The future of any food system is dependent upon the next generation of producers, and the importance of robust opportunities for Native youth to become leaders in agriculture cannot be understated. This need becomes all the more relevant in the wake of COVID-19, as the pandemic has exacerbated existing inequalities in access to education (Brookings Institution).

While NAAF funded 88.2% of the CDFIs from which it received requests, only 32.3% of overall funding need as identified in the applications was met. This suggests that **CDFIs may demonstrate the strongest demand for funding**. The high demand also reflects the fact that Native producers often face difficulty in securing loans from traditional banks or lenders; CDFIs play a pivotal role in providing gap funding to Native farmers and ranchers. In 2020, NAAF grantmaking was limited to \$4 million in this category. **Because agriculture is so capital-intensive, the need to expand funding opportunities for CDFIs is clear.**

NAAF funded the majority of overall financial need under the Advocacy area, but only 20% of the applicant pool due to the scope of the request (work to specifically support the Native Farm Bill Coalition) and the focus of the applications received. The applicant pool was also much smaller than other categories. Funding for more localized advocacy work was not funded and could identify a future outstanding need.



Top Left: Coffee beans pre-roasting at O-Gah-Pah Coffee, a Tribal-owned, value-added food enterprise in Quapaw, OK. **Top Right:** Transferring roasted beans into bags for customer orders. **Bottom:** Latte made with O-Gah-Pah beans and coffee bag ready for sale.

Founded in 2016, O-Gah-Pah Coffee services the Quapaw Nation's Downstream Casino and fulfills individual customer orders through its website: www.shop.ogahpahcoffee.com. O-Gah-Pah Coffee is an exciting example of a Tribe's integrating value-added food processing activities into its broader enterprises, bringing more of the "[food dollar](#)" back to Indian Country.



NEEDS & GAPS ANALYSIS: SPECIAL EMPHASIS/TARGETED AREAS

To further clarify funding needs and gap, I thematized NAAF's grantmaking into eleven categories based upon the organization's four key mission areas, as outlined in its trust agreement: Business Assistance, Technical Support, Agricultural Education, and Advocacy. Each of these four areas was expanded into sub-categories, providing a deeper understanding of the types of projects submitted for funding. The results of this exercise provided concentrated insight into the types of projects that are underfunded, enriching the earlier analysis with data that specifies the type of projects that feature strongly in the applicant pool. The categorization scheme is identified below.

Thematic Analysis - Methodology:

The eleven categories of project-focused need were based upon the four mission areas outlined in our trust agreement. They include the following:

- **Advocacy**
- **Youth**
- **Cultural Food Ways**
- **Sustainable Ag Methods/Activities**
- **Training & Career Pathways**
- **Policy**
- **Research**
- **Food Production & Producer Engagement**
- **Food Systems & Supply Chain Planning**
- **Ag Lending & Business**
- **COVID-19 Response**

To provide context as to why the categories were arranged under their respective mission areas, a short description of each follows the category name in the table below. Note that COVID-19 remained a standalone category, to independently track pandemic-related needs.

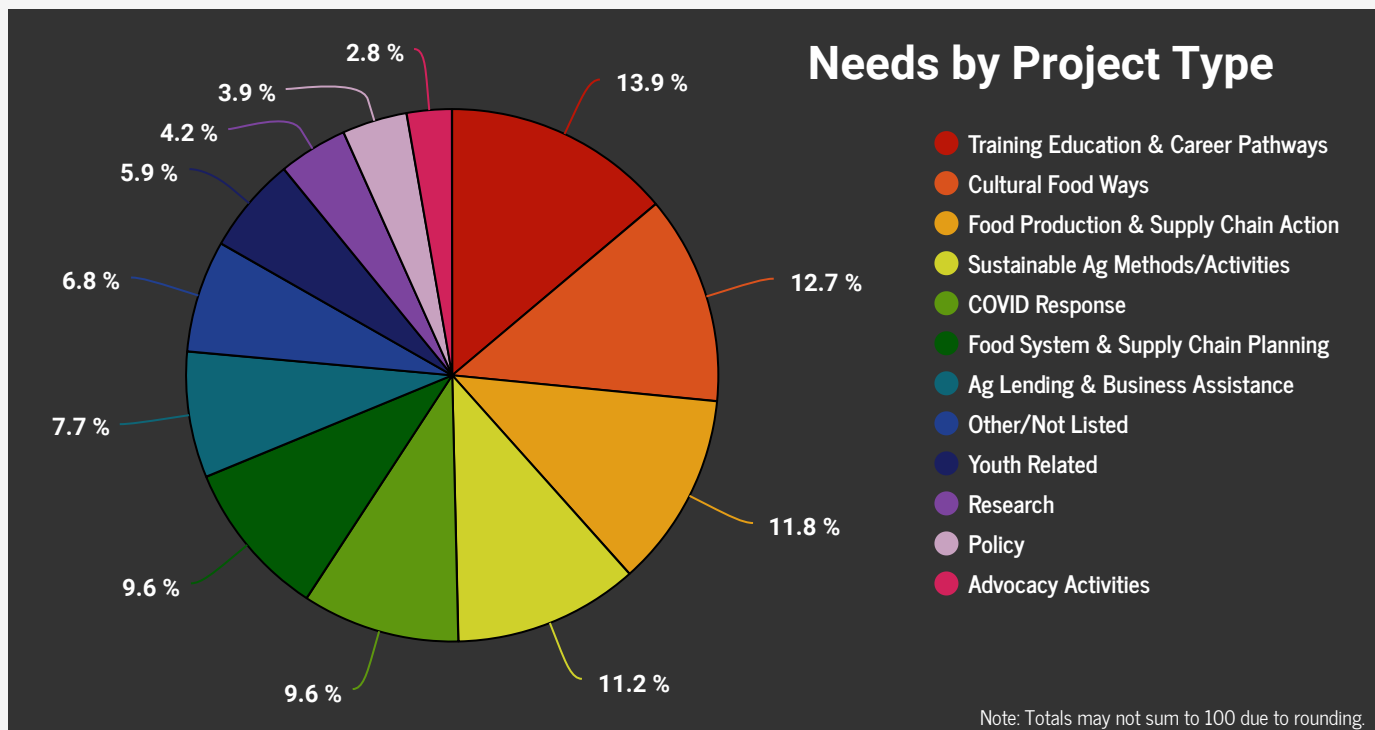
Excluding COVID-19, I aligned the eleven categories across the four mission areas as follows:

Technical Support	Agricultural Education	Advocacy Services	Business Assistance	COVID-19
Food Systems & Supply Chain Planning: Focuses on planning for supply chain resilience, mapping food systems pathways, or planning and delivery of value-added technical or regulatory support.	Training & Career pathways: Enables Native youth and others to receive professional and technical training.	Advocacy Activities: Promotes and supports on-the-ground public issues advocacy.	Food Production & Producer Engagement in Supply Chain: Addresses producer needs and capacity development to build stronger production and supply chains.	COVID-19: Addresses community and farmer/rancher needs that result from COVID-19 disruption.
Sustainable Ag Methods: Focuses on agriculture practices.	Cultural Food Ways: Enables teaching and practice of traditional foods and food culture.	Research: Focuses on research/ research activities; extension of research knowledge or curriculum development.	Ag Lending & Business Assistance: Offers access to credit or financial services, including business and market planning.	
	Youth: Offers educational activities and programs to youth.	Policy: Addresses policy needs or questions.		

NEEDS & GAPS ANALYSIS: THEMATIC CATEGORIZATION

Thematic Assessment: Findings and Analysis

Through the thematic assessment, financial need was distilled to the project level. The chart below represents the results of the assessment, in which projects were coded into each of the eleven categories.

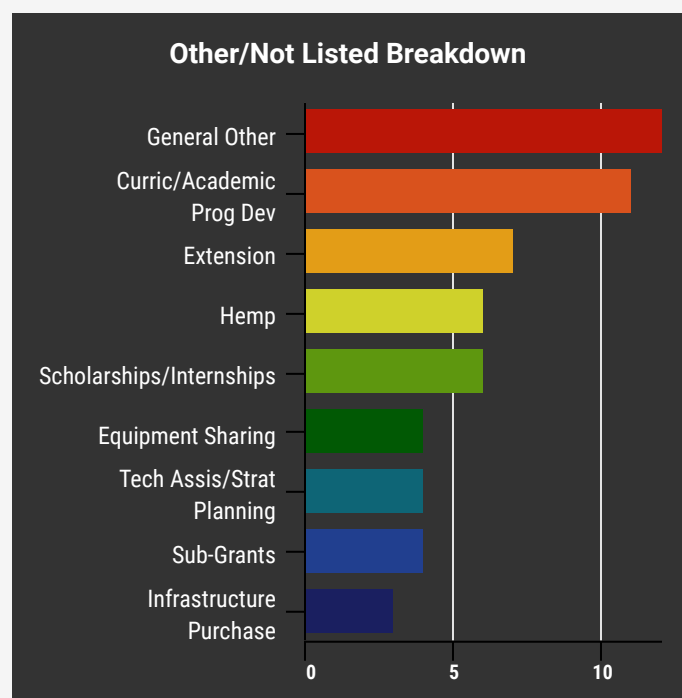


Training Education & Career Pathways emerged as the most highly ranked theme, followed by **Cultural Food Ways**, **Food Production & Supply Chain**, and **Sustainable Ag Methods/Activities**. The strong need for pathways for youth engagement in Native food systems echoed the findings from the assessment, which demonstrated the level of underfunding for Education projects. Investment in Native supply chains—both in production and supply chain/value added planning—also should be noted, together representing nearly a quarter of overall results. While Ag Lending & Business Assistance represented only 7.7%, access to credit is a key part of any supply chain, further suggesting that targeted investment is required across the production and distribution landscape.

Other/Not Listed Breakdown:

The survey tool enabled allowed for "other/not listed" responses, which I then placed into nine sub-categories, identified in the graph to the right. None of the sub-categories identified demonstrated stronger need than the eleven primary categories, as the Other/Not Listed section comprised only 6% of overall projects.

The breakdown of "other/not listed" responses **further emphasized the need for funding for training, youth development, and education** and suggested a need for access to higher education and job training to help Native young adults expand their professional networks and technical skills. **The combined responses in Technical Assistance and Business Planning, Equipment Sharing, and Infrastructure Purchase** echo the need articulated above for increased funding in Native supply chains.



NEEDS & GAPS ANALYSIS: THEMATIC CATEGORIZATION

Thematization & NAAF Mission Areas

I then organized the eleven categories discussed above, excluding the “Other/Not Listed” category, into the four mission areas from NAAF’s trust agreement, as well as a standalone category for COVID-19. The results echoed previous findings from the other analyses, **driving home the need to strengthen Native supply chains as well as invest in Native youth.**

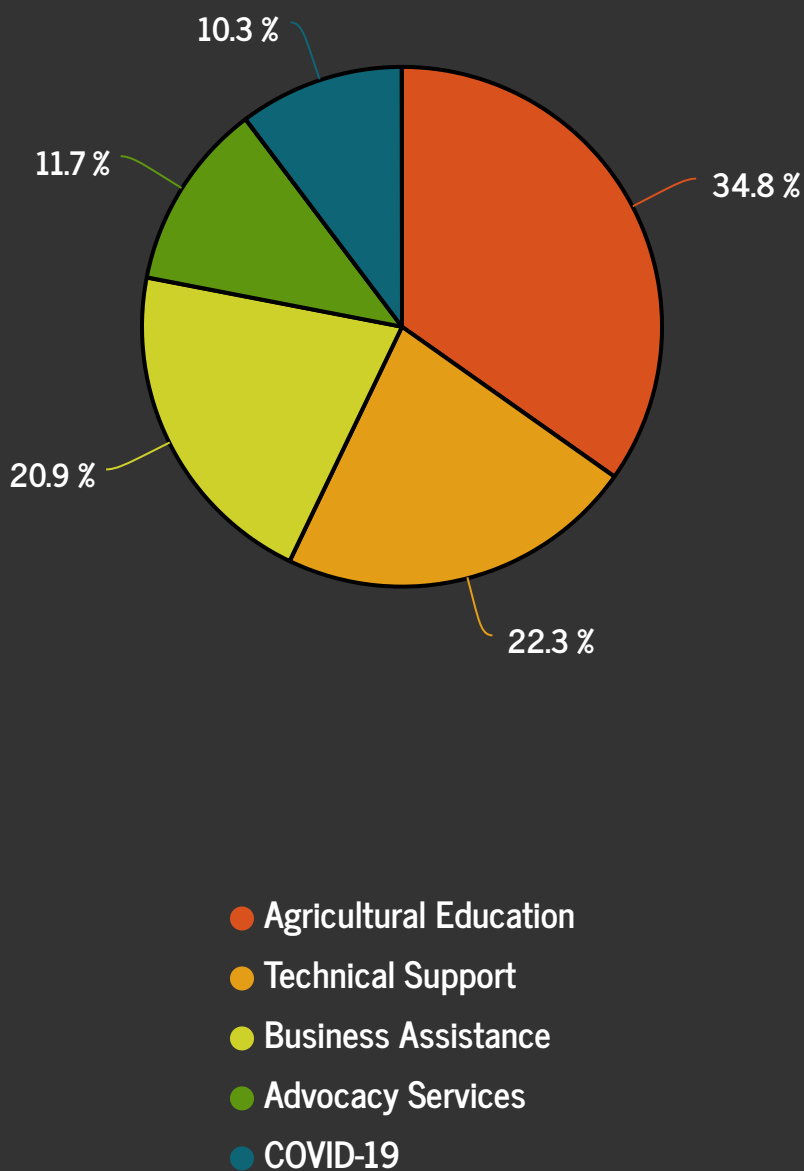
Ag Education received the overall highest percentage of all four primary mission areas and COVID-19. To ensure a sustainable future for any food system, producers of any age must be engaged in farming, fishing, livestock raising, and in some cases, research. An investment in agricultural education is ultimately an investment in the long-term viability of Native farms, fisheries, and ranches, as well as the long-term health of Native food systems.

Together, Technical Support and Business Assistance also ranked highly, again suggesting the need for continued and expanded investment in Native supply chains. As many Native communities are rural communities, strengthening Native food systems and supply chains strengthens rural economies and can create jobs within underserved and underserved regions.

Advocacy Services ranked lowest among the four categories, followed closely by COVID-19. This does not mean that COVID-19 is a low-priority issue within Indian Country and Native agriculture today; NAAF simply did not receive a significant number of applicants addressing COVID-19 only.

In fact, according to an October 2020 Indigenous Futures Project entitled “The Impact of COVID-19 on Indigenous Peoples,” 51% of respondents surveyed who had COVID-19 symptoms or diagnoses stated that they could not access a test. The report further points to how COVID-19 has exacerbated existing disparities in low-income Native peoples’ ability to access healthcare and health services. Weaknesses in the healthcare system are reflected in the food system, both of which have negative impacts on Native communities nationwide. It should be noted that strengthening Native food systems leads to a more resilient supply chain, more adept in responding to pandemic-level crises.

Funding Needs by NAAF Mission Areas



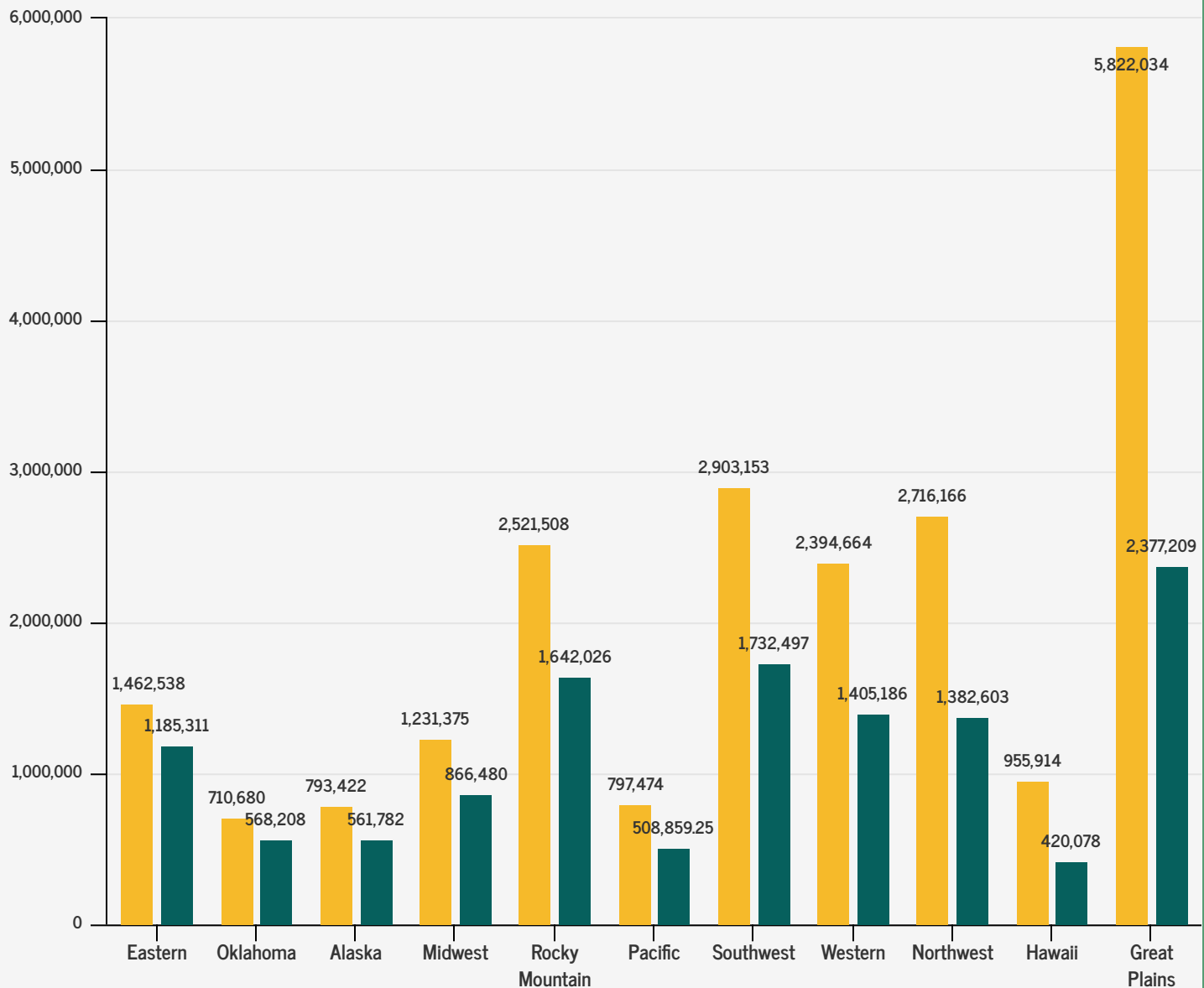
NEEDS & GAPS ANALYSIS: GEOGRAPHIC ANALYSIS

In the geographic evaluation, I analyzed grantees awarded funding in the 2020 General and Youth RFA, to identify regions across Indian Country that demonstrate strong, unmet financial need. Many grantees received partial funding, and the projects for which they initially applied changed, sometimes significantly, due to the lesser funding amount. This analysis accounts for this gap and filters it through a geographic lens.

The regions used in this analysis are based off of the Bureau of Indian Affairs Regions. Note that grantees in Arizona that may have otherwise been categorized in the Navajo Region were instead included in the Western Region. Grantees in Oklahoma were placed into a separate Oklahoma Region, and grantees in Hawaii were placed into a separate Hawaii Region. Also note that grantees with national activities or that serve populations across the country have been removed from this analysis. As those grantees serve communities throughout the U.S., they cannot be well categorized into any one region; doing so would overstate the concentration of funds or unmet financial need in any one region.

There are additional maps in the addendum to the report, with the location of grantees awarded funding in 2019 and 2020. Additional breakdown by Special Emphasis and Targeted Areas is provided for the 2020 grantees.

FUNDING REQUEST RECEIVED VS. FUNDING DISBURSED PER REGION



NEEDS & GAPS ANALYSIS: GEOGRAPHIC ANALYSIS

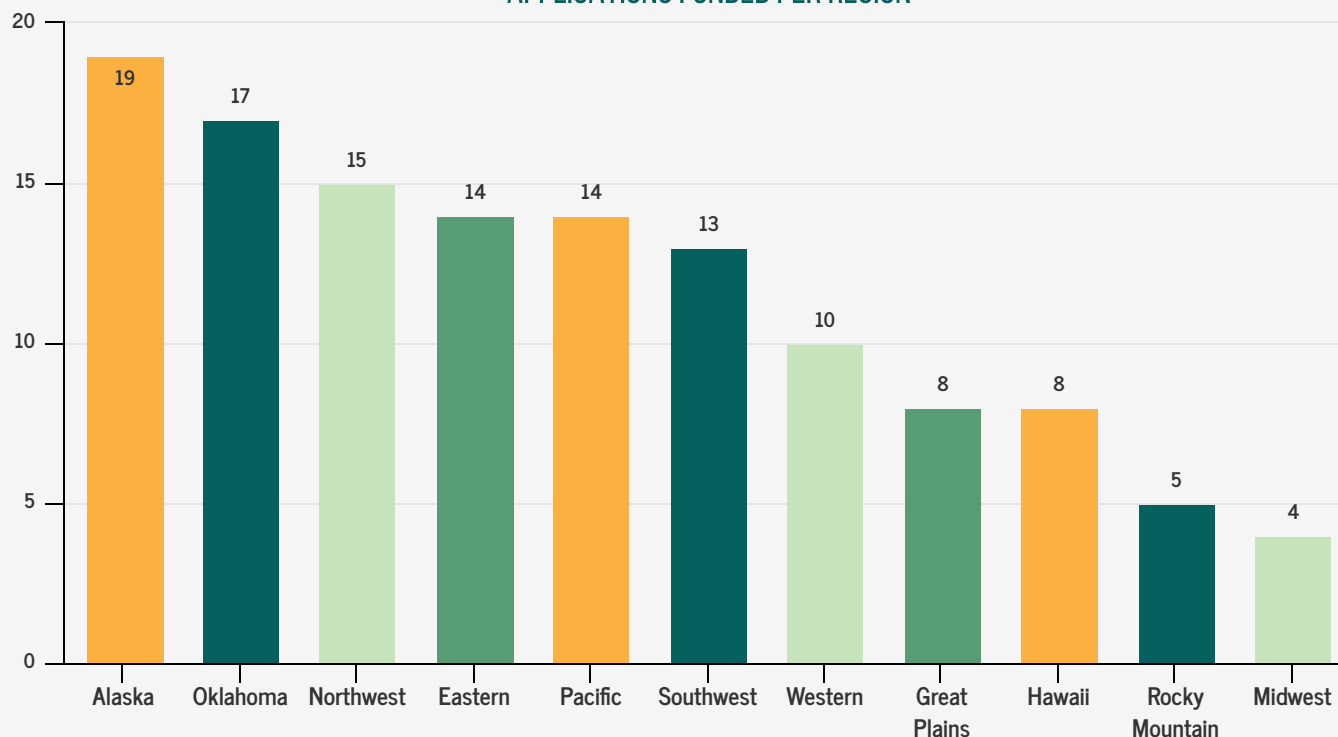
As demonstrated on the previous page, **the largest gaps between request made and request funded lie in the Great Plains Region (40.8% funded), followed closely by Hawaii (43.9%).** The Great Plains Region has the highest overall request (\$5.82 million), which partially explains the disparity between request made and funding allocated. The Great Plains Region also saw a few very high requests from CDFIs, which skewed the overall request upward and increased the funding gap. Hawaii, conversely, has one of the lowest overall requests (\$955,514) but is similarly underfunded.

Region	% Need Met
Eastern	81.0%
Oklahoma	80.0%
Alaska	70.8%
Midwest	70.4%
Rocky Mountain	65.1%
Pacific	63.8%
Southwest	59.7%
Western	58.7%
Northwest	50.9%
Hawaii	43.9%
Great Plains	40.8%

In general, however, the lower the overall request, the greater percentage of funding a given region received. This is the case with the Eastern Region (\$1.46 million requested; 81.0% funded), Oklahoma (\$710,680 requested; 80.0% funded), Alaska (\$793,422 requested; 70.8% funded), and Midwest (\$1.23 million requested; 70.4% funded).

Another factor that could impact the percentage of grant request met is the number of grantees per region. There is not a strong correlation between the number of grantees per category and the percentage of regional funding request serviced. For example, the Midwest Region has the lowest number of grantees (4), while Alaska has the highest number of grantees (19), but both regions share nearly the same overall percentage of funding request met (70.4% vs. 70.8%, respectively).

APPLICATIONS FUNDED PER REGION



CONCLUSIONS

In every grant cycle to date, NAAF has worked to strengthen Native agriculture by funding 501(c)(3) agencies, Educational Institutions, Tribes and Tribal Instrumentalities, and CDFIs. As this report has made clear, there are areas where there is a strong demonstrated need that NAAF alone cannot service. A snapshot of several leverage points—where collaborative work among any number of private or public funders would be particularly beneficial—follows below.

Key Leverage points lie among the following areas:



Native Supply Chains – While 6% of U.S. farmland is managed by Native farmers, Native farmers represent only 1% of the national agricultural market share. Over 50 million acres of land in Indian Country, roughly the size of Nebraska, are involved in some form of agriculture. Many rural Native economies form the backbone for rural communities nationwide. There is a strong need for investment in Native food systems and supply chains to ensure that Native producers can viably manage their land. Infrastructure, such as processing plants, distribution centers, and systems of data collection and management, must be built to facilitate this growth, as well as lay the foundation for more closed-loop and farm-to-table opportunities.



Ag Lending & Business/Technical Assistance – To operate at economies of scale, Native producers and supply chains require adequate access to financial and lending resources. Access to credit poses a significant issue across Indian Country, felt strongly by Native producers. In 2017, Native farm production sales were \$3.54 billion, but by NAAF estimates, a Native value-added agriculture sector could generate \$45.4 billion. To realize these market opportunities, Native producers require adequate, accessible capital and technical assistance to sustainably develop their agricultural enterprises.



Skills/Employment Training and Education – Native people, particularly youth, need access to training and education opportunities. Being a food producer means engaging in life-long learning, training, and any number of activities that strengthen knowledge. To ensure the long-term viability of Native food systems and supply chains, it is imperative to equip rising generations with the tools and resources to make informed decisions.



Cultural Food Ways & Traditional Foods – A robust cultural and traditional food system ensures Native agricultural practices are preserved, while providing a strong foundation for youth to engage in agriculture. Across the country, there is significant diversity in traditional foods and food ways. Funding traditional food projects helps to bring communities together and celebrate lived cultural practices.

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All photos featured in this report are courtesy of the Native American Agriculture Fund. The graphic on page 3, representing the impacts of land fractionation in Indian Country across generations, is from the Indian Land Tenure Foundation, page linked above.

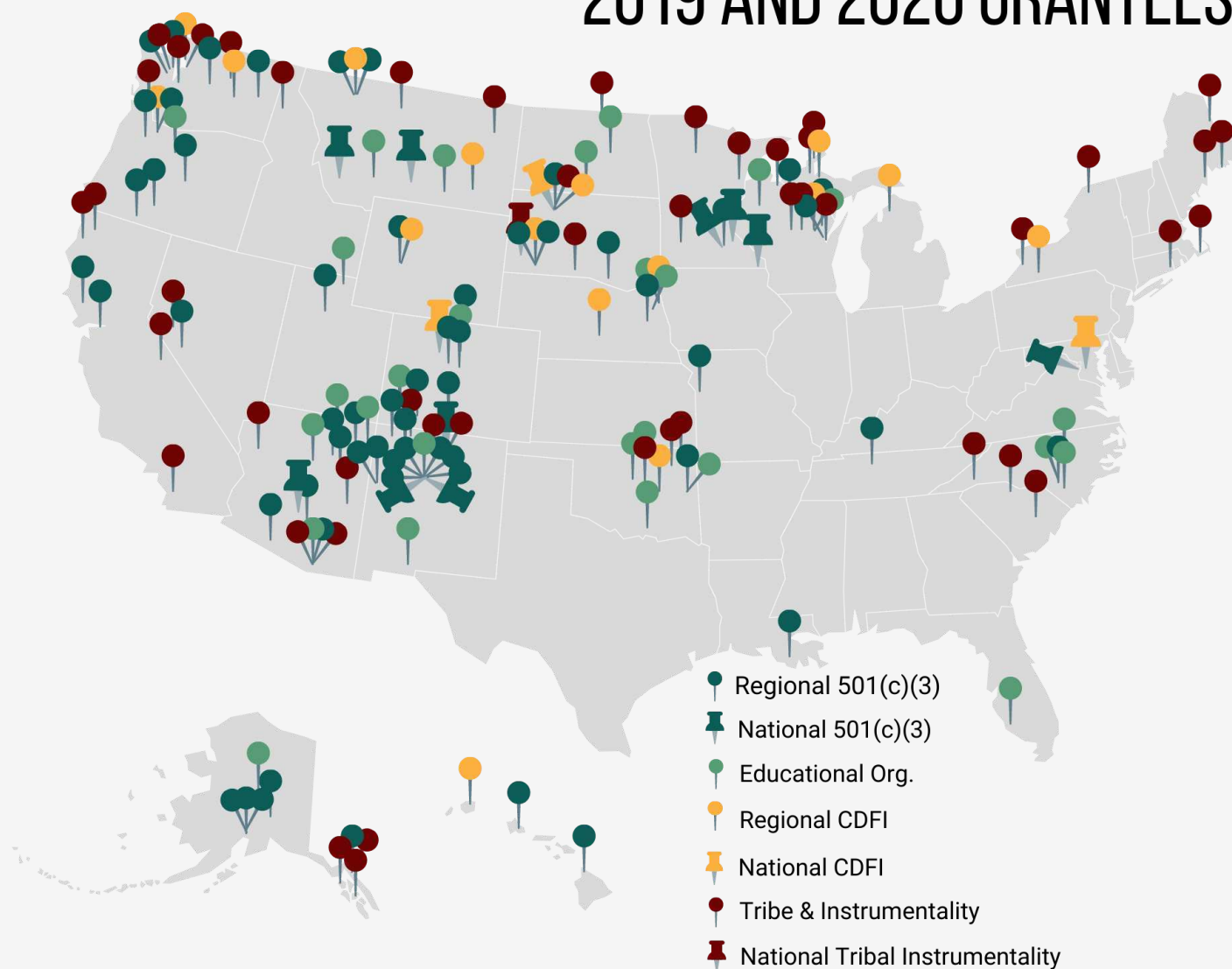
ADDENDUM: MAPS

The following is a series of maps that demonstrate the location of grantees receiving funding from NAAF in 2019 and 2020, with breakout maps for Targeted and Special Emphasis Areas for the 2020 RFA cycle.

Map A: 2019 and 2020 Grantees

All grantees from 2019 and 2020. If grantees received funds in multiple categories (e.g., in the 501(c)(3) Targeted Area and in the Traditional Foods/Food Sovereignty Special Emphasis Area), they are included only once on the maps. Similarly, if a grantee received funding in both 2019 and 2020, they are included only once on the map.

2019 AND 2020 GRANTEES

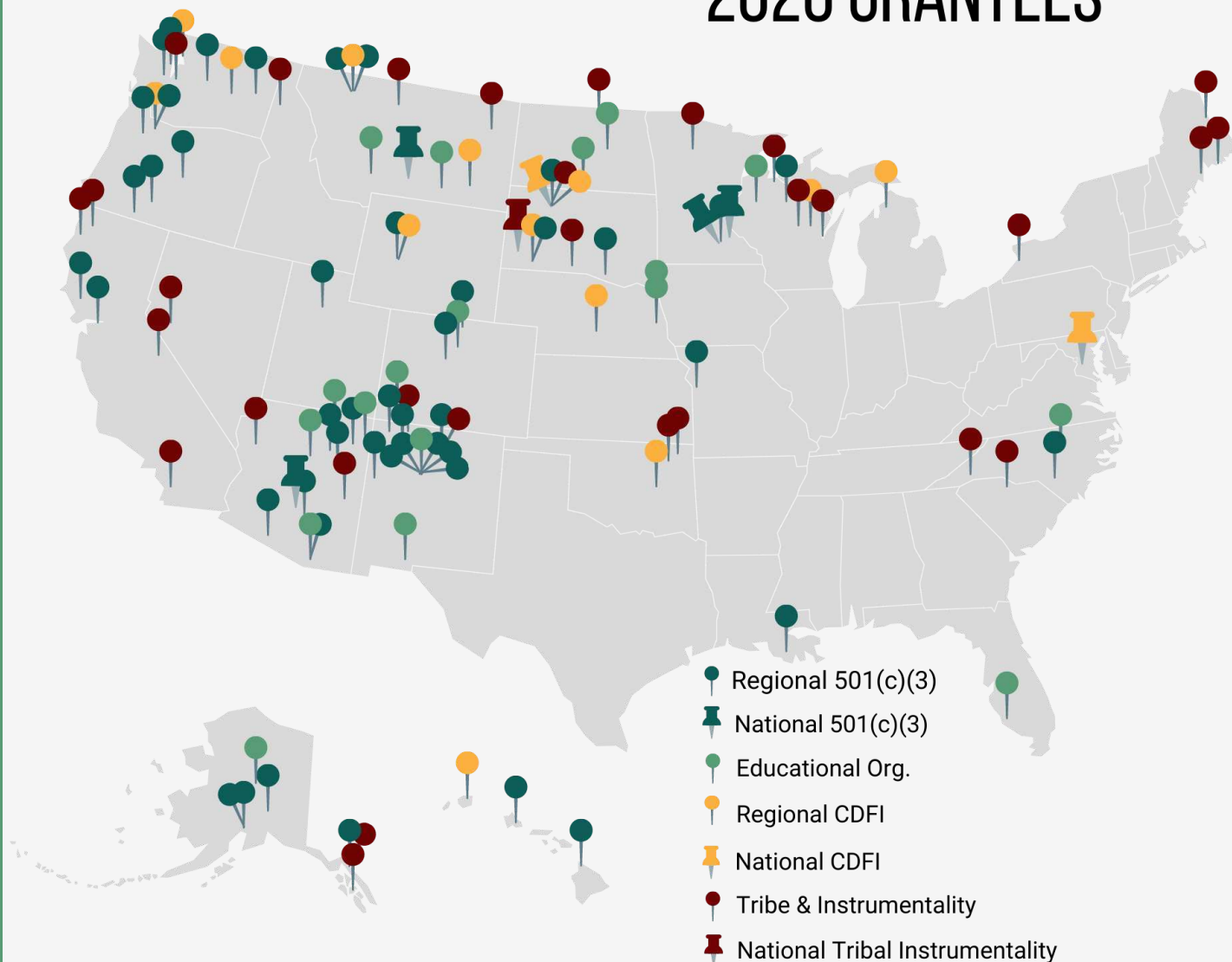


ADDENDUM: MAPS

Map B: All 2020 Grantees

All grantees that received funding in 2020, including grantees from both the General RFA and Youth RFA. If grantees received funds in multiple categories (e.g., in the 501(c)(3) Targeted Area and in the Traditional Foods/Food Sovereignty Special Emphasis Area), they are included only once on the map.

2020 GRANTEES

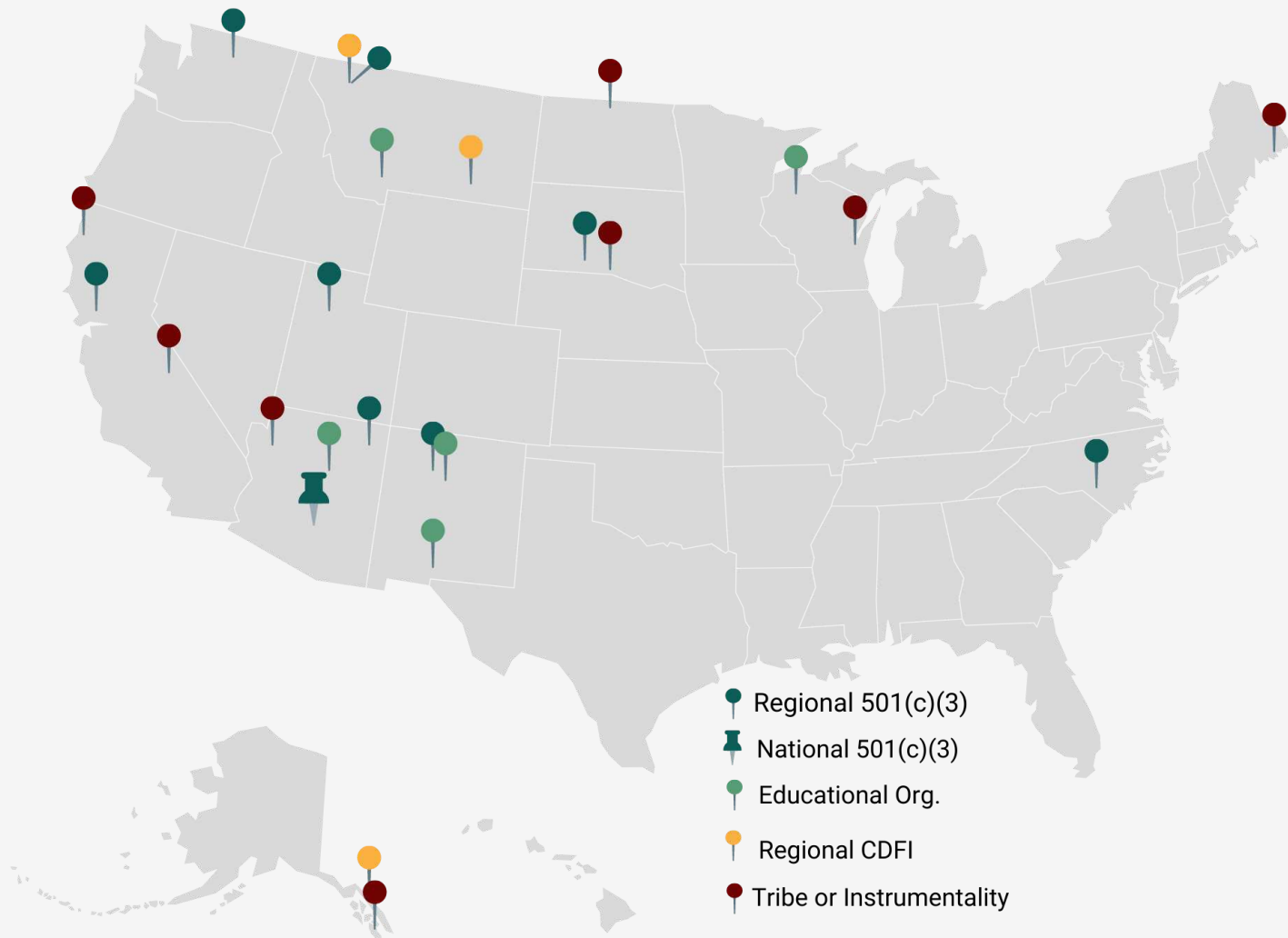


ADDENDUM: MAPS

Map C: All Youth RFA Grantees

All grantees that received funding from the 2020 Youth RFA only. No general RFA grantees are included.

2020 YOUTH GRANTS

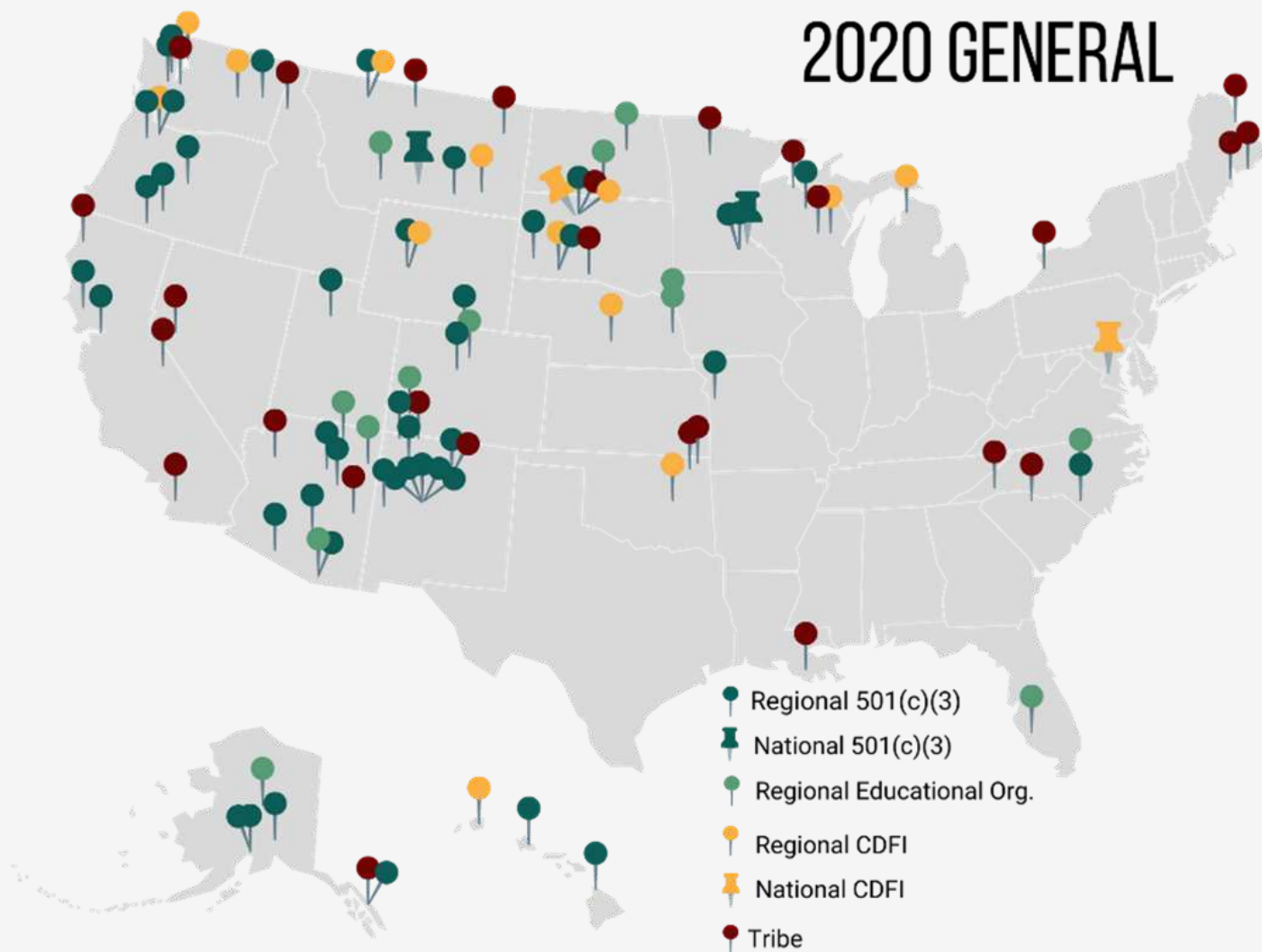


ADDENDUM: MAPS

Map D: All 2020 General RFA Grantees

All grantees that received funding in the 2020 General RFA only. This map excludes grantees that received funding via the 2020 Youth RFA. If a grantee received funding in multiple categories (e.g., in the 501(c)(3) Targeted Area and in the Traditional Foods/Food Sovereignty Special Emphasis Area), they are included only once on the map.

2020 GENERAL

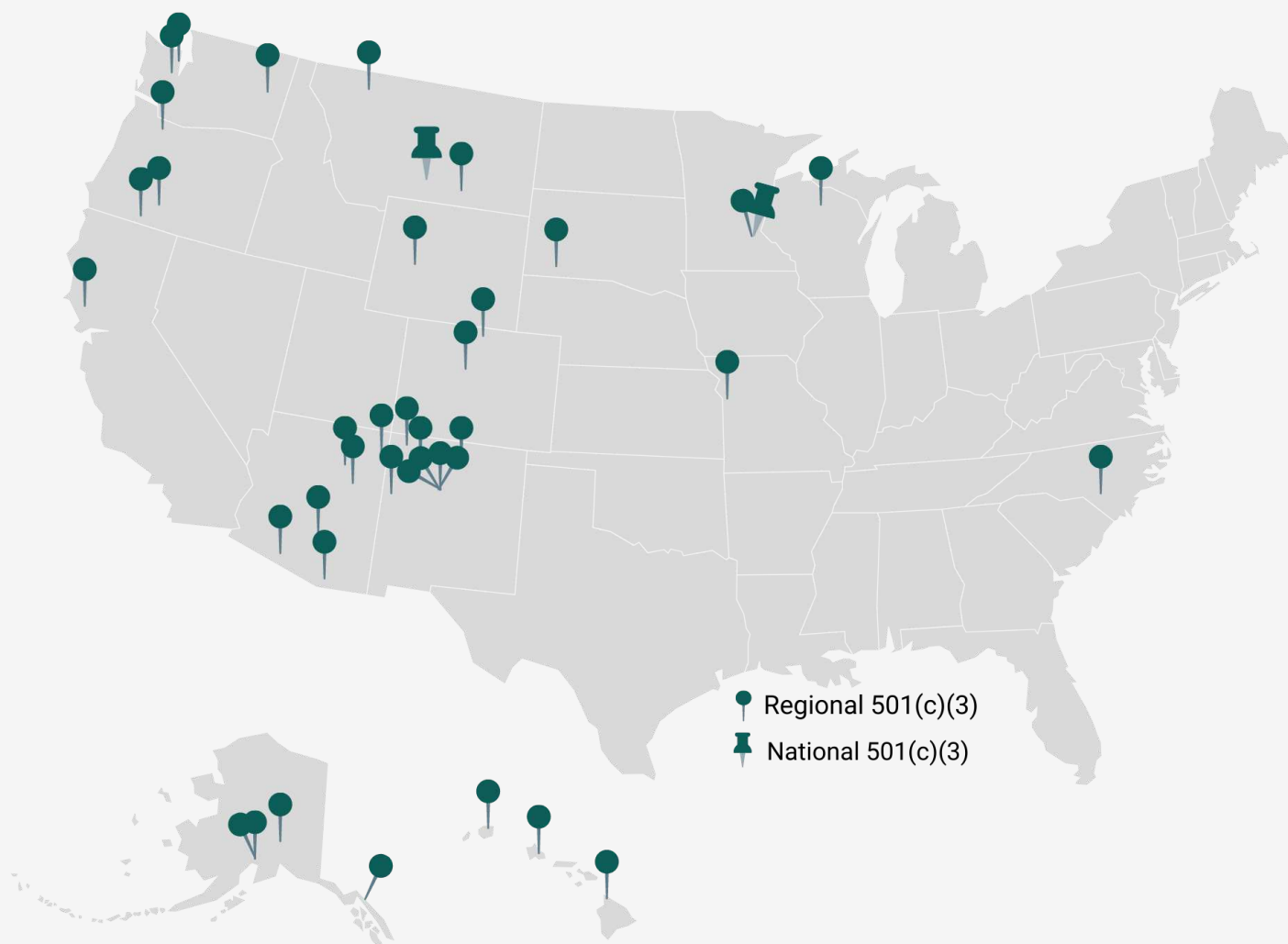


ADDENDUM: MAPS

Map E: 2020 501(c)(3) Grantees

All grantees that received funding in the Targeted Area: 501(c)(3) category in 2020.

2020 501(C)(3) ORGANIZATION GRANTS

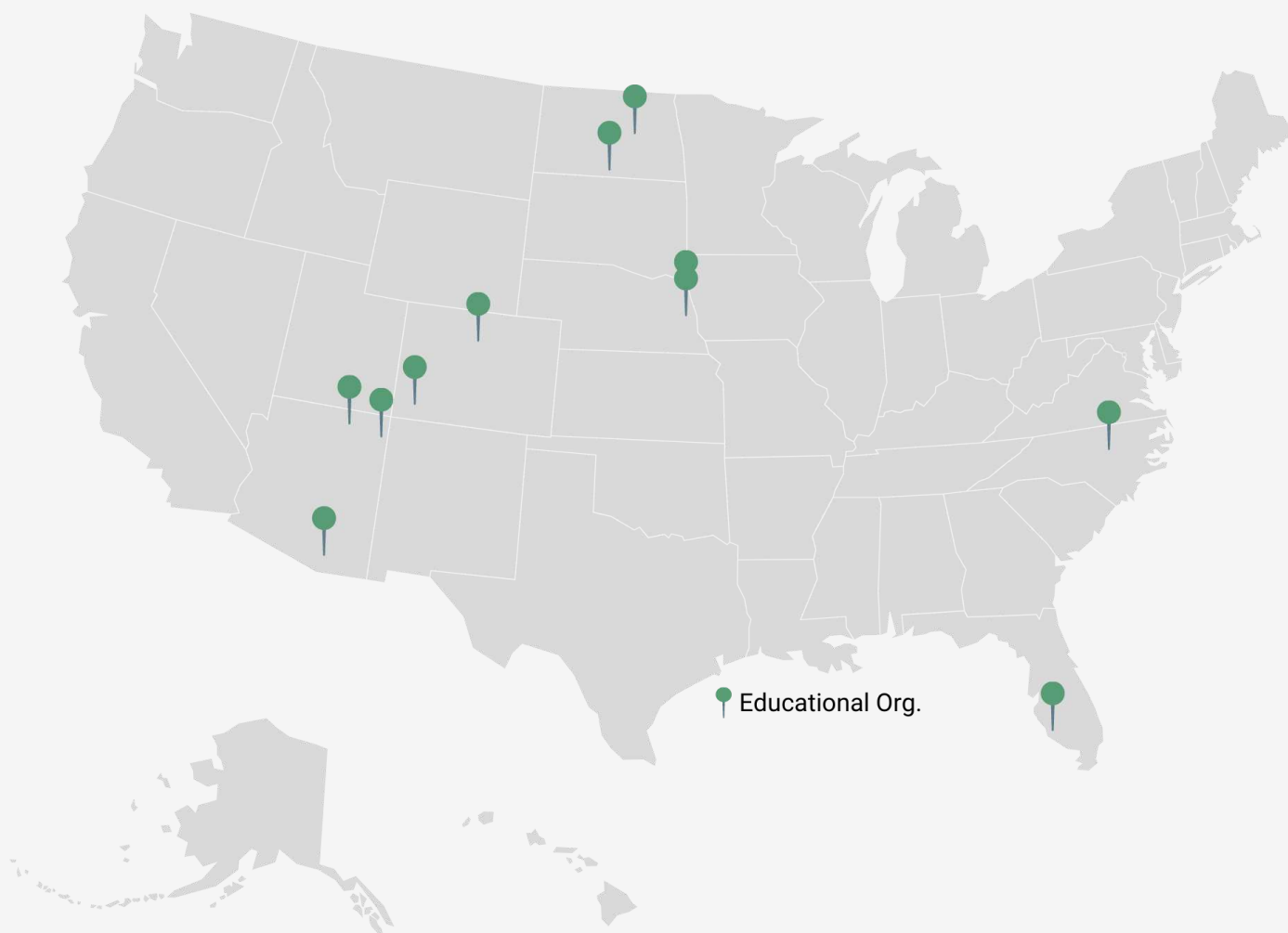


ADDENDUM: MAPS

Map F: 2020 Education Organization Grants

All grantees that received funding in the Targeted Area: Educational Organization category in 2020.

2020 EDUCATIONAL GRANTS

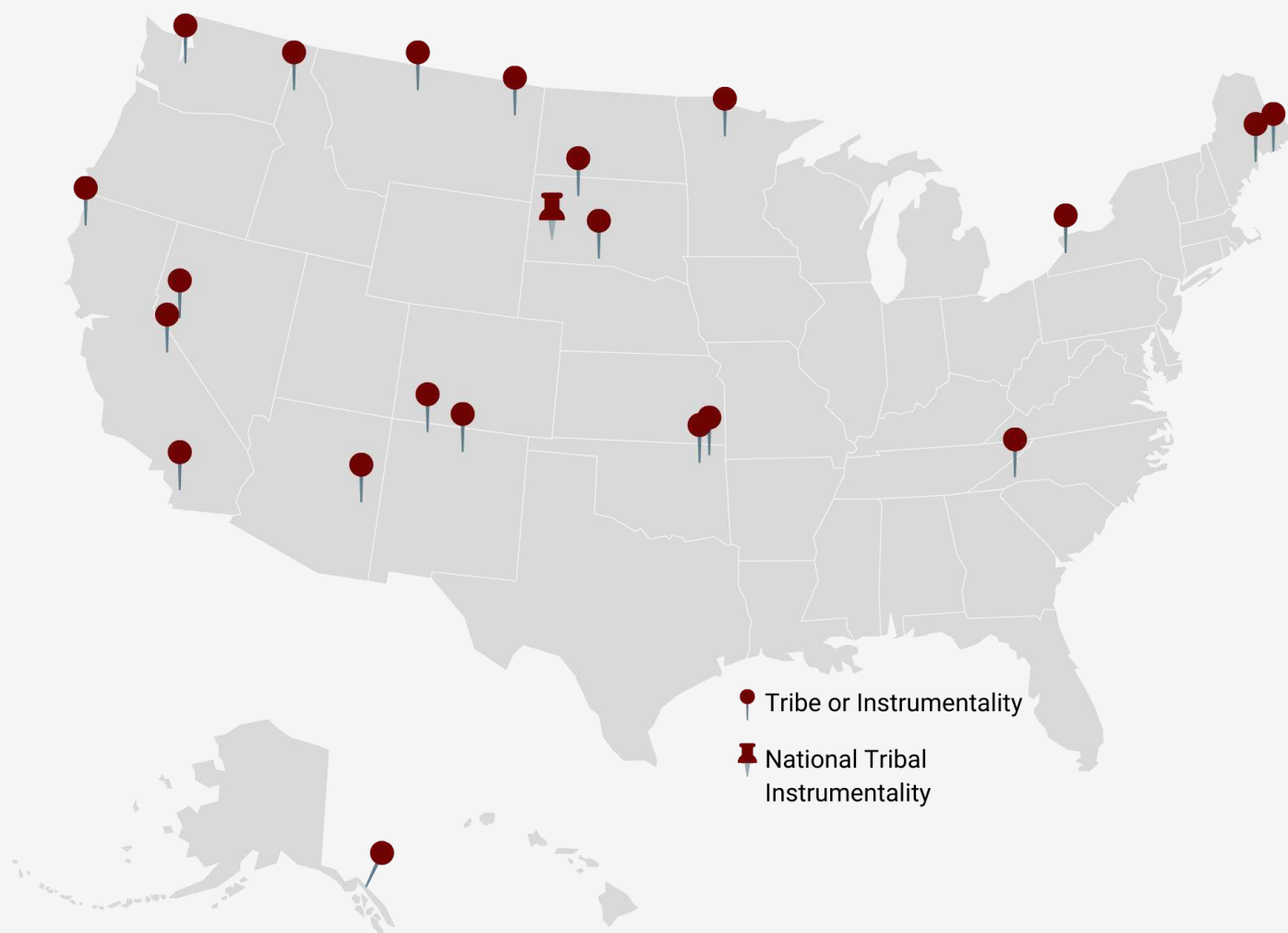


ADDENDUM: MAPS

Map G: 2020 Tribe or Tribal Instrumentality Grant

All grantees that received funding in the Targeted Area: Tribe/Tribal Instrumentality category in 2020.

2020 TRIBAL VALUE-ADDED GRANTS

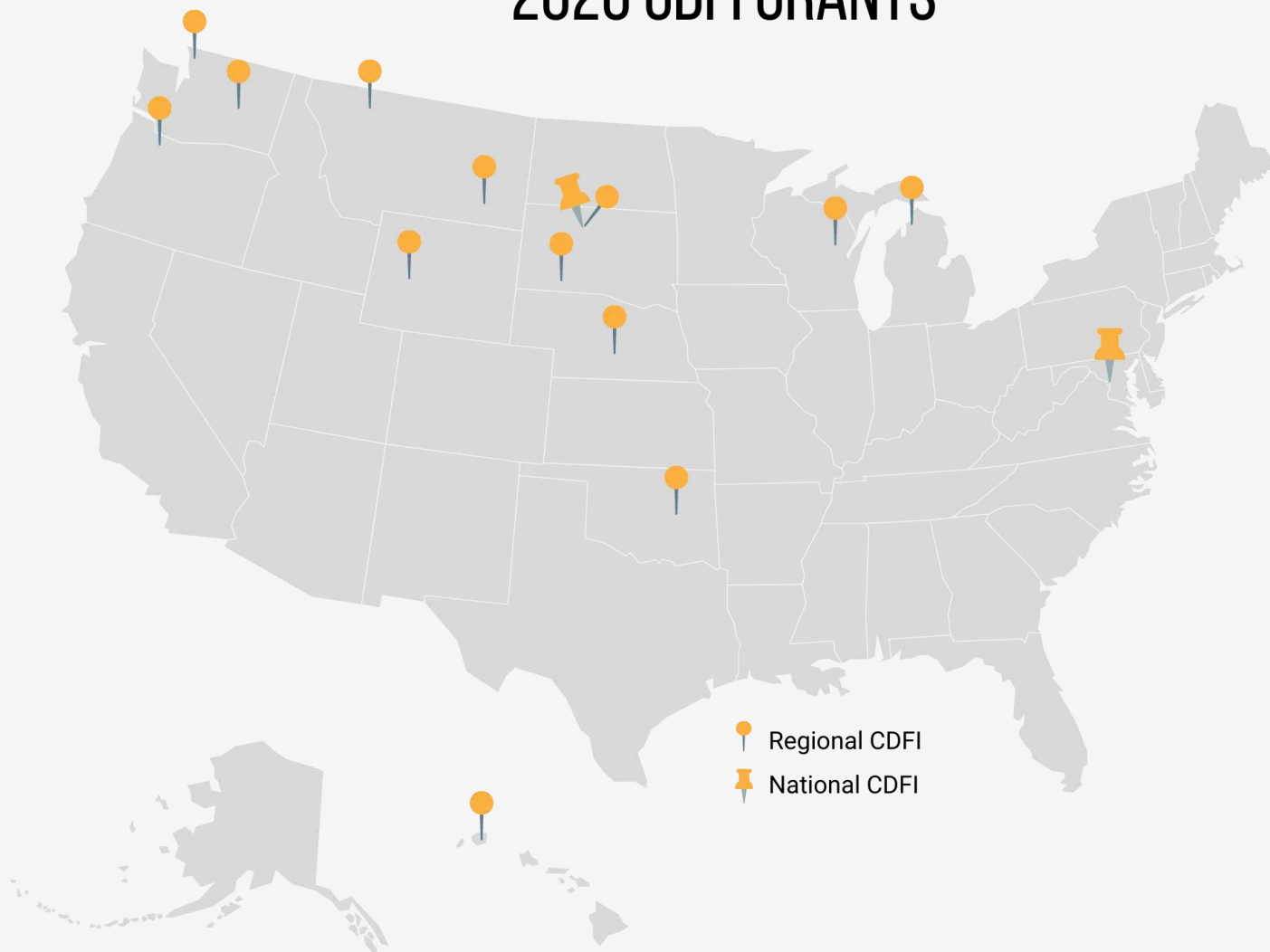


ADDENDUM: MAPS

Map H: 2020 CDFI Map

All grantees that received funding in the Targeted Area: CDFI category in 2020.

2020 CDFI GRANTS

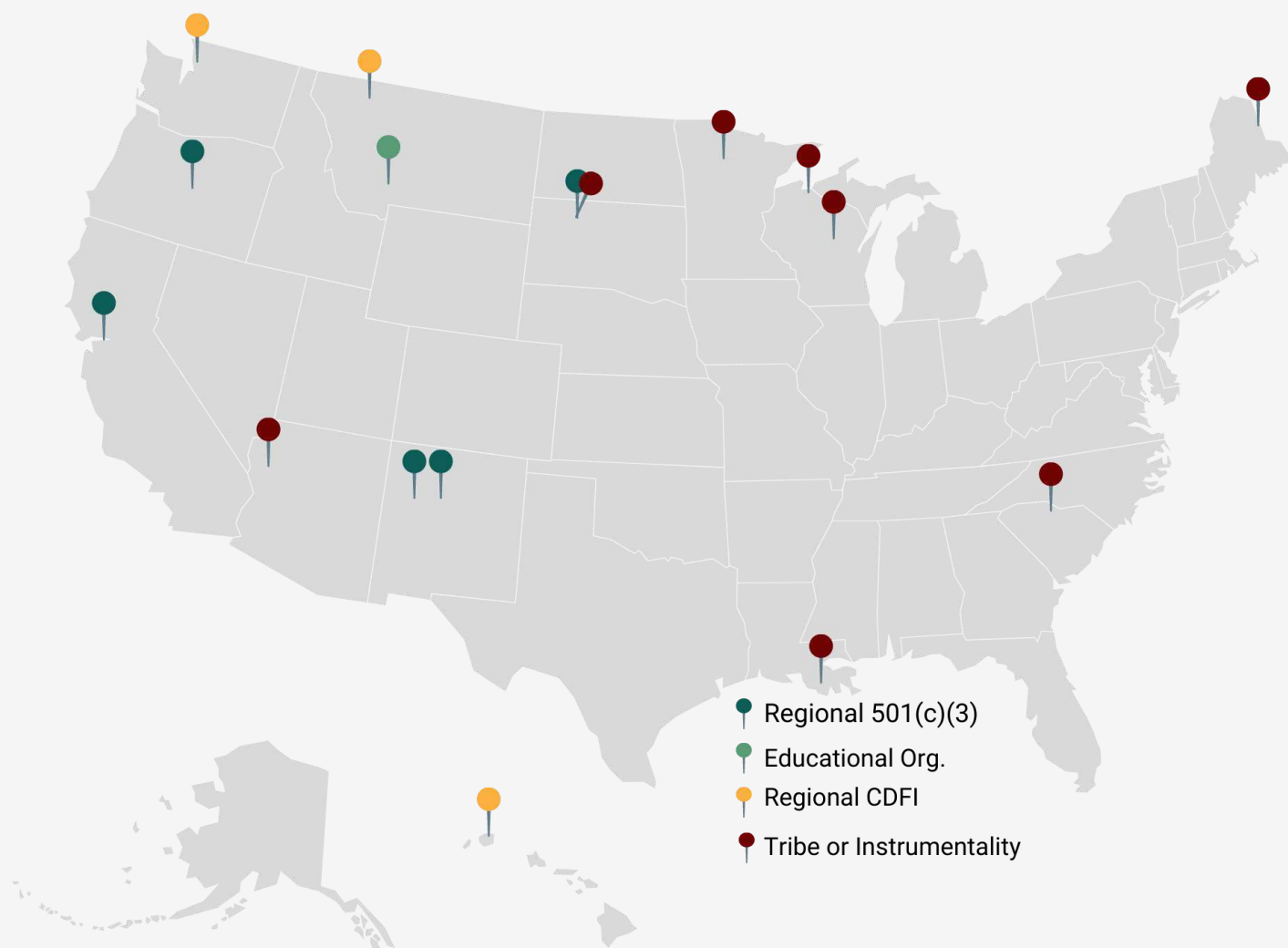


ADDENDUM: MAPS

Map I: 2020 Traditional Foods and Food Sovereignty

All grantees that received funding in the Special Emphasis Area: Traditional Foods and Food Sovereignty category in 2020.

2020 TRADITIONAL FOODS AND FOOD SOVEREIGNTY GRANTS



ADDENDUM: MAPS

Map J: 2020 Advocacy Map

All grantees that received funding in the Special Emphasis Area: Advocacy category in 2020.

2020 ADVOCACY GRANTS



ADDENDUM: MAPS

Map K: 2020 Agriculture Extension

All grantees that received funding in the Special Emphasis Area: Agriculture Extension in 2020.

2020 AGRICULTURE EXTENSION GRANTS

