

Open Your Heart to the Hungry and Homeless

Draft 2019 -2022 Strategic Plan

April 2019



The Board of Open Your Heart to the Hungry and Homeless (OYH) conducted a planning process to identify strategic directions for carrying out the mission in the next 2-3 years. Specific objectives included the following:

- Assess the current status and underlying values of OYH activities and operations
- Identify 2-3 -year strategic action priorities to carry out the OYH mission
- Develop an action roadmap for plan implementation

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Plan-At-A-Glance

Mission

Open Your Heart to the Hungry and Homeless believes that every Minnesotan should be free from hunger and homelessness. We make an impact by partnering with those who serve people in need, growing donor engagement and increasing awareness.

Core Values:

Mission-driven | Respect for those served | Giving where need is greatest | Providing crisis response
 Statewide focus | Staying grounded | Agility and responsiveness

Draft Values for further refinement



Current **ADVANTAGES**

Current **CHALLENGES**

2-3 Year **STRATEGIES**

- A. Active statewide network of grantees, partners and constituents
- B. Funding aimed to maximize impact in addressing local needs
- C. Serving grantees and organizations with flexibility and responsiveness
- D. Three decades of sustained, transparent and low-overhead service
- E. Collaborative and effective board and staff leadership

- A. Diversifying and increasing sources of funding
- B. Involving the young generation as donors
- C. Guiding grantee expectations and understanding of funding needs and guidelines
- D. Elevating OYH visibility and messaging
- E. Focusing our service niche to meet needs and maximize impact in a changing environment
- F. Sustaining and enhancing board composition, engagement and leadership

Strategy A:
Plan and implement sustainable GROWTH in FUNDING

Strategy B:
Enable more PEOPLE to KNOW WHO WE ARE and what we do

Strategy C:
Clarify and enforce the GRANT PROCESS and GUIDANCE for grantees to maximize impact

Strategy D:
Attract and retain BOARD MEMBERS – succession, diversity and intentional engagement

Details p. 3

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Strategies Details p. 6 | Action Roadmap pp.

Priority STRATEGIES

What are needed priority actions, initiatives or goals in the next 2-3 years?



Strategy A	FUNDS: Plan and implement sustainable growth in funding	
	Suggested short-term actions: <i>The next 6-12 months</i> <input type="checkbox"/> Piggy-back fundraising on current events or initiatives <input type="checkbox"/> Evaluate special projects	Suggested longer-term actions: <i>The next 2-3 years</i> <input type="checkbox"/> Increase funding <input type="checkbox"/> Assure clear alignment of money in and money out <input type="checkbox"/> Diversify the donor base - other companies (non-government); more employee options; "giving local" opportunities <input type="checkbox"/> Provide donor engagement opportunities <input type="checkbox"/> Build donor involvement – ways for volunteering <input type="checkbox"/> Increase grantee and donor engagement in... ... events (past, present future) ... social media presence <input type="checkbox"/> Seek foundation donors <input type="checkbox"/> Add opportunity for donor-advised funds
Strategy B	VISIBILITY: Enable more people to know who we are and what we do	
	Suggested short-term actions: <i>The next 6-12 months</i> <input type="checkbox"/> Update branding <input type="checkbox"/> Re-evaluate and build our brand and message <input type="checkbox"/> Seek publicity opportunities <input type="checkbox"/> Evaluate special projects based on outcomes	Suggested longer-term actions: <i>The next 2-3 years</i> <input type="checkbox"/> Assure clear alignment of money in and money out <input type="checkbox"/> Increase the visibility of OYH story and name <input type="checkbox"/> Involve donors as volunteers <input type="checkbox"/> Play a thought leadership role <input type="checkbox"/> Partner with new policy initiatives or collaboratives
Strategy C	GRANTING: Clarify and enforce the grant process and guidance for grantees to maximize impact	
	Suggested short-term actions: <i>The next 6-12 months</i> <input type="checkbox"/> Clarify grant guidelines <ul style="list-style-type: none"> • Current focus is on education • Have more Board discussion/involvement <input type="checkbox"/> Improve the grant process: <ul style="list-style-type: none"> • Re-evaluate Criteria and grant time frames; • Grantees' responses and follow-up; • Transparency on decision-making; • Decision-making process review; • Consider education grants; • Databasing and recording grant history; • Making expectations clear to grantees <input type="checkbox"/> "Enforce" grant closure logistics	Suggested longer-term actions: <i>The next 2-3 years</i>
Strategy D	BOARD: Attract and retain board members - succession, diversity and intentional engagement	
	Suggested short-term actions: <i>The next 6-12 months</i> <input type="checkbox"/> Plan for Board succession and specify engagement and expectations <input type="checkbox"/> Define expectations and engagement for board members <input type="checkbox"/> Increase board engagement at board/committee meetings (more discussions) <input type="checkbox"/> Increase board member engagement in events	Suggested longer-term actions: <i>The next 2-3 years</i> <input type="checkbox"/> Diversify Board composition <input type="checkbox"/> Develop opportunities for outstate engagement i.e. advisory committees



Strategic Action Road Map SUMMARY

Action STEPS				Expected OUTCOMES
Spring -Summer 2019	Fall 2019	Winter 2019	2020 and beyond	
Strategy A: Plan and implement sustainable GROWTH in FUNDING				Details p.5
<p>Step 1: <i>Evaluate capacity, skill set and champions for initiatives</i></p> <p>Step 2: <i>Track, measure and thank current donors</i></p> <p>Step 3: <i>Identify new donor pools including past board members</i></p> <p>Step 4: <i>Seek volunteers for grant writing</i></p>	<p>Step 5: <i>Track social media and website traffic</i></p> <p>Step 6: <i>Identify donor incentives and engagement activities</i></p>	<p>Step 7: <i>Seek new partnerships with suppliers</i></p> <p>Step 8: <i>Explore initiating an endowment fund</i></p> <p>Step 9: <i>Look into donor advised funds</i></p>	<p>Step 10: <i>Conduct program evaluation and communication</i></p>	<p>Short-term: (6-12 months)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Improve event effectiveness; evaluate special projects/ impacts <input type="checkbox"/> Align programming with corporate partnerships <input type="checkbox"/> Increase in grant-writing <p>Long-term: (1-2 years)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Capture more donor information <input type="checkbox"/> Created tangible incentives to give donors <input type="checkbox"/> Improved donor engagement and increase the donor base.
Strategy B: Enable more PEOPLE to KNOW WHO WE ARE and what we do				Details p.6
<p>Step 1: <i>Research opportunities and resources for branding assistance</i></p>	<p>Step 2: <i>Fix or improve website to clearly communicate brand/message</i></p> <p>Step 3: <i>Research partner volunteer opportunities</i></p> <p>Step 4: <i>Identify the target market for volunteer opportunities</i></p> <p>Step 5: <i>Identify 2-3 partners for a volunteer opportunity</i></p>	<p>Step 6: <i>Define and identify incentives and marketing - how exciting work can be</i></p> <p>Step 7: <i>Launch a proactive presence and marketing campaign on social media</i></p>		<p>Short-term: (6-12 months)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Obtain a professional opinion of our brand and messaging <input type="checkbox"/> Research the brand <input type="checkbox"/> Create a volunteer opportunity by partnering with another agency <p>Long-term: (1-2 years)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Increase the number of social media avenues/outputs <input type="checkbox"/> Define the OYH message; what we do/why it's exciting
Strategy C: Clarify and enforce the GRANT PROCESS and GUIDANCE for grantees to maximize impact				Details p.7
<p>Step 1: <i>Add closure form requirement to grant guidelines/agreement</i></p> <p>Step 2: <i>Discuss grant guidelines amongst grant review committee</i></p> <p>Step 3: <i>Bring recommendations to the board and discuss as a board</i></p> <p>Step 4: <i>Conduct discussion at board meetings re: grants led by GRC Chair</i></p>		<p>Step 5: <i>Discuss future of Education and Program Grants</i></p> <p>Step 6: <i>Be intentional with enforcing grant guidelines</i></p>	<p>Step 7: <i>Continue ongoing board engagement with grants and special projects</i></p>	<p>Short-term: (6-12 months)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Clarity of process and clear direction <input type="checkbox"/> Enforcement of closure forms <p>Long-term: (1-2 years)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Better informed board leading to more engagement <input type="checkbox"/> Data and information collections <input type="checkbox"/> Decision about the Education Grant.
Strategy D: Attract and retain BOARD MEMBERS – succession, diversity and intentional engagement				Details p.8
<p>Step 1: <i>Identify Board expectations and ways to measure engagement</i></p> <p>Step 2: <i>Develop a plan for participative board recruitment and succession</i></p> <p>Step 3: <i>Initiate recognition of Board and Board members</i></p>	<p>Step 4: <i>Diversify our approaches for attracting new board members</i></p> <p>Step 5: <i>Consider convening diverse board events</i></p>		<p>Step 6: <i>Pair board meeting with happy hour, grantee location tours and volunteering</i></p> <p>Step 7: <i>Identify technology tools to attract and engage out-state and local board members</i></p>	<p>Short-term: (6-12 months)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Implement Board expectations and accountability <input type="checkbox"/> Develop a board recruitment/succession plan <input type="checkbox"/> Engage the entire board in board member recruitment <p>Long-term: (1-2 years)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Improve technology to support/retain new members <input type="checkbox"/> Increase the social aspect of the Board membership



Action Plan:

Strategy A: Plan and implement sustainable GROWTH in FUNDING

The REALITY CHECK: What are considerations for effective implementation?

What ONGOING EFFORTS or ADVANTAGES will <u>assist</u> action?	What FACTORS might <u>hinder</u> or <u>complicate</u> implementation?
<ul style="list-style-type: none"> Workplace grants and sponsorships Events Give To The Max Day (GTMD) – survey past individual donors Staff and board engagement and board member matches 	<ul style="list-style-type: none"> Lack of donor information regarding passions etc. Lacking volunteer opportunities for donor organizations

The Expected OUTCOMES: What do we want to achieve or produce? How will we measure progress?

Short Term (6-12 months):	A. Improve event effectiveness by evaluating special projects and impacts B. Align programming with corporate partnerships C. Increase in grant-writing
Long Term (1-2 years):	A. Capture more donor information B. Create tangible incentives to give donors C. Improved donor engagement and increase the donor base. <ul style="list-style-type: none"> Increase number of <u>donors</u>, Increase dollar amount of <u>donations</u> Increase donor <u>interactions</u> Increase donor <u>experiences and information</u> Consider <u>donor-advised funds</u>

The IMPLEMENTATION: What key actions/initiatives will implement this action area/priority strategy?

Action STEPS	When	Who
Step 1: Evaluate capacity, skill set and <u>champions for initiatives</u>	Spring 2019	TBD
Step 2: Track, measure and <u>thank current donors</u> <ul style="list-style-type: none"> Engage all board members in the task 	Spring-Summer 2019	TBD
Step 3: Identify new donor pools including past board members <ul style="list-style-type: none"> GTMD donors, foundation donors, non-government donors etc. 	Summer 2019	TBD
Step 4: Seek volunteers for <u>grant writing</u>	Fall 2019	TBD
Step 5: Track <u>social media and website traffic</u>	Fall 2019	TBD
Step 6: Identify donor incentives and engagement activities <ul style="list-style-type: none"> Identify sources for donor engagement; more employee options, giving local opportunities etc. Which social media channels are most effective? 	Fall 2019	TBD
Step 7: Seek new <u>partnerships with suppliers</u> <ul style="list-style-type: none"> Appliance companies, mattress companies, Etc. 	Winter 2019	TBD
Step 8: Explore initiating an <u>endowment fund</u> <ul style="list-style-type: none"> 	Winter 2019	TBD
Step 9: Look into <u>donor advised funds</u>	Winter 2019	TBD
Step 10: Conduct program <u>evaluation and communication</u>	2020	TBD



Action Plan:

Strategy B: Enable more PEOPLE to KNOW WHO WE ARE and what we do

The REALITY CHECK: What are considerations for effective implementation?

What ONGOING EFFORTS or ADVANTAGES will <u>assist</u> action?	What FACTORS might <u>hinder</u> or <u>complicate</u> implementation?
<ul style="list-style-type: none"> Adding workplace giving campaigns Expanded use of social media and website Defining what we do will help! 	<ul style="list-style-type: none"> Branding is confusing; <ul style="list-style-type: none"> How do we make it relevant? How do we know we have a good brand? Need to get professional input on our brand Financial resources Lack of awareness about the younger generation and workplace giving Identify as a direct service provider

The Expected OUTCOMES: What do we want to achieve or produce? How will we measure progress?

Short Term (6-12 months):	A. Obtain a professional opinion of our brand and messaging on what we do as exciting B. Research the brand C. Create a volunteer opportunity by partnering with another agency
Long Term (1-2 years):	A. Increase the number of avenues and outputs on social media B. Define the OYH message about what we do and why it is exciting

The IMPLEMENTATION: What key actions/initiatives will implement this action area/priority strategy?

Action STEPS	When	Who
Step 1: <u>Research opportunities and resources for branding assistance</u> <ul style="list-style-type: none"> Seek professional guidance and an “outside perspective” on our brand 	Spring 2019	TBD
Step 2: <u>Fix or improve the OYH website to clearly communicate our brand and message</u>	Fall 2019	TBD
Step 3: <u>Research partner volunteer opportunities</u> <ul style="list-style-type: none"> Research options for partnership Who is the target? What do they want? What are success measures? 	Fall 2019	TBD
Step 4: <u>Identify the target market for volunteer opportunities</u> <ul style="list-style-type: none"> Target markets for volunteer interest opportunity by age group 	Fall 2019	TBD
Step 5: <u>Identify 2-3 partners for a volunteer opportunity</u>	Fall 2019	TBD
Step 6: <u>Define and identify incentives and marketing - how exciting work can be</u>	Winter 2019	TBD
Step 7: <u>Launch a proactive presence and marketing campaign on social media</u> <ul style="list-style-type: none"> Who do we target? 	Winter 2019	TBD



Action Plan:

Strategy C: Clarify and enforce the GRANT PROCESS and GUIDANCE for grantees to maximize impact

The REALITY CHECK: What are considerations for effective implementation?

What ONGOING EFFORTS or ADVANTAGES will assist action?

- Spreadsheet of closure form submissions and those missing
- Spreadsheets with impact statements

What FACTORS might hinder or complicate implementation?

- Time that grantees have and not adding a burden with new process steps

The Expected OUTCOMES: What do we want to achieve or produce? How will we measure progress?

Short Term
(6-12 months):

- A. **Clarity** of process and clear direction
- B. **Enforcement** of closure forms

Long Term
(1-2 years):

- A. **Better** informed board leading to more engagement
- B. **Data** and information collections
 - Publicity - Increase transparency in decision-making
 - Internal auditing
 - Engage Board with grants and special projects to increase impact
- C. **Decision** about the Education Grant. Do we make it into a new program?

The IMPLEMENTATION: What key actions/initiatives will implement this action area/priority strategy?

Action STEPS	When	Who
<p>Step 1: Add closure form requirement to grant guidelines and agreement on application</p> <ul style="list-style-type: none"> • Possibly changing the name of the form and process • Enforce • Add denied grants to board agenda 	<p>ASAP</p> <p>ASAP – Next board agenda</p>	<p>Staff</p> <p>Allie</p>
<p>Step 2: Discuss grant guidelines amongst grant review committee</p> <ul style="list-style-type: none"> • Discussion around grants more with board and highlighting some Size of organization – clarifying on guidelines – deciding as a board what we do (Sub-committee to review - ex: org. restr.res.) • Create a draft and then bring to the board 	<p>Spring 2019 Next Grant Review Committee (GRC)</p>	<p>GRC</p>
<p>Step 3: Bring recommendations to the board and discuss recommendations as a board</p> <ul style="list-style-type: none"> • Provide space at the board meetings to discuss this • Utilize consent agenda 	<p>Summer 2019 At next board meeting</p>	<p>Board</p>
<p>Step 4: Conduct discussion at board meetings around grants led by GRC Chair</p>	<p>Next board meeting and long-term</p>	<p>GRC chair</p>
<p>Step 5: Discuss future of the Education and Program Grants</p> <ul style="list-style-type: none"> • Do we keep the Education grant? • Do we make it into a new program? 	<p>Winter 2019</p>	<p>GRC Committee and Board</p>
<p>Step 6: Be intentional with enforcing grant guidelines</p>	<p>Winter 2019</p>	<p>GRC Board</p>
<p>Step 7: Continue ongoing board engagement with grants and special projects</p>	<p>2020</p>	<p>Board</p>



Action Plan:

Strategy D: Attract and retain BOARD MEMBERS – succession, diversity and intentional engagement

The REALITY CHECK: What are considerations for effective implementation?

<p>What ONGOING EFFORTS or ADVANTAGES will <u>assist</u> action?</p> <ul style="list-style-type: none"> Working board and volunteers Passionate board members 	<p>What FACTORS might <u>hinder or complicate</u> implementation?</p> <ul style="list-style-type: none"> Visibility – not well known, lack of a brand, etc. Need more use of technology to support our work Need to add social dimensions to board meetings and events
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The Expected OUTCOMES: What do we want to achieve or produce? How will we measure progress?

<p>Short Term (6-12 months):</p>	<p>A. Implement Board expectations and enforce accountability B. Develop a board recruitment and succession plan C. Engage the entire board in board member recruitment</p>
<p>Long Term (1-2 years):</p>	<p>A. Improve technology to support, attract, recruit and retain new members B. Increase the social aspect of the Board membership</p>

The IMPLEMENTATION: What key actions/initiatives will implement this action area/priority strategy?

Action STEPS	When	Who
<p>Step 1: <u>Identify Board expectations and ways to measure engagement</u></p> <ul style="list-style-type: none"> Refine core values Be prescriptive about expectations and holding people accountable 	Spring 2019	TBD
<p>Step 2: <u>Develop a plan for participative board recruitment and succession</u></p> <ul style="list-style-type: none"> Identify a vision and plan for building a diverse and engaged board Identify ways that for all board members to identify candidates Consider ways to recruit and engage out-state members (i.e. advisory committees etc.) 	Spring - Summer 2019	TBD
<p>Step 3: <u>Initiate recognition of Board and Board members</u></p> <ul style="list-style-type: none"> Celebrate birthdays, holidays parties and recognition of each person Spotlight board members on social media Other ways to acknowledge Board service and contributions 	Spring - Summer 2019	TBD
<p>Step 4: <u>Diversify our approaches for attracting new board members</u></p> <ul style="list-style-type: none"> Tabling, mixers, Mixers/Plus 1's to bring in potential board members to board events 	Fall 2019	TBD
<p>Step 5: <u>Consider convening diverse board events</u></p> <ul style="list-style-type: none"> Assign board members one quarter per year to identify 3 events within that time for staff to research (E.g. Shake shack MIX parties) 	Fall 2019	TBD
<p>Step 6: <u>Pair board meeting with happy hour, grantee location tours and volunteering</u></p> <ul style="list-style-type: none"> Meetings at restaurants, grantee locations, and other venues 	2020	TBD
<p>Step 7: <u>Identify technology tools to attract and engage out-state and local board members</u></p> <ul style="list-style-type: none"> Have long-distance, virtual ways to attend meetings effectively Look into using best tools - Skype, VoIP, etc. 	2020	TBD

Situation Assessment

Where are we now? How are we positioned for the future?



Current ADVANTAGES:

What have been major achievements? What strengths can we build on? What is working well?
What are opportunities to leverage?

A. Active statewide network of grantees, partners and constituents

Related comments and observations:

- Built a statewide network
- Gone much broader geographically in funding organizations
- Over 30 workplace partners
- Strong, positive reputation with constituents
- Opportunity for leveraging partnerships

B. Funding aimed to maximize impact in addressing local needs

Related comments and observations:

- We provide help locally and see the impact of donated money
- Thoughtful approach in fulfilling the mission and always looking for impact
- Employees attracted by our low overhead, impact of investment and connectedness to giving

C. Serving grantees and organizations with flexibility and responsiveness

Related comments and observations:

- More flexible compared to big foundations
- Quick and agile in our operations
- Grant proposals are grantee-focused
- Good resource to organizations that serve the community; they call us for help and referrals

D. Three decades of sustained, transparent and low-overhead service

Related comments and observations:

- Organization sustainability – we have served over 30 years!
- Low administrative costs that mainly covers staff salaries
- Transparent work and finances; we can tell everyone about our service and finances
- Overhead is low and can help fundraising in organizations, especially in rural areas, etc.
- Employees attracted by our low overhead, impact of investment and connectedness to giving

E. Collaborative and effective board and staff leadership

Related comments and observations:

- Board composition is an asset; dedicated members that represent diverse perspectives
- Very active Board that provides hand-on leadership without micromanaging operations

Core VALUES:

(Initial thinking for further discussion)

What are underlying values to guide our work?

- ✚ Giving where need is greatest
- ✚ Crisis response
- ✚ Respect for those served
- ✚ Statewide focus
- ✚ Mission-driven
- ✚ Staying grounded
- ✚ Agility and responsiveness

Situation Assessment Continued



Where are we now? How are we positioned for the future?

Key CHALLENGES:

What needs work at this juncture of the organization? What are organizational weaknesses to address?

What are trends, threats and opportunities to consider as we identify future priorities?

A. Diversifying and increasing sources of funding

Related comments and observations:

- Assuring needed financial resources due to a decline in available funds and the increase in needs
- Individual donor base is not growing
- Changing donor base trends
 - Continued decline in workplace giving
 - Generational trends in giving are changing
- Staying focused in the face of increasing needs and decreasing public funds (threat)
- Need to diversifying funding sources (threat)
- Need to increase statewide giving (threat)
- Getting out there to bring in foundations as donors (opportunity)
- Opportunity for donor relationship cultivation (opportunity)
- Opportunity for leveraging partnerships (opportunity)

B. Involving the young generation as donors

Related comments and observations:

- Need to identify how to involve young people
- Young people seek to be involved in ways other than money (e.g. volunteering)
- There are new workplaces to engage that seek new ways of giving (beyond United Way) (opportunity)
- Younger donors -- seek specific connection to recipients and causes; seek to volunteer

C. Guiding grantee expectations and understanding of funding needs and guidelines

Related comments and observations:

- Need to educate grantees on how to seek funding in a changing environment
 - Grantees expect to be funded according to traditional needs
 - In our effort to provide funding where the need is the greatest, we need to assist grantees find other ways to meet their needs such a new refrigerator or backpacks, etc.
- Address the disconnect in grant guidelines and what we fund
 - Need better tracking of decisions
 - Need to make sure requirements are met

D. Elevating OYH visibility and messaging

Related comments and observations:

- Missing ways to share stories in a way that grantees and others understand our process
- Managing public perceptions
 - We are often seen as a direct service organization vs. a foundation
 - Need to clarify our message
- Building visibility of OYH beyond grantees to attract potential new donors
- Working effectively within the fast-pace of technology changes - speed of information conveyed in social media; data security, etc. (threat)

Situation Assessment Continued



Where are we now? How are we positioned for the future?

Key CHALLENGES: Continued

What needs work at this juncture of the organization? What are organizational weaknesses to address?

What are trends, threats and opportunities to consider as we identify future priorities?

E. Focusing our service niche to meet needs and maximize impact in a changing environment

Related comments and observations:

- Avoiding the potential for mission creep because the need is so great; how do we keep the advantage of our broad service but focus our work?
- Being able to change with needs (e.g. elder homelessness) and also with donors' needs
- "Homelessness" is getting increased public attention; how do we humanize the challenge of people experiencing homelessness and define our niche?
- Need to further clarify who we are as an organization (threat)

F. Sustaining and enhancing board composition, engagement and leadership

Related comments and observations:

- Working through staff and board transition challenges - new Executive Director and new President
 - Building working relationships
 - Building institutional knowledge; supplementing with efforts such as speakers, etc.
- Need to continue building a board that is representative of those we serve
- Sustaining Board passion, energy and engagement without the motivation derived from direct service
- With new leadership we have an opportunity to re-clarify and re-develop our internal processes (opportunity)