

Regional Housing Legal Services Strategic Implementation Plan

Summer 2022

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Executive Summary

In the last five years our world and the way we work has changed in ways few could have imagined. RHLS moved suddenly to all remote work, successfully transitioned to a new executive director, and began to execute a pivot toward racial equity spurred, in part, by the national reckoning on race two summers ago.

Now we face inflation and escalation in interest rates that we haven't seen in decades, accelerated involvement of private capital in acquiring not just apartments but homes, and an across the board shocking decrease in housing supply and housing affordability. This is happening as COVID continues to infect, kill, and cause disability at alarming rates and as the workforce is reshaping itself with the "great resignation" and uncertainty about whether office life will ever be what it was.

RHLS comes to this moment in time with new, aspirational leadership who wants to help RHLS pivot to center racial equity in everything we do; strengthen and broaden our reputation; and ensure long-term financial stability for the organization. We have a highly skilled, passionate staff who are deeply committed to working on affordable housing, addressing racial equity, and bolstering RHLS – and are fully capable of implementing the new vision.

This strategic implementation plan was designed to build upon the work of the prior strategic plan, but to modify and refine the vision and then to focus more extensively on identifying key implementation steps needed to move us toward the refined vision.

This plan begins with a clearly articulated vision for the future of the organization and the key strategies we expect to employ to get there. The bulk of the report focuses on outlining the specific tasks in five action areas that we see as most essential to move us forward. With such an extensive and ambitious list, we will need to prioritize our work. The final section of the report details the actions we expect to take during the first six months of the plan. After six months, the Leadership Team will evaluate our progress and identify the action items for the following six months. We expect to repeat this process as needed to get through our lists and to our goal.

We go into the implementation phase with a recognition that we are taking on hard work that is at times uncomfortable and uncertain. We are adding this hard work, even when staff are already extremely busy with existing projects and other work demands, because we know it is essential to the future of the organization. We enter this phase of the work with an understanding that things may change. After the first six months we may identify new priorities or may have found we didn't have the time to complete as much as we'd hoped on the initial action items. As always, drawing upon existing RHLS strengths, we will be flexible, but persistent.

Background

RHLS's last strategic plan covered 2018-2021. This current process is an update of that plan to meet the current environment and to reflect the vision of RHLS's new executive director.

Generally, the leadership thought that the direction of the last plan was the correct direction. There was no desire to alter the existing practice areas (housing, policy, utilities).¹ In addition, a primary goal of the prior plan was to achieve financial sustainability through diverse funding. That remains a key organizational priority.

The area where change was needed was to pivot from having racial equity be one of three priorities to be centered in everything we do. Much of the strategic planning process with staff revolved around thinking about what that could look like and what we'd need to do to successfully make that pivot. In addition, the new executive director wants the organization to grow. This change also requires thoughtful consideration of the best ways to grow the organization and working to ensure the organization can manage growth productively.

Process

The process was asynchronous, iterative, and collaborative. Most of the key items for discussion generated with the Leadership Team and then were shared either with staff or with specific board committees for feedback. Staff feedback and Board feedback were also shared back with other groups, and generated changes to Leadership Team proposed approaches and has been captured in this document.

Rather than our previous standard of large group meetings where naturally a few people dominate, we used a small group process. Staff meetings were limited to four staff at a time. We utilized a 1-2-4 methodology. For the key discussion questions, we gave people time to just think on their own (1), then asked them to join a partner to discuss (2), then we brought it all to the full group for discussion (4). We found that this process allowed everyone to participate more fully and produced very rich group discussions.

The small groups focused on three classic strategic questions: what matters, what is RHLS the best in the world at doing (or could be), and what brings us revenue. You want to work as much as possible at the intersection of the three answers. Because this plan was focused on implementation, we also included a fourth issue focused on *how* we can make the changes we need to make to achieve our goals. The key infographic that guided staff conversations is attached as [Exhibit A](#). Detailed notes from the staff sessions are attached as [Exhibit B](#) (first session) and [Exhibit C](#) (second session).

¹ While the utilities program area is referenced here, the work related to utilities is carried out under the leadership of the Executive Director of the Pennsylvania Utility Law Project (PULP). While technically part of RHLS, PULP's work was not included in the last strategic plan, upon which this plan builds. In addition, PULP completed its own strategic planning just prior to the start of this RHLS plan, so for strategic planning purposes, PULP and RHLS are operating on parallel, but not coordinated, tracks.

Transformational Vision

Ultimately, the updates to the plan need to reflect the vision of the executive director and the leadership. Over the process, the transformational vision for RHLS became clear--

- *In 5 years, RHLS will have:*
 - *earned a reputation as a leader in centering racial equity in housing and community development;*
 - *become a widely-known and respected expert in the field, who is consulted regularly on key issues by clients working directly on racial equity issues in housing, policymakers, community advocates and news agencies;*
 - *demonstrated impact that results in funders seeking us out and generously funding our work.*

The Strategy

RHLS's strategy is to provide boutique-level legal services and policy/legislative insight to organizations that have been excluded from power in the housing system and to engage in advocacy to make the housing system more racially equitable.

Action Areas

The key Action Areas that need to be addressed to move RHLS towards its goal are:

1. Internal Racial Equity
2. External Racial Equity
3. Organizational Development
4. Revenue Development
5. Communications

Internal Racial Equity

RHLS, as part of its commitment to make racial equity part of everything we do, understands that a significant part of the change that needs to happen is internal operational and cultural change. We started this work several years ago, in a generally exploratory way. With new leadership we are being asked to move toward more action in this area.

- In order for RHLS to earn a reputation as a leader in centering racial equity in housing and community development, we will:
 - Continue to build organizational culture of equity and inclusion
 - adopting and utilizing a clear statement about why racial equity matters for our work which we can refer to and use as guardrails
 - engaging in ongoing policy/procedure review and open dialogue about how to break free of environmental pressures and organizational history
 - supporting ongoing work to improve new staff onboarding and existing staff training and engagement
 - working collaboratively with the board to facilitate a more inclusive board culture
 - hiring diverse staff at all levels of the organization
 - Continue to incorporate equity and inclusion into our jobs and work processes
 - incorporating into job responsibilities for all staff
 - exploring the potential for making DEI-related work a primary or significant part of one or more staff roles
 - revising the Development Services and Policy intake processes to ensure they center racial equity and push RHLS forward

External Racial Equity

While the internal racial equity work is important, it is not sufficient to move us in the direction the organization seeks to go. We will need to refine what services we provide, how we connect with communities, and our historic approach to policy/advocacy.

RHLS will also center racial equity in our substantive & external work, as evidenced by:

- Community Connection
 - creating a plan for outreach, including goals, staffing, and oversight
 - engaging in extended outreach activities throughout the Commonwealth (and possibly beyond), particularly in Black communities and communities of color
 - cultivating meaningful, long-term relationships with community members and community organizations rooted in communities of color, particularly in Black communities
- Advocacy
 - taking clear, unequivocal public stances on key questions of equity in housing and community development
 - exploring Expanded Services
 - conducting a statewide, broad-based needs assessment
- Communication
 - communicating clearly and consistently about our values and our services

Organizational Development to Prepare for Growth

RHLS has operated for nearly 50 years with a staff of less than 20 (sometimes much less than that) that worked predominantly in Southeastern Pennsylvania, and after a point, in Pittsburgh. The current executive director wants the organization to grow and have a larger footprint. In addition, the organization is receiving encouragement from some state funders to do the same.

Simply adding staff members and assigning them specific caseloads worked under the prior model. It does not work for the future we are trying to build. RHLS is working to change the culture from a collection of individuals to a team working toward shared goals. This pivot requires planning and coordination. Planning and coordination are impossible without significantly increased role clarity, including some members giving up some responsibilities and others taking on more responsibility.

RHLS is committed to continue to move away from an ad hoc approach, unclear lines of authority, and lack of clarity about the values and goals of the organization, our work in this area will be:

- Improving/populating management structure (org chart, role clarity, hiring, training & supervision/support)
 - clarifying the scope of the director of development services role; filling the role
 - clarifying the role of director of policy
 - delegating the power to plan to better coordinate development services and policy and outreach to the lead or leads
 - making decisions about expanded services and creating materials that describe our approach and services
 - identifying brief services that RHLS can provide (and advertise them)
 - creating a list of key trainings that we can provide and timeline for expanding them across the Commonwealth

- Planning for Staff Growth/Change
 - creating a plan for growth that lays out which hires should happen in what order
 - creating plans to increase staff backup/support as well as succession plans re: critical skills/knowledge

Revenue Development Aligned with Strategic Goals

RHLS, like most other smaller nonprofits, has long sought to find ways to increase the stability and predictability of funding from year-to-year. Under our prior executive director, the organization engaged in a unique, but highly effective fundraising strategy. Unfortunately, that strategy was highly dependent on personal relationships – making the strategy hard to transfer, and not actually a stable long-term strategy (people leave jobs/positions and things change). That strategy also kept RHLS focused on a relatively small section of the potential funder pool. Our new executive director is highly committed to this issue and understands that to expand our revenue, we will have to invest more resources in this area (time and money).

The priorities in this area include:

- Pursuing Funding that Works for RHLS
 - commit to a strategy of pursuing general operating, then program areas (work to get away from project-by-project funding)
 - seek out funding that does more than cover hourly rates)
 - continuing to build upon the foundation created by the fundraising team in FY21-22 (Dina, Phyllis, Rachel, and Anabel)
- Increasing Resources & Capacity for Fundraising
 - transitioning the hybrid fundraising/communications role that currently exists into a full-time fundraising role
 - giving the fundraising role the respect and authority, it needs to function at a high level
 - ensuring the Executive Director can delegate most non-fundraising, non-Executive functions so that she can prioritize this work
- Improving Outcome Tracking
 - identify clear outcomes which can be easily tracked
 - getting clarity on who is responsible for outcome reporting (and nagging staff)

Communications

RHLS's communications function is relatively new in its 50 year history. It has grown over time but has always been limited by very small staffing and an intentionally unclear message about the organization. Moreover, the previous strategy was to not try to gain profile or to take clear positions in any way. Due to this guidance, much of RHLS communications has been descriptive and never in a way that satisfied either the communications staff or other staff.

We have an opportunity – and a need – to take this function more seriously as we try to pivot our identity with existing partners, introduce ourselves to new people and areas, and seek to grow the organization and our recognition. Moreover, utilizing the communications function to engage in more advocacy is a key step identified by many staff as essential on the road to the future vision.

Priorities for this area include:

- Expand the Communications Function to Allow it to Support Strategic Goals:
 - giving the head of communications the power to design and execute a communications plan that advances the organization's goals – specifically supporting advocacy and building revenue, also internal communications and team building
 - investing in communications staffing/consultants
 - ensuring adequate time and support from and for staff, including attorneys, to improve communications about their work
 - engaging in long-term branding planning (including name change)

Next Steps

This is a very ambitious plan that requires us to think carefully about our long-term goals and our short-term capabilities. Knowing how fluid the field can be, we anticipate making a series of 6-month plans that identify the key priorities during that time period.

For the first 6 months, we anticipate working on the following:

- adopting a racial equity statement for the organization
- adopting new intake criteria
- determining the scope of the Director of Development Services role as well as the Director of Policy role; fill roles as needed
- splitting the Fundraising and Communications functions into two roles
- completing a statewide needs assessment
- creating multi-year hiring plan to increase capacity and diversity
- creating a plan for integrating outreach into our work; hiring for that role

As we finish work on these priorities that we will then move to address additional priorities from this plan – likely in a series of 6-month plans.

Exhibit A
Guiding Infographic

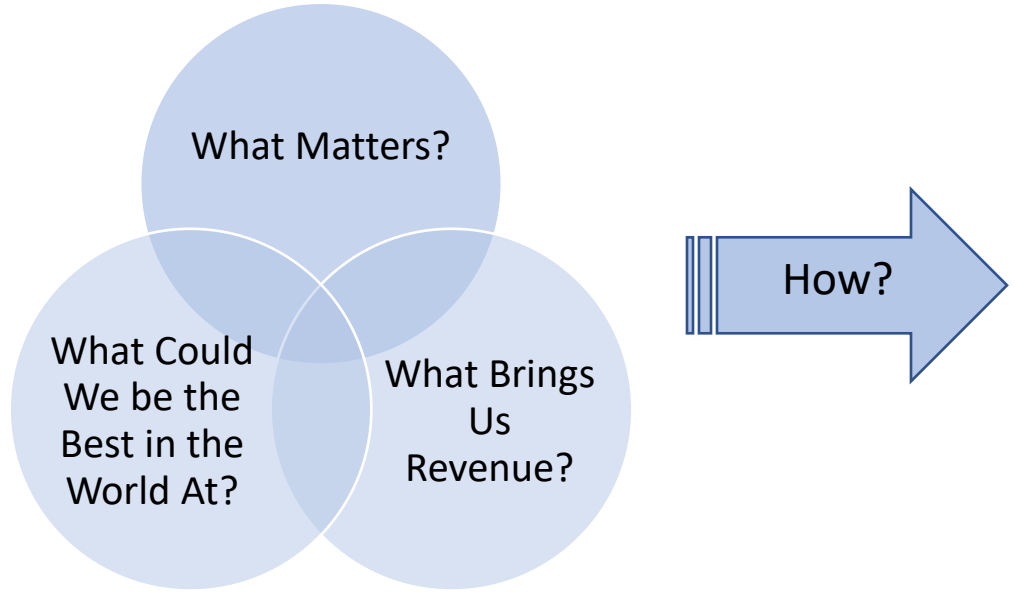


Exhibit B

Notes from Round 1 Staff Small Groups

Background

The breakouts included an overview of strategic planning and strategic implementation planning using a travel analogy to explain that we have pieces of the puzzle from the previous plan, but leadership has tweaked aspects of the vision laid out in the strategic plan, needs to tweak more with staff feedback, and then we all need to figure out the “how.”

Method

We used ground rules for conversation based on the model from the External Work Subcommittee of the RHLS DEI group. We also utilized the 1-2-4 discussion framework¹, which is designed to address several of the items in the ground rules (conversation being dominated by a small group, not everyone participates actively).

Break-Out 1

This break-out was focused on reviewing the high-level statement about why we do housing and why racial equity is a central part of the why. The statement reviewed was:

We believe housing is a human right. We know that housing is fundamental, that housing is fundamental to health, but that people are the reason for our work. We know that good policy and good decision-making comes from meaningfully involving, and ideally following the leadership of, people who live with the problem we are trying to address. We honor the call that there should be “nothing about us without us.”

We also know that the American housing system is a legal creation. Whether you are looking at private market issues and solutions or at the highly regulated world of subsidized housing, the law has created and maintains the housing system, including the racial and economic inequities.

Prompt questions² were provided, but people were instructed to go where the conversation took them.

Responses³:

- Global
 - We need to address what we are doing re: the racist system we work in
 - Structural issues cause tension.
 - Capitalism doesn’t have human rights. We value property rights over human rights.
 - Doesn’t clearly say why racial equity matters in housing.
- 1st paragraph
 - RHLS should not follow community-group leadership. Some of them are not reasonable.
 - Statement about following community-group leadership is too vague; doesn’t go far enough.
 - Who, exactly, are we following?
 - We don’t serve individuals. How does that square with saying we do our work for people?
 - We mostly listen to developers now. Or to people with particular relationships with leadership (at least historically).

- Tenants don't really care about the QAP.
- Sometimes we've made problematic decisions that don't advance the needs of the majority of development clients:
 - supporting more units for people with disabilities.
 - CLT work might be hurting some clients.
- There are other developers/nonprofits we could listen to (more)
- 2nd paragraph
 - 1st paragraph had an action, there is no action in this paragraph.
 - Begs the question what are we doing about the system? Are we working within in to get what good we can? Are we working to transform it? Essentially, what is our relationship/strategy re: a racist housing system.
 - 2nd bullet doesn't address what we are doing – are we breaking it down?
 - The paragraph on legal issues is incorrect, the law didn't "create" but it supports/maintains. Government/private market created it.
 - What are the implications of paragraph 2? Are we talking about advocating for taking away people's private property rights?
- Missing Topics
 - Statement doesn't include utilities
 - Statement doesn't include climate change
 - What about wealth-building?
- Need more direction
 - Need more concreteness this statement is too high up.
 - Questions about the context and who decided we were "centering" racial equity.
 - Also concerns about the message that we are "centering" racial equity not being clear – people don't know what they are supposed to be doing.
 - The culture of RHLS is "not very top-down."
- Shared knowledge
 - Housing is extremely important, and we know about racist history.
 - It would be helpful to somehow name the explicit and implicit patterns/systems.
 - Lots of discussion about how to do that, concerns about the purpose/audience of the statement. Possibility: identify the specific parts of the system we touch most directly or could do the most about.
 - How do we make sure everyone has a similar knowledge level re: the history/patterns?
 - Be careful not to conflate poverty and race.
- Drafting/usage concerns
 - Move the sentence with "nothing about us without us."
 - Don't like the word "you" in the statement.
 - Don't understand "nothing about us without us." (multiple people expressed this)
 - Where are we going to use the statement? Who is the audience?
 - Can we pivot from "housing" to "homes"?
 - Too many ideas in the first paragraph.

Break-Out 2

This break-out was focused on what we do. Over the course of the three breakouts, I kept evolving it. The first question was what we do well and resulted in not much more clarity. For the second group I altered the question on the slides and when I introduced the question, but the note sheet I provided people still had what we do well. For the third group⁴ all the instructions talked about what we do best in the world:

Prompt questions⁵ were provided, but people were instructed to go where the conversation took them.

Responses:

- We are really good at/could be really good at:
 - Making do with not enough
 - Looking on the bright side
 - Spending more time/effort than a private firm attorney could/would
 - Helping nonprofits that couldn't pay for private firm services
 - Homeownership
 - Home repairs
 - LIHTC
 - Lots of things, could do more if we had a paralegal
 - Consulting
 - More trainings, seminars, etc. to open up the field
 - Build relationships
 - Tenant selection plan review/or models
 - Helping people stay in their homes
 - Reviewing eviction policies of property owners
 - Work on climate change (intersection of housing, equity, and health)
 - Innovative housing models/zoning
 - Model repair contracts
 - Connecting key players/coordination/coalition work
 - We do already work with groups that are either working in communities of color or led by people of color.
 - If there is a housing justice issue in PA, we are generally involved in one way or another.
 - We are at a unique nexus.
 - Maybe in Dev Services we can educate developers about how they need to have internal connections to engage in the system?
 - We close LIHTC deals well
 - We have transactional real estate + nonprofit + affordable housing knowledge à not usually together.
- Differences between us and a boutique law firm:
 - We also do "capacity building"/business development
 - We have more of a long-term perspective (work with clients longer, how long maybe needs to be looked at)
 - We are the same for the closing and the months just before.
 - LIHTC experience gives us:
 - Expertise on lending and land use issues that impact other work, like CBA
 - Reputation that gets us invited to comment

- Clout that lets people listen to us in ways they probably wouldn't otherwise
- An understanding of bureaucratic processes beyond what a typical firm lawyer might understand; allows us to know how/where to poke/prod the system (have several good stories here)
- We empower people through process (someone cited this and said they saw it somewhere else)
- Other issues
 - Do we work within, without, or try to hybrid?
 - We have a choice to make in both Development Services and in Policy – work within the existing system that is deeply inequitable, but achieves results or do we challenge the structure?
 - Worries about becoming “too pure.”
 - Why is there a choice to either work within the system or work to change it? Can't we do both? Think of health care – can work to treat people and work to prevent disease.
 - Are we trying to “tweak” the system?
 - Policy
 - What does it mean that in policy work we are often working “behind closed doors”?
 - What does it mean that in our field public participation is usually an afterthought?
 - Internal Communication
 - Don't know all of what we do. I don't know what happens in policy work.
 - Worries
 - Concerns about no longer helping white people
 - Concerns about stopping all of our work
 - We aren't great at saying no, but we have to

Follow-Up:

In addition, I encouraged people to follow-up with me if they had any questions or concerns or additional comments.

As of the early morning of 2/17/22 I have received the following:

- Is there a way for us to serve minority-owned business enterprises that want to do an LIHTC project? Through an affiliate entity (like CHLS? Or another?)? Or a partnership with an established NFP?
- Is there a way to take our capacity-building (which I understand is a topic under general consideration/debate) to minority-owned enterprises?
- Have we surveyed the community we serve (and that we want to serve) to see what we could do better? What are our NFP clients working on in terms of racial equity? Is there a way of doing some information-sharing/resource-pooling there?
- If as much federal money will be poured into housing as everyone keeps saying, how can we advocate for setting aside a portion for MBE (if we want to broaden our focus to include that group) and/or NFP developers? How can we equip ourselves to be responsive to potential new funding sources? Increase in funding sources? Can we do anything now to build capacity in our NFP clients to help them access future resources?

- One thing I've often found frustrating in the LIHTC arena is how many of the players are of the same race and gender. Is there a way to look at all of the elements of the industry (construction, developers, architects, etc.) and consider how to foster racial diversity and equity in those elements? Or at least to help facilitate the discussion in the community development arena?
- We're mostly lawyers. Can we do anything to foster diversity in economic development legal practice more broadly?

Exhibit C

Notes from Round 2 Staff Small Groups

Background

The breakouts included a reminder of the strategic planning/implementation planning travel analogy, an update of the process to this point, and two breakout sessions.

Method

We used ground rules for conversation based on the model from the External Work Subcommittee of the RHLS DEI group. We also utilized the 1-2-4 discussion framework², which is designed to address several of the items in the ground rules (conversation being dominated by a small group, not everyone participates actively).

Break-Out 1

This break-out was preceded by a quick overview of RHLS funding sources and a description of the draft Program Areas (see attached).

The question was: *Think about the Program Areas with respect to your own work. What opportunities does that create – for expansion of your work, for collaboration (internally or externally), for publicly promoting your work?*

Responses³:

- Overall
 - I like the plan, can treat it like guardrails and can be expanded
 - DEI is important here

- Funding
 - It would be good to know more about funding restrictions/parameters; what are we obligated to do?
 - What do we want to do more of whether there is explicit funding or not?
 - Do people get to do whatever they want to do? Or will there be direction from LT?
 - People would like to see the pie chart information about revenues more regularly. They were surprised how low CHLS was and how high grants were.

- Program Areas
 - Overall
 - Not quite sure how I/my work fits into every one of the Program Areas
 - Unsure about health & housing – we don't have a lot of expertise there

² <https://www.liberatingstructures.com/1-1-2-4-all/>

³ Clustered in themes across groups

- Real opportunity to bring in students to help with the democratizing housing piece – a million students would be interested (others have expressed jealousy of current student intern’s position)
 - Where does homeownership & commercial corridor revival fit?
 - Website doesn’t describe what we do well at all
- The Work
 - Where does LIHTC fit? It isn’t called out as its own thing. Some deals could fit under the headings – most? Are we going to all??
 - A lot of work with new developers that has been historically devalued – is now elevated with this new frame; makes me feel better about this work/proud
 - Are we changing how we do LIHTC? Are we shifting away from centering big, established developers doing big deals?
 - Some people are doing LIHTC and don’t get a lot of freedom for other things; other people don’t do LIHTC and have more freedom to choose what they work on.
- Organization/Staffing/Assignments
 - We have sort of informal groups now – there is dev services, but a bunch of stuff is LIHTC, which isn’t everyone in dev services. Do we need to think about how we organize our work differently?
 - This looks like an opportunity for more collaboration
 - If we take the Program Areas seriously, then we would build capacity in each area that is beyond 1-2 people.
 - I’d like to learn new things & be trained in new things. Right now, I have to self-teach. This pivot could facilitate those opportunities
 - We could be more collaborative (we want to be more collaborative)
 - Development Services and Policy is too separated – can we integrate them/find more synergy between the areas?
 - Can Dev Services folks do more policy?
 - This looks like an opportunity for more collaboration
 - Do we need to hire more policy folks?
- Outreach
 - Outreach is going to be very important moving forward; not recreating Homes Within Reach – but getting statewide
 - How do we share and package our information to have more reach/impact
 - Important for people to understand enough to ask the questions they need to ask
 - Do more PACDC webinars (as speakers or organizers)

Break-Out 2

This breakout was focused on implementation.

The question was: *Imagine RHLS is well-known & generously funded for its accomplishments in the Program Areas and is a leader in racial equity? What has happened to create this result?*

Responses:

- Questions
 - What is the time horizon of this plan?
- Taking a stand
 - We take positions that shake things up (ex: PHFA should only give LIHTC to minority developers – not proposing that specifically, but as an example of a bold position)
 - Take strong positions that need to be taken
 - Can't really be seen as leaders in racial equity unless we are willing to embrace some controversy; take a stand
 - Example: if we said the QAP is hurting racial equity and PHFA needs to do a, b, and c to fix that we'd be THE people in the state taking on racial equity in the QAP.
 - Q: is leadership and the board ready to take potentially controversial positions?
 - History of hiding in the shadows; to make that future happen we have to change that approach.
 - Example: QAP advocacy – especially re: racial equity. We could be a leader here. Who else in the state is doing it?
- Partnerships
 - We have to figure out what our strategy is for building partnerships. Partnerships will put us on the map.
- Internal Processes/Role Clarity
 - We need to know what the internal processes are for engaging in partnerships in various ways (including doing sign-ons).
- Staffing + Staff/Board Diversity
 - Probably need to hire staff
 - The Board and the Leadership need to match the community
 - Need experienced folks “on the trip” (using travel analogy for strategic planning & implementation planning)
- Recognition
 - We need a MacArthur Genius Grant
 - We give QAP comments and PHFA listens and gives credit
- Communications/Marketing
 - Celebrate/promote the good work we are already doing (see Justin & the encampment)
 - We need to promote our work – talk, presentations, writing, blogging, partnerships
 - More comms staff?
 - Advertise what we do more
 - Get better at talking about outcomes
 - Make sure the “right people” hear about what we are doing
 - More blogging; broader distribution

- Get stories of people impacted
- Learning & Collaboration
 - Learning new things; collaborating (like we used to)
 - Day-to-day case work and policy is disconnected; should be more connection
 - Miss old staff meetings (when staff was smaller)
 - Shifting RHLS from doing discrete tasks to a place where all of us are working in services of something larger might help with cohesion.
- Development Services
 - Look at development differently? Should it be not developer based, but tenant-based or community-based? Should we be focusing on having clients in particular geographies or demographic groups?
- Name
 - Make a tagline to clarify the name if we can't change our name
 - Change our name (do we have to get permission from PLAN??)
- External Collaboration
 - Forums and coalitions

Follow-Up:

There was no follow-up communication from staff after this session.