

## Local Food Promotion Program (LFPP) Final Performance Report

The final performance report summarizes the outcome of your LFPP award objectives. As stated in the LFPP Terms and Conditions, you will not be eligible for future LFPP or Farmers Market Promotion Program grant funding unless all close-out procedures are completed, including satisfactory submission of this final performance report.

This final report will be made available to the public once it is approved by LFPP staff. Write the report in a way that promotes your project's accomplishments, as this document will serve as not only a learning tool, but a promotional tool to support local and regional food programs. Particularly, recipients are expected to provide both qualitative and quantitative results to convey the activities and accomplishments of the work.

The report is limited to 10 pages and is due **within 90 days** of the project's performance period end date, or sooner if the project is complete. Provide answers to each question, or answer "not applicable" where necessary. It is recommended that you email or fax your completed performance report to LFPP staff to avoid delays:

LFPP Phone: 202-720-2731; Email: [USDALFPPQuestions@ams.usda.gov](mailto:USDALFPPQuestions@ams.usda.gov); Fax: 202-720-0300

Should you need to mail your documents via hard copy, contact LFPP staff to obtain mailing instructions.

<b>Report Date Range:</b> <i>(e.g. September 30, 20XX-September 29, 20XX)</i>	September 30, 2014-September 29, 2015
<b>Authorized Representative Name:</b>	Gail Hassmer
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<b>Recipient Organization Name:</b>	City of Charlottesville
<b>Project Title as Stated on Grant Agreement:</b>	Virginia Produced: Developing New Markets for Lightly-Processed and Flash-Frozen Virginia-Grown Produce
<b>Grant Agreement Number:</b> <i>(e.g. 14-LFPPX-XX-XXXX)</i>	14-LFPPX-VA-0163
<b>Year Grant was Awarded:</b>	2014
<b>Project City/State:</b>	Charlottesville, VA
<b>Total Awarded Budget:</b>	\$25,000

LFPP staff may contact you to follow up for long-term success stories. Who may we contact?

- Same Authorized Representative listed above (check if applicable).  
 Different individual: Name: \_\_\_\_\_; Email: \_\_\_\_\_; Phone: \_\_\_\_\_

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1. State the goals/objectives of your project as outlined in the grant narrative and/or approved by LFPP staff. If the goals/objectives from the narrative have changed from the grant narrative, please highlight those changes (e.g. “new objective”, “new contact”, “new consultant”, etc.). You may add additional goals/objectives if necessary. For each item below, qualitatively discuss the progress made and indicate the impact on the community, if any.
  - i. Goal/Objective 1: Perform market research on Virginia institutional and retail food procurement criteria, complementing/ building on concurrent analysis of product mix, pack size and price point requirements. Meet with food service directors and store team leaders, and ascertain how/ whether the nutritional, social and environmental benefits of local food procurement can reduce price sensitivity.

a. Progress Made:

Virginia Produced has the opportunity to meet a strong demand for local produce to be available year round. It has performed a rigorous analysis to define how it will capture this market opportunity and market its products. Importantly, it has developed a program that it believes will both offset the “local premium” in pricing it will need, and overcome consumer perceptions that ‘fresh is always better than frozen’. The following describes the core features of its program.

**Market Opportunity**

Virginia Produced is riding a wave of interest in healthy and minimally processed food products. Nutritious, local, fresh and healthy are now popular themes in the majority of food categories. This trend has been taken up by people of all ages and situations – parents for their children, students, active adults, seniors and individuals with chronic health conditions. Unfortunately, for the those living outside of Florida, California’s Central Valley and the Pacific Northwest, fresh produce from local farms is unavailable for most of the year. Moreover, produce that is transported many hundreds or even thousands of miles loses much of its nutritional value and fresh taste. Virginia Produced aims to fill this gap by producing individually quick frozen (IQF) produce grown on local farms, flash frozen near harvest peak to preserve nutrition and taste profile, to be made available throughout the year.

Virginia Produced intends to initially market its products (bulk IQF produce and frozen individual meals) to food service providers, primarily in institutions – Campus Dining programs, Home-Delivered Meals programs for seniors, K-12 systems and Hospital Nutrition Services. In each distribution channel, wholesale agents, corporate buyers and facility managers will stand between Virginia Produced and the ultimate consumer. In most cases its marketing strategy must encompass all four of these levels in the channel and it must position its marketing communications to address each.

**The Research Base**

The preliminary marketing approach and product positioning is based on substantial research.

- Extensive interviews with companies and organizations in each segment

- Work sessions and interviews with wholesale suppliers of fresh and frozen produce to the segments
- In depth involvement with the farming community through partnership with the Local Food Hub
- Work sessions drawing on the professional food industry experience of the project team
- Survey responses defining the general market opportunity, priorities and concerns
- Industry and academic research.

### **Critical Factors**

This preliminary research identified ten factors that enter the decision-making of the channel participants to a greater or lesser extent or, in some cases, not at all. Most of these are team judgements based on preliminary research rather than quantified facts. These themes and issues for bulk IQF produce are listed without ranking, since ranking will vary by participant.

- Price premium of VP local IQF versus conventional frozen or imported ‘fresh’
- Nutrition and quality
- Local farm sourcing
- Year-round availability
- Product supply
- “Frozen” versus “fresh” taste biases and perceptions
- VP viability
- Creation of local fair-wage jobs
- Support for local charities
- Grown with Good Agricultural Practices

Our market research indicates that institutional buyers are willing to pay a 5-10 percent premium for flash-frozen bulk local produce. Our extensive financial modeling indicates that Virginia Produced can begin making a profit in Year 5 while generally staying within the local premium price range dictated by the market. The products that Virginia Produced is focused on providing are: chopped kale, chopped spinach, collard greens, cut green beans, broccoli florets, (cut) sweet corn, chopped/diced yellow or green squash, peeled and diced white potatoes, and peeled and diced sweet potatoes.

The frozen meals channel is somewhat different since nutrition is a prescribed element for seniors if the agency is to be reimbursed by the government. Moreover, there are very few distributors and price is very important. Virginia Produced has a slight advantage in this market since its key missions of helping local farms, creating fair-pay jobs and supporting local senior-oriented charities carry significant weight.

### **Virginia Produced’s Marketing Program**

*As a new entrant to the food service market, VP’s key marketing challenges are to persuade the wholesalers, who are the gate-keepers to the market, to distribute the product, the food service operators to use it in their kitchens and the ultimate consumers to appreciate it. Few products stand on their own without marketing support. VP’s marketing program will address the needs and desires of each channel participant*

through education, competitive pricing, sustained quality in its products and effective marketing communications to each level.

The drivers of VP's market positioning are very specific to each category of participant, e.g. broadline distributors have different issues than chefs and each is different than those of students. The process VP has used to define the marketing positioning works through the key drivers for each segment, arriving at the essence of our marketing message for each segment. The process starts with considering the characteristics of the key decision-maker, assesses how competitors appear to be addressing the market, states the promise VP can make to the customer, considers the issues the customer might have about this, summarizes the reasons why the customer should believe in VP and concludes with the core of the message we need to communicate consistently in all dealings with that customer (sales presentations, advertisements, marketing support material and product service). This process and our conclusions are summarized in Exhibit II. In summary; taste, nutrition and *local year-round* will be a constant theme with all channel participants. However, the emphasis will vary:

- Broadline Distributors – cost, product supply and VP's viability will be key
- Specialty and Local Distributors – fresh farm taste available year round at a reasonable price
- Food Service Companies and Chefs – sustainably grown on local farms available all year
- University Staff and Students – nutritious local food from a company with a service mission
- Public and Private Schools – healthy and good tasting local produce in a form that saves the school or district labor and is affordable.

It is important to recognize that VP will have a limited marketing budget and therefore will set priorities on how much it invests in each channel participant group. During its initial market entry it will focus on the wholesale distributors (e.g. Sysco), food service providers (e.g. Aramark) and meal distributors (e.g. Blue Dog – a distributor of meals to Virginia's Area Agencies on Aging). However, it recognizes that its marketing program must also build support with students, meal recipients and cafeteria customers.

As the business evolves, VP will adjust its market positioning to solidify repeat purchase and capture a wider set of customers and consumers. For example, it will seek ways to provide its high quality frozen products to low and moderate income families. It will also explore opportunities to enter the retail market, once it has established a highly efficient production and distribution operation. At all times it will respond nimbly to market conditions, for example, countering moves by competitors being threatened by VP products replacing theirs in the markets.

b. Impact on Community: Not applicable

- ii. Goal/Objective 2: Conduct customer discovery interviews with senior leadership of area non-profits and agencies, including Blue Ridge Area Food Bank and Meals on Wheels of Charlottesville/ Albemarle, to understand current pathways of food access to the area's vulnerable individuals and households. Document ways in which a 'Virginia Produced' flash freezing and light food processing entity could leverage existing infrastructure and

volunteer networks maintained by the above-referenced non-profit organizations, to incorporate locally sourced and produced, frozen food products into existing supply chains and delivery networks.

a. Progress Made:

- **Volunteers:** All of the agencies mentioned above rely on a significant number of volunteers. Meals on Wheels, for example, delivers meals to homebound residents with only four paid staff (two of them part-time) and over 30 volunteers. Other distributors to the food-insecure, such as the Blue Ridge Area Food Bank, Loaves & Fishes (a local food pantry), and the Jefferson Area Board on Aging, also rely extensively on volunteers. Thus, this volunteer base is a robust system that can be leveraged to provide distribution of flash-frozen local produce.
- **Scale.** Furthermore, the delivery system itself – for every agency – rarely runs at full capacity. For example, Meals on Wheels drivers currently carry two insulated carriers. With ample space in virtually any vehicle for two more, this would double an agency’s capacity automatically. In other words, the “infrastructure” exists to deliver locally grown, nutritious, prepared meals to many more food-insecure families in our region.
- **Socialization:** Regular, friendly and attentive human contact between low-income recipients and a caring person at the door is an important “early warning” system for health-related concerns. If nothing else, that interaction is an essential contribution to the client’s quality of life, especially for the shut-in senior who lacks such opportunities.
- **Capacity:** While volunteer management and recruitment are indeed an inescapable part of any agency’s cost structure, the number of potential volunteer recruits exceeds the number of current volunteers by a huge factor. (The Charlottesville Yellow pages has over 350 churches, for example. The University of Virginia’s Madison House alone has over 100 students volunteers. The United Way Day of Caring marshals thousands into community service.)
- **Frozen vs. fresh.** There are storage challenges for perishable food throughout the low- or no-cost food delivery system, especially frozen food. Virtually all food pantries of any scale, however, have residential freezers, and many even have walk-in cold storage. But the most potential for serving **locally sourced frozen food to the food-insecure is a delivery mechanism for frozen food, especially pre-cooked or lightly processed food.** Frozen meals, delivered to the neighborhood, does an end-run around the significant challenges that low-income families face in terms of time, money, education and opportunity.
- **Menus:** It goes without saying that changing eating habits cannot occur if the food is not attractive, delicious and appealing to taste and eye. Recipes and menus that incorporate fresh local foods are the sine qua non in that equation.
- **IQF.** Individually Quick Frozen “sides” that are already blanched, seasoned, ready to heat and serve overcome the home preparation obstacle and all it means in terms of time, opportunity, and cost. Sides, such as a medley of mixed vegetables, can accompany rice pilaf or pasta and an entree. For this market, IQF containers should be 4-, 8- or 10 oz. portions.
- **Smoothies.** Protein “shakes” can incorporate all the nutrients needed to constitute a full meal. A major focus should be on taste, especially for children. Delicious recipes can be made from a variety of green vegetables and fruits; mixed and pureed in a blender and then frozen. The advantage of Smoothies is that they can

be manufactured, with significant economies of scale, from low cost number two ingredients that are blemished or not sized properly for the retail market. Once frozen, cases of smoothies can be shipped great distances and kept in frozen storage for off-season consumption.

- **Packaging.** Another advantage of “Smoothies,” is that they can be a complete meal that can be eaten out of the container, on the run by children – or adults. With creative graphics, the packaging can meet the all-important “fun” criteria that a prominent local Public Health Nurse identified as critical to reaching children.
- **Delivery mechanism:** The most promising method of assuring food-insecure residents’ access to locally grown, nutritious food is to **leverage delivery systems that are already in place.** Bringing the food to the customer, at least initially, will make eating well as convenient and obstacle-free as possible; and stands the best chance of overcoming existing purchasing and eating habits. Since children often drive the mealtime habits of the family, focusing on systems that include them stands the best chance of long-term change. Some of those systems are:
  - **Child and Adult Care Food Program (CACFP).** Low-income children often eat two or more meals a day at school during the school year. That program, the USDA’s **Child and Adult Care Food Program (CACFP)**, offers children a safe place to be with their friends, with structured activities, supportive adults, and good nutrition. We could leverage that program to offer frozen produce for the children to take home. The schools’ cafeterias obviously have the kitchen facilities to prepare them, including frozen storage space. Frozen meals could be made available to sell, along with current offerings and for about the same price. Meals are sold through a reimbursable program for \$3.45 for meals; \$.87 for snacks; and \$2.00 for breakfast.
  - **Summer Food Service Program (SFSP):** SFSP The Summer Food Service Program (SFSP) ensures that low-income children continue to receive nutritious meals when school is not in session. During the weekends during the school year, the same problem exists, and the Blue Ridge Area Food Bank helps with a **Backpack Program** that makes available enough food to serve 16 meals per weekend for a low-income family. That includes breakfast, lunch and dinner for a family of 4, and the ingredients are beans, corn, Peanut Butter and Jelly, macaroni and cheese, pasta, cereal, tuna, chicken, potatoes and rice.
  - **Food Trucks.** While not a formal “system” such as the programs above, one distribution method that bears further exploration is conventional **Ice Cream trucks.** There are a number of benefits:
    - **Footprint.** In the summer, most low-income neighborhoods are visited on a regular basis by ice cream trucks.
    - **Vendors.** Several vendors in the Charlottesville community are entrepreneurs who know their customers well, since they have come from the same neighborhoods. They themselves are a local resource.
    - **Capacity.** Adding frozen storage capacity is a relatively simple matter, since smoothies are pre-frozen.
    - **Pre-frozen.** Although most ice-cream trucks have mixers that dispense soft-serve ice cream or slushies, all of them offer already pre-frozen popsicles and ices.
    - **Smoothies.** Adding nutritious pre-frozen smoothies brings a more nutritious offering into the neighborhood, *meeting children (and adults)*

where they are.

- **Home storage.** Every low-income household has a refrigerator with a freezer compartment. Since the Food truck is coming to the block, smoothies or frozen meals are a short distance from a home freezer – assuming it is not consumed immediately.
- **Information.** Since Social Media use is ubiquitous as cell phones, getting the word out through websites, Instagram and Twitter would be a necessary part of this idea.

b. Impact on Community: Not applicable

2. Quantify the overall impact of the project on the intended beneficiaries, if applicable, from the baseline date (the start of the award performance period, September 30, 20\_\_). Include further explanation if necessary.

- i. Number of direct jobs created: Not applicable
  - ii. Number of jobs retained: Not applicable
  - iii. Number of indirect jobs created: Not applicable
  - iv. Number of markets expanded: Not applicable
  - v. Number of new markets established: Not applicable
  - vi. Market sales increased by \$insert dollars and increased by insert percentage%. Not applicable
  - vii. Number of farmers/producers that have benefited from the project: Not applicable
- a. Percent Increase: Not applicable

3. Did you expand your customer base by reaching new populations such as new ethnic groups, additional low income/low access populations, new businesses, etc.? If so, how? Not applicable

4. Discuss your community partnerships.

- i. Who are your community partners? Partners, both formal and informal, include: the Local Food Hub, the Jefferson Area Board on Aging, the Charlottesville Works Initiative (non-profit affiliate of the regional Chamber of Commerce), Homegrown Virginia, Loaves & Fishes food pantry, University of Virginia Health System, Charlottesville City Schools
- ii. How have they contributed to the overall results of the LFPP project? At a foundation level, 'VP' had the benefit of Local Food Hub's involvement as an aggregator/ distributor of fresh produce from 70 small family partner Virginia farms, most less than 100 acres. In order to meet institutional purchasing requirements for Good Agricultural Practices (GAP) certified produce, 'VP' project team members expanded the sourcing/ aggregation focus to include a Virginia produce wholesaler-distributor that operates a network of 30+ larger, mostly GAP-certified growers. Through auspices of these wholesaler-distributors, direct conversations were had with farm producers regarding required quantities and target pricing for products within 'VP's' target IQF product mix.

Further, 'VP' cultivated a relationship with a local wholesaler-distributor of tray meals for seniors, which services Home-Delivered Meals programs administered by Va. Area Agencies for Aging (AAAs). The 'VP' project team was able to gauge price sensitivities around the provisioning of locally/ sustainably sourced proteins and produce, as components of a "local/ healthy option" tray meal product for Virginia seniors, in addition to required breadth of menu offerings and USDA nutritional requirements.

Through the involvement of Charlottesville Works Initiative (CWI), another founding partner of 'VP,' the project benefited from a pilot methodology and curriculum that engages with area employers to discover the jobs that need filling; appoints community/ neighborhood liaisons to identify suitable individuals within the Charlottesville community who have interest/ aptitude for those jobs; and creates customized, social services support solutions that position potential hires for success (soft skills training, child/ dependent care, personal transportation, etc.)

- iii. How will they continue to contribute to your project's future activities, beyond the performance period of this LFPP grant? Should the project proceed to execution phase, Local Food Hub would function as an aggregator and purveyor of raw produce from a GAP-certified subset of its local grower network, and as a distributor of LFH-branded bulk product to select institutional customers.

Should a 'VP' facility come online, CWI will deploy its social and vocational services support capabilities in order to identify food processing and warehouse workers, building on an intentional commitment of 'VP' to pay "pathway to middle class" wages, and provide health benefits to workers, helping to fulfill a mandate of "triple bottom line" accountability.

5. Are you using contractors to conduct the work? Yes. If so, how did their work contribute to the results of the LFPP project? Our contractors took the lead on customer discovery, market development and distribution options. Specifically, in addition to conducting the on-line survey, they have followed-up with critical market participants such as Aramark, U.Va., the University of Virginia Health System, FeedMore, Virginia Tech and the University of Richmond. These conversations focused on both the "local premium" we would be asking buyers to pay, and exploring new avenues for making nutrient-rich meals and produce more accessible and affordable to low-income individuals.
6. Have you publicized any results yet?\* Not yet. As noted in our application, should this venture be successful, we will construct a website with a virtual toolkit that demonstrates how this was accomplished. We have not yet proven that this venture will be successful, since we are just now at the point where we can begin raising capital.
  - i. If yes, how did you publicize the results?
  - ii. To whom did you publicize the results?
  - iii. How many stakeholders (i.e. people, entities) did you reach?\*Send any publicity information (brochures, announcements, newsletters, etc.) electronically along with this report. Non-electronic promotional items should be digitally photographed and emailed with this report (do not send the actual item).
7. Have you collected any feedback from your community and additional stakeholders about your work? Not applicable at this business planning stage
  - i. If so, how did you collect the information? Not applicable
  - ii. What feedback was relayed (specific comments)? Not applicable
8. Budget Summary:

- i. As part of the LFPP closeout procedures, you are required to submit the SF-425 (Final Federal Financial Report). Check here if you have completed the SF-425 and are submitting it with this report:
- ii. Did the project generate any income? No.
  - a. If yes, how much was generated and how was it used to further the objectives of the award? Not applicable

9. Lessons Learned:

- i. Summarize any lessons learned. They should draw on positive experiences (e.g. good ideas that improved project efficiency or saved money) and negative experiences (e.g. what did not go well and what needs to be changed).

On a macro level, the importance of operating at scale as an IQF processor was repeatedly emphasized, with significant production and sales volumes being essential to compensate for low margins in the produce industry, and the high capital costs of entry. The 'VP' project team was able to quantify a "local premium" on order of 5-10% above conventionally sourced product. This has particular bearing in the institutional food service market segment, where Campus Dining services cater to students—and parents—who are increasingly concerned with food traceability and sustainability as components of procurement.

Numerous cost and logistics challenges were noted in terms of IQF plant management and operations—these include capital costs of equipment (IQF spiral/ tunnel system, processing lines, commercial kitchen fit-out, cold storage space); recurring utility costs (electric, water and sewer); efficient turn-down and rebuilding of equipment in the out-season; cleanup and set-up requirements for each product type, between production shifts; food safety and audit requirements (HACCP, GMP, SQF); and organic waste disposal. While the social mission components of 'VP' are central to the project's value proposition, they are secondary to efficient and sound plant operations management.

The Customer Discovery component of the grant-funded work proposal proved much more complex and time-consuming than originally envisioned. This had to do with the challenge of engaging institutional and grocery retail customers, for whom locally sourced foods currently represent a very small supply chain component. While national food service management companies, broad-line distributors and national grocery retailers are being responsive to increasing consumer demand for locally sourced, minimally processed foods, sourcing/ supply chain networks will take time to build.

Financial modeling and analysis—i.e. the development of a pricing structure for Virginia-grown IQF products—was contingent on the results of Customer Discovery. Therefore, the overall project schedule shifted to the right, as a result of unanticipated delays in completing this aspect of the Work Plan.

- ii. If goals or outcome measures were not achieved, identify and share the lessons learned to help others expedite problem-solving:

Other local food value chain stakeholders contemplating a similar undertaking would benefit from expertise not only in the sourcing and aggregation of fresh produce for processing, but in the areas of flash freezing, menu planning and meal production

themselves. While 'VP' was fortunate to have the involvement of a Kitchen Operations Consultant versed in value-added production (e.g. processing, bottling and jarring of sauces and condiments), the involvement of an experienced produce processing/ freeze plant manager—from standpoint of throughput, portioning, packaging, storage, Quality Control and plant safety—would have flattened the learning curve for 'VP' project team members, in developing an understanding of plant operations management. The same applies to menu planning for IQF tray meals – while 'VP' project team members were able to research portion sizes, protein/ produce input and processing costs, costs of packaging storage cost, etc., the involvement of a trained nutritionist or dietician, a culinary professional experienced in menu creation, etc., would have augmented the project team during the planning stage.

- iii. Describe any lessons learned in the administration of the project that might be helpful for others who would want to implement a similar project: Not applicable

#### 10. Future Work:

- i. How will you continue the work of this project beyond the performance period? In other words, how will you parlay the results of your project's work to benefit future community goals and initiatives? Include information about community impact and outreach, anticipated increases in markets and/or sales, estimated number of jobs retained/created, and any other information you'd like to share about the future of your project.

'VP' project team members could maintain their involvement with the project in a variety of ways. Certain team members could transition into senior management or board roles, either on an interim or full-time basis. The creation of a nonprofit to guide the activities of the local IQF processing plant, with a particular focus on addressing job and food/ nutrition insecurity in Charlottesville-Albemarle, would provide a ready opportunity for keeping the current project team structure intact, as the subset of a board of directors (or advisors). Ideally, bridge funding would be raised that enables retention of project management expertise--either on a consultancy or full-time basis--to lead the project through the operations start-up phase. Should this not prove feasible, 'VP' project team members remain committed to serving in advocacy roles, to support capital raising and engagement of plant operations management expertise.

- ii. Do you have any recommendations for future activities and, if applicable, an outline of next steps or additional research that might advance the project goals?

The project is at the point where a significant capital raise—for lease, renovation and up-fit of an appropriately zoned facility, to food standards; purchasing of processing and kitchen equipment; hiring of salaried managers, and recruitment and training of a plant workforce; building up of raw product inventory; on-hand working capital—is required to move the project forward. 'VP' project team members, who will now revert into advisory/ advocacy roles, are discussing how best to position the business plan materials in front of select equity and debt investors, and grantmaking entities.