HELPERS STRATEGIC DEVELOPMENT PLAN 2021-2023
AT A GLANCE
Vision + Mission

To develop the infrastructure and resource support required

- ENRICH the lives of Individuals with Developmental Disabilities
- ENGAGE with the community
- ENGAGE with our constituents

Strategic Objective:
Develop an integrated development plan, with clearly defined and achievable measures, that fulfills our Mission, improves brand perception, increases awareness, and targets sustainable revenue growth for the next 3 years

- Re-position
- Re-Brand
- Re-Name organization

This initiative will facilitate the Helpers brand to ensure we are favorably and positively shaping the perspective and narrative of what we do, who we are and who we represent

Organizational Management

Dedicated to complete organizational transparency to ENSURE trust within our community.

Develop and adhere to sound business, fiscal and ethical management processes.

- In 2019, Received Guidestar Platinum Seal Award for transparency
- Completion of an annual budget. Create a link of Helpers annual financials on the Helpers website
- Adhere to monthly fiscal policies and practices
- Identify and vet 1-2 new members to current Board of Directors
- Begin the process of creating a formalized succession plan for the organization

Program Development

Helpers Artisan Boutique:

Optimize and Enhance the Helpers Artisan Boutique Store experience:

- Develop sales strategy to increase traffic and ensure break even revenue by Sept ’20
- Enhance in-store imagery and marketing 2x / year, and store windows monthly to raise awareness and increase store traffic
- Continue to promote our “Artists in Residence” program Bi monthly and cultivation events/evenings Qtrly
- Develop, design and implement an Online retail store presence by Year End 2020

Helpers Resident Homes:
The renovations are complete. Helper’s opened both homes as residential care homes through a collaboration with the Janet Pomeroy Recreation and Rehabilitation Center

Helpers Grant Program:
Helpers is dedicated to supporting nonprofit agencies and individuals that support the Helpers Mission Helpers grants funds to 501c3 organizations that serve individuals with developmental disabilities
Marketing Development

Build and Increase Brand Awareness, through effective brand marketing and consumer outreach:

- Investment in new Branding components, new logo and possible name change by YE 2019
- Effectively utilize our NEON CRM database to Re Connect with former donors, Re Engage former supporters and to build a solid, clean consumer outreach base of 1000 names
- Strengthen and Update our website and social media content with “new” public interest stories, posts or client profiles each quarter
- Continue to implement a quarterly newsletter for purpose of sharing key milestones at Helpers Community
- Reposition the perception of and Re Shape the narrative of the Helpers Community “story”
- Develop integrated communication plan that ensures/maximizes community outreach through effective social media and PR
- Design and create an Online retail store presence that reinforces the Helpers Community and Helpers Artisan Boutique brand image

Fund Raising Development

Develop and Expand new and additional Revenue streams via an effective and sustainable Fund Raising Strategy:

- Follow up on Holiday Greeting letter and New Store announcement letter with 2 additional targeted fund raising messages for balance of 2019
- Identify and Cultivate 1-2 potential “angel donor” individuals or organizations by YE 2020
- 100% Board commitment financially contributing to the organization by end of 2020
- Utilizing new NEON data Mgmt system, identify and cultivate the top 50 donors/ “friends of Helpers” patrons to a sustainable donor program by YE 2019
- Achieve a goal of raising $10,000 by YE 2019
- Future goal of raising $100,000 annually
VISION + MISSION

To develop the infrastructure and resource support required

• **ENRICH** the lives of Individuals with Developmental Disabilities
• **ENGAGE** with the community
• **ENGAGE** with our constituents

**Strategic Objective:**
Develop an integrated development plan, with clearly defined and achievable measures, that fulfills our Mission, improves brand perception, increases awareness, and targets sustainable revenue growth for the next 3 years

• **Re-position**
• **Re-Brand**
• **Re-Name organization**

This initiative will facilitate the Helpers brand to ensure we are favorably and positively shaping the perspective and narrative of what we do, who we are and who we represent
Dedicated to complete organizational transparency to ENSURE trust within our community.

Develop and adhere to sound business, fiscal and ethical management processes.

- In 2022, Received Guidestar Platinum Seal Award for transparency for the 3rd consecutive year.
- Completion of an annual budget. Create a link of Helpers annual financials on the Helpers website. (C)
- Adhere to monthly fiscal policies and practices. (C)
- Added 5 new members to current Board of Directors. (C)
- Begin the process of creating a formalized succession plan for the organization. (F)
Past
Through 2021

- In August 2018, Helpers hired a new Executive Director.
- Board and ED prioritized transparency, accountability and responsibility to the developmentally disabled community. (C)

Monthly business and fiscal procedures implemented monthly. (C)

Adoption of strategic development plan to serve as a roadmap for all aspects of the organization. (C)

Present
Through 2022

- **Complete** 3-year Strategic Plan (C)
- **Complete** Helpers Employee Handbook (C)
- **Establish** Criteria for Board Membership (C)
- **Invest** in Search Engine Optimization (SEO) (C)
- **Invest** in People/Positions
- **Add 1-2** New Board Members (C)
- **Update** Original By Laws (C)

2023
Goals

**Operational:**
- Review/amend current lease agreement on residential homes
- Prepare annual report
- Quantify SEO with metrics
- Reduce overall opex by 15%
- Increase Store revenue by 20% by implementing a retail strategy

**Board Cultivation:**
- Identify and vert 2 potential new board members during 2023 (Attorney, Accountant, Tech or marketing Executive)
- Create and embrace a succession plan
- Invest in Development

VISION
For Future

- A highly functioning board and administration committed to enhancing the lives of the developmentally disabled.

Recognized and respected as a much valued resource for other organizations who serve the developmentally disabled community.

Become the non profit charity of choice for future board members and potential donors.
PROGRAM DEVELOPMENT

Helpers Artisan Boutique:
Optimize and Enhance the Helpers Artisan Boutique Store experience:

• Develop sales strategy to increase traffic and ensure break even revenue by Sept ‘2022 (P)

• Enhance in-store imagery and marketing 2x / year, and store windows monthly to raise awareness and increase store traffic (C)

• Continue to promote our "Artists in Residence" program Bi monthly and cultivation events/evenings Qtly (P)

• Develop, design and implement an Online retail store presence by Year End 2020 (C)

Helpers Residences:
The renovations are complete. Helper’s opened both homes as residential care homes through a collaboration with the Janet Pomeroy Recreation and Rehabilitation Center

Helpers Grant Program:
Helpers is dedicated to supporting nonprofit agencies and individuals that support the Helpers Mission. Helpers grants funds to 501c3 organizations that serve individuals with developmental disabilities
• In March 2019, the board of Directors of Helpers makes the financial investment to Re Open a new HAB
• In 2018, after 25 years at Ghirardelli Square, Helpers Bazaar, a retail store committed to mentoring and training individuals with developmental disabilities, loses its rent free lease
• Helpers Bazaar accepted product donations
• Store “strategy” was not limited to products created by individuals with developmental disabilities.
• Little to no in-store signage or imagery; no merchandising of product categories
• Inconsistent pricing on most products offered

PAST
Through 2021

• In March 2019, the board of Directors of Helpers makes the financial investment to Re Open a new HAB
• In 2018, after 25 years at Ghirardelli Square, Helpers Bazaar, a retail store committed to mentoring and training individuals with developmental disabilities, loses its rent free lease
• Helpers Bazaar accepted product donations
• Store “strategy” was not limited to products created by individuals with developmental disabilities.
• Little to no in-store signage or imagery; no merchandising of product categories
• Inconsistent pricing on most products offered

Present
Through 2022

• 100% of all products in our store are made by, designed by or supplied by companies that support individuals with developmental disabilities.
• Helpers Artisan Boutique remains committed to further mentoring and training a core group of dedicated worker clients from the Arc SF and Pomeroy Rehabilitation and Recreation Center
• Add 5 new artists/vendors to merchandise mix and 2 new categories by YE
• Create Helpers Virtual Online Store
• Promote former client to serve as full-time mentor & job coach
• Create In-Store Video Loop
• Leverage Online Store Experience with Virtual Tour

2023 Goals

• Create In-Store Video Loop (P)
• Leverage Online Store Experience with Virtual Tour (C)
• Test Higher Price Points (C)
• Add 2-3 New Product Vendors to help Expand Assortment (C)
• Collaborate with other Organizations to Plan In-Store Events execute 4x annually (C)
• Maximize artists in residence programs
• Increase # of Program Participants
• Increase Store profitability by 30%
• Increase Store Revenue to $60,000 annual.

VISION
For Future

• Identify 1-2 additional worker clients as potential full-time employees
• Longer term goal: become a sought after employment resource for the Arc SF, PRRC and other SF Bay Area organizations seeking work opportunities for their adult population.
• Recognize, reward and retain (or refer) our best trained clients for potential Full-time opportunities.
• Consider expanding # of store locations through acquisition or new locations
• Determine whether retail store strategy is sustainable
• Become GERC Vendor for job training.
• After nearly two decades of being unoccupied...

In 2018, at our own expense, Helpers invests $400,000 to refurbish and reconstruct its two former group home residences.

In 2019, Helpers reopens 2626 Fulton and 2750 Fulton to provide a home for 5 and 5 residents respectively with developmental disabilities.

Continue to provide dedicated service, commitment and resources to the residents at both of our group homes.

ENSURE daily that each resident enjoys the comfort, support and benefit of living in a warm, friendly, safe and supportive “home” environment.

PAST 2021

Present Through 2022

2023 Goals

Determine a timeline for expansion and partnership
Develop a strong home partnership strategy
Increase opportunity for resident capacity by 50%
Research to expand or partner
Determine economics of scale.

Future Vision 2023/2024

• Act on the research conducted, and seek opportunities to expand number of group homes where it fits with the input gained (EG: Shared living vs Group Homes)
• Commit to adding 1 additional residential home for up to 5 individuals with Developmental Disabilities
• Target a Strategy of Self Sustainability model
• Determine if Helpers wants to stay in the real estate business
In 2017, Helpers Community recommitted to re-launching its annual grant disbursement program.

Disbursed $1.0M in grants to 4 Bay Area organizations who support individuals with developmental disabilities.

In 2018, the Board of Directors of Helpers Community approved grant disbursements of $260,000 to 6 worthy Bay Area nonprofit organizations, two of whom are first time recipients.

In 2019, Board approved $250,000 in grant support to 6 Bay Area nonprofits including 2 new first time recipients.

In 2020, in an effort to proactively address the financial impact caused by COVID-19, the Helpers board approved $375,000 in grant support to 8 Bay Area nonprofits, including 5 first time recipients.

Committed to identifying a minimum of 1 new grant recipient each year.

ED and board member will visit all organizations seeking support prior to making final grant decisions.

Ensure a minimum of 2-3 new award recipients to award program each year.

Schedule quarterly cultivation visits to partner organizations.

• Commit to expanding & increasing grant support each year to South Bay & East Bay

• Ensure a minimum of 2-3 new award recipients to award program each year

• Explore naming opportunities with certain award grants

• Schedule quarterly cultivation visits to partner organizations

• Research DAF Organizations and opportunities

• Cultivate Corporate sponsorship support

• Consider establishment of a Legacy Award Grant for Outstanding Excellence for Service to the Community

• Expand awareness and reach beyond SF Bay Area and State of CA

• Consider benefits/challenges of becoming Private Foundation

• Research and target potential long-term donors and investors

• Target a minimum 5 foundations and 2 DAFs for potential annual support
Build and Increase Brand Awareness, through effective brand marketing and consumer outreach:

**Investment** in new Branding components, new logo and possible name change by YE 2019.

- Effectively utilize our NEON CRM database, to Reconnect with former donors, Re Engage former supporters and to build a solid, clean consumer outreach base of 1000 names.
- Strengthen and Update our website and social media content with "new "public interest stories, posts or client profiles each quarter.
- Continue to **implement a quarterly newsletter** for purpose of informing and sharing key events and milestones at Helpers Community.
- Reposition the perception of, and Reshape the narrative of the Helpers Community “story”
- To ensure and to **maximize effective community outreach**, develop an integrated communication plan that utilizes social media and PR
MARKETING DEVELOPMENT

PAST Through 2021

• Created a new and enhanced website (C)
• Invested in a new NEON CRM data management system (C)
• Developed a new branding and Logo initiative (C)
• Implemented a community outreach strategy via Quarterly newsletter (C)

Present Through 2022

• Created an In-Store continual loop message (C)
• Ensure a singular, consistent brand marketing message across all programs (C)

2023 Goals

• Create an In-Store continual loop message (C)
• Ensure a singular, consistent brand marketing message across all programs (C)
• Implement an integrated communication plan that utilizes social media / PR (C)
• Develop and implement an annual dev & marketing planning calendar.
  • Tactical plan to include:
    - Newsletters
    - Social Media Platforms
    - Community Outreach
    - In Store Events
    - Collaborative Partnerships

Future Vision 2023/2024

• Consider a New Corporate Brand name
• Develop strategies that enables Helpers to become an organization of choice for potential board members, product vendors and future investors
• Recognized as a market leader and premier resource and supporter of I/DD
Maximize and increase brand awareness through effective brand marketing and consumer outreach:

- **Ensure** consistent usage of new branding components, logo, gift wrap at every consumer touchpoint
- Build brand perception, awareness, **increase revenue** through a Helpers Artisan Boutique and Shop Online Store product and merchandising strategy. Become a destination for gift shopping.
- **Develop** Integrated Communication Plan: Strengthen and update website and social media content with public interest stories, posts, client profiles, artists bios and photos, Helpers’ grant impacts, Quarterly Newsletters, email blasts
- **Effectively utilize** Neon CRM database to connect with donors and increase the consumer outreach base to 1,000+ names
- **Increase** constituent and **consumer awareness** with effective events
Develop an integrated retail marketing development plan, with defined and achievable measures, that fulfills our mission, improves brand perception, increases awareness, and supports marketing initiatives to:

**Support**

- Build Consumer Awareness
- Maximize SEO for purpose of conversion to sales
- Utilize & maximize all social media platforms

**Build**

- Drive sustainable revenue
- Research store expansion
- I.D. a pathway to sustainability
- Maximize Profitability

**Drive**

- Support program initiatives to enhance constituent engagement and development.
- Increased Corp?** of non profit collaboration events
- Explore store space opportunities and potential?**
2023 MARKETING GOALS

Retail Program Tactics

Branding Components:
Utilize new components at all consumer touchpoints:

- Logo
- Helpers Community Name
- Gift Wrap
- Instore Signage and Imagery
2023 MARKETING GOALS

Visual Initiatives

Build Brand Perception, awareness, increase revenue
Become a gift shop destination of choice

Helpers Artisan Boutique

- **Utilize** current in store branding and imagery
- **POP**: Call out Partner Organizations with Signage. Tell artists’ stories. Feature their bios and photos with product on floor. Assess Fixtures for update if needed.
- **Communicate** product features and benefits through use of small blackboards
- Monthly window change-outs, merchandising store weekly as needed
- **Monthly research** for new products, reorders as needed, new resources
2023 MARKETING GOALS

Helpers Online Store

• Ensure Seasonal Story Telling with Featured Category Page changes and category to reflect holidays: Valentines Day, July 4th, Halloween, Holiday

• Call out National Persons with Disability Day - December

• Update photos with new product additions as needed and ensure availability properly reflected on the online store (weekly virtual meetings with Kate Fitzsimmons from the agency)

• Add new vendors and product photos, descriptions as needed

• Update new artists in Meet the Artists

• Maintain Online Site – remove sold out product not reordered

• Develop new vendor resources
2023 RETAIL MARKETING GOALS

Integrated Communication Plan

• Social Media Postings

• **Increase** frequency during holiday and key selling periods. Otherwise 2x weekly postings. Facebook, Instagram, Google Business, Pinterest Business

• MH to provide admin with content weekly.

• Helpers Community website content – **Update** as needed to reflect News, Events, PR, Grant Impacts

• **Email Blasts** – Monthly – New Product Updates – March, April, June, July, September, December

• **Quarterly Newsletters** – February, May, August, October

• **PR Outreach** – Collaborate with partner organizations for newsletter inclusion, partner events. Research potential publications to tell Helpers Story.
Develop and Expand new and additional Revenue streams via an effective and sustainable Fund Raising Strategy:

- Follow up on Holiday Greeting letter and New Store announcement letter with 2 additional targeted fund raising messages for balance of 2023.
- Identify and Cultivate Annually “angel donor” individuals or organizations by YE 2023. (P/F)
- Commit to 100% Board commitment to financially contributing to the organization by end of 2023. (C)
- Utilizing new NEON data Mgmt system, identify and cultivate the top 50 donors / “friends of Helpers” patrons to a sustainable donor program by YE 2019. (C/P)
- Achieve a goal of raising $10,000 by YE 2019. (C)
- Future goal of raising $100,000 annually.
- Increase database by 20% to 1000 names
- Increase % of Public support (donations received) from 10% - 20%
- Increase awareness and support provided to San Andreas Regional Center by 50%
- Write and submit a minimum of 3 LOI’s / grant applications to prospective funders monthly
FUND RAISING DEVELOPMENT

PAST
Through 2021

No Formal Development Plan
Revenue generated primarily via Estate Sales
Utilized a manually created data base with system of 3x5 cards

Present
Through 2022

Create a fund raising case statement
Executed several InStore cultivation receptions prior to S-I-P mandates
Successfully implemented a consumer outreach strategy
Invested in a digital data base program (NEON)
Began utilizing website & social media as effective outreach tools
In December '20, distributed 1st targeted direct appeal for support

2023
Goals

Establish goal of raising $20,000 in Individual support
Increase data base by 150 names
Research 5-6 new potential foundations/organizations for grant support
Target 2-3 Foundations/organizations to submit LOI’s or applications
Increase # of recurring donors by 50%
Establish a financial metric for each newsletter & direct appeal letter sent. (min 5)
Invest in Development
Ensure total Board Engagement in development process

Future Vision
2024/2025

Target fund raising goals: 2022:
$50,000
2023: $100,000
Long Term: $150,000
Develop & Create a sustainable cultivation strategy
Consider adding a Director of Development or Grant writer to help facilitate plans
Invest in development
Create Board Development Committee
Develop and embrace a comprehensive development strategy