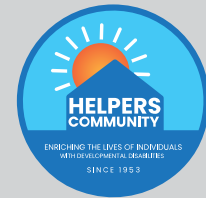




HELPERS COMMUNITY

# HELPERS STRATEGIC DEVELOPMENT PLAN 2021-2023

AT A GLANCE



# 01

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## 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

# 02

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## 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

# 03

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## 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**

# 04

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## 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** data base 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

# 05

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## 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

# ORGANIZATIONAL MANAGEMENT



(C)-completed  
(P)-in progress  
(F)- future

**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)

# ORGANIZATIONAL MANAGEMENT

## 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 Qtrly (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**

# PROGRAM DEVELOPMENT

## HELPERS ARTISAN BOUTIQUE

### 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.



# PROGRAM DEVELOPMENT

## HELPERS RESIDENT HOMES

### PAST 2021

- **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.

### Present Through 2022

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.**

### 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

# PROGRAM DEVELOPMENT

## HELPERS GRANT PROGRAM

### PAST Through 2021

- 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 **approves \$250,000 + in grant support** to 6 Bay Area nonprofits including 2 new first time recipients
- In 2020, in effort to proactively address the financial impact caused by COVID-19, the Helpers board approves \$375,000 in grant support to 8 Bay Area nonprofits, including 5 first time recipients.

### Present Through 2022

**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.

### 2023 Goals

- **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

### Future Vision 2023/2024

- 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

# 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 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)
- **Design and create** an Online retail store that reinforces and leverages brand image

## Present Through 2022

- **Create** 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

# MARKETING DEVELOPMENT OVERVIEW OF 2023 GOALS



**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

# STRATEGIC RETAIL MARKETING

## Support

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:

## Build

Build Consumer Awareness

Maximize SEO for purpose of conversion to sales

Utilize & maximize all social media platforms

## Drive

Drive sustainable revenue

Research store expansion

I.D. a pathway to sustainability

Maximize Profitability

## Support

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. Other wise 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 news-letter inclusion, partner events. Research potential publications to tell Helpers Story.

# FUNDRAISING DEVELOPMENT 2023



## 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

# ASPIRATIONAL VISION

