



HELPERS COMMUNITY

HELPERS STRATEGIC DEVELOPMENT PLAN 2020-2022

AT A GLANCE



01

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

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

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

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

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
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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 2019, Received Guidestar Platinum Seal Award for transparency (C)
- 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)
- Identify and vet 1-2 new members to current Board of Directors. (F)
- Begin the process of creating a formalized succession plan for the organization. (F)

ORGANIZATIONAL MANAGEMENT

PAST

- Embroiled in 18 month PR controversy with press and State of CA

Despite the challenges and hurdles to overcome, board decided to place all focus and priority on continuing to operate the organization.

Helpers board with support of interim Consultant/ ED re-prioritized it's Mission, and established new governance and fiscal procedures .

Present Through 2020

- 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)

2021 Goals

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

VISION

- 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:

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- **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

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PROGRAM DEVELOPMENT

HELPERS ARTISAN BOUTIQUE

PAST

- 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 2020

- In March 2019, the board of Directors of Helpers **makes the financial investment to Re Open a new HAB**
- **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

2021 Goals

- **Create** In-Store Video Loop
- **Leverage** Online Store Experience with Virtual Tour
- **Test** Higher Price Points
- Add 2-3 New Product Vendors to help Expand Assortment
- **Collaborate** with other Organizations to Plan In-Store Events execute 4x annually
- **Maximize** artists in residence programs

VISION

- **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** our best trained clients for potential Full-time job opportunities.
- **Consider expanding** # of store locations through acquisition or new locations
- **Determine** whether retail store strategy is sustainable

PROGRAM DEVELOPMENT HELPERS RESIDENT HOMES

PAST

- **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 6 and 4 residents respectively with developmental disabilities.

Present Through 2020

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.**

2021 Goals

Determine a timeline for expansion

Develop a strong home partnership strategy

Increase opportunity for resident capacity by 50%

Future Vision 2022/2023

- Research and seek opportunities to expand number of group homes
- Commit to adding 1 additional residential home for up to 6 individuals with Developmental Disabilities
- Target a Strategy of Self Sustainability
- Determine if Helpers wants to stay in the real estate business

PROGRAM DEVELOPMENT

HELPERS GRANT PROGRAM

PAST

- 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

Present Through 2020

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

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.

2021 Goals

- **Commit** to minimum 10% increase in grant support each year
- **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

Future Vision 2022/2023

- 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

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

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Present 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

2021 Goals

- Create an In-Store continual loop message
- **Ensure** a singular, consistent brand marketing message across all programs
- **Implement** an integrated communication plan that utilizes **social media / PR**

Future Vision 2022/2023

- 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 2021 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

Drive

Drive sustainable revenue

Support

Support program initiatives to enhance constituent engagement and development.

2021 MARKETING GOALS



Retail Program Tactics

Branding Components:

Utilize new components at all consumer touchpoints:

- Logo
- Helpers Community Name
- Gift Wrap
- Instore Signage and Imagery

2021 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

2021 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

2021 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



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 Annually “angel donor”** individuals or organizations by YE 2020. (P/F)
- Commit to **100% Board commitment** to financially contributing to the organization by end of 2020. (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.**

FUND RAISING DEVELOPMENT

PAST

No Formal Development Plan

Revenue generated primarily via Estate Sales

Utilized a manually created data base with system of 3x5 cards

Present Through 2020

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

2021 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)

Future Vision 2022/2023

Target fund raising goals:

2022: \$25,000

2023: \$50,000

Long Term: \$100,000

Develop & Create a sustainable cultivation strategy

Consider adding a Director of Development or Grant writer to help facilitate plans

ASPIRATIONAL VISION

