



STRATEGIC PLAN 2008

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TABLE OF CONTENTS

A WORD FROM OUR FOUNDER

EXECUTIVE SUMMARY

ORGANIZATIONAL BACKGROUND

FORMAL MANDATES

INFORMAL MANDATES

STAKEHOLDER ANALYSIS

VALUES

MISSION STATEMENT

EXTERNAL ENVIRONMENT ASSESSMENT

SWOT ANALYSIS

CRITICAL ISSUES

STRATEGIC ISSUES

GOALS AND OBJECTIVES

IMPLEMENTATION OF STRATEGIES

EVALUATION PLAN

VISION OF THE FUTURE

A Word from Our Founder

HelpNet*USA*

Executive Summary

Strategic planning is a vital tool that assists organizations in responding effectively to the challenges their environments present. By facilitating communication, unifying divergent views, and enhancing strategic judicious reasoning capabilities amongst stakeholders, the strategic planning process assures the fulfillment of future goals. In an attempt to identify the most efficient approaches to achieving mission fulfillment and public value creation, HelpNet USA initiated the process of strategic planning.

Upon the commencement of the planning efforts, the organization identified the mandates that govern its functioning. As an exempt organization, HelpNet USA must remain in compliance with all regulations provided by section 501 of Internal Revenue Code and Chapter 617 of Florida Statutes. Informally, the organization must adhere to a variety of internal and external expectations. Along with mandate identification, a stakeholder analysis identifies what requirements the organization must follow and what issues and concerns of the stakeholders must be addressed. Within the organization, stakeholders include the Board of Directors, the CEO, and volunteers. Members, fiscally sponsored organizations, and donors comprise the group of significant external stakeholders.

Analysis of the current mission statement is essential, as the organization's mission, in tandem with its mandates, provides significant justification for its existence. Clarification of the organization's current mission and preparation of revisions thereto are integral steps in the planning process. HelpNet USA faces a need for mission elucidation in order to highlight the core values and key objectives for which the organization was formed.

Organizations today must operate within a world of constant change. Therefore, identification of the organization's strengths and weaknesses, in relation to the opportunities and threats it faces, is essential. Performing a SWOT analysis allows key stakeholders to remain abreast of the internal and external contexts in which they operate. In addition, development of a TOWS matrix further organizes findings. For HelpNet USA, strengths include a dedicated founder and Board, collaboration ability, and a broad scope via the World Wide Web. In contrast, weaknesses include a lack of revenue and reputation as well as an ambiguous mission. Opportunities being presented to the foundation include the continued growth of the nonprofit sector, collaboration need therein, and established relationships with a variety of community and faith based organizations. Nonetheless, a recessive economy and increasing competition threaten organizational success.

Having analyzed strengths, weaknesses, opportunities, and threats, HelpNet USA identified the following three issues that must be addressed in order to facilitate future success and survival for the organization:

- How can HelpNet USA more clearly define our mission?
- How can HelpNet USA establish a presence throughout the nonprofit sector?
- What efforts can HelpNet USA make to remain up to date with technology?

For each strategic issue, goals, measurable objectives, strategies, and indicators that demonstrate achievement milestones were developed.

Goal: Develop a defined mission statement, which reflects the organization's core purpose and values.

To achieve this goal, key stakeholders will identify a precise purpose and values and create a new mission statement using their combined knowledge, skills, and abilities.

Goal: Generate active membership of individuals and organizations in web portal.

To achieve this goal the organization will actively register past and present clients.

Goal: Retain maximum site performance and efficiency of portal use by keeping all hardware up to date with advancing technology.

To achieve this goal, the organization will redesign the site with an emphasis on aesthetics and begin a campaign to expand the donor base.

Once a plan for issue management had been established, HelpNet USA stakeholders detailed its process of execution, in the realization that an effective strategic plan must, of necessity, operate hand-in-hand with an effective implementation plan. Additionally, an evaluation plan will assure continued progress.

The strategic planning process concluded with the development of a distinct vision of the organization's future.

Creating a vibrant and healthy nonprofit sector while promoting integrity, collaboration, and respect, HelpNet USA, Inc. is the

premier web based resource for nonprofit organizations and their constituents.

HelpNetUSA

Organizational Background

HelpNet USA, Inc. is a 501 (c) (3) private operating foundation that provides a variety of resources to nonprofit organizations, churches, and individuals in need. The organization's programs provide many opportunities for the attainment of resources via an online community. Supporting the development of self-sufficiency, increased organizational capacity, and economic stability, HelpNet USA provides many individuals and organizations with a thorough foundation for success.

Empowerment and fellowship have been strong components of the organization. Founded in 2001, the organization was conceived and organized to address the promotional, development, and volunteer needs of the nonprofit community; to counteract failure; and to assist in the provision of opportunities for individual and organizational achievement. ***The mission of HelpNet USA is to serve as an online information and solutions resource, networking to enhance community life.***

Recognizing the needs that exist in the nonprofit community, the organization will provide programs that utilize the power of the Internet, along with extensive database and search features and functionality, to facilitate communication between nonprofit organizations and their constituents. The organization's goal is to help individuals and organizations connect and work together to improve our communities.

For individuals in need, HelpNet USA provides free access to an online community help network. For those seeking to make a difference in the lives of others, web tools provide opportunities for volunteering, special event announcements, and donation needs from charities nationwide. Individuals may also post items that they have available for donation. In addition, the online community supports our users with valuable information, tool, and links to other family oriented web resources.

For nonprofit organizations, HelpNet USA provides support by helping to create awareness of their services, posting information on upcoming fundraising events, facilitating online donation, and posting of item needs. The online community assists with volunteer recruitment, as well as provides links to other sources of tools and resources to better serve our communities.

Since its founding in 2001, the organization has lacked a staff, thus leading to a lack of due diligence in assuring continued site improvement and mission fulfillment. In anticipation of a re-launch of the website, the organization has resolved to develop a strategic plan in an effort to provide direction for the organization's growth over the next several years.

Mandates

If an organization aspires to clearly define its mission and values, it must first identify any and all organizational requirements, both formal and informal. Formal mandates are likely to be codified in laws, regulations, ordinances, and corporate filings. Compliance with formal mandates is imperative for all public and nonprofit organizations.

Informal mandates, in contrast, are not legally regulated. These requirements stem from the norms or expectations of key stakeholders. Public and nonprofit organizations comply with informal mandates in an effort to establish and retain public trust.

Formal Mandates

Federal

Recognized by the IRS as a 501(c)(3) nonprofit organization

- ❖ 501(c)(3) provides income tax exemption and deductibility for donors
- ❖ HelpNet USA must comply with all 501(c)(3) requirements

Recognized as a private foundation and subject to Section 4942 of the tax code

- ❖ Requires a foundation to distribute annually a minimum amount of its funds
- ❖ HelpNet USA must distribute a minimum of 5% of its non-charitable use assets within 12 months of fiscal year end

Equal Employment Opportunity (EEO)

- ❖ Ensures the employees are hired, employed and promoted equally and fairly
- ❖ Upon hiring a staff HelpNet USA will be mandated to follow all EEO guidelines

State

Chapter 617 of Florida Statutes

- ❖ Governs nonprofit corporations in the state of Florida
- ❖ HelpNet USA must conform to Chapter 617 regulations

Informal Mandates

Internal

HelpNet USA Bylaws

- ❖ Provides organizational guidelines to ensure legal and appropriate operations
- ❖ Board of Directors are responsible for creating and updating bylaws

HelpNet USA Mission Statement

- ❖ Defines the organization's purpose in a concise yet precise manner
- ❖ Board of Directors are responsible for analyzing and updating the mission statement

External

Fiscal Sponsorship Client Expectations

- ❖ Organizations provided with fiscal sponsorship expect HelpNet USA to provide timely donation processing

Fiscal Sponsorship Donor Expectations

- ❖ Individuals and Organizations donating through HelpNet USA' fiscal sponsorship program expect adequate supervision and monitoring of appropriation of funds donated

National Expectations and Reputation

- ❖ Internet resource for individuals and organizations nationwide

- ❖ HelpNet USA must establish a reputation as an essential online resource

Stakeholder Analysis

An item critical to the success of any public or nonprofit organization is a proper stakeholder analysis. In order for an organization to be successful at satisfying its constituents, it must identify its key stakeholders, note the criteria by which they judge the organization, and review how the organization is performing against those criteria.

Internal

Board of Directors

- ❖ Passionate and knowledgeable individuals who donate their time to govern the organization, in hopes of ensuring organizational success
- ❖ Establishment of public trust and mission fulfillment demonstrate productive direction

CEO

- ❖ Assures implementation of Board recommendations
- ❖ Achievement is evident in the foundation's current and future accomplishments

Volunteers

- ❖ Assist in fundraising activities and facilitation of services
- ❖ Goal realization is evidenced by membership expansion and increased organizational capacity

External

Nonprofit Members

- ❖ Primary purpose of the foundation is to provide resources to these organizations
- ❖ HelpNet USA must display membership expansion and increased revenue development as indicators of achievement

Individual Members

- ❖ Individuals in need, as well as those seeking to provide assistance are essential to organizational success
- ❖ Expansion of individual registration and volunteer match facilitation indicate success

Fiscal Sponsorship Clients

- ❖ Sponsorship of other non-exempt organizations provides revenue for the foundation and extends philanthropic purposes
- ❖ Importance lies in fund development

Donors

- ❖ Provide the necessary funding and/or material resources necessary for program implementation
- ❖ Presence of donor base sensed throughout all organizational operations



Values

Values are the philosophies or beliefs of the organization that mandate its functioning. Public and nonprofit organizations must operate according to their prescribed values in order to successfully fulfill their mission. The mission statement should contain evidence of the organization's core values.

HelpNet USA recognizes the importance of operating according to constructive values. The values deemed most integral to organization operations are demonstrated in all aspects of the foundation's functioning.

Integrity

Collaboration

Respect

Mission Statement

A mission statement is the clear declaration of organizational purpose. A targeted, inspiring mission statement provides a snapshot of the organization's distinctive capabilities. All programs and activities should relate to and provide justification of this mission. The mission statement should answer the Who, What, When, Why, and How of the organizations existence.

Current Mission Statement

HelpNet's mission is to serve as an online information and solutions resource, networking to enhance community life.

Evaluation of Current Mission Statement

The current mission statement, while concise, fails to adequately portray the core values and purposes of the organization. The statement could be enhanced incredibly by incorporating the values of integrity, collaboration, and respect, thus providing a more inspirational statement to represent the foundation.

1. Who are we as an organization?

Organization description is vague; however it does describe basic purpose.

2. What are the political needs or social problems we exist to address?

Specific needs to be addressed are unclear as written. "To enhance community life" is quite broad. Mission could be narrowed to more clearly identify constituents.

3. How do we recognize and respond to these problems?

An online community provides facilitation of resource exchange to address individual and organizational needs within the nonprofit sector.

4. How should we respond to our key stakeholders?

By more clearly identifying the foundation's key stakeholders, the organization will become more aware of their needs and expectations, thus providing the opportunity for method modification.

5. What is our philosophy and what are our core values?

Values are missing from the current mission statement. Revisions should recognize core organizational values and philosophy, emphasizing integrity, collaboration, and respect.

6. What makes us distinctive or unique?

The mission statement describes what the foundation does, but not its unique methods for service implementation.

External Environment Assessment

In an effort to encourage and facilitate success, nonprofit organizations must routinize attention to environmental trends. Assessment of the external environment, including identification of the political, social, economic, and technological forces that are acting upon the organization is imperative. Early recognition of both opportunities and challenges allow the agency the opportunity to take timely action. HelpNet USA must identify the issues it is currently facing and respond accordingly.

Political

Increasing deficits in local, state, and federal budgets threaten the availability of government grant making programs. While this has led to increased competition amongst all nonprofits for the remaining revenue sources, it may prove to be an opportunity for HelpNet's organizational growth. An increased need for volunteer services and in-kind donations will contribute to the need for and increased participation in HelpNet USA programs.

Social

The revival of the philanthropic spirit in Americans that has occurred since the events of September 11, 2001, may have a profound effect on HelpNet's mission fulfillment. A plethora of new grassroots nonprofits is emerging, thus providing HelpNet USA with a substantially increased client base.

Economic

Analysts have noted that the national economy is indeed entering a period of recession. With the addition of the sub-prime mortgage crisis the economy has quickly spiraled downward. As we continue in this direction, the services of nonprofit organizations will be in high demand. Unfortunately, the reclassification of HelpNet USA as a private foundation has resulted in limited opportunities for grant funding. The organization is now faced with the need to scout other sources of revenue in order to facilitate service availability.

Technical

Technical changes and the globalization of information have birthed a revolution in the nonprofit sector. HelpNet USA embodies these advances. The World Wide Web promotes a never before encountered field of opportunity and potential for organizational success.

SWOT Analysis

In order to provide efficient responses to changes which affect a nonprofit organization, agency administrators must remain abreast of the internal and external contexts in which they operate. During the planning process, identification of the organization's strengths and weaknesses, in relation to the opportunities and threats it faces, is essential.

In an effort to identify the organization's most pressing issues, HelpNet USA begins with the following analysis.

Strengths

- Broad scope via World Wide Web
- Dedicated Founder and Board
- Partnering and collaboration ability
- Large constituent base

Weaknesses

- Lack of reputation amongst constituents
- Lack of consistent planning efforts
- Lack of revenue
- Lack of marketing
- Ambiguous mission

Opportunities

- Collaboration/Partnership need in nonprofit sector
- Continuing growth of nonprofit sector
- Relationships with numerous nonprofit organizations

Threats

- Recessive economy
- Reduction in charitable giving
- Competition from other similar groups
- Quickly outdated technology
- IRS regulations becoming more stringent; may limit fiscal sponsorship opportunities

Critical Issues

By identifying the critical issues facing the organization, HelpNet USA will become more focused on what is truly important. Attention will become focused specifically on issues, not answers. Additional benefits of issue identification include the establishment of useful tension, provision of clues to resolution, and clarification of need for the planning process.

HelpNet USA has identified the following strategic issues:

- 1. How can we more clearly define our mission?**
- 2. How can we establish a presence throughout the nonprofit sector?**
- 3. What efforts can we make to remain up to date with technology?**

Strategic Issues

1. How can HelpNet USA more clearly define our mission?

- HelpNet USA must clarify mission in order to effectively communicate our core values and engage a large working client base.
- If the organization does not elucidate its mission statement we will not be able to develop additional programming or create an unmistakable vision for the future.

2. How can HelpNet USA establish a presence throughout the nonprofit sector?

- HelpNet USA must develop a widely known presence throughout the sector in order to populate our programs and expand service availability.
- If we do not make our existence known throughout the nonprofit sector, we will not be able to fulfill our mission of becoming a solutions resource for individuals and organizations in need.

3. What efforts can HelpNet USA make to remain up to date with technology?

- HelpNet USA must continually update both software and hardware in an effort to allow our services to be widely available to all stakeholders, and to provide services in the most efficient manner.
- If the organization fails to remain up to date with technological advances we risk losing our clients and donors to competing agencies.

The logo for HelpNet USA features the words "HelpNet" in a light blue, sans-serif font, followed by "USA" in a red, sans-serif font with horizontal white stripes.

Goals, Objectives, Strategies, and Indicators

1. How can HelpNet USA more clearly define our mission?

Goal: Develop a defined mission statement, which reflects the organization's core purpose and values.

Objective 1: Key stakeholders to identify precise purpose and values and create new mission statement by September 2008.

Strategy 1: Develop agenda and set date for stakeholder brainstorming session.

Strategy 2: Utilize the knowledge, skills, and abilities of all key stakeholders.

Indicator 1: Sparked interest in mission overhaul by June 2008.

Indicator 2: Established agenda and schedule planning session by July 2008.

Indicator 3: Proposed mission statement developed by August 2008.

Indicator 4: Board approval of new mission statement by September 2008.

2. How can HelpNet USA establish a presence throughout the nonprofit sector?

Goal: Generate active membership of individuals and organizations in web portal.

Objective 1: Register 250 individual or organizational accounts in website by January 2009.

Strategy 1: Notify corporation's past nonprofit clients of organization's existence and encourage web registration.

Strategy 2: Offer all of corporation's new nonprofit clients automatic registration in web portal.

Indicator 1: Previous nonprofit clients notified and enrollment begun by September 2008.

Indicator 2: All new nonprofit clients being offered automatic registration by September 2008.

Indicator 3: Minimum of 250 registered members in web portal by January 2009.

Objective 2: Develop and implement a successful marketing program by March 2009.

Strategy 1: Utilize corporate websites to link to HelpNet USA, Inc., emphasizing corporate philanthropic efforts.

Strategy 2: Utilize PSAs, press releases, and articles to market the organization.

Indicator 1: Links to foundation found on all corporate websites with description of corporate philanthropy and donation link in place by March 2009.

Indicator 2: Standard of 6 PSAs, press releases, or articles disseminated in at least 3 media outlets during a year.

3. What efforts can HelpNet USA make to remain up to date with technology?

Goal: Retain maximum site performance and efficiency of portal use by keeping all hardware and software up to date with advancing technology.

Objective 1: Redesign web portal to emphasize aesthetics and efficiency by September 2008.

Strategy 1: Utilize engaging template and flash technology to impart animation and interactivity in web portal.

Indicator 1: Web portal redesigned for greater appeal and efficiency by September 2008.

Objective 2: Increase donor base by 50 percent to establish adequate revenue to cover continual upgrade expenses by June 2009.

Strategy 1: Implement mandatory Board contribution.

Strategy 2: Solicit contributions and in-kind service donations from profitable enterprises and individuals.

Strategy 3: Develop and implement a variety of fundraising initiatives.

Indicator 1: Individual and corporate donations increase by 50 percent by June 2009.

Indicator 2: Receive \$10,000 in cash or in-kind donations by June 2009.

Indicator 3: All Board members contributing by January 2009.

Indicator 4: Standard of 3 fundraising initiatives per year by 2009.

Objective 3: Establish cooperative partnerships with technology organization in the for-profit sector by September 2009.

Strategy 1: Generate proposals and press releases to submit to technology-focused companies.

Strategy 2: Actively court technology-focused corporations for sponsorship.

Indicator 1: Standard of 4 proposals or press releases to technology companies in a year.

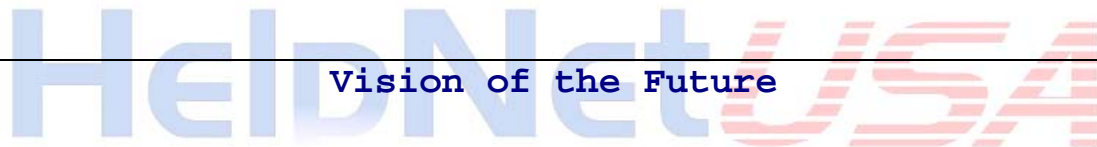
Indicator 2: Establishment of a stable collaborative partnership by September 2009.

Evaluation Plan

A detailed plan for evaluation will be implemented in order to assess the ongoing progress in meeting the goals and objectives outlined in the strategic plan. Members of the planning committee will provide key stakeholders with quarterly appraisals of all implementation activities. Items reviewed will include, at minimum, objective achievement, public value creation, and cost-effectiveness.

Meetings among key stakeholders, particularly the Board of Directors, provide an opportunity for discussion and decision-making regarding needed method modifications. Staff will also seek to assess the satisfaction of clients with strategically improved services via survey instruments.

All funders of HelpNet USA, Inc. will receive a final report outlining the success of the strategic plan, as will board members, the executive director, and other interested individuals. If HelpNet USA, Inc. is able to auspiciously implement the strategies identified to address the strategic issues subsequently reach or adapt goals then the planning project will be considered a success.



High performing organizations formulate a clear and distinct description of how the organization should look when functioning at its best in relation to its environment and key stakeholders. This **vision of success** acts as a guide to strategy implementation, thus becoming an inspiration for the organization to achieve its full potential and create the most significant public value.

Creating a vibrant and healthy nonprofit sector while promoting integrity, collaboration, and respect, HelpNet USA, Inc. is the premier web based resource for nonprofit organizations and their constituents.

Implementation of Strategies

In order to successfully transition from strategic planning to strategic management, HelpNet USA, Inc. must identify and adopt efficient strategies by which to address its issues. Action plans are thus implemented in an effort to resolve issues and allow the organization to secure added public value. Realization that the implementation process involves adaptive learning will lead to more effective implementation. Competent utilization of resources and adherence to time lines will lead to rapid, worthwhile goal achievement.

The logo for HelpNet USA. The word "HelpNet" is in a light blue, sans-serif font. The word "USA" is in a red, sans-serif font with horizontal white stripes, giving it a flag-like appearance.

Issue 1: *How can HelpNet USA more clearly define our mission?*

Goal: Develop a defined mission statement, which reflects the organization's core purpose and values.

Objective 1: Key stakeholders to identify precise purpose and values and create new mission statement by September 2008.

Strategy	Actions	Indicators	Person(s) Responsible	Target Date
Develop agenda and set date for stakeholder brainstorming session.	Review availability of key stakeholders. Identify key issues for discussion and select date.	Sparked interest in mission overhaul. Established agenda and scheduled planning session.	CEO Board of Directors	July 2008
Utilize the knowledge, skills, and abilities of all key stakeholders.	Meet and brainstorm to determine core values. After identifying clear purpose, draft new mission statement.	Proposed mission statement developed by August 2008. Board approval of new mission statement.	Board of Directors	September 2008



Issue 2: How can HelpNet USA establish a presence throughout the nonprofit sector?

Goal: Generate active membership of individuals and organizations in web portal.

Objective 1: Register 250 individual or organizational accounts in website by January 2009.

Strategy	Actions	Indicators	Person(s) Responsible	Target Date
Notify corporation's past nonprofit clients of organization's existence and encourage web registration	Compile list of past nonprofit clients. Implement email notification campaign.	Previous nonprofit clients notified and enrollment begun.	Board of Directors Employees Volunteers	September 2008
Offer all of corporation's new nonprofit clients automatic registration in web portal.	Train and inform reps on program details. Begin offering program to all clients.	All new nonprofit clients being offered automatic registration.	Board of Directors Employees Volunteers	January 2009

HelpNetUSA

Issue 2: How can HelpNet USA establish a presence throughout the nonprofit sector?

Goal: Generate active membership of individuals and organizations in web portal.

Objective 2: Develop and implement a successful marketing program by March 2009.

Strategy	Actions	Indicators	Person(s) Responsible	Target Date
Utilize corporate websites to link to HelpNet USA, Inc., emphasizing corporate philanthropic efforts.	Create links to HelpNet USA throughout the network of websites.	Links to foundation found on all corporate websites with description of corporate philanthropy and donation link	CEO	March 2009
Utilize PSAs, press releases, and articles to market the organization.	Draft press releases, create PSAs, etc.	Standard of 6 PSAs, press releases, or articles disseminated in at least 3 media outlets during a year.	Board of Directors	June 2009

HelpNetUSA

Issue 3: What efforts can HelpNet USA make to remain up to date with technology?

Goal: Retain maximum site performance and efficiency of portal use by keeping all hardware and software up to date with advancing technology.

Objective 1: Redesign web portal to emphasize aesthetics and efficiency by September 2008.

Strategy	Actions	Indicators	Person(s) Responsible	Target Date
Utilize engaging template and flash technology to impart animation and interactivity in web portal.	Employ web developer to redesign current site.	Web portal redesigned for greater appeal and efficiency.	CEO Web developer	September 2008

HelpNetUSA

Issue 3: What efforts can HelpNet USA make to remain up to date with technology?

Goal: Retain maximum site performance and efficiency of portal use by keeping all hardware and software up to date with advancing technology.

Objective 2: Increase donor base by 50 percent to establish adequate revenue to cover continual upgrade expenses by June 2009.

Strategy	Actions	Indicators	Person(s) Responsible	Target Date
Implement mandatory Board contribution.	Meet with Board to vote on a minimal mandatory contribution.	All Board members contributing	Board of Directors	January 2009
Solicit contributions and in-kind service donations from profitable enterprises and individuals.	Draft request letter templates. Compile list of potential donors. Implement campaign.	Individual and corporate donations increase by 50 percent. Receive \$10,000 in cash or in-kind donations.	Board of Directors CEO	June 2009
Develop and implement a variety of fundraising initiatives	Meet with Board and volunteers to brainstorm ideas for fundraisers. Plan and implement fundraising initiatives.	Standard of 3 fundraising initiatives per year	Board of Directors CEO	December 2009

Issue 3: What efforts can HelpNet USA make to remain up to date with technology?

Goal: Retain maximum site performance and efficiency of portal use by keeping all hardware and software up to date with advancing technology.

Objective 3: Establish cooperative partnerships with technology organization in the for-profit sector by September 2009.

Strategy	Actions	Indicators	Person(s) Responsible	Target Date
Generate proposals and press releases to submit to technology-focused companies.	Draft proposals making requests for funding or partnerships with technology firms	Standard of 4 proposals or press releases to technology companies in a year.	Board of Directors	May 2009
Actively court technology-focused corporations for sponsorship.	Present proposals and develop relationships with potential partners in technology firms.	Establishment of a stable collaborative partnership	Board of Directors	September 2009

