BACKGROUND/CONTEXT

In August 2020, the RAMS Board of Directors embarked on a holistic CEO search and strategic planning process designed to build upon a 46-year history of accomplishment. The purpose of this process was to identify the organization's next CEO and, with that new leader, set RAMS’ strategic course for the next three years. RAMS contracted with Walker and Associates Consulting (W&A) to facilitate this process.

Following a deep internal assessment, external landscape analysis and competitive national search, JayVon Muhammad was appointed RAMS’ CEO, joining the organization in February 2021.

With JayVon and Board Chair Cynthia Huie, W&A designed an inclusive strategic planning process, assembling Board and staff leadership to consider RAMS’ core strengths and areas of opportunity in order to refresh the organization’s Vision, Mission, Values and Goals, or strategic pillars. This process included:

- **Board Retreat** to build upon the 2020 assessment and begin to shape the longer-range vision for the organization;
- **Staff Ideation Session** to reflect upon the challenges of RAMS’ clients and communities and begin to craft innovative interventions;
- **Program-level Conversations** led by program managers to integrate the ideas of program staff who are on the front-lines of RAMS’ services and operations;
- **Strategic Planning Committee** meetings to integrate and refine the emerging direction.

Together, these conversations generated a new and aspirational **Vision**, a refreshed **Mission** to meet this moment, a set of core **Values** to guide RAMS’ work and five intersecting **Goals** that will propel RAMS toward greater reach and impact, starting in [calendar year] 2022.

The following Strategic Plan is accompanied by a Dashboard that the Board and staff will use to track and celebrate progress on a quarterly basis, iterating along the way to build upon success and address challenges as they emerge.
# FOUNDATIONS FOR SUCCESS

<table>
<thead>
<tr>
<th>VISION</th>
<th>RAMS envisions mental wellness for all people.</th>
</tr>
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<tbody>
<tr>
<td>MISSION</td>
<td>RAMS provides and advocates for mental health and wellness services that are centered in clients, community and culture, with expertise in serving Asian and Pacific Islander Americans.</td>
</tr>
<tr>
<td>SUPPORTING LANGUAGE</td>
<td>Since 1974, RAMS has supported those who have the least resources and opportunities to achieve their highest potential. We do this by providing integrated services that include counseling, job training, capacity building for partner organizations and advanced training of mental health professionals.</td>
</tr>
</tbody>
</table>
| VALUES          | • **Inclusion** - *We reflect our communities’ rich diversity in every aspect of our services and evolve as our communities change*  
• **Impact** - *We deliver high-quality care and promising practices that result in measurable outcomes for our clients*  
• **Insight** - *We approach our work with an understanding of the long-term impacts of trauma and a commitment to ending the stigma around mental health*  
• **Integrity** - *We are principled, transparent and accountable to our clients, funders and communities*  
• **Innovation** - *We seek to continually improve how we serve our communities and act as a thought leader for mental health and wellness* |
| GOALS           | 1) **Strengthen the RAMS team** by investing in Board and staff development.  
2) **Right-size RAMS’ infrastructure** to support strong programs and operations.  
3) **Establish charitable donations** as a major source to support programmatic innovation and sustainability.  
4) **Strengthen programs** to support innovation, excellence in service delivery and comprehensive client support.  
5) **Increase RAMS’ visibility** as a thought leader and advocate for mental health and wellness. |
GOALS, DELIVERABLES & BENCHMARKS

The 2022-2025 Strategic Plan identifies five overarching and interconnected [SMARTIE\textsuperscript{1}] goals that hold the strongest potential to advance RAMS' mission and increase our influence and impact. The Plan becomes a tool to strengthen and innovate RAMS' programs and operations; provides a template for cascading program- and department-level plans; and can be used as a dashboard for regular review and iteration.

DEFINITIONS

Goal: Overarching goal/strategy

3-Year Deliverables: What is different as a result of our efforts in 3 years

Tactics: Activities to advance or make progress toward our 3-Year Deliverables

Annual Benchmarks: How we know we are making progress toward our 3-Year Deliverables

\textsuperscript{1} SMARTIE goals are Strategic, Measurable, Ambitious, Realistic, Time-Bound, Inclusive and Equitable
GOAL 1: Strengthen the RAMS team by investing in Board and staff development.

3-YEAR DELIVERABLES: A strong and diverse Board governs RAMS with the highest standards of integrity and excellence. RAMS staff report high levels of satisfaction and retention rates increase at all levels of the organization.

<table>
<thead>
<tr>
<th>TACTICS</th>
<th>YEAR ONE BENCHMARKS</th>
<th>YEAR TWO BENCHMARKS</th>
<th>YEAR THREE BENCHMARKS</th>
</tr>
</thead>
</table>
| Board   | - Self-evaluation or Assessment of Board Membership and Performance (Questionnaire)  
- Update bylaws to reflect future/desired state (e.g., expand # of BoD members to reflect core constituents)  
- Assess current Board composition and identify gaps to reflect employee and client base (to guide recruitment strategies)  
- Identify training needs to strengthen governance, fiscal oversight and fundraising  
- Identify ways to engage in and build out RAMS’ thought leadership in community  
- Establish BoD giving and fundraising guidelines to ensure 100% participation | - Evaluation Questionnaire created (Q1)  
- BoD Self-evaluation completed & results analyzed (Q1)  
- Bylaws are reviewed/updated (Q1)  
- Recommendations to update BoD composition implemented (Q2)  
- Recruitment matrix developed and criteria used to drive identification of new BoD members (Q2)  
- X new members recruited (TBD)  
- Collaboration with ELT to establish Thought Leadership workshop developed (Q3)  
- Informed by self-evaluation, Training Plan and priorities developed and calendared (Q4)  
- 75% of BoD members participated in Giving program (Q4) | - Bylaws are reviewed to reflect current priorities (Q1)  
- BoD membership filled out (Q1)  
- Training Plan implemented and evaluated (Q2)  
- 90% of BoD Members participated in Giving program (Q4) |
|         | - Bylaws are reviewed to reflect current priorities  
- 100% of the Board participated in making a personal gift and participating in the stewardship of donors/funders |
| Staff | - Conduct **salary analysis and market research** to ensure competitive compensation and retain outstanding talent  
- **Update performance evaluation** process  
- Promote a culture of wellness  
- Integrate principles and values around **Diversity, Equity and Inclusion (DEI)**  
- Develop **equitable staff development opportunities** (training, coaching)  
- Create **internal job board** to support internal promotion  
- Establish **mentorship program** for new hires  
- Establish an **alumni association** of former RAMS staff | - Salary analysis and market research conducted and salaries adjusted accordingly  
- Research on best practice around performance evaluation conducted and recommendations proposed  
- Promotion of RAMS employee group discount programs (incentives) increased  
- Ongoing leadership training offered to all Directors and Managers  
- Wellness Manager hired that includes DEI and trauma-informed expertise  
- Internal/online job board created as part of website refresh | - Performance evaluation process updated and rolled out across the organization, including time-off/wellness measures (PTO is a core competency)  
- RAMS group programs and activities for staff expanded (Q3)  
- **New Alumni Association launched** |
Goal 2: Right-size RAMS’ infrastructure to support strong programs and operations.

3-Year Deliverable: *RAMS has the infrastructure - HR, technology, finance and operations - to support outstanding program delivery.*

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<thead>
<tr>
<th>TACTICS</th>
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<th>YEAR TWO BENCHMARKS</th>
<th>YEAR THREE BENCHMARKS</th>
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<tbody>
<tr>
<td>Expand HR team to meet increased needs of 300+ staff</td>
<td>HR Manager hired (Q1)</td>
<td>Training Institute Director hired (Q1)</td>
<td>Digital Marketing Coordinator hired (Q1)</td>
</tr>
<tr>
<td>Assess technology and develop plan for modernization and integration of systems to increase efficiencies</td>
<td>Director of Community &amp; Workforce Empowerment hired (Q1)</td>
<td>Compliance Manager and/or Facilities Manager hired</td>
<td>Online Training Platform developed and rolled out across org</td>
</tr>
<tr>
<td>Boost financial literacy across the org by implementing systematic training to help staff identify best practices, manage change and improve overall skills in financial management</td>
<td>Technology Assessment &amp; Plan developed (Q1)</td>
<td>Technology Plan implemented and evaluated, including acquisition of and training around modernized tools and systems</td>
<td>Technology Plan implemented and evaluated, including acquisition of and training around modernized tools and systems</td>
</tr>
<tr>
<td>Fund infrastructure growth through admin/overhead of current gov’t grants and new private revenue</td>
<td>Community Engagement &amp; Govt Affairs role hired (Q3)</td>
<td>FY2023 budgeting process designed as inclusive opportunity to increase financial literacy among ELT</td>
<td>FY20224 budget monitoring process developed</td>
</tr>
<tr>
<td>Identify new location for Balboa Programs</td>
<td>FY2023 budgeting process oversight conducted</td>
<td>Inclusive FY2024 budgeting process continued</td>
<td>Inclusive FY2025 budgeting process continued</td>
</tr>
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<td></td>
<td>New location for Balboa Programs and funding sources for additional rental, buildout and moving costs secured (Q3)</td>
<td>New space for Balboa programs secured (Q2)</td>
<td>New space for Balboa programs secured (Q2)</td>
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<tr>
<td></td>
<td></td>
<td>Balboa programs transition begun to new site (Q4)</td>
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Goal 3: Establish charitable contributions as a major funding source to advance RAMS’ mission, growth, long-term financial stability and sustainability.

3-Year Deliverable: RAMS has flexible funding to test or expand programs and to build long-term assets.

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<tr>
<td>- Determine specific/concrete fundraising dollar goal ($XM TBD through collaborative process b/t staff and Board)</td>
<td>- Development Plan created, including fundraising goal</td>
<td>- Progress against fundraising goal achieved ($XK-M raised)</td>
<td>- Progress against fundraising goal achieved ($XK-M raised)</td>
</tr>
<tr>
<td>- Create a Development Plan to detail how the fundraising goal will be achieved, including campaign types (annual, capital, endowment, etc.), donor types (micro, small, mid, large, individual, corporate, foundation, etc.)</td>
<td>- Progress against fundraising goal achieved ($XK-M raised)</td>
<td>- Additional Development hires made, as appropriate</td>
<td>- Additional Development hires made, as appropriate</td>
</tr>
<tr>
<td>- Define &amp; develop the structure, functional composition and org chart for the Development Department, including the hiring plan and operating and expense plan</td>
<td>- Development Department structure determined, searches for staff and/or consultants launched and X hires made</td>
<td>- $XK-M raised for Endowment or Foundation Campaign</td>
<td>- $XK-M raised for Endowment or Foundation Campaign</td>
</tr>
<tr>
<td>- Establish Board Fundraising Committee</td>
<td>- Board member(s) with fundraising expertise recruited and onboarded</td>
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<tr>
<td>- Recruit new Board members with fundraising expertise</td>
<td>- Feasibility of Endowment and/or Foundation determined, fundraising campaign launched if appropriate</td>
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<tr>
<td>- Determine the feasibility of an Endowment, Foundation or both</td>
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**Goal 4: Strengthen programs to support innovation, excellence in service delivery and comprehensive client support.**

**3-Year Deliverable:** *RAMS’ cohesive programmatic model reflects best practice in mental health and wellness.*

<table>
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</thead>
<tbody>
<tr>
<td>- Streamlined and community inclusive program evaluation process/system</td>
<td>- Tool created in partnership with clients to evaluate impact of programs on community</td>
<td>- Annual program evaluation conducted</td>
<td>- Annual program evaluation conducted</td>
</tr>
<tr>
<td>- Grad school partnership(s) for special research projects</td>
<td>- Relationships with grad school (outside of training programs) identified and established for purpose of research projects</td>
<td>- Grad school(s) identified to set up interns in public health to evaluate RAMS program impact</td>
<td>- Grad school(s) partnership program evaluated, expanded as appropriate</td>
</tr>
<tr>
<td>- Time and funding for clinical scholarship</td>
<td>- Feasibility determined around direct application for Federal grants for clinical scholarship</td>
<td>- X federal grants secured for clinical scholarship (# TBD)</td>
<td>- Based on student research, model of local best practices evaluated and developed</td>
</tr>
<tr>
<td>- Strengthen program budget management capacity among program directors and managers</td>
<td>- Leadership training in program budget management developed, implemented and evaluated</td>
<td>- Annual Lean Process Improvement assessment for all programs implemented</td>
<td>- X federal grants secured for clinical scholarship (# TBD)</td>
</tr>
<tr>
<td>- Implement Lean Process Improvement system</td>
<td>- Annual Lean Process Improvement assessment for all programs implemented</td>
<td>- Intake forms updated to disaggregate RAMS-wide client data (by race, ethnicity, gender, age, language)</td>
<td>- Annual Lean Process Improvement assessment for all programs implemented</td>
</tr>
<tr>
<td>- Implement Electronic Health Record (EHR) across RAMS</td>
<td>- Standardized RAMS client data analyzed and assessed to inform program and process improvements</td>
<td>- EHR implemented</td>
<td>- EHR implemented</td>
</tr>
<tr>
<td>- Published intranet with resource directory on wrap-around services</td>
<td>- Funding identified to standardize Electronic Health Record across RAMS programs to more easily obtain comparative client data, and identify gaps</td>
<td>- Wrap-around service resource directory expanded</td>
<td>- Wrap-around service resource directory expanded</td>
</tr>
<tr>
<td>- Centralized internship program</td>
<td>- Shared resource directory on wrap-around services (food, housing, education, etc.) developed and published via</td>
<td>- Internship program expanded</td>
<td>- Internship program expanded</td>
</tr>
<tr>
<td>Social Enterprise</td>
<td>TBD</td>
<td>TBD</td>
<td>TBD</td>
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</table>
| - Board and RAMs organization will **foster and support creativity and ideation around social enterprise/earned revenue concepts** with the potential to serve the RAMs mission and generate future revenues  
- Board/programs will **define what constitutes a viable enterprise** (i.e., alignment of interest with mission and $X) revenue potential  
- Programs will **develop guidelines for staff to explore earned revenue opportunities**  
- Board/programs will **define process for presenting viable concepts to the Board, how ventures would be incubated, piloted and supported** to get to growth stage |

*intranet*  
- Centralized process to set up internship programs for various schools developed and implemented
Goal 5: Increase RAMS’ visibility as an expert, thought leader and advocate for mental health and wellness.

3-Year Deliverable: RAMS is known throughout California (and beyond) for its model programs and leadership in providing culturally-responsive, comprehensive wellness care, with expertise in serving Asian and Pacific Islander Americans.

<table>
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</thead>
<tbody>
<tr>
<td>- Refresh the RAMS brand, building from the strategic planning process to identify our core audiences and unique value proposition&lt;br&gt;- Develop a multi-year Marketing and Communications Plan to express the refreshed brand&lt;br&gt;- Identify opportunities for RAMS’ diverse staff and Board to share expertise and thought leadership in broader mental health field, including public speaking, white papers and peer-reviewed industry field journals&lt;br&gt;- Build partnerships with other more visible organizations to increase visibility and reach&lt;br&gt;- Engage with state and local policymakers to increase sphere of influence around mental health</td>
<td>- Marketing and Communications Plan implemented; year one evaluated, including new ADA-compliant website developed&lt;br&gt;- Messaging Architecture developed, rolled out across the org for consistent language&lt;br&gt;- Brand Guidelines rolled out across org, implemented and evaluated&lt;br&gt;- Master online calendar of presentation opportunities developed and shared across org&lt;br&gt;- At least one conference presentation or public speaking opportunity realized and evaluated (#, reach, impact of participation)&lt;br&gt;- Peer review committee established with diverse internal representation&lt;br&gt;- # OpEds, white papers and industry field journals published&lt;br&gt;- At least one new partnership</td>
<td>- Marketing and Communications Plan implemented; year two evaluated&lt;br&gt;- Brand Guidelines implemented, evaluated and iterated as appropriate&lt;br&gt;- Feasibility of fee-for-service CEU speaking or training opportunities tested&lt;br&gt;- At least three internal experts identified and trained for public speaking opportunities&lt;br&gt;- At least three conference presentations or public speaking opportunities realized and evaluated (#, reach, impact of participation)&lt;br&gt;- Peer review committee continued with diverse internal representation&lt;br&gt;- Multilingual archival materials (videos, papers, slide decks, etc.) developed into online library for training around specific topics/series (possible)</td>
<td>- Marketing and Communications Plan implemented; year three evaluated&lt;br&gt;- Brand Guidelines implemented, evaluated and iterated as appropriate&lt;br&gt;- Fee-for-service speaking or training opportunities implemented and evaluated, if appropriate&lt;br&gt;- At least three more internal experts identified and trained for public speaking opportunities&lt;br&gt;- At least five conference presentations or public speaking opportunities realized and evaluated (#, reach, impact of participation)&lt;br&gt;- Peer review committee continued with diverse internal representation&lt;br&gt;- Online library of training materials expanded to include more languages&lt;br&gt;- At least one new partnership</td>
</tr>
</tbody>
</table>
- Community Engagement and External Affairs manager hired
- Participation in at least 20 community events secured and evaluated
- At least one new partnership developed and evaluated
QUARTERLY & ANNUAL REVIEW

The Strategic Plan will be reviewed on a quarterly basis by the Board of Directors and Executive Leadership Team, engaging program directors and other team members on an annual basis. A Dashboard has been created to track our progress around each Goal, Deliverable and Annual Benchmark in order to celebrate accomplishments, lift up challenges and identify where adjustments may need to be made. To illustrate how the Dashboard will be structured, we look at Goal 1a:

<table>
<thead>
<tr>
<th>GOALS</th>
<th>3-Year Deliverables</th>
<th>Year 1 Benchmarks</th>
<th>Q1 - Jan-Mar '22</th>
</tr>
</thead>
</table>
| 1) Strengthen the RAMS team by investing in Board and staff development. | A strong and diverse Board governs RAMS with the highest standards of integrity and excellence. | -Evaluation Questionnaire created (Q1)  
-BoD Self-evaluation completed & results analyzed (Q1)  
-Bylaws are reviewed/updated (Q1)  
-Recommendations to update BoD composition implemented (Q2)  
-Recruitment matrix developed and criteria used to drive identification of new BoD members (Q2)  
-Recruit X new members (TBD)  
-Collaboration with ELT to establish Thought Leadership workshop developed (Q3)  
-Informed by self-evaluation, Training Plan and priorities developed and calendared (Q4)  
-75% of BoD members participated in Giving program (Q4) | What we did during the quarter... | Successes we're proud of... | Barriers we encountered... | How we will adjust our tactics or questions we'll hold in the next quarter... |

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ACKNOWLEDGEMENTS

The Strategic Planning Committee devoted countless hours to discussing RAMS’ strengths, opportunities for improvement and most promising new strategies and tactics. They also led team-level conversations to build out the Goals of the Plan. Thank you to these outstanding team members for their time, creativity and commitment to RAMS.

- Natalie Ah Soon, Program Manager, API Mental Health Collaborative and Pacific Islander Wellness Initiative
- Yanela Alvarado, Executive Assistant
- Carmen Castorena-O'Keefe, Director of Hireability Vocational Services
- Anoshua Chaudhuri, Board Member
- Trina de Joya, Director of Human Resources
- Eduard Agajanian, Director of Finance
- Domenica Giovannini, Director of Development and Communications
- Cynthia Huie, Board Chair
- JayVon Muhammed, CEO
- Maire Quinn, Board Member
- Marjorie Scholtz, Board Member
- Christina Shea, Deputy Chief and Director of Clinical Services
- Hasian Sinaga, Director of the Division of Peer-Based Services
- Angela Tang, Director of Operations
- Tom Yeh, Board Member