



Strategy Roadmap

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Executive Summary

For almost 150 years, Cameron House has served the Chinese community in San Francisco, providing care and support to the most vulnerable. Today, we serve children and adults with diverse programs that ultimately support the entire family. As we near our historic anniversary in 2024, we are also reflecting on the changing needs of the community, made all the more acute over the past 18 months by the far-reaching impacts of COVID-19. While the pandemic has been difficult for Cameron House and many other service organizations, we leveraged this disruption in our programs and services to engage in a strategic planning process that will guide our work for these next 2–3 years.

We are grateful to our committed Board of Directors, staff members, clients, and other stakeholders—especially those serving on our Strategic Planning Committee—who have participated in this work to identify a clear direction for the future of the organization, examine our strengths and challenges, agree on criteria for strategic decision making, and collectively explore ways to strengthen the organization and our ability to provide meaningful services to the community.

Our mission, updated in the process of developing this strategic plan, is **to empower the San Francisco Chinese community to build strength and resilience through family-centered programs**. This is both consistent with our existing programs and represents our intent to rethink and reframe that work in a more integrated, holistic way to deepen our impact for families and the broader community.

This work contributes to our broader vision of **a safe and healthy community where people learn, heal, and thrive**. We recognize that this vision is larger than us and that Cameron House will not reach it alone, but we believe that by working with like-minded organizations and community leaders we can achieve this desired future together.



Over the course of our planning process, we affirmed our organizational identity, listened to the voices of key stakeholders, clarified our “big questions,” or strategic issues, and defined four strategic priorities moving forward.

1. We are weaving together and further developing our programs with a family-centered lens and an emphasis on new immigrant families.
2. We are also exploring the ways that we might contribute to a community-level response to poverty and its impact in Chinatown.
3. We are diversifying our financial model to strengthen our sustainability and potential for community impact.
4. We are ensuring our success in these strategic endeavors by developing our organizational culture to support not only the organization we have become but the organization we strive to be.

Programs

We are excited to explore different models of family-centered service delivery that will bring cohesion to our services for children and youth, parents and caregivers, and elders, with a special focus on new Chinese immigrant families. We will clarify desired outcomes, assess how our current programs contribute to these outcomes, and explore partnerships with other agencies for greater impact. We are also embarking on a research phase to learn how Cameron House might best contribute to poverty solutions in Chinatown.

Financial Model

To strengthen our financial sustainability, we will create and implement a comprehensive fund development plan. Informed and guided by a new Development Director, working with the Executive Director and Board, this plan will include strategies to: engage alumni and intergenerational donors, enhance fundraising, explore earned income opportunities, and clarify program outcomes that help tell Cameron House’s story of impact.

Organizational Culture

All of our work will be supported by developing an institutional culture of accountability, community-responsiveness, and excellence. Through recruitment, orientation, training, and ongoing professional development, we will ensure that our staff, board, and volunteers have the skills and support needed to succeed.

This plan captures the best of our thinking today and will be dynamic, nimble, and responsive to whatever may unfold tomorrow. This plan will not sit on a shelf as an artifact of our planning process but will serve as an interactive roadmap for the future.

Vision, Mission, Values, and Faith Statement

Cameron House is a deeply values-driven organization, and these values show up in how we live out our mission toward an ideal vision for the community. We are also grounded in a history of faith in action, and our faith statement complements our vision, mission, and values by articulating how faith informs our work today.

Guided by our Strategy Committee and with support from the Executive Director and our consultants at Mosaic Consulting and Coaching, our Board of Directors contributed to and adopted a new vision and mission, updated values, and organizational faith statement.

Vision: *A safe and healthy community where people learn, heal, and thrive.*

Mission: *We empower the San Francisco Chinese community to build strength and resilience through family-centered programs.*

Values:

- *Community: We build healthy and vital relationships through inclusion and compassion.*
- *Authenticity: We affirm and value each individual— their whole self as created in God’s image—and offer genuine love and acceptance without judgment.*
- *Servant Leadership: We lead with empathy and humility and use our strength to help others.*
- *Accountability: We are willing to have difficult conversations; we speak the truth; and we evaluate our impact, learn from mistakes, and change as necessary.*
- *Excellence: We are committed to making a valuable impact by always striving to innovate and deliver quality work for the benefit of our community and stakeholders.*

Faith Statement: *Rooted in the Christian faith and our Presbyterian heritage, we believe that God calls us to be an empowering presence in the community. We provide a safe place, are a trusted friend and advocate, meet people where they are, and walk with them as they fulfill their lives. We are a resource for people to explore faith and spirituality, and we believe and share Christian principles:*

- *Our work is a manifestation of God’s love—we demonstrate God’s loving kindness through our service and stewardship.*
- *All people are welcomed. Every person is worthy of love and respect and will be treated as such.*
- *We promote justice for all.*

Business Model

Every organization needs to be clear and aligned on the elements of their Business Model, a capsulized version of its core why, who, what, where, and how. This current business

model for Cameron House is summarized below.

<p><i>Whom we serve</i></p>	<p>Low-income Chinese individuals and families with language barriers who are in need of:</p> <ul style="list-style-type: none"> ● Social service intervention and advocacy ● Development of skill sets and support to acculturate and thrive in the American society ● Expansion of their social networks
<p><i>Where we serve</i></p>	<p>San Francisco</p>
<p><i>What we do</i></p>	<p>Through culturally and linguistically appropriate, healing-centered interventions and advocacy services, including:</p> <ul style="list-style-type: none"> ● Counseling services ● Domestic Violence intervention and advocacy ● Chinese cancer support program ● Community resources and adult education (life skills development) ● Friday Night Club (youth mentorship and group support) ● Bilingual Afterschool Program (academic support) ● Summer youth programs ● Special community events
<p><i>Our desired impact</i></p>	<p>Participants will:</p> <ul style="list-style-type: none"> ● Achieve stability from acute and unstable issues ● Make life improvements ● Learn life skills ● Expand and strengthen their social networks ● Strengthen social, emotional, and mental health ● Gain access to social and community networks and have opportunities to expand their community engagement and advocacy
<p><i>How we fund it</i></p>	<p>84% contributions/grants; 10% program service fees; 6% other.</p>

Pandemic Pivot

COVID-19 had a profound impact on our community. Many of the participants and clients at Cameron House live on the edge of poverty, so the pandemic posed severe disruptions

to the lives of these individuals, their households, and their families. In response, Cameron House took actions through which we built our institutional “muscle” for listening to and creating value for our clients, shifting focus from activities to outcomes, and leveraging technology to scale our impact.

Our staff teams implemented regular wellness checks by phone to monitor the health and stability of our clients’ home lives and developed new responses to identified needs. We delivered supplemental and culturally appropriate food to households/families, provided activity packs to support out-of-school time remote learners, and offered remote mental health counseling for victims of gender-based violence. Our teams developed YouTube videos to promote wellness, and we added web resources for our individual clients and families, in both English and Chinese.

During this difficult time, we instituted two 3-day wellness breaks for staff, encouraged use of our Employee Assistance Program, and offered an 11-day holiday break for all employees. We also encouraged employees and clients to participate in Hollaback’s Bystander Training as a response to the spate of Anti-Asian violence.

We secured emergency and economic relief support to expand access to mental health counseling, cash cards, technology, and supplemental food to support clients’ essential needs and improved our fundraising performance by restructuring our individual direct appeals and by hosting virtual events to engage recurring and new donors.

Our senior management team leveraged our networks, coalitions, and cohorts to share resources and approaches, to problem-solve, and to advocate together. This fueled our internal adaptive management process as our senior team served as the decision-making and communications hub for our staff, volunteers, board, and key stakeholders. We also engaged consultants from the Bridgespan Group to work with our senior management team in pre-strategic planning, setting the stage for our full strategic planning process with the Board of Directors.

Data Collection and Analysis

Strengths, Weaknesses, Opportunities, Threats (SWOT)

The Mosaic consultants interviewed fourteen external stakeholders identified by Cameron

House to elicit their views on the organization’s strengths, challenges, and opportunities. Interviewees represented community leaders, funders, and other area nonprofits. Online research was used to develop profiles of nine competitor/collaborator organizations to help understand Cameron House’s market position and assess opportunities in its external operating environment; this landscape scan was supplemented by interviews with five of the peer organizations’ executive leaders.

Together, this information was used to develop a summary highlighting Cameron House’s strengths, weaknesses, opportunities, and threats.

<p style="text-align: center;"><i>Strengths</i></p> <ul style="list-style-type: none"> ○ Youth programs that helped shape the lives of many of Chinatown’s leaders ○ Formidable alumni network ○ Culture of deep caring and compassion for the community ○ Strong reputation as a highly trusted community resource 	<p style="text-align: center;"><i>Weaknesses</i></p> <ul style="list-style-type: none"> ○ Relying on its legacy is not enough to stay relevant, it must continue to evolve ○ Has not articulated a compelling vision ○ Lack of visibility outside its current circle of alumni ○ Could be more assertive in approaching funders
<p style="text-align: center;"><i>Opportunities</i></p> <ul style="list-style-type: none"> ○ Many are open to partnering with Cameron House, but they want it to indicate its own vision and intentions before suggesting specific opportunities ○ Use its trusted voice to engage more visibly in advocacy to deepen its impact ○ Cameron House’s location, building, and outdoor space are all unique assets, as are its foundation/endowment 	<p style="text-align: center;"><i>Threats</i></p> <ul style="list-style-type: none"> ○ Stakeholders don’t know what Cameron House is doing now or has in mind for its future—this puts it at risk of missing opportunities and/or being left behind ○ Lack of visibility, intensified by COVID ○ COVID concerns and hesitation of some clients to return to in-person programs ○ Board and staff development are essential to grow and thrive

Community Needs

Interviews also shed light on community needs relevant to Cameron House’s current programs and/or the broader environment in which it operates, including:

- Youth development, DV counseling, and case management needs have intensified during COVID, as stay-at-home has exacerbated individual and family challenges
- Low-income and monolingual immigrant populations (particularly those living in SROs) have the greatest need

In addition, online research was conducted to distill, from existing sources of data, a high-level view of key issues affecting the Chinatown community. This lent detail to much of what was heard from interviewees, including:

- Chinatown faces existential challenges due to demographic shifts, aging

infrastructure, business closures, job losses, and encroaching gentrification.

- The quality of life is worse and the cultural benefits of living in Chinatown is less than has been experienced in the recent past.
- Chinese populations are growing more outside of San Francisco and Chinatown than within
- Youth and family needs include affordable childcare and youth mental health resources
- Capacity of existing programs is affected by staff turnover as even leadership salaries fall below industry averages



Client Feedback

In addition, the consultants developed and conducted surveys and focus groups to gather input from Cameron House clients.

- An online survey of youth and families participating in Friday Night Club and Bilingual Afterschool Program received 19 responses, and similar questions were answered by 32 Westminster Woods Youth camp participants. The results showed that respondents are happy with Cameron House's youth programs as supportive social spaces giving youth a sense of community and belonging, and that they are most interested in social/recreational activities, leadership development, and life skills development.
- A bilingual client focus group was held with five participants of the cancer support program and other services. They, too, talked about the important role of Cameron House providing services in community, with a focus on building relationships and creating opportunities for recreation and enjoyment.

Through this self-assessment, research, and reflection, we gained perspective, listened to community voices, and clarified our strategic challenges and opportunities. This provided us with a strong foundation for setting our future direction and bolstered our interest in finding ways we can continue to better understand the evolving needs of our community.

Competitive Advantage

The concept of competitive advantage may seem foreign to nonprofits, yet the reality is that all nonprofits compete every day for resources and attention. Those with strengths that differentiate them are often better positioned to attract these supports.

We define a competitive advantage as the ability to produce social value (have impact, make a difference) by:

- ✓ *Using a unique asset* (such as a strength that no other similar organization in your geographic area has) and/or
- ✓ *Having outstanding execution* (such as being faster or less expensive or having a better service than other similar organizations in your geographic area)

Cameron House Assets

- Our building
- Our foundation (endowment)
- Alumni network, contributing to fund development capacity, other benefits
- Committed staff loyal to the compassionate mission of service to the community
- Legacy, history lending trust, credibility in the community

Cameron House Execution

- Strengths based approach
- Holistic, client-centered approach
- Continuity of participation built into program design (clients grow up with Cameron House, lifelong involvement)
- Cultural and linguistic capacity
- Community of practice where staff, volunteers and participants work toward creating a safe, compassionate, faith-based acceptance and productive environment conducive to learning, healing and thriving

Often, an organization's competitors are also potential collaborators. While Cameron House provides some specialized programs and offers Chinese language capacity that others lack, its work intersects with agencies that provide similar or adjacent services to youth and families, such as APA Family Support Services, Richmond Area Multi Services (RAMS), Community Youth Center San Francisco, and Gum Moon Women's Residence/

Asian Women’s Resource Center. These are also organizations with which it has already, continues to, and/or could potentially partner toward mutual goals.

Whether competing or collaborating, understanding our competitive advantage will help Cameron House determine how to leverage our unique strengths in relationship to others in the field to have a positive impact in our community.



Trends

Trends shaping Cameron House’s current and future operating environment include:

- Shifts in demand for youth programming, with decreasing participation in teen leadership development activities and increasing need for out-of-school time supports for younger children
- Steady demand for counseling and other social services
- Declining economic outlook for Chinatown and its residents, with persistent poverty, business losses, and worsening mobility (ability to move out of SROs)
- Increasing philanthropic and public investment in emergency support due to COVID, but with a likely drop-off post-pandemic

Funding

This strategic plan prioritizes fund development planning to diversify revenue and create a more sustainable financial model for Cameron House. This will likely include efforts to engage more effectively with alumni and existing donors, to develop the next generation of

donors, to build relationships with institutional funders and government contractors, and to explore and pilot revenue-generating programs. Specific strategies and activities will be developed with input from a new Development Director.

All this must be supported by a compelling story of Cameron House’s community impact. Stakeholders have challenged the organization to find and articulate a new story that will engage our community partners and attract new and continuing donor/funder support.

Cameron House’s typical revenue mix to date is outlined below, and reflects a combination of government contracts, individual contributions and sponsorships, endowment income, earned income, and foundation grants.

<i>Funding Source</i>	<i>Percentage of Total</i>
Foundation Grants	2%
Cameron House Foundation	8%
Corporate Grants	1%
Government Contracts	40%
Unrestricted Funding: Endowment, Donor, Sponsorships	40%
Earned Income	9%

Strategy Screen (Decision-making Criteria)

One of the most important decisions any organization makes is how to address a strategic opportunity or a challenge in a quickly changing landscape. Costly errors of money, time, and reputation occur when there is no solid basis for such decision making. With a strategy screen—a set of criteria against which new ideas and opportunities can be vetted—Cameron House can ensure that its most important decisions are consistent and rational. The screen is not designed to stop new ideas or to easily reject all new opportunities, but rather to focus the discussion of opportunities in a way that satisfies key criteria and documents thoughtful deliberation by the Board and staff.

The following decision-making criteria have been used to evaluate the strategies reflected in this strategic plan and will be used on an ongoing basis to evaluate opportunities and challenges as they emerge.

Strategy Screen

- Is it aligned with our **mission**?
- Does it use and/or support our **competitive advantages**?
- Is there **need/demand** for the service?
- Is it consistent with our **values**?
- How will we **fund it**? What will it cost? Can we raise money for it?
- Do we have the **capacity**—staff, skills, space—needed to do this well?
- If we do this, how will it **impact our existing work**? Will we have to limit or say no to other things?
- Do we need to mitigate **risk** through insurance or other protections?
- (Partner screen): Is the potential partner a **compatible match** for us?

Big Questions (Strategic Issues)

Big questions are those opportunities or challenges to which an organization must respond. After an assessment of Cameron House’s internal strengths and weaknesses as well as the opportunities and threats in its external environment, the Strategy Committee recommended that the Board consider four Big Questions:

How do we build an institutional culture that enables Cameron House to actualize its fullest potential for community impact?

What is the best way to create a family-centered approach that integrates Cameron House direct services for greater impact?

How do we strengthen and diversify our financial model for greater sustainability?

How do we participate in addressing poverty and offering solutions to Chinatown residents?

Organizational Strategies in Response

With the focus on the above Big Questions, the following strategies were identified and tested. Even though actions will be taken on all strategies over the next 18-36 months, some actions will need to be phased in over time. Those details will be identified in the implementation plan to be created later.



Institutional Culture Strategies

- Define and develop a culture of accountability, transparency, and responsiveness to the community (through roles and behaviors, reporting structures, and policies)
- Enhance the talent management of Staff and Board to support the strategic direction and desired culture (e.g., recruiting, orientation, ongoing professional development, volunteer training and management, etc.)

Family-Centered Approach Strategies

- Explore different models of service delivery focusing on new Chinese immigrant families
- Assess how current programs contribute to our strategies and clarify desired outcomes
- Partner with other agencies for impact on overall family vitality and sustainability
- Assess how an integrated, family-centered focus might open Cameron House up to new resources

Sustainable Financial Model Strategies

- Enhance fundraising by leveraging alumni network, reaching out to multi-generational donors, and other fundraising strategies
- Explore (pilot) earned income models and opportunities
- Clarify program outcomes to show how Cameron House makes a measurable impact in families' lives
- Increase visibility of Cameron House's mission and programs (e.g., town hall sessions, partnerships, etc.)

Researching Poverty Solutions Strategies

- Do more research, learning, planning, to identify Cameron House's best contribution (its sweet spot) in this area and test ideas (e.g., center for entrepreneurship) before moving to implementation
- Develop advocacy expertise, voice



Next Steps

Strategic direction and priorities only tell the first part of the story. A solid and clear process for implementation and monitoring is equally necessary. The following outlines key steps necessary to implement the strategies highlighted in this document.

- ✓ ***Create an implementation plan for Year One.*** Cameron House has done a very thorough job at deciding on its organizational direction and strategies. However, an implementation plan to support the organizational strategies still needs to be developed. This would include specific goals related to each strategy, timeline, and responsible party.
- ✓ ***Develop a process to conduct periodic check-ins.*** A quarterly check-in with the Board is recommended to keep them apprised of successes, challenges, and specific requests for action.
- ✓ ***Communicate back to external stakeholders.*** Throughout the research process of interviews and surveys, stakeholders expressed real interest and investment in Cameron House's success. Providing opportunities for these stakeholders to hear key highlights of this plan, possibly through the Executive Summary, would be a way to recognize their input and keep them engaged in the organization's continued success. Some clients have held Community Forums to explain the new strategic direction forward.
- ✓ ***Communicate to and engage the staff and clients.*** The internal stakeholders, like staff and clients, also need to be included in and brought up to date on the plan and its implementation development.

Additional Ideas for Staying on Track

Strategic planning should not be just a “once every 3 or 5 years” activity or only an annual off-site retreat. Strategy is built upon an organization’s business model, market awareness, and competitive advantage, each of which will shift over time. A strategy can be enduring but may need to change when it is no longer the best way to advance the mission. Therefore, it is important to constantly monitor the environment and the effectiveness of different strategies.

Cameron House should consider the following ongoing practices to help stay current on its strategic and implementation plans:

- ✓ ***Continue engaging the Board in strategic conversations.*** This roadmap should be reviewed in its entirety by the Board on a quarterly or at least bi-annual basis to track progress and identify any necessary adaptations. Additionally, it can be used as a tool in every Board meeting to focus on one of the core components in greater depth, depending on where Board education and/or input is needed. The Strategy Screen is an excellent tool to help guide these strategic and generative conversations.
- ✓ ***Consider other methods of community input.*** One of Cameron House’s key strengths is its reputation and history in the community. Offering convenient ways for the community to offer timely feedback will help Cameron House stay updated and responsive especially as it pursues improvements and new programs. These could include short program evaluations, brief surveys, family forums, Annual meeting and/or simple one-on-one conversations with clients, donors, funders, and partners.
- ✓ ***Develop and use an organizational dashboard.*** A dashboard provides an ongoing record of tasks and progress towards accomplishing those tasks identified in the implementation plan. A word of caution: the dashboard should be easy to read and not burdened with so many metrics that the data is overwhelming. Ask yourself, what are the top 3-5 items we want to absolutely make sure we are on track with?

Closing Thoughts

The strategic planning process never really ends. The dips and curves of organizational life require that the Board and staff remain attentive to the changing landscape. The strategic thinking and planning that comes out of thoughtful and productive discussion will make the organization and mission stronger as you move to achieving your vision.

It has been our humble honor to be your thought partner and cheerleader for these many months. Wishing you all the best and tons of success!

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Appendix A: Consulting Process and Strategy Committee

The Real-Time Strategic Process involved critical new approaches to traditional strategic planning. The process was guided by a Strategic Planning Committee comprised of Board and staff members and a community representative:

- Scott Barlow, Board Chair and Strategy Committee co-Chair
- Barbara Fong, Board Member and Strategy Committee co-Chair
- Robert Lim, Board Member
- Denise Yohn, Board Member
- Danny Sauter, Community Partner
- Michael Lee, Executive Director

This group met monthly from January thru October 2021 to plan and review the collection of external data (including phone interviews, client/staff surveys, and focus groups), to have generative discussions, and to advance and advise on the overall process. A subcommittee (which also included other board and staff members) met additional times to do focused work on the mission, vision, and values to bring recommendations to the full group.

The full Board was convened in May and June for special sessions to review research data and for mission, vision, and values development. These sessions allowed for thoughtful and in-depth conversations around key topics that would not normally be able to be completed in a one-day retreat.

A working group of staff and Board members on the Program Committee also met during this process to develop and review impact profiles of each of Cameron House's existing programs, which will help to inform implementation planning and decision-making at the program level.

The Board of Directors and senior staff met in-person for a full-day strategy retreat on August 21, 2021 to affirm the big questions and key strategies to answer them. In addition to the Board members, Michael Lee (Executive Director), Bill Vigna (Finance & Operations Director), Laurene Chan (Director, Youth Ministries), Yulanda Kwong (Director, Social Service Ministry), and Megan Shockro (Development Consultant) were in attendance.

Board members participated in a post-retreat survey to refine key components of the organizational identity, and the Strategy Committee continued to refine the results of the key elements of the strategy roadmap. The Mosaic consultants interviewed six stakeholders to test the final strategies. Feedback was supportive and helped refine the final strategies.

The next step will be a presentation to the Board on October 26, 2021, and a recommendation from the Strategy Committee to approve the strategy roadmap.

Appendix B: Stakeholder Interviews

We are deeply grateful to our colleagues in the field who shared their insights about how we show up in this work and our opportunities to make change together as ecosystem partners.

Georgina Bane, Global Leadership College, United Parcel Service, Community Immersion Program

Doug Chan, Chinese Historical Society of America

Rev. Gregory Chan, Community Elder

Gloria Choy, Principal, Gordon J. Lau Elementary

Sherrice Dorsey-Smith, Deputy Director, Planning and Grants, Department of Children, Youth and Their Families (DCYF)

Norman Fong, Former Executive Director, Chinatown Community Development Center (CCDC)

Rev. Don Hammond, Interim pastor for English Worship Community, Presbytery of San Francisco

InHo Kim, Presbytery of San Francisco

Kari Lee, Executive Director, YMCA San Francisco - Chinatown

David Lei, Vice Chairman, Chinese American Community Foundation

May Leong, Senior Development Office, East Bay Community Foundation

Mario Paz, Executive Director, Good Samaritan Family Resource Center

Dr. Tom Pong, Major Donor

Christina Shea, Deputy Chief and Director of Clinical Services, Richmond Area Multi-Services

Gloria Tan, Executive Director, Gum Moon Women's Residence/Asian Women's Resource Center

Beverly Upton, City of San Francisco, Funder Commission on the Status of Women

Sarah Wan, Executive Director, Community Youth Center San Francisco (CYCSF)

Calvin Yan, Legislative Aide to Aaron Peskin, San Francisco Board of Supervisors

Malcolm Yeung, Executive Director, Chinatown Community Development Center (CCDC)

Rick Yuen, Executive Director, APA Family Support Services