

COMMUNITIES ADVOCATING
EMERGENCY AIDS RELIEF

CAEAR

COALITION

Strategic Plan

2023-2025



VISION

The CAEAR Coalition's vision is the end of new HIV infections and full, healthy lives for all people with HIV.

MISSION

The CAEAR Coalition's mission is to advocate for robust federal funding and community-based responses to end the HIV epidemic.

The CAEAR Coalition is a national membership organization rooted in the Ryan White HIV/AIDS Program. We work to end the HIV epidemic by ensuring equitable access to welcoming, high-quality health care and support services.

WHAT WE DO

The CAEAR Coalition advocates for and collaborates with federal partners, impacted communities, administrators, and people with HIV to maximize the allocation and use of federal funding to address local jurisdictional needs.

VALUES STATEMENT

The CAEAR Coalition's goal is for people with HIV to live full and engaged lives. We commit to ensuring that both our and the federal HIV response centers diversity, equity, and inclusion. The CAEAR Coalition works to model the changes we advocate for in the larger service system to create equity for all and to embrace a status-neutral approach to end the epidemic.

VALUES

People First

- Engage people with HIV, particularly those from marginalized communities, in developing advocacy priorities and actions to ensure the needs of people we serve drive our work.
- Embrace a status-neutral approach to support people vulnerable to HIV and the communities most impacted by the disease.

Partnerships

Collaborate and coordinate with federal partners, people with HIV, impacted communities, and other HIV advocacy organizations to maximize the allocation and use of federal funds to meet local needs.

Diversity, Equity, and Inclusion

- Ensure diversity, equity, and inclusion centers our advocacy work.
- Embrace a culture of organizational change to successfully address structural and cultural racism, sexism, homophobia, and transphobia.
- Impact social determinants of health to address income, education, and geographic inequities.
- Commit to modeling the changes we advocate for in the larger service system to create equity for all to end the HIV epidemic.

STRATEGIC PLAN 2023-2025

The CAEAR Coalition Board of Directors established a working group in late 2021 to develop a new *Strategic Plan (2023-2025)*. The two-year plan is organized in two phases and is designed to serve as a roadmap for the organization's next chapter. It will be revised as working groups finalize efforts and activities are completed.

The plan addresses the need for the CAEAR Coalition to adapt as a membership organization to meet a changing political and work landscape – a landscape that includes changes wrought by COVID-19, a concomitant political situation, changing demographics of the HIV epidemic with an increased focus on addressing social determinates of health and health equity, HIV care and prevention advancements that impact the service delivery models and systems, and new federal funding through the Ending the HIV Epidemic (EHE) Initiative.

The working group developed a strategic planning process to address the following:

- **Board and general members are disproportionately white, male, advanced middle age, and nearing retirement.**
Strategies are needed to recruit, nurture, and retain the next generation of members/leaders that is more reflective of the HIV epidemic and to develop a succession plan.
- **Need to understand how to incorporate new and emerging digital technologies**
both to increase and broaden representation of membership as well as expand how the CAEAR Coalition conducts its advocacy work.

Strategic Plan Working Group

Bill Blum, Co-Vice Chair, CAEAR Coalition, and Director of Programs, Primary Care, Director, HIV Health Services, San Francisco DPH

Kevin Burns, LCSW, ACSW, Secretary, CAEAR Coalition, and Executive Director of Action Wellness, Philadelphia, PA

Jonathan Hanft, PhD, Co-Vice Chair, CAEAR Coalition, and Ryan White Program Coordinator, Hennepin County, MN

Graham Harriman, MA, Chair, CAEAR Coalition, and Director and Governmental Co-Chair, HIV Health and Human Services Planning Council of New York, Bureau of HIV/AIDS Prevention and Control, NYCDHMH

Larry Lehman, Board Member, CAEAR Coalition, and President and CEO, Positive Impact Health Centers, Atlanta, GA

Consultants

Justin Smith, MS, MPH, Director, Campaign to End AIDS, Positive Impact Health Centers

Peggy Meehan, Operations Manager, CAEAR Coalition

- With the Ryan White Program secure and no reauthorization fight on the near horizon, the urgency felt by Ryan White grantees to join and/or participate has waned. The organization needs to **adjust its mission and/or rebrand its work to include the wider lens of HIV health equity** and to understand if doing so would increase the engagement of Ryan White Part A and EHE jurisdictions, subrecipients, and consumers. Rebranding may also help to enhance the organization's ability to serve as the umbrella organization to bring all the parts of the Ryan White Program together to advocate with HRSA-HAB on Ryan White Program implementation issues.

- In addition to its current strategic partnership with the National Association of County and City Health Officials (NACCHO), the CAEAR Coalition needs to identify other organizations and/or strategies to pursue to **expand collaborations**. In 2020, the CAEAR Coalition developed a strategic partnership with NACCHO to work together on critical issues, including sharing best practices and identifying technical assistance needs for both the Ryan White Program and the EHE Initiative and fostering communication and collaboration among Ryan White Program staff and county and city health departments. The Ryan White Part A Community of Practice (COP) was established to facilitate this work. The success of the partnership saw an increase in engagement and serves as a blueprint for thinking about other ways the CAEAR Coalition can work collaboratively with other organizations to further its mission.
- **Consider a new financial structure for the CAEAR Coalition** to improve participation among Ryan White Part A jurisdictions and to address the long-term viability of the organization. The current membership structure and fees are prohibitive for many jurisdictions and subrecipients and has long been a challenge for the CAEAR Coalition. The current membership construct is a pay-to-play which limits engagement; makes it difficult for smaller, minority organizations to join; and constrains the expansion of the organization's scope of work.
- **Review and potentially rescope the role of the CAEAR Coalition Foundation (501c3)** related to the new strategic plan. The CAEAR Coalition formed the Foundation in 2018 to pursue grants and funding opportunities. Lack of staff capacity has made pursuing funding efforts through the Foundation difficult.

STRATEGIC PLAN PROCESS

- A survey was distributed to all CAEAR Coalition members and all Ryan White Part A jurisdictions. See *Appendix A: Strategic Plan Survey Results*.
- Four virtual focus groups and interviews were held. See *Appendix B: Overview of Focus Group Discussions*.
 - » **Focus Group 1: CAEAR Coalition Members Who are People of Color**
The purpose of Group 1 was to better understand what the CAEAR Coalition needs to do as an organization so that its membership and leadership are reflective of the HIV epidemic.
 - » **Focus Group 2: Ryan White Part A Jurisdictions**
The purpose of Group 2 was to better understand the barriers to joining and/or participating in the CAEAR Coalition and its national HIV advocacy and policy efforts.
 - » **Focus Group 3: Consumers**
The purpose of Group 3 was to understand how the CAEAR Coalition can better engage consumers in its national advocacy and policy work.
 - » **Focus Group 4: Mid-Career Professionals**
The purpose of Group 4 was to understand how the CAEAR Coalition can identify and better engage mid-career professionals in its national advocacy and policy work.
- A facilitated two-day Strategic Planning Retreat was held on July 22-23, 2022, at Positive Impact Health Centers in Atlanta, GA. See *Appendix C: Retreat Summary*.

STRATEGIC PLAN

The data gathered from the survey and focus groups informed the robust discussion at the two-day retreat, which resulted in the following *Strategic Plan*. The plan is organized in two phases. The first phase will focus on creating new Mission, Vision, and Value Statements and raising funds to develop and implement a two-year *Advocacy Agenda*. Using the two-year *Advocacy Agenda* as a guide, the second phase will address the changes needed in governance, finance, and internal capacity to deliver the *Advocacy Agenda and Strategic Plan*.

Phase 1: Update CAEAR Coalition’s Mission-Vision and Advocacy Agenda			
OBJECTIVES	WORKING GROUPS/PROCESS	TIMELINE	EVALUATION
Update Mission, Vision, and Values Statements			
<p>Develop new mission, vision, and values statements to reflect the current HIV epidemic and the changing political and work landscape.</p> <p>Key concepts include addressing health equity and social determinants of health, ensuring access to care and treatment, and reflecting the organization’s commitment to diversity and engaging the community.</p>	<p>Mission/Vision Working Group:</p> <ul style="list-style-type: none"> • Pat Bass • Bill Blum • Kevin Burns • Graham Harriman • Brenda Starks-Ross 	<p>Completion Date: December 2022</p> <p>Present to CAEAR Coalition Board of Directors on September 28, 2022, and unveil the new Mission, Vision, and Values Statement at a virtual meeting of members and all Part A jurisdictions on December 8, 2022.</p>	<p>New Mission, Vision, and Values Statements adopted by the Membership.</p>
Pursue Grants to Support New Strategic Plan			
<p>Seek grant funds to support the <i>Strategic Plan</i>, including the development and implementation of a two-year <i>Advocacy Agenda</i> and the related staffing needs.</p>	<p>Grant Writing Working Group:</p> <ul style="list-style-type: none"> • Bill Blum • Kevin Burns • Larry Lehman <p>Consultants:</p> <ul style="list-style-type: none"> • Preference Butler • Sheila Trapp <p>Develop and implement a first-phase <i>Fundraising Plan</i>.</p> <p>Tasks include:</p> <ul style="list-style-type: none"> • Outline basic budget for developing and implementing the <i>Advocacy Agenda</i>. • Develop list of prospects. • Create process for writing proposals and managing successful grants. 	<p>Preliminary meetings begin fall 2022.</p> <p>Work begins in earnest in January 2023 once the new Mission, Vision, and Values Statement and <i>Strategic Plan</i> are unveiled at the December 8, 2022 virtual meeting.</p> <p>The <i>Grant Writing Working Group</i> will prepare a <i>Fundraising Plan</i> to present to the Board at its spring 2023 meeting. The plan will detail the number of grant applications to pursue and fundraising goals to support implementation of <i>Strategic Plan</i> objectives.</p>	<p>Report to the Board, outlining efforts and success at meeting the objectives and fundraising goals outlined in the <i>Fundraising Plan</i>.</p>

Phase 1: Update CAEAR Coalition’s Mission-Vision and Advocacy Agenda			
OBJECTIVES	WORKING GROUPS/PROCESS	TIMELINE	EVALUATION
Develop a Two-Year Advocacy Agenda			
<p>Create a detailed and succinct Advocacy Agenda to guide the CAEAR Coalition’s policy work, fundraising efforts, and membership recruitment efforts.</p>	<p>Advocacy Working Group:</p> <ul style="list-style-type: none"> • Ernest Hopkins (Policy Chair) • Prescott Chow • Jonathan Hanft • Graham Harriman <p>The Advocacy Agenda will detail the CAEAR Coalition’s advocacy priorities, outline partnerships and collaborations, and detail communications/ social media efforts.</p> <p>Agenda development will be collaborative and include input from consumers, key constituents, and strategic partners. The engagement process will be deliberate and include members, Ryan White Part A jurisdictions, consumers, national HIV-AIDS advocacy organizations, ASOs, and BIPOC organizations and mid-career professionals to ensure the advocacy agenda accurately reflects the epidemic.</p> <p>The agenda will outline new and emerging digital technologies to expand CAEAR’s advocacy work.</p>	<p>Preliminary work begins Jan./Feb. 2023.</p> <p>Completion date: fall 2023.</p>	<p><i>Advocacy Agenda</i> to be presented to Membership for approval at its fall 2023 meeting.</p>
Reach out to all Ryan White Part As to join the CAEAR Coalition			
	<p>Peggy Meehan to prepare and execute campaign to reach out to all Part A jurisdictions to join.</p>	<p>November 2022</p>	<p>Report to the Board outlining efforts.</p> <p>Success will be measured by the increase in the number of Ryan White Part A jurisdictions joining the CAEAR Coalition. The goal in 2023 is a 10% increase.</p> <p>The 2024 goal will be based on Phase 2 of the Strategic Plan, which includes a re-envisioning of the membership dues structure.</p>
Re-establish Planning Council Calls			
	<p>Peggy Meehan to organize calls with Planning Councils.</p>	<p>January/February 2023</p>	<p>Report to the Board listing the Planning Council calls.</p> <p>Measured by participation in two Planning Council calls by end of 2023, representing 30% of all Ryan White Planning Councils.</p>

Phase 2: CAEAR Coalition Governance, Finances, and Internal Capacity			
OBJECTIVES	WORKING GROUPS/PROCESS	TIMELINE	EVALUATION
Create New Financial Structure			
<p>Restructure membership categories and dues.</p> <p>Review and rescope the role of the CAEAR Coalition Foundation.</p> <p>Explore the possibility of offering training to be monetized.</p>	<p>Establish a <i>Financial Structure Working Group</i> to develop a new financial structure for the organization.</p> <p>Plan will outline new member categories and revenue goals.</p>	<p><i>Financial Structure Working Group</i> begins spring 2023.</p> <p>Working group presents <i>Financial Plan</i> to the Board at fall 2023 meeting.</p>	<p>Report to the Board/ Membership on revenue.</p>
Build a Membership/Leadership Reflective of the HIV Epidemic			
<p>Develop strategies to recruit, nurture, and retain the next generation of members with the goal of addressing the current lack of racial and age diversity within the organization’s membership/leadership.</p> <p>Identify new and emerging digital technologies to broaden membership.</p>	<p>Establish a <i>Membership Development Working Group</i> to develop a plan to recruit BIPOC members.</p> <p>Plan will detail strategies and goals for increasing BIPOC membership numbers.</p> <p>Create marketing materials and update website and social media presence to recruit members and increase engagement.</p>	<p><i>Membership Development Working Group</i> begins November/December 2023.</p> <p>Note: New financial structure will impact membership development work, so needs to start after the <i>Financial Structure Working Group</i> makes recommendations.</p> <p>Present <i>Membership Development Plan</i> to the Board in Jan./Feb. 2024. The plan will outline ways in which technology will be used to broaden outreach and engage members.</p>	<p>Report to the Membership/Board on the implementation of the <i>Membership Development Plan</i>, including the goal of 50% of Members and Board leadership being BIPOC and PLWH by spring 2024.</p>
Develop a Succession Plan			
<p>Create a <i>Succession Plan</i> to address a retiring leadership team.</p>	<p>Establish a <i>Succession Plan Working Group</i>.</p> <p>Plan will outline process to ensure future leadership of the organization and an increase of BIPOC representation on the Board.</p>	<p>Work of the <i>Succession Plan Working Group</i> begins fall 2023.</p> <p>Present <i>Succession Plan</i> to the Board in January/February of 2024.</p>	<p>Report to the Members/Board on the implementation of the <i>Succession Plan</i>, including the goal of five new BIPOC Board members recruited by spring 2024.</p>
Build Internal Capacity			
<p>Hire consultants to assist with CAEAR’s operations; policy work, including organizing Hill visits; fundraising; and communications.</p>	<p>Advocacy Working Group outlines the consultant position needed to implement Advocacy Agenda. Develop job description.</p> <p>Executive Committee of the Board outlines the consultant positions needed to manage the membership development, fundraising, and operations of the organization. Develop job descriptions.</p>	<p>Advocacy position is to begin January 2024.</p> <p>Operational positions depend on membership and fundraising successes. Goal is summer 2024.</p>	<p>Positions filled.</p> <p>Process measures assessed by examining the time between posting roles and hiring of staff/ consultants.</p>