



AIDS UNITED
2023-2026
STRATEGIC & TACTICAL PLAN

STRENGTHENING THE ENGINE:

Strengthening AIDS United to propel the organization and the HIV sector toward 2030 and ending the HIV epidemic in the United States.

Adopted and amended by the Board of Trustees on February 14 and March 31, 2023.

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I. INTRODUCTION

AIDS United (AU)'s strategic plan aims to shape the trajectory of the organization over the next several years. Through the strategic planning process, three main questions rest at the center of how to move forward: One, how do the components of the strategic plan all flow up, in harmony and with a clear through line, to the mission of ending the HIV epidemic in the United States? Two, how can AU best shore up its infrastructure, internal capacity, and funding to provide the needed stability to work toward achieving its mission? And lastly, how can AU continue to be at the forefront in serving and supporting the communities it has historically served while considering new opportunities and filling gaps.

In response to these questions, AU's strategic plan adopts five priority areas: (I) **Advancing the Sector**; (II) **Continuing to Lead in a Competitive Environment**; (III) **Internal Strengthening**; (IV) **Fortify Funding**; and (V) **Continuing Commitment to the HIV Community**. These strategic priorities are designed to maximize AU's impact, while ensuring the organization has the fuel it needs to sustain its engine to drive the work and the sector. They are the foundation of this strategic plan and will drive its work in the coming years.

Conducting rounds of interviews with internal and external stakeholders – other national organizations, funders, and grantees – led to the decision to reaffirm the following in this strategic plan. AU reaffirms the mission, vision, and “north star” guiding principle of the organization. AU reaffirms the name of the organization, and its focus on ending the HIV epidemic in the United States. AU will continue to solely focus on its mission of ending the HIV epidemic in the United States and will not pursue global programming. Lastly, AU reaffirms the three core pillars (Policy and Advocacy, Grantmaking, Capacity Building) that structure and push the work forward.

AU is endowed with many time-tested assets and strengths. AU is endowed with a sterling and trusted reputation as a reliable partner, and overall credibility in the HIV and AIDS space that it has built and fostered for decades. AU has shown an ability to always evolve its programming to meet the needs of the community, and to deliver on its support to organizations in the sector that need it most. AU has a skilled, enthusiastic, and diverse staff; and a clear, focused mission. All the factors above, and AU's national platform and voice, means it is uniquely positioned to lead as a thought leader, convener, and priority-setter in the HIV sector.

AU's previous strategic plan had the core purpose of increasing organizational resilience. Securing and maintaining each year \$1 million or more in unrestricted net assets and weathering a global pandemic and dramatic shifts in the political landscape are testaments to AU achieving its goal of organizational resilience. As challenges shift and the sector changes, the strategic lenses AU applies to the work and to the organization must remain active, dynamic, and reflective of how the organization plans to meet these challenges. This strategic plan will propel AU to the next phase and ensure AU remains at the forefront of the sector – and that AU, the sector, and the work will continue to progress, evolve, and thrive well into the future.

II. MISSION, VISION, “NORTH STAR,” AND NAME

While the sector has seen changes in recent years, the strategic planning process and the Strategic Planning Task Force have reaffirmed the mission, vision, and “north star” of the organization to guide it toward a clear end goal – the ending of the HIV epidemic in the United States.

Mission

AIDS United’s mission is to end the HIV epidemic in the United States.

Vision

AIDS United envisions a time when all people, governments, and organizations commit to ending the HIV epidemic and strengthening the health, well-being, and human rights of everyone impacted by HIV.

Our “North Star”

The voices of people living with and vulnerable to HIV always guide our work. We exist to amplify their voices until their needs and experiences are embedded in our national consciousness.

Our Name

AIDS United affirms the continuation of the name of the organization and its commitment to ending the HIV epidemic in the United States.

Statement on Health Equity and Racial Justice

In this next phase of our history, AIDS United will continue to advance and invest in racial justice, Black, queer and trans liberation, geographic equity, harm reductionist approaches, and the meaningful involvement of people living with HIV.

AIDS United recognizes that it is our responsibility to proactively address the racial disparities in our community—work that includes addressing any racial inequities within our own organization. Specifically, we believe that centering leadership and decision-making by Black, Indigenous, and People of Color who reflect the communities most impacted by the epidemic in the United States in internal and external policies and practices leads to equity in outcomes for our focus communities.

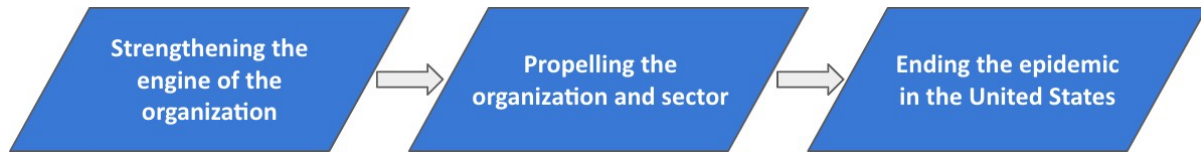
We acknowledge that this work will require difficult but crucial conversations, as well as political education to ensure that organizational leadership, including the Board of Trustees and AIDS United staff have shared language and a basic understanding of how racial injustice, anti-Blackness, transphobia, white supremacy and other forms of oppression affecting communities most impacted by HIV in the US function, so that we can jointly determine how to set and monitor benchmarks to assess our progress in these areas. This will all take time and an ongoing commitment to stay engaged.

In this process, we will work to be role models of humility, prioritizing attention to and resourcing of those communities that are historically and structurally excluded from power and decision-making, to ensure they are meaningfully engaged in these processes. We seek to create processes that invite thoughtful feedback without risk of punitive repercussions to marginalized individuals and communities. We acknowledge that this work will be hard, however we will be open, transparent, and accountable to each other in doing this work. We acknowledge that there will be missteps along the way, but we will learn from our mistakes, and we will continue working.

We further acknowledge that we are just at the beginning of this work. The road ahead will be long, but we will proceed forward together.

We commit to operationalize these commitments to the values mentioned above by ensuring that in our implementation of the 2023-2026 strategic plan, AIDS United's policies, programs and portfolios are designed utilizing a harm reduction approach, racial and health equity framework, and by developing and administering organizational implementation plans with measurable indicators for investment and impact that demonstrate our commitments to Black and Latinx communities, people living with HIV, queer and trans communities, people who use drugs, and the US South.

III. STRATEGIC PRIORITIES



This strategic plan is designed to strengthen the engine of AU – the engine that will propel the organization and the HIV sector toward 2030 and ending the HIV epidemic in the United States. To achieve this, AU has identified five strategic priorities for the organization.

Five Strategic Priorities

1. **Advancing the Sector:** Continue to innovate and adapt to meet the field where it is and work to ensure the success of the sector.
2. **Continuing to Lead in a Competitive Environment:** Make structural changes as needed to ensure AU maintains its leadership and competitive edge as an organization and within the sector.
3. **Internal Strengthening:** Continually strengthen internal capacity and organizational infrastructure to meet the dynamic needs of the organization and its pillars.
4. **Fortify Funding:** Increase, diversify, and expand funding from public and private sector and individual resources.
5. **Continuing Commitment to the HIV Community:** Addressing intersectional health justice while affirming the full diversity of the HIV community and taking into account the syndemic nature of communities and individuals impacted by HIV.

Each of the strategies and tactics in this strategic plan outlined below are designed to advance the organization toward achieving one (or more) of the five strategic priorities.

| Strategic Priorities | | | | |
|---|--|--|--|--|
| Advancing the Sector | Leading in a Competitive Environment | Internal Strengthening | Fortify Funding | Continuing Commitment to the HIV Community |
| Strategies: | Strategies: | Strategies: | Strategies: | Strategies: |
| <ul style="list-style-type: none"> → Refine capacity building. → Develop ongoing communications strategies and plans. | <ul style="list-style-type: none"> → Strengthen the harmonization of the three pillars of AU's work with each other to achieve AIDS United's mission more fully. → Determine the viability of additional strategic business model approaches. → Remain competitive as an intermediary funder in an increasingly competitive field. → Enhance the capacities and skills represented on the board. | <ul style="list-style-type: none"> → Strengthening and enhancing the internal capacity to produce evaluation and impact metrics and data. → Refresh board commitments, expectations, and collateral on a regular and ongoing basis. → Create systems and practices to preserve institutional memory and knowledge. → Ensure best practices as a primarily virtual organization. → Break down siloing and increase internal coordination. → Ensure AU develops and prepares succession planning for organizational and departmental leadership. | <ul style="list-style-type: none"> → Building a fee-for-service and/or consulting services business line. → Aggressively seek and secure new and stable funding for AU's programs. → Evaluate fundraising priorities including establishing a formal major gifts and individual donor program. → Strategically balance the role of the board in fundraising. | <ul style="list-style-type: none"> → Develop and launch a portfolio system. |

III. STRATEGIC PRIORITY AREAS

STRATEGIC BUSINESS MODEL APPROACHES

Strategic business model approaches focus on innovative ways AU can continue to evolve in how it structures the tools and services it provides to the sector, brings in new sources of revenue for the organization, while continuing to effectively serve and support the needs of grantees and partner organizations in ways that drive the field forward toward ending the HIV epidemic in the United States.

1. Building a fee-for-service and/or consulting services business line.

A fee-for-service business line will provide AU the opportunity to bring in new resources and unrestricted revenue streams.

Tactics:

- A. Conduct an audit of existing fee-for-service and consulting activities across the organization, including:
 - a. Which services AU currently charges fees for
 - b. Entities engaging AU's fee-for-service work
 - c. Amounts charged
 - d. What competencies and resources (e.g. course materials) AU currently has
- B. Survey grantees and PPC members to determine which services they would be interested in receiving from AU.
- C. Conduct a cost-benefit analysis of the PPC members' dues-structure to assess whether to increase dues for AU members to provide new or more expansive services.
- D. Conduct a market analysis to determine potential fee-for-service or consulting services opportunities. Areas to analyze may include:
 - a. A package of ASO field development to support ASO staff and pipeline of growth of members:
 - i. Cultural humility training and educational courses/materials
 - ii. Basic grant writing training or educational courses/materials
 - iii. Nonprofit leadership strengthening and development
 1. Human resources
 2. Budgeting and nonprofit finance
 3. Development
 4. Program development and implementation
 5. Program management and evaluation
 6. Succession planning
 - iv. Policy and advocacy training

- E. Review how AU’s existing e-learning course/platform can be expanded, including with:
 - a. Hospitals and pharmacies
 - b. Community health centers
 - c. Community-based direct service organizations
 - d. Others (e.g., community health workers)
 - F. Examine other “levels” of membership to determine which could be adopted and implemented, including:
 - a. Subscription services model (either per-course fees or an annual nominal fee).
 - i. Smaller organizations or organizations in the grantee network pay a fee for more targeted and tailored policy updates or read-outs that provide a clear value-add to organizations
 - ii. Courses to provide nonprofit technical expertise/skills and basic competencies on budgets, development/fundraising, human resources, proposals and grant writing, models to build community-based interventions, and financial management
 - G. Review how AU has maintained or expanded its existing lists and whether the model(s) could be replicated as AU formally builds its fee-for-service and consulting services.
 - H. Include fee-for-service components into AU’s grant agreements to grow grantees’ competencies (such as policy and advocacy, grant writing, etc.). This may include:
 - a. Basic courses
 - b. Advanced courses
 - c. Governance
 - d. Succession planning
 - e. Leadership and staff development
 - I. Better utilize the Racial Justice Index to provide training and education for corporations to better serve communities.
2. **Determine the viability of additional strategic business model approaches.**
Sustaining AU exclusively through organic business growth, including winning new contracts and grants, will not get AU to the sustainability and revenue levels and bases needed for ending the HIV epidemic in the United States. Developing new strategic business models for obtaining new unrestricted and/or programmatic revenue will strengthen AU's ability to broaden its revenue and achieve its mission.

Tactics:

- A. Identify potential strategic mergers with other organizations to strengthen AU's ability to sustain and broaden its revenue levels and bases beyond organic business growth and achieve its mission of ending the HIV epidemic in the United States.

- B. Determine whether AU should create a 501(c)(4) model, and how the 501(c)(4) can help identify AU's role and voice in the electoral and political process and serve as a vehicle to enhance AU's revenue.
- C. Build fiscal sponsorship models for HIV-sector organizations including how AU can develop fiscal sponsor offerings beyond revenue pass-through for HIV-sector organizations that do not have a 501(c)(3).
- D. Assess the feasibility of creating a national affiliate model and how AU could join other HIV-sector organizations into affiliates or chapters. An affiliate model would transition current members to an affiliate level where AU provides the support work (i.e., HR, finance), including providing core internal services, branding, etc. and ensures consistent collaboration while building AU's revenue and helping those affiliates sustain their mission.
- E. Determine if AU should establish an operational and/or organizational presence in the South, and how AU can leverage staff in the South, with an eye toward regionally focused funders.

THE PILLARS: Policy and Advocacy, Grantmaking, Capacity Building

The three pillars that drive the work of AU – policy and advocacy, grantmaking, and capacity building – are critical structures undergirding the mission of the organization. By taking steps to strengthen the harmony between the work of the three pillars, making refinements to best harness and coordinate internal skills and expertise, and to capture the impact of the three pillars of work, AU will be able to effectively focus and drive the work forward in a unified way toward ending the HIV epidemic in the United States.

1. **Strengthen the harmonization of the three pillars of AU's work with each other to achieve AIDS United's mission more fully.**

While the mission of AU remains clear and firm, how the organization strengthens the harmony between the three pillars that undergird the mission is critical to the mission's success.

Tactics:

- A. Develop an organizational/programmatic theory of change.
- B. Periodically evaluate and align or realign the key initiatives with the three pillars.
- C. Develop measurement and evaluation systems that break AU's strategic priorities down into clear annual metrics.
- D. Develop and track metrics of the initiatives in AU's pillars in relation to the strategic priorities of AU.
- E. Develop a communications plan to communicate and narrativize how the work of the pillars ties to the mission of AU to external stakeholders.
- F. Launch a dashboard to track and display aggregated data in the following areas:

- a. Policy
- b. Advocacy
- c. Communications
- d. Grantmaking
- e. Capacity Building
- f. Programmatic reach (e.g., number of organizations served in the south, number of organizations serving the trans community, number of grants or proportion of overall grant resources allocated in the south, etc.)

2. **Refine capacity building.**

With an eye toward reducing reliance on external consultants by using existing internal skills and capacities that may be currently siloed at the organization.

Tactics:

- A. Reframe capacity building as field building to meet the current needs of the HIV sector (i.e., multi-year funding for operations and technical support) whereby AU shifts to a focus on core organizational and strategic best practices for organizations and their operations.
- B. Conduct a gap analysis to understand the types of skills organizations in the field need to be stable and sustain growth.
- C. Determine what fields of focus and levels of technical assistance AU can and will provide.
- D. Conduct an internal audit of skills to determine what skills are currently present on the capacity building team and across the pillars of the organization.
- E. Conduct an audit of contracts with external consultants and contractors to determine the cost of using external service providers.
- F. Utilize an existing AU team for an initial pilot program to reallocate resources from external consultants and contractors and expand capacity building resources internally.

3. **Develop and launch a portfolio system.**

A portfolio system will classify and catalog different types or categories of work under a unified domain or strategy. A portfolio system will help AU reframe and coordinate siloed, named grant programs in terms of the greater mission the work seeks to achieve, and bring together and unify staff and expertise whose work touches a given community or issue area.

Tactics:

- A. Develop the system of portfolios based on or informed by:
 - a. Conducting a needs assessment across communities to identify and inform what the needed portfolios are. These may include:
 - 1. The Latinx Community

2. The South
3. Harm Reduction
- b. AU's mission, skills, expertise, and areas of work from across the organization
- B. Develop a rollout plan that includes educating staff on the rationale behind the portfolio system and approach to get buy-in and support.
- C. Launch three levels of funding for organizations in the field:
 - a. Incubator Funding: for new organizations continuing to do work past year one
 - b. Sustainability Funding: based on level or number of years as appropriate for that grantee and/or grant program
 - c. Innovation Funding: for organizations doing innovative work or piloting an innovative approach to addressing inequities, service delivery, or engagement strategies, etc.
4. **Strengthening and enhancing the internal capacity to produce evaluation and impact metrics and data.**

Strengthening internal evaluation capacity and enhancing and integrating efforts to capture data and metrics will allow AU to better articulate, define, and convey its work and its impact to demonstrate to donors, funders, and external stakeholders.

Tactics:

- A. Leverage existing funding and/or find new funding to strengthen the internal capacity to oversee M&E.
- B. Engage funders to develop and isolate the data and metrics that funders want but don't have or are currently not able to get.
- C. Develop a template standard set of questions to ask grantees to capture and track data and metrics.
- D. Utilize work plans that incorporate those metrics and incorporate the time it will take to capture them in those plans.
- E. Develop key performance indicators to ensure AU is meeting its obligations to dues paying PPC members.

DEVELOPMENT AND FUNDRAISING

The fundraising landscape is changing and becoming more competitive. To continue to remain competitive and have stable, consistent sources of funding and revenue, AU will take steps to ensure it has the fuel it needs to drive the organization and its work, support the sector, and sustain the organization as it advances toward its mission of ending the HIV epidemic.

1. Remain competitive as an intermediary funder in an increasingly competitive field.

To increase AU's efficiency to mobilize and distribute resources to address increasing competition as the field of intermediary funders expands and funders are increasingly going directly to beneficiaries. Specifically, how AU wins the competition to be the intermediary and how AU helps the field to understand an intermediary is the best way to go and that AU is an effective intermediary partner.

Tactics:

- A. Conduct research to determine how AU can build on and leverage the areas where it currently serves as an intermediary funder and how AU can provide other services that support its intermediary grantees and meet their unaddressed needs, while setting itself apart from competition in the sector.
 - B. Restructure grant applications and build project budgets so that AU can build cross-budgets that build internal expertise and capacity and send less funding out to secure external expertise for their organizations.
 - C. Use AU's network, expertise, and knowledge as an intermediary to guide funders that are looking to fund organizations directly.
 - D. Establish strategic partnerships with grantees so that grantees are not only funded by AU but are partners, and AU has the ability to collaborate and expand partnerships and pursue new funding opportunities.
 - E. Strategically market AU's capacity as an intermediary funder to government agencies so AU is viewed as a partner of federal, state, and local governments on the allocation of funds and development of resources needed to end the HIV epidemic effectively.
- 2. Aggressively seek and secure new and stable funding for AU's programs.**

Continuing to address the need for strategic growth and a broader strategy that considers restricted and unrestricted funding, the limits on adequate indirects, and the resources needed to support underfunded programmatic efforts by the sector and prioritizes key projects that define AU's commitments.

Tactics:

- A. Build development strategies that incorporate the following:
 - a. Major donors: focused on issue-specific or geographic-specific giving

- b. Recurring donors: to maintain and increase the pool of recurring donors to provide consistent ongoing revenue for AU’s mission
 - c. Public-private partnerships: built on an intersectional movements and health equity funding strategies (e.g., racial justice, reproductive justice, LGBTQ+)
 - d. Fee-for-service
 - e. Multi-year funding and grants
- B. Use public policy advocacy with the federal government to increase the indirect funding allowed for projects and collaborate with similarly situated organizations who are also impacted by low indirect rates.
 - C. Develop proactive models or strategies that are ready to be launched if funding is identified.
 - D. Evaluate and update the structure and practices of the Notice of Funding Opportunity (NOFO) grants decision tree tool developed in the last strategic plan.
3. **Evaluate fundraising priorities including establishing a formal major gifts and individual donor program.**

Tactics:

- A. Research what other similarly situated organizations have done to raise funds from individual donors.
- B. Consider where past fundraising tactics fell short to inform plans moving forward.
- C. Move toward greater internal coordination and a full-time staff member in-house on the development team to allow for greater capacity to create fundraising programs and expand upon existing opportunities.
- D. Conduct a cost-benefit analysis of investing in digital fundraising assets, including new electronic communications systems and donor list acquisition.
- E. Develop major donor pipelining, cultivation and stewardship practices and programs, with donors who are engaged in AU’s priorities and board members’ contacts.
- F. Develop a council for major donors, business, and foundations to be connected to AU.
- G. Evaluate how to leverage individual major donors, including reimaging and retooling Friends United and/or an additional entity.

COMMUNICATIONS

AU needs robust, focused, and cohesive ongoing communications strategies and plans to reach and engage key audiences, promote the organization and its work to critical stakeholders and the sector, and to better integrate its strategic communication and development efforts. Doing so will allow AU to wield its national platform in impactful ways toward the mission of ending the HIV epidemic in the United States.

1. **Develop ongoing communications strategies and plans.**

To allow AU to effectively promote the organization and its work with the broader sector and with communities and constituencies, build strong media relations, strategically reach target audiences, and strengthen internal communications practices and structures.

Tactics:

- A. Build a unified development and communications strategy and team, including oversight and management responsibilities for the combined functions of the strategy and team.
- B. Create a branding plan for the organization.
- C. Launch a testimonials program to structure how grantees communicate feedback outwards to grant makers, funders, and grantees in the field and demonstrate how AU provides a value-add for the grantee.
- D. Develop targeted communications articulating AU's work, role, and value-add to organizations in the field to come back to AU for technical and other kinds of support, even if they are receiving direct funding elsewhere.
- E. Develop standard practices for communication campaigns.

GOVERNANCE

Ensuring that AU's board has the support, skill sets, and expertise it needs to continue to be successful in its responsibilities and duties, and that AU will continue to have solid governance to steer the organization toward achieving its mission.

1. **Refresh board commitments, expectations, and collateral on a regular and ongoing basis.**

Tactics:

- A. Conduct a governance re-orientation including a bylaw and policy review and audit and refresh of commitments, expectations, and collateral for the board. This re-orientation may also include:
 - i. Formalizing on-boarding/off-boarding practices
 - ii. Expectations for board financial commitments and donations to AU
 - iii. Expectations for committee service

- iv. Participation monitoring
- B. Assess the board's own performance and engagement and determine how to best plug members into various efforts.
- C. Hold a board retreat every year or every two years.
- D. Regularly survey board members to assess their engagement and interests.
- E. Conduct an annual or biannual board self-performance evaluation.
- F. Consider annual plans for individual board members and for the board.
- G. Consider the optimal size of the board within the range set by the bylaws.

2. **Enhance the capacities and skills represented on the board.**

AU will maintain its commitment to a board that is reflective of the HIV epidemic and communities that AU serves, while enhancing the capacities and skills represented on the board by strategically recruiting board members from diverse professional backgrounds and sectors with access to potential new resources, funds, and donors.

Tactics:

- A. Identify and add top national leadership to the board, from the business, political, religious and/or philanthropic sectors, including c-suite corporate and foundation leadership that can help to cultivate new resources for AU.
- B. Formally assess and determine whether funders or grantees have a conflict of interest that should preclude their representation on the board.
- C. Consider the use of auxiliary councils or advisory committees to help build the pipeline and further diversify the skills represented on AU's board.
 - i. Consider transitioning board members that are pharma representatives from the board to a new business council, to serve as an informal body that could represent business and corporate donors to AU.

3. **Strategically balance the role of the board in fundraising.**

AU is a membership organization and a philanthropic organization. AU's membership is dependent on AU's philanthropy, while also having their own organizational budgets and fundraising imperatives. The role of the board must actively and strategically balance how it represents the HIV community, while also working to sustain the organization.

Tactics:

- A. Maintain the demographics and community-base as identified by the Racial Justice Index, that AU is leading, while balancing it with the fundraising needs of the organization.
- B. On an annual basis, develop a shared sense of all board members' roles for board engagement in fundraising, including reviewing the give-or-get financial contribution requirement and setting a board fundraising strategy.

- C. Audit current board members to identify their relationships with potential funders or donors and their appetite to make introductions, participate in pitch meetings, host events, etc.
- D. Create a new Fundraising/Development Committee that leads discussion on fundraising and development at board meetings and focuses on prospecting at its meetings.
- E. Under the leadership of the Fundraising/Development Committee, and in consultation with the development team, implement the annual board fundraising strategy.
- F. Work with the Fundraising/Development Committee to ensure that board members have the collateral, training, and tools they need to be successful in fundraising.
- G. The Fundraising/Development Committee should establish a policy that clarifies that AU is a top philanthropic priority for board members.

INFRASTRUCTURE AND INTERNAL CAPACITY

By taking steps to strengthen and solidify its infrastructure and internal capacity, AU will continue to be a healthy and resilient organization that will help drive the sector toward 2030.

1. **Create systems and practices to preserve institutional memory and knowledge.** *These new systems will consider the shift to a primarily virtual organization in how it standardizes and formalizes best practices uniformly across departments and the organization.*

Tactics:

- A. Develop and implement standard operating procedures (SOPs) and trainings to ensure redundancies for recording keeping for systems and staff, as well as organizational business processes (e.g., staff travel, convenings) that currently reside with the unofficial ombudsman at AU.
- B. Refine onboarding practices, including:
 - a. Peer-to-peer mentorship
 - b. Training on navigating memory storage systems, processes, and protocols
- C. Refine offboarding practices, including:
 - a. Migrating all data and files to the system
 - b. Formalized exit memos templates
- D. Implement a customer relationships management (CRM) system that tracks interactions with external stakeholders.
- E. Leverage Sharepoint to develop an intranet to make space for interpersonal and departmental learning in a virtual environment, including conducting “cross-trainings” to help staff know what others do at the organization to help mitigate and minimize risk.

- F. Integrate organizational, departmental, and programmatic goals into Asana so staff can see how programmatic work connects to broader organizational goals.

2. **Ensure best practices as a primarily virtual organization.**

Ensuring best practices for a primarily virtual organization will allow AU to best serve its staff in terms of management, accountability, and internal cohesiveness.

Tactics:

- A. Develop and regularly update standard operating procedures (SOPs) to help staff carry out routing AU operations in an appropriate and consistent manner.
- B. Survey staff on virtual work and their needs.
- C. Conduct ongoing expectations-setting sessions for the entire organization including current staff and for new hires, which may include:
 - a. Policies on availability, work hours, and time zones
 - b. Setting clear standards for response times to internal messages and emails
 - c. A policy that every staff member uses Microsoft Teams
 - d. Policies around updating digital calendars
- D. Evaluate opportunities for organizational buy-in and team and community building (e.g., annual retreat, regional in-person gatherings for staff, etc.).
- E. Implement the use of the e-learning platform to orient new staff, PPC, and board members, including a course on culturally humble and inclusive language.
- F. Refine hiring practices for fully virtual staff members.
- G. Determine the feasibility of implementing location-specific salaries.

3. **Break down siloing and increase internal coordination.**

Increasing internal coordination amongst departments, teams, and work streams will allow existing complementary work to be connected, augmented, and strengthened in new and innovative ways.

Tactics:

- A. Engage departmental leadership and staff in conducting an audit of current program activities to examine them for areas of overlap where coordination and collaboration makes sense.
- B. Engage departmental leadership and staff in assessing notices of funding opportunities and new funders that touch more than one program or policy and advocacy effort.
- C. Establish a process to increase coordination between the pillars and the operational (e.g., human resources, finance, and communications) teams and departments.
- D. Survey staff to assess how AU structures its internal communications, what internal rules and guidelines may be needed, and how AU can more effectively structure vertical and horizontal communication within the organization.

- E. Hold space for cross-departmental learnings at all-staff meetings, wherein departments can inform other staff about their department, their work, and how it fits into the mission of AU.
4. **Ensure AU develops and prepares succession planning for organizational and departmental leadership.**
- Ensuring AU develops and prepares for the departure and transition of leadership roles across all departments at the organizations.*

Tactics:

- A. Prepare a written succession plan, in collaboration with the President & CEO and the Board, including formal policies and procedures for:
 - a. Interim president & CEOs (selection process, role, and responsibilities)
 - b. Template/model timelines for leadership searches and transitions
 - c. Emergency contingencies in case of sudden departures to address the timely delegation of duties and authority
 - d. Support for new leadership, including executive coaching and mentoring
 - e. Communications plans for leadership transitions
- B. Prepare, and continually maintain and update, job descriptions for the President & CEO and senior staff on a regular basis, that are reviewed by the board.
- C. Develop an internal set of criteria, including specific skills and experience requirements, for candidates for leadership positions to meet current and future organizational needs.
- D. Identify and curate internal leadership skills development opportunities for staff and board members to develop future leaders.

V. IMPLEMENTATION

Next, the organization will turn to implementation of the strategic plan. This will involve phasing the work across the years of the strategic plan, determining resource allocations and needs, assigning roles and responsibilities to the strategies and tactics that will drive the work, and benchmarks, timelines, and goal setting to track progress.

VI. ACKNOWLEDGEMENT

The completion of this strategic plan would not have been possible without the work of the Strategic Planning Task Force members and co-chairs, and Petchina Partners. Together, the Task Force and Petchina Partners worked over six months to construct a plan that will guide AIDS United strongly and confidently in the direction of its next phase. We thank the Task Force and Petchina Partners for their time and effort to make it possible.

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Eugene McCray, M.D., Task Force Co-Chair, Board Vice Chair and Chair-elect,

Retired, Director, Division of HIV/AIDS Prevention Centers for Disease Control and Prevention

Joseph Stango, Senior Program Manager

Naina Khanna, Member of the Board, Executive Director, Positive Women's Network – USA