



**INTEGRATED  
HIV/AIDS  
PLANNING**  
TA CENTER

**JUNE 30, 2022**

**INTEGRATED PLANNING 101:**  
BACK TO BASICS WITH INTEGRATED  
PLANNING EXPERTS!

**DIGITAL WEBINAR COMPANION GUIDE**

## INTRODUCTION

This webinar companion guide offers attendees a resource to supplement the information covered during the webinar and extend the webinar's benefits beyond the allotted presentation time. It contains:

- [Presenter bios](#)
- [Presentation slides](#)
- [Prompts for additional discussion](#)
- [Integrated planning resources](#)

State and local jurisdictions across the country are working on their response to the [Integrated HIV Prevention and Care Plan Guidance, including the Statewide Coordinated Statement of Need, CY 2022-2026](#). The IHAP TAC is hosting a monthly webinar and peer learning series to support these efforts. The fifth webinar in our series, Integrated Planning 101: Back to basics with integrated planning experts!, expands our lens outward from the Integrated HIV Prevention and Care Guidance to include a focus on the fundamentals of integrated planning (i.e. integrated planning 101). To ground the information in real-time experiences, we hear from an expert panel of HIV planners who are playing a role in the development of their jurisdiction's Integrated HIV Prevention and Care Plans.

By the end of this webinar, participants will be able to:

- Describe the rationale and goals of integrated planning, specifically in the context of additional national HIV/AIDS planning initiatives.
- Describe basic components of the 2022-2026 Integrated Plan, and understand how those are developed.
- Understand what role they play in their jurisdiction's Integrated Plan development process

## PRESENTER BIOS



### **Barry Callis, Director of Behavioral Health and Infectious Disease Prevention, Massachusetts Department of Public Health**

Barry Callis is a Social Worker and Director of Behavioral Health and Infectious Disease Prevention for the Office of HIV/AIDS (OHA), Bureau of Infectious Disease and Laboratory Sciences at the Massachusetts Department of Public Health. He oversees OHA population health responses, integrated prevention and care planning, advisory groups, and community engagements to inform the design of prevention and care services for persons living with and at risk for HIV, viral hepatitis, and overdose.



### **Carissa Weisdorf, Coordinator, Minnesota Council for HIV/AIDS Care and Prevention**

Carissa Weisdorf leads the lead planning council support staff for the Minnesota Council for HIV/AIDS Care and Prevention, which serves as the single community planning body for the Minneapolis – St. Paul Part A TGA, and the state's Part B and HIV prevention programs. Carissa participated in an integrated planning workgroup that combined Minnesota's prevention and care planning groups into a single community planning body in 2016, and supported the council in the development of the last integrated plan. Presently she serves on the steering committee that is leading the development of the next Integrated HIV Prevention and Care Plan.



### **Holly Hanson, Ryan White Part B Program Manager, State of Iowa**

Holly Hanson has served as the Ryan White Part B Program Manager for the state of Iowa for more than twenty years. She is responsible for ensuring program compliance with the Ryan White Treatment Extension Act, including strategic planning, reporting requirements, grant and budget management, program implementation, and communication. Holly received her Bachelor of Arts in Social Work from the University of Iowa and her Master of Arts in Counseling Psychology and Counselor Education from the University of Colorado at Denver. Before coming to the Iowa Department of Public Health she was a therapist and outreach worker at Columbine Connections in Littleton, Colorado and has a particular passion for bringing trauma informed care to the HIV field in a meaningful way.

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### **Joey Wynn, South Florida AIDS Network, Florida Comprehensive Planning Network**

Joey Wynn has made a career in HIV advocacy and public policy, and has worked in a variety of public health settings in the state of Florida. In 1994, he was involved in the start up of the first Ryan White Outpatient HIV Program Dept. at Mercy Hospital in Miami, FL. His career in HIV highlights his blended public health and HIV expertise, having served as the Ryan White Patient Care Administrator for the Broward County Health Department's AIDS Program office, the statewide Community Relations Director for the Statewide Medicaid HIV Disease Management program, and the Director of Public Policy for Broward House. He has been a member of the local Integrated Workgroup for Broward County since its 2015 inception, and has worked at Holy Cross Hospital in the Community Health & Well Being program since 2021.

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### **Sean Ryan, HIV Services Manager, Kansas City Health Department**

Sean Ryan is the Part A Recipient and HIV Prevention and Care Services Manager for the Kansas City Health Department. Sean has a Master's degree in Social Welfare Administration from the University of Kansas. Prior to becoming the HIV Services Manager, Sean got his start working with people with HIV as a Ryan White Medical Case Manager and later became the Program Manager for the entire regional Ryan White Case Management System. During his time at the Kansas City Health Department he has been a part of several efforts to integrate programs and collaborate across agencies, programs, and jurisdictions. In 2016, Sean was one of the Key members selected to develop the Missouri Statewide Integrated HIV Prevention and Care Plan. After the plan was developed and adopted by state and local planning bodies, Sean oversaw many of the plan's activities to ensure strategies were carried out accordingly and the indicators needed to track outcomes were captured appropriately.



## Integrated Planning 101: Back to basics with integrated planning experts!

June 30, 2022  
3:00– 4:30 pm EST



**INTEGRATED HIV/AIDS PLANNING**  
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## About the Integrated HIV/AIDS Planning Technical Assistance Center





## Agenda

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- Overview of Integrated Planning guidance
- Description of the cycle of integrated planning
- Q&A with expert panel

## Webinar objectives

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After this webinar, participants will be able to:

- Describe the rationale and goals of integrated planning, specifically in the context of additional national HIV/AIDS planning initiatives.
- Describe basic components of the 2022-2026 Integrated Plan, and understand how those are developed.
- Understand what role they play in their jurisdiction's Integrated Plan development process.

## Have a question?

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**Have a question for one of the presenters? Please use the Q&A feature.**

Click on "Q&A" located along the bottom of your screen



# What is Integrated Planning, and why is it done?



### **Integrated Planning 101**

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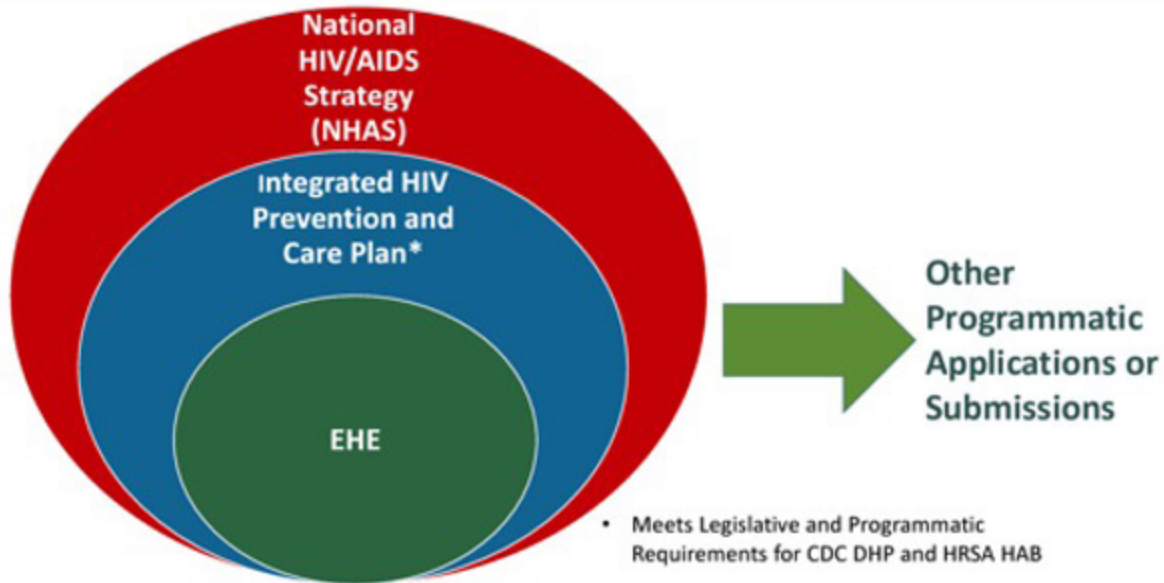
- HRSA and CDC first released guidance in 2015 to support the submission of an Integrated HIV Prevention and Care Plan, including the Statewide Coordinated Statement of Need (SCSN).
- Guidance for CY 2022-2026 builds on first Integrated Plan Guidance for CY 2017-2021, and plans are due December 9, 2022
- Required to meet all programmatic and legislative requirements associated with CDC and HRSA funding
- Plans are living documents to be reviewed and updated, as needed

### **Why is integrated planning important?**

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- Fosters new approaches to address barriers to HIV prevention, care, and treatment
- Serves as a jurisdictional roadmap
- Leverages existing resources and improves efficiency and coordination of HIV prevention and care service delivery
- Promotes collaboration and coordination in the use of data for prevention and care program planning, resource allocation, evaluation, and continuous quality improvement efforts
- Establishes ongoing mechanisms for stakeholder engagement

## Connection to national initiatives and plans



Source: CDC and HRSA Guidance Overview Webinar; October 27, 2021. Available at <https://aeroethiv.org/library/integrated-hiv-prevention-and-care-plan-guidance-including-statewide-coordinated-statement/>

## Tiered view of the connections

<b>National/federal plans and initiatives</b> (country-wide)	<ul style="list-style-type: none"> <li>• National HIV/AIDS Strategy</li> <li>• EHE Initiative</li> <li>• STI National Strategic Plan</li> <li>• Viral Hepatitis National Strategic Plan</li> </ul>
<b>Jurisdictional plans and Initiatives</b> (city, county, region, state)	<ul style="list-style-type: none"> <li>• Integrated HIV Prevention and Care Plan</li> <li>• EHE Plan</li> <li>• EtE or Getting to Zero Plan</li> <li>• Fast-Track Cities Initiative</li> <li>• Cluster and Outbreak Detection and Response Plan</li> <li>• Hepatitis Elimination Plan</li> <li>• Ending the Syndemic/Epidemics Plan</li> </ul>
<b>Recipient/grantee plans and initiatives</b> (organization, agency)	<ul style="list-style-type: none"> <li>• Programmatic applications</li> <li>• Work plans</li> <li>• Strategic plans</li> </ul>
<b>Overarching principles</b> (at all levels)	<ul style="list-style-type: none"> <li>• Community engagement</li> <li>• Achieving health equity and reducing disparities</li> <li>• Focus on priority populations</li> <li>• Implementing status neutral approaches</li> </ul>



## Approaches to integrated planning

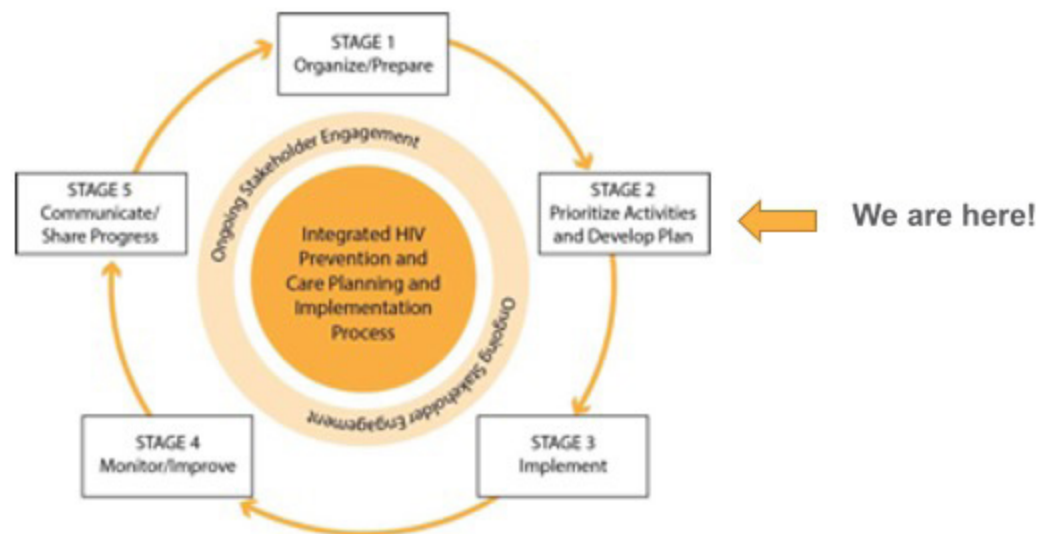
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- Approaches depend on jurisdictional needs, feasibility, and the context for planning
- Key factors associated with the approach used:
  - Involvement in the EHE initiative
  - Existence of other HIV planning initiatives (Fast Track Cities, GTZ)
  - Type of Integrated Plan submission based on the grantees and jurisdictions involved (state and/or local)
  - Extent to which the jurisdiction is taking a syndemic planning approach
  - Planning body structures
  - Planning infrastructure and existing relationships for community and other stakeholder engagement

## Stages of Integrated Planning



## Stages of integrated planning



## Stage 1: Organize and prepare

- Key activities include:
  - Foster meaningful stakeholder and community engagement
  - Provide orientation and training to prepare staff and community members for plan development processes
  - Establish communication strategies to ensure use of clear language, including common definitions
  - Develop a committed and diverse planning group
  - Encourage cooperation between RWHAP Part A and B planning bodies and any prevention planning groups

## Stage 2: Prioritize activities and develop the plan

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- Key activity: Structure plan development process
  - Ensure sufficient resources and dedicated leadership for plan development
  - Develop realistic timelines that account for plan development, review, and revision
  - Reference federal guidance to verify you have all information to draft the required sections
  - Concurrently develop a monitoring plan to track progress and successes
  - When possible, use technology that allows multiple parties to simultaneously view, edit, and contribute to plan development



## Stage 2: Prioritize activities and develop the plan

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- Key activity: Continue engaging stakeholders
  - If using an external consultant, ensure that PC/PB members are fully and meaningfully engaged throughout the process
  - Consult a range of stakeholders, taking note of diverse communities within a jurisdiction
  - Solicit feedback in a variety of venues and formats to accommodate the needs and preferences of community members
    - Consider community involvement burden
    - Geographic (rural vs. urban)
    - When possible, gather feedback remotely (e.g. virtual townhall, online comment submission)



## Stage 3: Implement plan

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- Key activity: Document implementation process
  - Document protocols to support implementation
    - Decision-making process
    - Communications to report progress and challenges
  - Develop a realistic work plan based on the Integrated HIV Prevention and Care Plan, including:
    - Roles and responsibilities for planning bodies, recipients, and sub-recipients
    - Timelines
    - Outcomes



## Stage 3: Implement plan

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- Consider developing a list that includes small but important, achievable steps
  - Frame activities as action steps to support goals and objectives
  - Help to generate momentum
  - Provide structure for regular updates to key stakeholders





## Stage 4: Monitor and Improve plan

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- Key activity: Implement monitoring plan
  - Update the monitoring plan developed in Stage 2 to ensure effective and responsive tracking of progress and successes, including:
    - Measures, data sources, and data collection processes
    - Reporting structures and processes for reporting
    - Data management protocols
    - Ongoing quality assurance
  - Monitor and assess implementation of goals, SMART objectives, and projected activities



## Stage 4: Monitor and Improve plan

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- Key activity: Share and incorporate feedback
  - Update stakeholders on plan implementation
    - Report progress on plan implementation
    - Share data, as well as conclusions gleaned from partner data, in an appropriate format
    - Solicit feedback for plan and program improvements
  - Integrate feedback for improvement
    - Update plan to reflect feedback if necessary



## Stage 4: Monitor and Improve plan

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- Key activity: Use data to monitor progress
- Use HIV care continuum data and real-time data dashboards to monitor jurisdictional progress in improvements in HIV prevention, care, and service delivery
  - Identify HIV care continuum data and sources
  - Determine schedule/plan to review surveillance, program, and care data
  - Use data to improve and measure changes to specific steps of the HIV care continuum



## Stage 5: Communicate and share progress

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- Key activity: Share updates and progress
  - Provide updates on plan activities and progress to PB/PCs and other stakeholders
  - Include successes, challenges, modifications, and lessons learned
  - Create a progress report or activity dashboard that is updated and shared regularly according to an established schedule
  - Distill the Integrated Plan and its activities into a succinct visual or snapshot to promote or communicate progress



## Meet our experts!

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**Holly Hanson**

Ryan White Part B  
Program Manager,  
State of Iowa



**Carissa Weisdorf**

Coordinator,  
Minnesota Council for  
HIV/AIDS Care and  
Prevention



**Barry Callis**

Director of Behavioral  
Health and Infectious  
Disease Prevention,  
Massachusetts  
Department of Public  
Health



**Sean Ryan**

HIV Services  
Manager, Kansas City  
Health Department



**Joey Wynn**

South Florida AIDS  
Network, Florida  
Comprehensive  
Planning Network



## Questions?

Click on "Q&A" located along  
the bottom of your screen



Leave Meeting

## Upcoming series events

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### ▪ Next Webinar

- Spotlight on Integrated Plan Section VI: Implementation, Monitoring and Jurisdictional Follow Up
- Thursday, July 14 from 3:00-4:00 pm EST
- Featuring guest speakers from Puerto Rico Department of Health, and presented in Spanish, with simultaneous Spanish to English translation

Registration details available at <https://targethiv.org/library/ihap-webinars>.

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## The IHAP TAC can help!

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- **New to Integrated Planning or Need a Refresher?**
  - Online Course: An Introduction to HIV Prevention and Care Planning
  - Access at [www.targethiv.org/ihap](http://www.targethiv.org/ihap)
- **Don't know what you need?**
  - Visit our website at [www.targethiv.org/ihap](http://www.targethiv.org/ihap)
    - Join our mailing list at <https://targethiv.org/ihap/subscribe>
    - Review resources
    - Request tailored technical assistance
  - Contact us at [ihaptac@jsi.com](mailto:ihaptac@jsi.com)

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**Thank you!**



This project is supported by the Health Resources and Services Administration (HRSA) of the U.S. Department of Health and Human Services (HHS) under grant number U69HA30144, Ryan White HIV/AIDS Program Integrated HIV Planning Implementation. This information or content and conclusions are those of the author and should not be construed as the official position or policy of, nor should any endorsements be inferred by HRSA, HHS or the U.S. Government.

## PROMPTS FOR ADDITIONAL DISCUSSION

As you reflect on the webinar content, consider these prompts for discussion with your colleagues and integrated planning partners.

- Ongoing meaningful stakeholder engagement is an essential component of successful integrated planning. When you look at who you're soliciting input from about your jurisdiction's HIV prevention and care activities, who's missing? What is your jurisdiction doing to actively try to solicit input from those missing stakeholders?
- What kind of relationship building or system strengthening needs to take place to get everybody around the integrated planning table?
- What are some key lessons learned or takeaways from the first Integrated Plan development process and subsequent plan implementation and monitoring? How has this informed this round of integrated planning?
- What may be the biggest obstacle to completing your jurisdiction's integrated plan? What can you or others do to address this obstacle to ease the process?
- Think about any previous or existing plans in your jurisdiction. Do you use them? How? What can you do to create a new Integrated Plan that will be useful to you and your jurisdiction?
- In developing goals and objectives for your Integrated Plan (IP), think of other documents and processes where HRSA and CDC have asked you to set goals and objectives, such as developing grant applications and reports, your local HIV Care Continuum, and your jurisdiction's Quality Management Plan. How will you ensure these goals and objectives are included in and coordinated with your IP?

## GLOSSARY OF TERMS

Check out the [IHAP TAC glossary](#) for terms specifically related to integrated planning.

## ACRONYM LIST

- CDC DHP - Centers for Disease Control and Prevention, Division of HIV Prevention
- EHE - Ending the HIV Epidemic in the U.S.
- EMA - Eligible Metropolitan Area
- HAB - HIV/AIDS Bureau
- HRSA - Health Resources and Services Administration
- IHAP TAC - Integrated HIV/AIDS Planning Technical Assistance Center
- IP - Integrated Plan
- JSI - JSI Research & Training Institute, Inc.
- NHAS - National HIV/AIDS Strategy
- PrEP - Pre-Exposure Prophylaxis
- RWHAP - Ryan White HIV/AIDS Program
- SCSN - Statewide Coordinated Statement of Need
- SMART goal or objective - Specific, measurable, achievable, realistic, timebound
- TA - technical assistance
- TGA - Transitional Grant Area

# INTEGRATED PLANNING RESOURCES

All the resources available on the IHAP TAC website support the integrated planning process, but we have a handful to highlight as helpful starting points for those new to the process or in need of a refresher.

## [Integrated HIV Prevention and Care Planning Online Resource Guide \(IHAP TAC\)](#)

This Online Resource Guide is intended to support RWHAP Parts A and B recipients, CDC HIV prevention recipients, and their planning bodies with the ongoing integrated planning and the development, implementation, and monitoring of their Integrated HIV Prevention and Care Plans. The guide includes resources, tools, and tips to help inform and guide jurisdictions' work in integrating HIV planning and implementation efforts across prevention, care, and treatment delivery systems.

## [An Introduction to Integrated HIV Prevention and Care Planning \(IHAP TAC\)](#)

This self-paced, online course serves as an introduction to the fundamentals of integrated planning, and is designed for anyone who is new to integrated HIV prevention and care planning or anyone who would like a refresher on the basics.

## [2022-2026 Integrated HIV Prevention and Care Plan Development \(IHAP TAC\)](#)

This roundup includes all of IHAP TAC's tools and resources that directly support a jurisdiction's development of their 2022-2026 Integrated HIV Prevention and Care Plan. Many of these tools and resources are also featured throughout IHAP TAC's [Integrated Planning 2.0 Webinar and Peer Learning Series: Taking It One Section at a Time](#).

## [Integrated HIV Prevention and Care Plan Guidance, Including the Statewide Coordinated Statement of Need, CY 2022-2026 \(CDC and HRSA\)](#)

This guidance outlines the planning requirements for RWHAP Parts A and B recipients and all DHP-funded state and local health departments.

## Need More?

[Visit our website](#) to access more resources and learn about upcoming events.

Stay in touch! [Sign up for our listserv](#) to receive up-to-date information about new resources and upcoming learning opportunities.

Thank you for your participation!



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**About the IHAP TAC:** The HRSA-funded [Integrated HIV/AIDS Planning Technical Assistance Center](#) (IHAP TAC) supports Ryan White HIV/AIDS Program Parts A and B recipients, CDC DHP-funded recipients, and their respective HIV planning bodies with integrating planning, including the development, implementation, and monitoring of their Integrated HIV Prevention and Care Plans. We provide national and individualized training and technical assistance and facilitate peer-to-peer learning.