Rough Guide to Influencing and Monitoring PEPFAR Country Programs

An activist’s tool for watchdogging the world’s largest source of funding for the global HIV response where it matters most
## Important Acronyms

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>APR</td>
<td>Annual Program Results</td>
</tr>
<tr>
<td>CDC</td>
<td>Centers for Disease Control and Prevention</td>
</tr>
<tr>
<td>COP</td>
<td>Country Operational Plan</td>
</tr>
<tr>
<td>DoD</td>
<td>Department of Defense</td>
</tr>
<tr>
<td>IP</td>
<td>Implementing Partner</td>
</tr>
<tr>
<td>MER</td>
<td>Monitoring, Evaluation and Reporting</td>
</tr>
<tr>
<td>OGAC</td>
<td>Office of the Global AIDS Coordinator</td>
</tr>
<tr>
<td>OU</td>
<td>Operating Unit, or a single bilateral PEPFAR program</td>
</tr>
<tr>
<td>PEPFAR</td>
<td>President’s Emergency Plan for AIDS Relief</td>
</tr>
<tr>
<td>POART</td>
<td>PEPFAR Oversight Accountability Response Team</td>
</tr>
<tr>
<td>ROP</td>
<td>Regional Operational Plan</td>
</tr>
<tr>
<td>RPM</td>
<td>Regional Planning Meeting</td>
</tr>
<tr>
<td>SDS</td>
<td>Strategic Direction Summary</td>
</tr>
<tr>
<td>SAPR</td>
<td>Semi-Annual Program Results</td>
</tr>
<tr>
<td>USAID</td>
<td>United States Agency for International Development</td>
</tr>
</tbody>
</table>
# 2022 PEPFAR Watch Timeline

## PEPFAR Countries

### Group 1 — Week of March 7, 2022

**Single OUs:** Cameroon, Mozambique, Nigeria, Rwanda, South Africa, South Sudan, and Ukraine.

**Sustaining HIV Impact OUs:** Lesotho

### Group 2 — Week of March 14, 2022

**Single OUs:** Angola, Burundi, Côte d’Ivoire, Democratic Republic of Congo, Dominican Republic, Ethiopia, Malawi, Rwanda, Tanzania, and Zimbabwe.

**Sustaining HIV Impact OUs:** Uganda

**Regional Platforms:** West Africa Region (Benin, Burkina Faso, Ghana, Liberia, Mali, Senegal, Sierra Leone, and Togo).

### Group 3 — Week of March 21, 2022

**Single OUs:** Haiti, Vietnam, and Zambia.

**Sustaining HIV Impact OUs:** Botswana, Eswatini, Kenya, and Namibia.

**Regional Platforms:** Asia Region (Burma, Cambodia, India, Indonesia, Kazakhstan, Kyrgyz Republic, Laos, Nepal, Papua New Guinea, Philippines, Republic of Tajikistan, Thailand) and Western Hemisphere Region (Brazil, El Salvador, Guatemala, Guyana, Honduras, Jamaica, Nicaragua, Panama, Trinidad & Tobago).

## New in 2022

PEPFAR has updated its categorization of country groupings. PEPFAR defines Sustaining HIV Impact Countries as:

“Countries that are currently at epidemic control. In the COP22, these will have focused discussions around program design, transforming from surge activities for case finding and treatment initiation to activities that sustain substantial cohorts on ART and maintain viral suppression. These countries are Botswana, Eswatini, Kenya, Lesotho, Namibia, and Uganda.”

(2022 COP/ROP Guidance for all PEPFAR-Supported Countries)

---

<table>
<thead>
<tr>
<th>When?</th>
<th>What happens?</th>
<th>What can activists do?</th>
</tr>
</thead>
</table>
| Dec 2021    | Country Operational Planning (COP) advocacy calendar starts now. Start building a list of priorities for what civil society organizations suggest PEPFAR should fund differently in 2022 than in 2021. | 1. Start meeting to review last year’s COP and begin building a list of recommendations and demands you can submit to PEPFAR by the end of January 2022.  
2. Take a look at the PEPFAR data for 2021 as a tool for advocacy—it tells an important story of what is working and what is not. All PEPFAR data is now online!  
3. Start identifying who your strongest advocates are to attend the virtual COP22 meetings between February and March 2022.  
4. Get in touch with your PEPFAR coordinator to ask them for a calendar of important meetings and deadlines for your country. |
<p>| Dec 2021    | Quarter 4 PEPFAR Oversight Accountability Response Team (POART) meetings.     | PEPFAR will hold conference calls or physical meetings with each country. Ask to see the data, briefings, slides, and outcomes of that meeting to help you prepare your input. |</p>
<table>
<thead>
<tr>
<th>When?</th>
<th>What happens?</th>
<th>What can activists do?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nov 9 — Nov 28, 2022</td>
<td>Draft COP guidelines are published. Final guidelines published by PEPFAR on Jan 19, 2022.</td>
<td>Get in touch with us at <a href="mailto:info@pepfarwatch.org">info@pepfarwatch.org</a> for the draft guidelines and more information about how to submit your comments.</td>
</tr>
</tbody>
</table>
| Jan 2022     | The formal PEPFAR COP planning process begins. This is the time to identify your priorities for change. | 1. Build a written priority list so you send it along with your representative to the strategic retreat at the end of January. We've provided a template you can use to do this, below.  
2. Ask the PEPFAR coordinator for the materials you need to be engaged. They should provide:  
   - Global guidance that sets the priorities of PEPFAR headquarters  
   - The country planning level letters that outline the funding amounts and PEPFAR's minimum requirements. Examples of planning level letters from past years can be found here.  
   - A calendar for the next few months  
   - Quarter 4 POART slides  
   - Access to the data (but you don't have to wait, see above)  
   - Initial invitation for the community to choose a representative to be invited for the COP22 PEPFAR meetings. |
| No later than Feb 7, 2022 | PEPFAR teams in each country have an in-country planning retreat. | 1. Contact your PEPFAR Country team and ask to be invited.  
2. Come with a clear set of initial demands/priorities.  
3. Start work on a formal submission from your groups about what you want to see in PEPFAR's 2022 plan for your country.  
4. Ask for Quarter 4 POART slides.  
5. For countries with People's COPs, Health GAP will generate a side-by-side comparison of the final COP21 SDSs and People's COP demands from 2021 which will help civil society assess what recommendations must be pushed again in COP22. |
<table>
<thead>
<tr>
<th>When?</th>
<th>What happens?</th>
<th>What can activists do?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mar 2022</td>
<td>Preparation for COP22 Virtual planning meetings.</td>
<td>Prepare a written submission regarding what you think should change and send it to them as soon as you can. To do this:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Consult with communities, especially those outside capitals, get their input and their evidence about why changes are needed.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Use data from PEPFAR, gather other evidence, stories, and experiences.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Be specific about what should change from last year’s Country Operational Plan. What should be added? Who should be covered? Where?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Make sure to share your priorities with global civil society networks who can make sure staff in PEPFAR headquarters in Washington are aware (send your submission to: <a href="mailto:info@pepfar-watch.org">info@pepfar-watch.org</a>)</td>
</tr>
<tr>
<td>Mar 7, 2022 — the week of</td>
<td>2022 Virtual COP Planning Meetings:</td>
<td>1. Send your best, boldest advocates well prepared to push for your priorities; please email <a href="mailto:info@pepfar-watch.org">info@pepfar-watch.org</a> to share the names of those who will be going!</td>
</tr>
<tr>
<td>Mar 21, 2022</td>
<td>PEPFAR country and Washington D.C. teams, local and international civil society groups, representatives from recipient country governments, UNAIDS and Global Fund gather in virtual five-day meetings where they will lay out the priorities for the PEPFAR program in your country for FY 2022.</td>
<td>2. Ask the PEPFAR team to send you the data and presentations for the planning meetings at least a week in advance.</td>
</tr>
<tr>
<td>Week of Mar 7, 2022</td>
<td>This is a key advocacy moment where civil society can influence what PEPFAR funds.</td>
<td>3. Have a pre-meeting with all civil society organizations to make sure your representatives are well prepared to represent all of your priorities.</td>
</tr>
<tr>
<td>(Group 1)</td>
<td></td>
<td>4. Consider also doing a pre-meeting with government and implementers to gather information.</td>
</tr>
<tr>
<td>Week of Mar 14, 2022</td>
<td></td>
<td>5. Before the planning meetings make sure PEPFAR knows your major priorities, ask that they be included in the agenda for the meeting.</td>
</tr>
<tr>
<td>(Group 2)</td>
<td></td>
<td>6. Consider inviting the PEPFAR team to a meeting hosted by civil society to discuss priorities.</td>
</tr>
</tbody>
</table>
| Week of Mar 22, 2022      |                                                                               | 7. Get in touch with global civil society groups who can support you at the reviews. Email info@pepfar-watch.org to find out who is going from the international civil society community. | (Group 3)
Tip: PEPFAR Watch will host civil society pre-meetings prior to the virtual COP planning meetings.

Make sure to email info@pepfarwatch.org to let us know who the civil society organization representatives are from your country and to get more information about these meetings.

<table>
<thead>
<tr>
<th>When?</th>
<th>What happens?</th>
<th>What can activists do?</th>
</tr>
</thead>
</table>
| March and April   | Country Operational Plan is drafted                                           | What was decided during the virtual planning meetings is only the first step and many details still have to be worked out including the exact activities, budgets, and areas of geographic focus.  
1. Stay in touch with PEPFAR country teams, keep pushing for community priorities as they write the COP.  
2. Ask your PEPFAR country team for written feedback on the recommendations you have submitted.  
3. Make it clear you want to review the narrative of the COP (known as the Strategic Direction Summary) as soon as a draft is ready.                                                                                                                                 |
| April 2022        | Strategic Direction Summaries (SDS) are shared for feedback before the COP goes to the U.S. Ambassador in your country for sign off (which means these will come a few days before the due dates below) | Your input on this critical document is still required to be considered by the Ambassador and by PEPFAR headquarters in Washington.  
• Read the Strategic Direction Summary and suggest changes and additions by sending these in writing to your PEPFAR Country team.  
• If you have done a formal submission, you can just update this to note what has not been taken on board fully in the SDS (maybe in red ink).                                                                                                                                                   |
| Group 1:          | COPs due to the Office of the Global AIDS Coordinator (PEPFAR’s Headquarters) in Washington, D.C. | After COP submission, the work is not over. You can still influence by:  
• Lobbying the PEPFAR team to make changes before the virtual COP approval.  
• Coordinating with U.S.-based and global advocates to make sure PEPFAR Washington knows about further changes you still want. Remember OGAC is now reviewing the COP and changes may still be made.                                                                                         |
| April 19, 2022    |                                                                               |                                                                                                                                                                                                                                                                                                                                                     |
| Group 2:          |                                                                               |                                                                                                                                                                                                                                                                                                                                                     |
| April 22, 2022    |                                                                               |                                                                                                                                                                                                                                                                                                                                                     |
| Group 3:          |                                                                               |                                                                                                                                                                                                                                                                                                                                                     |
| April 29, 2022    |                                                                               |                                                                                                                                                                                                                                                                                                                                                     |
| Group 4:          |                                                                               |                                                                                                                                                                                                                                                                                                                                                     |
| April 25—May 13, 2022 | Virtual COP approval                                                                 | Acting U.S. Global AIDS Coordinator Dr. Angeli Achrekar will officially decide whether or not to sign and approve the COP. All approvals will be conducted virtually in 2022.                                                                                                                                 |
| (all groups)      |                                                                               |                                                                                                                                                                                                                                                                                                                                                     |
| Oct 1, 2021       | Implementation of the 2022 COPs begin.                                       | Write to your Country Chair and Country Coordinator reminding them of your priorities and that activists will be watching PEPFAR progress and holding them accountable throughout the year.                                                                                                                                  |
What is new with PEPFAR COP engagement in 2022?

More virtual COP planning

“In COP21 I participated in two country reviews and as community people, it was not easy to speak.”
— CIVIL SOCIETY PARTICIPANT, COP21 PLANNING MEETINGS

For COP22, as with COP21, PEPFAR will hold almost all COP planning meetings virtually due to COVID-19. On top of a virtual format, which disadvantages civil society (and key populations in particular), the meetings will take place over a very compressed time frame, making meaningful engagement substantially more difficult. PEPFAR has set an expectation of half-day meetings over 3-4 days but this is still a significant reduction from a week of face-to-face meetings where activists had physical access to PEPFAR teams from both OGAC and PEPFAR countries, as had been in the status quo until COP20. Activists will need more extensive preparation to ensure their demands are heard in the PEPFAR planning process, and will have to explore multiple tactics for engaging in this virtual, compressed format. Make sure to seek additional meetings with your country teams and your country chairs and engage directly with PEPFAR country chairs (through email, text, and side meetings) so you can share your recommendations and request responses. We must prevent the backsliding experienced during COP21 from being repeated during the COP22 planning cycle. But the threat of a repeat is real. That’s why strong preparation and mobilization around ambitious demands in advance is even more important than ever before.

Sustainability, epidemic control

For COP22, PEPFAR has prepared new guidance on sustainability. The text states that “Over time, PEPFAR’s role will transform from a direct funder of services, into an accountability partner, supporting governments and communities to sustain services to all citizens” (p 69).

Transitioning HIV responses to governments that lack political will to ensure a robust HIV response will have a disastrous effect. We should be prepared during COP22 to challenge unrealistic and premature introduction of the idea of the withdrawal of PEPFAR country support. While PEPFAR acknowledges that “sustaining epidemic control within this context requires that countries have the functional and financial capacity to maintain key programs at scale” they overlook critical aspects of quality service delivery such as laws and policies that support quality service delivery for key populations. They overlook past data regarding whether countries have been prioritizing the voices of communities when planning the HIV response. They overlook whether or not countries have been prioritizing health overall.

Countries are struggling with resources to support their health programs already, even with PEPFAR’s support. It is alarming that PEPFAR would consider departing when most countries are still missing targets and some will even miss the upcoming 2025 targets.

PEPFAR states that it places “sustainability” at the same level of priority as “epidemic control.” This could leave countries that have worked hard to achieve epidemic control without the resources to maintain that achievement. Epidemic control is not static and failure to maintain quality will take countries back to increasing new infections,
increase vulnerability of communities and cost more in the long run. Communities have always asked PEPFAR to play a role that is greater than the one of providing technical assistance. The strength of PEPFAR lies in its ability to do actual service provision through their agencies and implementing partners.

Need support to participate meaningfully? Reach out to us at info@pepfarwatch.org.

How can I get involved in advocacy to influence what PEPFAR is doing in my country?

If you’re interested in working to hold PEPFAR accountable in your country or region, email us at info@pepfarwatch.org, join the webinars and check out the PEPFAR Watch website for additional resources.
A few basics about PEPFAR

What is PEPFAR?
The U.S. President’s Emergency Plan for AIDS Relief (PEPFAR) is the largest source of funding for the HIV response globally, with most funding focused in sub-Saharan Africa, Haiti, and in smaller regional programs in Asia, the Caribbean, and Latin America. As of March 2021, the U.S. President Emergency Plan for AIDS Relief (PEPFAR) supported antiretroviral treatment for nearly 18.2 million people, has enabled 2.8 million babies to be born HIV-free to mothers living with HIV.

Why is PEPFAR important?
In PEPFAR’s high priority countries, PEPFAR is often the largest single source of money for HIV—often larger than the Global Fund and more than the government in some countries. In other countries, PEPFAR provides smaller portions of total funding, but often for services that no other funding supports – including key populations funding. New scientific evidence shows that starting HIV treatment immediately upon diagnosis enables people to live longer, healthier lives and is among the most effective ways to prevent HIV transmission. In addition, antiretroviral medicines can also successfully be used as pre-exposure prophylaxis to prevent HIV-negative people from contracting the virus. PEPFAR has the power to help deliver the end of the AIDS pandemic by 2030, if it is fully funded and if it is held accountable to civil society goals and priorities.

Donor Government Funding for HIV, 2019 (Current USD in millions)

* Global Fund data is adjusted to represent 53% of the donor’s total contribution, reflecting the Fund’s reported grant approvals for HIV-related projects to date and includes HIV/TB.
How is PEPFAR organized and related to the CDC, USAID, and other U.S. agencies?

PEPFAR serves as the umbrella and coordinator for all U.S. government agencies providing funding for the AIDS response. Funding is spent through the U.S. Centers for Disease Control (CDC), USAID, Health Resources and Services Administration (HRSA), the Departments of Defense, Commerce and Labor, and the Peace Corps. These agencies are the ones that write the contracts and manage the programs—so HIV programs funded by CDC or USAID are part of PEPFAR.

Who gets PEPFAR funding in recipient countries?

PEPFAR funding goes to ‘implementing partners’ (IP) that are most often large, non-governmental organizations (NGOs) as well as government agencies in the implementing country. Implementing partners are then responsible for running HIV programs and sometimes provide funding to other organizations as sub-contractors (“subs”) including smaller, local organizations to implement programs.

How does PEPFAR plan how to use its funds in each country or region?

Every year, PEPFAR engages in a planning process to create a Country/Regional Operational Plan (COP/ROP) for each major country or region that receives funding. The resulting plan sets out the budget, targets, geographic focus, and expected impact of PEPFAR funding for the following fiscal year. Implementation follows the U.S. fiscal year—so it begins in October of each year and ends in September of the next year.

Why should you care about influencing PEPFAR?

PEPFAR is a dominant source of funding for HIV treatment, prevention, care and health systems strengthening in many countries. The stakes are higher than ever to make sure that this funding is put to the best possible use. With more countries at or near 95/95/95, ensuring that countries invest in and prioritise quality service will be key to maintaining the progress made. Activism will also be needed to ensure that countries still lagging behind have the necessary support to reach epidemic control.

It is critical that affected communities and civil society activists are authentically and meaningfully involved in the process in order to ensure that PEPFAR funding is used in accordance with community needs.
Key PEPFAR players

U.S. Global AIDS Coordinator

The next U.S. Global AIDS Coordinator is yet to be confirmed but the COP process will be led by Acting U.S. Global AIDS Coordinator, Dr. Angeli Achrekar. Dr. Achrekar will approve all the final COPs. Dr. John Nkengasong has been nominated to become the next U.S. Global AIDS Coordinator but has not yet had his nomination “confirmed” by the U.S. Senate.

The Country Chair

Each country has a chairperson. This person is based in the Office of the Global AIDS Coordinator in Washington, D.C., but they oversee the country operational planning process. This person has significant influence over whether the COP will be approved and sets the agenda for key meetings, including the Regional Planning Meeting, and so can ensure key priorities are acted upon.

The PEPFAR country teams

There will be a many other people working for the U.S. government and PEPFAR in your country who focus on different aspects of the implementation of the COPs. These people may work for PEPFAR, CDC, USAID, or various other agencies. Some key parts of the country team are:

• **The Country Ambassador.** The U.S. Ambassador for each country is the supervisor of the PEPFAR Country Team. You may also meet the deputy chief of mission (DCM) or deputy ambassador. Some are very active on PEPFAR and some less so, but they can have a very significant influence over what goes into the COP.

• **The PEPFAR Country Coordinator.** Each country has a PEPFAR coordinator. They are responsible for managing the different department teams and designing the timelines for the POART and the COP. They ensure the teams come together to review and interrogate the data. This person is one of the main points of contact with PEPFAR in-country. They often do not make the final decisions, but they coordinate all the different team members.

• **Centers for Disease Control and Prevention (CDC), United States Agency for International Development (USAID), Department of Defense (DoD) Leaders.** Each agency also has a director and staff in every country, who are in charge of managing the implementation of PEPFAR. They often have a lot of power over the details of the COP and the deepest knowledge of particular areas.

Implementing Partners

These are the organizations that receive PEPFAR financing in order to implement the COP.
Influencing PEPFAR country plans

What is a Country/Regional Operational Plan (or COP)?

Country and Regional Operational Plans are plans created jointly by several U.S. government agencies that outline how the billions of dollars in HIV funding from the U.S. government will be allocated and spell out programmatic priorities and targets in recipient countries and regions. Each COP/ROP consists of a detailed budget and target report and a narrative account of PEPFAR's plans, known as a Strategic Direction Summary (SDS). Both parts of the COP contain important information for activists, but if you're just getting started you can begin by reading the 2021 Strategic Direction Summary for your country or region.

The SDS outlines the main goals and targets PEPFAR is setting out to achieve in your country/region, which populations and geographic areas PEPFAR will prioritize, what strategies and interventions PEPFAR and its implementers are planning to use to achieve their goals and targets, and how they will monitor progress. The SDS also contains details about who is funding what in the AIDS response in the country, and about the state of the epidemic and response in the country as a whole, among other important pieces of information.

Can you actually participate in the process?

For years the COP process was closed—a confidential U.S.-government-only set of discussions that excluded affected communities. Health GAP and a coalition of activists in the U.S. and East and Southern Africa fought to open the process, beginning in 2013. We continue to insist that the inputs from people most affected by HIV should weigh more heavily than those from bureaucrats. Currently, members of civil society are able to take part in COP planning and monitoring in most countries through quarterly meetings.

What role have activists played in influencing PEPFAR policy before they officially had a seat at the table?

Even before they had an official seat at the table, activists have successfully influenced PEPFAR's programs and policies. For its first decade, PEPFAR funded several HIV policies that were not based on evidence such as abstinence-only programs that undermined the HIV response. Activists demanded that PEPFAR change these policies, and have consistently called on PEPFAR to increase its focus on evidence-based interventions. Activists have also won increased funding for PEPFAR and, a few years ago—when some in the U.S. administration said HIV treatment was “unsustainable” and pushed PEPFAR to move away from the “treatment mortgage”—activists successfully pushed for exactly the opposite.

Communities need to be at the center of decision making and involved in the program implementation.
Communities need to be at the center of decision making and involved in program implementation.
How can activists in recipient countries influence PEPFAR?

PEPFAR civil society meetings are meant to be open to all members of civil society interested in the PEPFAR process. In implementing countries, activists are officially invited into PEPFAR’s in-country program planning process and given access to the documents, data and plans. Of course, this does not mean this has always happened in practice. In fact, in countries where invitations have not been forthcoming, activists have attended based on information they received from other invited activists. This gives activists the opportunity to pressure PEPFAR to fund the interventions most needed by their communities.

Civil society should expect ongoing engagement and dialogue throughout the year (COP development, COP reviews, Annual Program Results (APR) and Semi-annual Program Result (SAPR) reviews, ongoing program monitoring and evaluation, etc.). PEPFAR teams in countries have been told by PEPFAR headquarters to plan civil society consultations through a formal structure on a quarterly basis at a minimum. Then every year there is a COP Planning Meeting where the COP for the year is designed at a meeting that normally takes place in Johannesburg, South Africa and there are at minimum two civil society representatives from each country who are selected and funded to attend and represent the views of civil society. Due to COVID-19, COP21 and COP 22 meetings are virtual.

Yes! Over several years, we have worked with civil society activists to use the COP process to win changes to PEPFAR programming that reflect community needs. These included:

- In **South Africa**, activists emphasized the grave risk of the premature removal of earlier “surge” funding in COP20, winning a commitment from PEPFAR to increase funding for human resources based on an analysis of gaps.

- In **Kenya**, activists advocated for a restoration of prior year funding levels ($18.4 Million) for key populations programming and increased the level of funding for COP20 to $20,500,000.

Acting U.S. Global AIDS Coordinator, Dr. Angeli Achrekar, responds at a town hall meeting hosted by local civil society organisations to share their priorities for PEPFAR in South Africa.
• In Malawi, activists secured a major shift in PEPFAR funding away from low-impact technical support and toward scaling up of direct service provision for communities with an increase in the numbers of community healthcare workers, including adding 380 healthcare workers through a new PEPFAR funding mechanism with the Government of Malawi.

• In Uganda, activists won an expansion of the Young People and Adolescent Peer Support (YAPs) model nationally. The YAPS model will be expanded from 50 to 71 districts.

• In Mozambique, activists won increased investment in modalities that bring treatment closer to communities (including key populations) through expanding the use of interventions such as community-based ART distribution in all provinces and exploring expansion of mobile clinics beyond the current four provinces.

• In Tanzania, activists secured an ambitious scale up of PrEP to 180,000 people, and demanded a plan for reviewing implementation of index testing strategies that engages civil society and ensures index testing is “client centered”—prioritizing safety, confidentiality, and human rights.

More examples can be found here.

How do we turn “engagement” into meaningful impact?

The criteria for civil society participation in the COP process are clearly laid out in the COP guidance: PEPFAR requires civil society COP engagement plans, meetings with interested civil society groups, and written feedback to be shared between civil society and PEPFAR.

But a seat at the table does not necessarily translate into meaningful input into PEPFAR program planning. Only where activists have proactively used these opportunities to hold PEPFAR accountable—pushing the program to deliver on the transparency and access it has promised—has ‘engagement’ resulted in impact.
“Civil society is holding our feet to the fire. They are making us uncomfortable. That is good. We need to feel uncomfortable.”

— UNAIDS Country Official
5 Steps to Start Influencing the PEPFAR Country Plans

1. Clearly outline key recommendations & demands

It is important to work with other activists ahead of the COP planning process cycle to develop a priority list of recommendations to demand from PEPFAR. This will be the basis of what you demand from the PEPFAR teams throughout the COP cycle.

By getting this clear from the beginning, you can all sing from the same sheet of music (so to speak) throughout the process—and PEPFAR Watch partners can help to amplify your demands. You can use this template to craft your demands:

What is the priority intervention? Identify the area or intervention of concern (e.g. Pediatric HIV treatment, or Prevention for men who have sex with men)

What is PEPFAR doing on this in 2021? Take a look at your country’s 2021 COP for the current language on what they’re doing. Dive into the Q3 and Q4 data - what does it tell us about progress, and why we need our interventions?

What should PEPFAR be doing on this in 2022? What specific language should PEPFAR include in the COP? What should the target be? Be clear and specific! Do we know what budget is needed?

2. Dive into the data

By using data and evidence from PEPFAR’s programs to formulate your demands, you can make them sharper, and your proposals more specific. Maybe you want more focus on underperforming geographic areas, or more money investing in programs that are lagging behind. Maybe the data proves that we need better interventions to support linkage or retention. Maybe the data shows that programs targeting key populations need strengthening. Whatever the demand, using PEPFAR data will help strengthen your advocacy. See the “monitoring” section of the guide for where to find the data and how to analyse it.

Overview of the PEPFAR COP Planning Cycle

- **December:** Time to outline your priorities
- **January:** Chance for you to push PEPFAR on the things you think should change.
- **Early February:** In-Country COP22 Planning Meetings.
- **March:** Virtual COP22 Planning Meetings.
- **March—April:** Feedback on the draft COP requested before submission.
- **Early April:** Don’t stop now! Keep pushing because OGAC is still reviewing the COP!
- **Late April:** Final COP is signed.
3. Visit and Monitor PEPFAR sites through community-led monitoring

By visiting and monitoring some PEPFAR sites you will have first hand information—our own community-led monitoring data—at your fingertips in order to call out PEPFAR’s poor performance—or to prove why PEPFAR must prioritise your interventions. Depending on the capacity of activists, community groups and civil society organizations in your country, you can design a simple monitoring survey to collect data in a handful, or more expansive, set of sites. For one example of community-led monitoring, visit Ritshidze.

4. Engage with PEPFAR before and after the COP22 Planning Meeting

Make sure you write to both the Country Chair and Country Coordinator in January outlining your demands—and meet with your country team ahead of the COP22 Planning Meeting. Use the meeting to continue to make your demands. Keep track of what PEPFAR promises in the meeting in your checklist. After the meeting, write to the Country Chair and Country Coordinator outlining what promises you heard them make. Get it on record. Ask to see the draft SDS when it is ready. Analyse the draft SDS. Are your demands and targets included? What is missing? Suggest language they should include in the SDS. Write back to the Country Chair and Coordinator with your suggestions. Make it impossible for them to ignore your demands!

Tip: The COP22 Planning Meetings

After the in-country strategic planning meeting, PEPFAR normally invites country teams and civil society to Johannesburg to discuss the country priorities together with the OGAC based team. Due to COVID-19, for COP22 this will be a virtual meeting. The PEPFAR country team, OGAC technical teams, representatives from global and local civil society organizations, UNAIDS, the Global Fund to Fight AIDS, TB and Malaria, Ministries of Health and the World Health Organization will all be present. The goal of the meeting is to present the country plan vision for debate and consensus by representatives. In the past, activists have successfully used the meeting to rally and push for changes in the proposed country plan to ensure more ambitious targets and activities are supported.

5. Amplify community voices

Often the people impacted by PEPFAR money and services seem to be forgotten in discussions. Dehumanising language like “positives” and “clients” is used in the literature—forgetting that these are people first. Bringing in community voices will refocus those discussions.

Once you have outlined your demands, you might want to get a handful of people who are in need of your interventions to speak out. Hearing the plight of a community healthcare worker working for a small stipend, without access to gloves and masks, could highlight the reality of why PEPFAR should invest in human resources. Seeing a young pregnant school girl explaining how she had no way of accessing a condom, for example, would make real the need for easy access to condoms and prevention tools in schools. Listening to someone who is struggling to take their HIV pills everyday could convince PEPFAR of the need for better differentiated care models including support groups at facilities.
TIP: The tactics we expanded in 2021: “The People’s COP” in 7 countries

The “People’s COP”—established in South Africa and now used in multiple other countries—is a tactic used to influence the development of the COP. Using data collected from clinics and other health facilities, a comprehensive document is developed that outlines community recommendations to PEPFAR. In past years, the recommendations have been launched in high-profile community events attended by people living with HIV, alongside the former U.S. Global AIDS Coordinator Ambassador Deborah Birx, the current Acting PEPFAR Coordinator Dr. Angeli Achrekar and the leadership of each of the U.S. agencies involved in PEPFAR in South Africa. The events—held in 2018, 2019, 2020 and 2021—pushed the voices of people living with HIV, young women, key populations, and health workers into the PEPFAR discussions that too often focus on numbers and targets instead of people and lives.

In 2021, People’s COPs were developed in five countries: Kenya, Uganda, Malawi, Zimbabwe, Mozambique, Tanzania and South Africa.

In 2021, we also released Measuring Up, a tool to assess PEPFAR’s responsiveness to civil society recommendations, by contrasting demands in the 2020 People’s COPs with what was contained in PEPFAR SDSs for 2020. We will repeat this assessment in 2022, providing another tool activists can use going into COP22 planning to determine whether or not their COP21 demands were acted upon by PEPFAR.

“The People’s COP is fantastic—it’s a clear best practice. It makes specific recommendations that we can really act on. I’ve asked the team to go point by point and be clear on what we are going to do on each point. We wish all countries had this.” — Former U.S. Global AIDS Coordinator Ambassador Deborah Birx (2014-2021)
Why should activists monitor the implementation of PEPFAR Country Plans?

By May, the PEPFAR Country Operational Planning cycle comes to an “end” but at this point our advocacy is far from over. Turning COP victories on paper into reality takes persistent advocacy and watchdogging. It is now time to shift to monitoring the implementation of the commitments won—often a much more difficult thing to do.

Overview of the PEPFAR COP monitoring cycle

(Q1 data released in March)
(Q2 data released in June)
(Q3 data released in September)
(Q4 data released in January)

How can activists track PEPFAR’s progress to ensure higher impact?

Attending and providing feedback in the PEPFAR Oversight Accountability Response Team (POART) meetings and engaging with PEPFAR monitoring data shared at the Regional Planning Meeting are important ways of tracking the implementation of your demands and assessing PEPFAR’s impact. This is where you can evaluate important questions, such as: How well are they doing on testing? Are they meeting prevention targets? How many people who test positive are being linked to treatment and care services? Are people staying on treatment? Are people being lost to follow-up? Is it the same across the country—or are different areas doing better or worse?

It is important to note that while PEPFAR officials spend months with their data and presentations, you might be seeing them for the first time in real-time as it is presented. This means that, as members of civil society, we must build our capacity to raise concerns on the spot, calling out areas of weakness or willful neglect to push for high-impact strategies. We must become detectives, digging into the data and identifying gaps – and then boldly challenging PEPFAR, the Global Fund, and Ministry of Health officials to do more, do better and do it faster.
What is the purpose of quarterly PEPFAR Oversight Accountability Response Team (POART) meetings?

POART discussions and other civil society engagement activities are intended to communicate the progress of the program and as an opportunity for civil society to provide feedback about how the program can be improved. However, this often takes the form of a slideshow presentation which cannot, on its own, adequately communicate a complete picture of the program. If PEPFAR has not presented sufficient information for you to understand how a certain area of the program is performing and suggest improvements, you can and should request further information and an opportunity for further engagement once you have had time to digest it.

How can you begin to make sense of PEPFAR’s data?

We know that data can be quite overwhelming, but with a few pointers it gets easier! Generally, it’s important to observe the initial target while analyzing the data. The data can make PEPFAR look like they are doing very well (e.g. we reached 97% of our target), but if the target is low to begin with then the outcome is still not good enough. In this case, it’s a good idea to advocate to PEPFAR that the targets be more ambitious and higher in the next COP cycle.

It’s also a good idea to look at data going back more than one year. PEPFAR will often explain that low performance is due to seasonal trends or that this is ‘normal for that time of year’ and that they ‘expect performance will improve next quarter.’ You can easily determine if that is the case by looking back at the trends the last couple of years.
TIP
Explore PEPFAR data using amfAR’s PEPFAR Monitoring, Evaluation, and Reporting Database:

The PEPFAR Monitoring, Evaluation, and Reporting (MER) database presents data on a set of PEPFAR data points (MER indicators) that PEPFAR uses to track progress in its programs. You can use this resource to identify where progress is lagging, where there are gaps, and to help develop your demands for the POART and RPM meetings. Here are some tips on navigating the database:

• **Exploring progress on treatment**: On the website, first select your country. You will first see a page that describes the treatment cascade. PEPFAR monitors HIV treatment through a cascade of indicators: HIV testing (total tested and the number diagnosed with HIV), linkage to treatment, initiation on treatment, retention on treatment, and the total number on ART. Each of the relevant indicators is shown in the treatment page.

• **Exploring progress on prevention**: In the second tab, you can monitor PEPFAR HIV prevention programs. Here you can see indicators on the PMTCT program (pregnant women initiated on treatment, infants tested and treated), VMMC, prevention programs for key and priority populations, and PrEP.

• **Exploring progress by district**: By default, both of these pages will show you data at the national level and across the entire PEPFAR program. Selecting districts in the map will update the data to just the districts selected. The filters on the left of the page can look at the targets and results for direct service delivery (DSD) or technical assistance (TA) separately.

• **Identifying PEPFAR’s geographic priority areas in your country**: Importantly, PEPFAR’s district priorities mean it does much more work in some districts than others. You can identify those districts that are most important to PEPFAR on the left filters as Attained or Scale-Up versus those that are Sustained or Centrally-Supported. You can select a specific quarter or you can look at the overall year-to-date (YTD) results.

• **Understanding PEPFAR’s indicators**: Definitions for all of the indicators that PEPFAR uses are available next to the map on the Indicator Trends & Performance pages, along with a link to the full text of each indicator. Also, under every graph on the website, there is a drop-down menu which explains that indicator, how each indicator fits into the treatment and/or prevention programs, and desirable trends. Importantly, it will also show you examples of how you (and PEPFAR) should be interpreting the targets and results, as well as examples of misleading or inaccurate ways of describing the data. It’s a good idea to read through these dropdowns as you look at the graphs to make sure that you notice any potential problems that should be raised in your next meeting.

• **Get data summaries for your country**: You can get a summary of the data for your country. At the top-right of each page, just click the ‘Download Fact Sheet’ and you’ll see a PDF with all of the same information. The last page of the fact sheet has a convenient way to see the codes PEPFAR uses most frequently.

• **Digging deeper**: If you have concerns with the targets or performance for any indicator, you can dig deeper into the data by switching to the third tab (“Indicator Trends & Performance”). Select your indicator of interest from the dropdown menu. From this page you can see a map that will show you the number of services provided, indicator targets, and performance against targets in each district. Further down, you can see detailed trend data in each quarter. Under ‘District Performance,’ you can see which districts have the highest and lowest performance. Finally, at the bottom of the page (and every page!) there are data tables, which can be sorted by performance, target size, or district priority.
How can you get ready for your next quarterly monitoring meeting with PEPFAR?

It is important that you arrive at the POART meetings prepared to evaluate the data reported. To better prepare, you should ask your Country Coordinator to send you the quarterly data or presentations ahead of your meeting. Even if the Country Coordinator doesn’t share the data ahead of time, you should review historical progress toward targets on amfAR’s MER Database, available online at http://mer.amfar.org/.

Before you go into your next quarterly monitoring meeting with PEPFAR, it’s a good idea to spend as much time as you can before the meeting looking at the data. If you have received the data pack before the meeting, take a look to see if performance has improved over the last quarter. Look carefully through the database and highlight issues and, if possible, some potential reasons for poor performance (such as lagging results in centrally-supported districts, or one district that’s doing much worse than the others, or low linkage to care leading to missed treatment targets).

Finally, if you see weak performance in some districts, it’s a good idea to do on-the-ground fact-finding to determine what is causing the poor performance. This will often give you much more information than PEPFAR has and will let you come into the next PEPFAR meeting ready to tell them the exact reasons why a program is not succeeding in a region. Your suggestions for improving the program can be especially effective when tied to the indicators PEPFAR uses to evaluate itself.

The more practice you have with this, the easier it will become!

TIP
Still need help making sense of the data?
Email us at: data@pepfarwatch.org
5 Steps to Start Monitoring the Implementation of PEPFAR Country Plans

1. **Document your demands and PEPFAR’s commitments:** First, it is very important to document the recommendations, demands, and commitments made during the COP review. You should also document the responses that you were given by the Country Coordinator and other PEPFAR staff during the COP Review. This should include who responded to your demands, when they responded, what they agreed to and in what timeframe.

2. **Review the Strategic Direction Summary carefully:** The draft Strategic Development Summary (SDS) document will be released shortly after the COP Review is finished with a very small window of opportunity to make comments or request edits to this document. Read through this document to see if your suggestions have been incorporated into the document. If you have requested changes to how programs are run and they do not appear in the SDS, it is much harder to get those changes implemented later.

3. **Stay in touch with your Country Coordinator:** Next, you should follow up with your Country Coordinator after the COP Review is concluded. You should first reiterate the demands that you have made and remind them of what they have agreed to do.

4. **Ask for the schedule of important quarterly meetings for your country:** You should also ask your Country Coordinator to send you the schedule of quarterly data review or PEPFAR Oversight Accountability Response Team (POART) meetings. These are meetings that happen every three months in which PEPFAR country teams outline progress against their quarterly targets. Country teams also report back to OGAC on their quarterly performance via conference calls. Make sure to request the dates for these calls as well. As part of these calls, country team are expected to report back on what civil society recommendations were given during the quarterly meetings. Meeting with your country teams before they do these calls to ensure the civil society input is reflected in the call.

5. **Get familiar with your country’s PEPFAR performance data:** The most user-friendly way to obtain PEPFAR’s program performance data is via amfAR’s PEPFAR Monitoring, Evaluation and Reporting database described in detail above. Spend some time exploring the database and reach out to us at data@pepfarwatch.org if you have any questions or are ready to dive even deeper.
Getting involved in PEPFAR watch

If you need help developing your demands and crafting an advocacy plan to influence or monitor PEPFAR, email us at info@pepfarwatch.org

About PEPFAR Watch

PEPFAR Watch is a growing network of civil society organizations, non-governmental organizations, activists and data analysts working together to ensure greater accountability of PEPFAR to the communities it serves. Together we influence the policies and practices of PEPFAR at the headquarter-level, and monitor and influence plans, programs and budgets at the country-level, to ensure that the single-largest source of funding for the global HIV response is put to the best possible use. Members of the network also provide technical assistance to activists and organizations interested in working to influence and monitor PEPFAR.

PEPFAR Watch is convened and coordinated by the Health Global Access Project (Health GAP). Members include the Foundation for AIDS Research (amfAR), AVAC, Coalition Plus, the Kenya Key Population Consortium (KKPC), Médecins Sans Frontières (MSF), MPact Global Action for Gay Men’s Health and Rights, O’Neill Institute for National and Global Health Law, the Treatment Action Campaign (TAC), Treatment Action Group (TAG), and the Uganda Key Population Consortium (UKPC).

We thank Coalition Plus for their support in translating this guide into French!

About Health GAP

Health GAP is an international advocacy organization dedicated to ensuring that all people living with HIV have access to affordable life sustaining medicines. Our team pairs pragmatic policy work with audacious grassroots action to win equitable access to treatment, care and prevention for people living with and affected by HIV worldwide. We are dedicated to eliminating barriers to universal access to affordable life sustaining medicines for people living with HIV/AIDS as key to a comprehensive strategy to confront and ultimately stop the AIDS pandemic. We believe that the human right to life and to health must prevail over the pharmaceutical industry’s excessive profits and expanding patent rights.

TIP: To stay in the loop and for continuous opportunities to learn about how to influence and monitor PEPFAR programs join the PEPFAR Watch email list.

We also have a Facebook group for civil society interested and participating in the PEPFAR process, send us a request to join. We’ve also recently launched a website! Visit PEPFAR Watch for prior year People’s COPs, news, and a members-only section with many more resources to help power your activism in 2022!