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

2023 Edition
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## Important Acronyms

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<tr>
<th>Acronym</th>
<th>Full Form</th>
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<tr>
<td>APR</td>
<td>Annual Program Results</td>
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<tr>
<td>CDC</td>
<td>Centers for Disease Control and Prevention</td>
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<td>COP</td>
<td>Country Operational Plan</td>
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<td>DoD</td>
<td>Department of Defense</td>
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<td>IP</td>
<td>Implementing Partner</td>
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<td>MER</td>
<td>Monitoring, Evaluation and Reporting</td>
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<tr>
<td>OGAC</td>
<td>Office of the Global AIDS Coordinator</td>
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<td>OU</td>
<td>Operating Unit, or a single bilateral PEPFAR program</td>
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<td>PEPFAR</td>
<td>President's Emergency Plan for AIDS Relief</td>
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<td>POART</td>
<td>PEPFAR Oversight Accountability Response Team</td>
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<td>PPM</td>
<td>PEPFAR Program Manager</td>
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<td>ROP</td>
<td>Regional Operational Plan</td>
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<td>RPM</td>
<td>Regional Planning Meeting</td>
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<td>SDS</td>
<td>Strategic Direction Summary</td>
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<td>SAPR</td>
<td>Semi-Annual Program Results</td>
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<td>USAID</td>
<td>United States Agency for International Development</td>
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2023 PEPFAR Watch Timeline

PEPFAR Countries

**Group 1**
Angola, Malawi, Ethiopia, Kenya, Burundi, South Africa, Namibia, Vietnam, Tanzania, South Sudan

**Group 2**
Ukraine, Nigeria, Botswana, Uganda, Côte d'Ivoire, Zimbabwe, Mozambique, Lesotho, Zambia, Cameroon, West Africa Region, Democratic Republic of the Congo (DRC)

(Rwanda to be held in country February 22–24, Dominican Republic to be held in country March 14–17)

**Note:**
With the exception of the West Africa Region (Benin, Burkina Faso, Ghana, Liberia, Mali, Senegal, Sierra Leone, Togo), Regional Operation Plan (ROP 23) development for Asia (Burma, Cambodia, India, Indonesia, Kazakhstan, Kyrgyz Republic, Laos, Nepal, Papua New Guinea, Philippines, Republic of Tajikistan, Thailand) and the Western Hemisphere (Brazil, El Salvador, Guatemala, Guyana, Honduras, Jamaica, Nicaragua, Panama, Trinidad & Tobago) will be developed during separate meetings.

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### When? What happens? What can activists do?

#### Feb 15, 2023
Planning level letters and COP23 Guidance are released on 15 Feb. Examples of planning level letters from past years can be found here.

The formal PEPFAR COP planning begins. This is the time to identify your priorities for change.

1. Build a written priority list so you send it along with your representatives to country strategy retreats in February.
2. Ask the PEPFAR coordinator for the materials you need to be engaged. They should provide:
   - A country calendar for the next few months, including the dates for the in-country Strategy Retreat
   - Quarter 4 “POART” slides
   - The country planning level letters that outline the funding amounts for the country and PEPFAR’s minimum requirements.
   - Access to the data (but you don’t have to wait, see above)
   - Note: invitations for communities to choose representatives to be invited to the COP23 Co-Planning Meetings in Johannesburg will have already been shared
   - Solutions Platform, previous SDS, SIMS outcomes.
   - Analyze these materials. What was good in COP22? What was bad and needs to change in COP23?

#### Feb, 2023
PEPFAR teams in each country have an in-person “strategic retreat.” (Timing TBD)

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 2023 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 COP22
When? | What happens? | What can activists do?
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SDSs and People’s COP demands from 2022 which will help civil society assess what recommendations must be pushed again in COP23.

### Group 1:
**Feb 21 – 24**

Internal USG COP23 strategy meetings. USG teams meet internally to discuss initial thinking around COP23 strategy in anticipation of the Johannesburg meeting.

Request a stakeholder meeting after your country retreat but before the Internal USG meetings to follow up the recommendations from the country retreats with what communities think should change.

To do this:

- Consult with communities, especially those outside capitals, get their input and their evidence about why changes are needed.
- Use data from PEPFAR, gather other evidence, stories, and experiences.
- Be specific about what should change from last year’s Country Operational Plan. What should be added? Who should be covered? Where?
- 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: info@pepfarwatch.org)

### Group 2:
**Feb 21 – Mar 3**

1. Send your best, boldest advocates well prepared to push for your priorities; please email info@pepfarwatch.org to share the names of those who will be going!
2. Ask the PEPFAR team to send you the data, draft tools, and presentations for the planning meetings at least a week in advance.
3. Have a pre-meeting with all civil society organizations to make sure your representatives are well prepared to represent all of your priorities.
4. Consider also doing a pre-meeting with government and implementers to gather information.
5. Before the planning meetings, make sure PEPFAR knows your major priorities, and ask that they be included in the agenda for the meeting.
6. Consider inviting the PEPFAR team to a meeting hosted by civil society to discuss priorities.
7. Get in touch with global civil society groups who can support you at the reviews. Email info@pepfarwatch.org to find out who is going from the international civil society community.

### Group 1:
**Feb 27 – Mar 3**

COP23 “Regional Co-Planning meeting” convening with stakeholders in Johannesburg:

PEPFAR country and Washington D.C. teams, local and international civil society groups, representatives from recipient country governments, UNAIDS, and Global Fund gather to lay out the priorities.

This is a key advocacy moment where civil society can influence what PEPFAR funds.
When? | What happens? | What can activists do?
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**Group 1**<br>Mar 6 – 17 | **In-country Planning and Tool Development.** Country teams will work in country to continue discussions (with national and global stakeholders) on high level outcomes from the Johannesburg Co-Planning meetings, refine strategies, and work to incorporate your strategic demands into COP tools. | What was discussed during the Co-Planning meetings in February-March is only the first step and many details still have to be worked out.  
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. Push for civil society to participate in all Planning and Tool Development meetings in country and ensure draft tools are shared with civil society.  
4. Stay in touch with your Country Chair. Consider scheduling bilateral meetings with the Chair as planning continues. |
**Group 2**<br>Mar 13 – 24 | | |
**Group 1**<br>Mar 20 – 24 | **Strategic Checkpoint.** Country USG team submits slides summarizing strategy. USG headquarters and stakeholders will review to validate that teams are looking at the total 2-year COP plan from a 2-year strategic standpoint and are proposing budgets and targets that represent that strategy. | 1. Request that the Strategy Slides be released on the shared drive space at the same time they are submitted to S/GAC. Request that notifications of the slides and tools are sent to all Johannesburg meeting delegation participants—in person and virtual.  
2. Most recent versions of all draft data tools (budget, data pack, Table 6, etc.) MUST be shared with CSOs for analysis and feedback. During this Strategic Checkpoint, country teams must have at least one formal meeting with CSOs (in-person/hybrid) to receive feedback on the strategy slides and draft tools and response to feedback formally in writing. |
**Group 2**<br>Mar 27 – 31 | | |
**Group 1**<br>Mar 27 – 31 | **In-country Stakeholder Meeting and Strategy Update.** Reconvene full planning delegation from Johannesburg (virtually or in-country with hybrid access) to enable OU teams to finalize strategy, targets, and activities. Continue to edit and refine tools. | 1. This is a key moment to assess the progress you’re making in pushing for community priorities.  
2. Prepare the civil society team so you have a strong plan going into the stakeholder meeting to make progress.  
3. Focus on the areas from your checklist or People’s COP23 where there hasn’t been responsiveness yet—don’t give up! |
**Group 2**<br>Apr 3 – 7 | | |
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<th>When?</th>
<th>What happens?</th>
<th>What can activists do?</th>
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<tr>
<td><strong>Group 1</strong></td>
<td><strong>Tool Checkpoint:</strong> Country teams, stakeholders, and USG HQ representatives verify that tools reflect broad support from strategic checkpoint meetings and ensure tools are on track for finalization at the end of April.</td>
<td>Request draft tools in advance from PEPFAR with enough time to consult with communities and prepare comments before the Tool Checkpoint meeting.</td>
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<td>Apr 3 – 7</td>
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<td><strong>Group 2</strong></td>
<td><strong>Finalize and Complete COP Plan and Tools:</strong> Country team works with S/GAC resources to finalize SDS and tools and all other COP/ROP elements. All delegates review final version of the tools.</td>
<td>Continue to track and analyze draft PEPFAR tools. Need support to unpack and analyze the data? Reach out to <a href="mailto:info@pepfarwatch.org">info@pepfarwatch.org</a> for support!</td>
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<td>Apr 10 – 14</td>
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<tr>
<th><strong>5 working days before COP approval</strong></th>
<th><strong>COP Submission</strong></th>
<th>Make it clear you want to review the draft COP before it is finalized. Create a tracked changes version for submission before finalization. Request written responses to community feedback to the draft COP.</th>
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<td><strong>All countries</strong></td>
<td><strong>Virtual Approval Meetings:</strong> Meeting of all stakeholders with the country team, chair, PEPFAR Program Manager (PPM), headquarters support team, and Ambassador for review and Ambassador approval of COP23 including targets and budgets.</td>
<td>Prepare final inputs for draft COP23. Select who from civil society will speak during the outbrief to provide the community analysis of the COP23.</td>
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<td>Apr 24 – 28</td>
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What is new with PEPFAR COP engagement in 2023?

Threats to PEPFAR’s accountability to communities and oversight by communities

After two years of virtual planning from 2021 - 2022, PEPFAR is returning to in person COP development - but with major changes. The revised process was developed without rigorous civil society engagement or solicitation of feedback.

The changes range from compressing COP planning dramatically from 14-18 weeks to only 10 weeks, to reshaping Regional Planning Meetings (RPMs) from a forum that had obligated powerful duty bearers to have to make decisions based on community concerns to one where virtually no decisions are made— deferred instead to settings with reduced global scrutiny and reduced scrutiny by directly impacted communities. In addition, COPs will be 2 years long rather than 1 year long, which will make it harder for communities to push for strategic pivots or other meaningful changes that might be needed during the two year implementation period.

While PEPFAR has asserted that they will not compromise civil society’s meaningful engagement, without detailed and enforceable standards for such engagement, these shifts will have the effect of making it easier for country teams to diminish or subdue the recommendations and evidence of civil society with the majority of target, budget, and strategy decisions finalized without serious consultation.

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.

Need support to participate meaningfully?
Reach out to us at info@pepfarwatch.org
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, the Dominican Republic, and in smaller regional programs in Asia, the Caribbean, and Latin America. As of September 2022, the U.S. President Emergency Plan for AIDS Relief (PEPFAR) supported antiretroviral treatment for 20.1 million people, has enabled 5.5 million children to be born HIV-free to people living with HIV, and 1.5 million people have newly enrolled on PrEP since FY21. Rates of death from all causes in PEPFAR countries have been 20% lower than in non-PEPFAR supported countries, pointing to a substantial population-level benefit from PEPFAR programming.

Why is PEPFAR important?

In PEPAR’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, such as key populations funding. PEPFAR has the power to help deliver the end of the AIDS pandemic by 2030 through bringing human rights and scientific advances to scale, if it is fully funded and if it is held accountable to civil society goals and priorities. A decade of flat funding of PEPFAR has undermined the program, contributing to the growing global HIV funding gap of $8 billion for low- and middle-income countries.

Donor Government Funding for HIV, 2021 (Current USD in millions)

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 subcontractors (“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. Activism is needed to ensure that countries with off-track responses have the necessary support to reach epidemic control for all communities, all genders, all ages and all geographies.

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

Ambassador Dr. John N. Nkengasong is the current U.S. Global AIDS Coordinator. He leads the COP process and approves all the final COPs. Ambassador Nkengasong has also been nominated by President Biden to be the Director of a new State Department Bureau of Global Health Security and Diplomacy.

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.

Implementing Partners

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

The PEPFAR country teams

There will be 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.
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 2022 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 program implementation.
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 COP22 meetings were virtual. In 2023, COP meetings will be in-person and virtual.
Have activists actually had a real impact on these plans?

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 Haiti, civil society successfully pushed back on deep proposed budget cuts, including turning a proposed $1.04 million cut to HIV pre-exposure prophylaxis (PrEP) programs into a more than $467,000 increase (Haiti COP 2022 Strategic Direction Summary, p37)

- In Uganda, key population-led civil society groups secured funding to invest in an ambitious commitment to accredit KP-led Drop-In Centers (DICs) to provide comprehensive clinical services including HIV prevention, treatment, and psychosocial services, with an additional $1.05 million in COP22 allocated for this purpose. The data used to guide this advocacy was generated by community-led monitoring, which revealed that referring KPs to mainstream clinics for clinical care results in high rates of loss to follow up because those mainstream clinics are not KP supportive (People’s Voice Uganda, COP22, p14)

- In Tanzania, KP-led activism made important strides to increase equitable access, winning expanded funding for programs to respond to criminalization, discrimination and other structural barriers obstructing access to quality HIV treatment and prevention services at health care facilities. (Tanzania COP 2022 Strategic Direction Summary, p68)

More examples of victories 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 COP22?
   Take a look at your country’s 2022 COP for the current language on what they’re doing. Dive into the most recent program data - what does it tell us about progress, and why we need our interventions?

   What should PEPFAR be doing on this in 2023?
   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 analyze it.

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 prioritize 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 COP23 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. Analyze 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!

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 used in 2022: “The People’s COP” in 8 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 and the leadership of each of the U.S. agencies involved in PEPFAR in South Africa. The events—held in 2018, 2019, 2020, 2021 and 2022—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 2022, People’s COPs were developed: Kenya, Uganda, Malawi, Zimbabwe, Mozambique, Tanzania, Haiti, and South Africa.

In 2022, we released the second edition of 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.
Monitoring the implementation of PEPFAR plans

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.
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.
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!
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 requested 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 teams 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.

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 2023!