PEPFAR Watch
Planning Call
COP23
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, including screening, diagnosis and treatment of AIDS/Advanced HIV Disease.

Most funding is focused in Sub-Saharan Africa, Haiti, and in smaller regional programmes in Asia, the Caribbean, and Latin America.
Why focus on PEPFAR?

Cumulative disbursements for HIV/AIDS in low- and middle-income countries from international donors, 2000-2015

- US-bilateral (PEPFAR)
- Global Fund
- UK
- Philanthropic organizations
- Other multilaterals
- Other bilaterals
- Netherlands
- Germany
- Sweden
- UNITAID
- Australia
- Denmark
- Norway
PEPFAR Agencies

PEPFAR serves as the umbrella and coordinator for all U.S. government agencies providing funding for the AIDS response.

1. The U.S. Centers for Disease Control (CDC)
2. USAID
3. Department of Defense (DoD)
4. The U.S. Peace Corps

These agencies are the ones that write the contracts and manage the programmes — so HIV programmes funded by CDC or USAID or DoD are part of PEPFAR.
Who gets PEPFAR funding?

PEPFAR funding goes to ‘implementing partners’ (IP) that are most often large, non-governmental organisations (NGOs).

Implementing partners are then responsible for running HIV programmes and sometimes provide funding to other organisations as sub-contractors (“subs”) including smaller, local organisations to implement programmes.
The Country Operational Plan

The Country Operational Plan (COP) is a plan created jointly that outlines how the billions of dollars in HIV funding from the U.S. government will be spent.

What is in the COP?
— The goals and priorities for the country
— What strategies and interventions will be used by the IPs
— “Where” and “who” will be prioritised
— The targets
— A detailed budget
How do we influence the COP?

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 in PEPFAR implementing countries 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 “POART meetings”.

HEALTH GAP
GLOBAL ACCESS PROJECT

PEPFAR WATCH
pepfarwatch.org
How do we influence the COP?

But a seat at the table does not necessarily translate into meaningful input into PEPFAR programme planning.

Only where activists have proactively used these opportunities to hold PEPFAR accountable — pushing the programme to deliver on the transparency and access it has promised — has ‘engagement’ resulted in impact.
Measuring what activists have won
Measuring Up

Activist tool tracking PEPFAR’s responsiveness to community demands in South Africa, Uganda, Kenya, Haiti, Mozambique, Zimbabwe, Tanzania, and Malawi

**NEW: Updated Measuring Up tools will be available in time for use during COP23 PEPFAR Strategy Retreats**
Kenya

Recommendations by Kenyan activists on HIV testing, reduction of service disruptions, HIV and TB literacy among others were included.

PEPFAR is yet to accept recommendations on Key populations funding targets and resource allocations to additional KP organisations.

Recommendations included: Covid-19, 6 MMD, Community ART clubs among others

PEPFAR is yet to accept recommendations on funding

South Africa

Recommendations included: 6 MMD+ 12 month scripts, repeat prescription collection strategies, fixing staff attitudes among others

PEPFAR is yet to accept recommendations an increase in funding male nurse and counsellors

How do we make this COP planning process more effective?
New Ambassador (with New Roles)

Ambassador Dr. John N. Nkengasong

U.S. GLOBAL AIDS COORDINATOR AND SPECIAL REPRESENTATIVE FOR HEALTH DIPLOMACY; and

DIRECTOR OF THE NEW STATE DEPARTMENT BUREAU OF GLOBAL HEALTH SECURITY AND DIPLOMACY
PEPFAR’s New Strategic Direction

Five pillars alongside three enablers

PEPFAR has proposed changes in COP planning, starting in COP23:

**Less time:** COP23 is on a much shorter planning timeline, with a later start.
- Only 10 weeks of COP planning
- Planning Level Letters and COP23 Global Guidance won’t be out until February 15 (one month later than usual)

**Two-year COPs:** instead of annual workplans, there will be two year plans (covering FY24-25) and two year budgets (“notional budgets” for FY25), with a “mid-point assessment of progress” at the end of FY24

**Regional planning meeting:** instead of 3 weeks of in person global meetings later in COP planning, with clear decision making, 2 weeks of planning meeting are happening earlier; it is unclear what decisions will be made.

**Strategic checkpoint and in-country finalization:** 6 weeks of virtual and/or hybrid meetings after Johannesburg before COP23 approval.
PEPFAR has proposed changes in COP planning, starting in COP23:

Renaming of minimum program requirements: For COP/ROP23 this will be known as Core Standards and the focus to supporting the national HIV response, PEPFAR teams will work with country governments, donors, and stakeholders to implement, assess, and regularly report on these standards at the national, subnational, organizational, and site levels.

Continued focus on sustainability: over the long-term, PEPFAR has identified common elements that may be needed to sustain the response such as (but not limited to):

1. a whole-of-domestic approach to successfully (i.e. efficiently and effectively) sustain the HIV response and reduce new infections, morbidity, and mortality;
2. a national government financially sustaining essential HIV services through domestic resource mobilization, and prepared to meet emerging needs;
3. sufficient functional (e.g., technical and managerial) capacity within the country to sustain scale up of key HIV programs, services, systems, and resources that are stewarded by local institutions;
4. HIV service delivery integrated into broader public and private care delivery systems;
5. a robust public health response to monitor and track HIV, which can also have the benefit of helping to track other existing and emerging health threats;
6. routinized quality assurance to effectively manage and monitor HIV services; and
7. HIV systems and services that promote equity, dignity, and human rights.
Data on initiation and retention: PEPFAR's total treatment cohort has increased over time, trends in treatment initiation and continuity of treatment for people living with HIV are decreasing.

Data on children and orphans: Since 2010, ART coverage has increased for all. On average, 81% of pregnant women received ART in 2021, however children only had an average of 52% treatment coverage. In 2021, the reported viral load suppression for children was 41% whereas for adults it was 70%.

Key Populations: Work with partner countries to

1. Know and Close the Gaps for Key Populations HIV Prevention and Treatment Services
2. Bolster KP Community Leadership, Collaboration and Empowerment
3. Address Structural Barriers to Scaling Effective KP HIV Responses and Advance Progress Toward the 10-10-10 Societal Enabler Targets
4. Strategic Partnerships
The COP23 Calendar for Activists
# COP23 PEPFAR timeline

## Table 2 COP23 Milestones by Group (All Dates are for 2023)

<table>
<thead>
<tr>
<th>Key Milestones</th>
<th>Dates for Group 1</th>
<th>Dates for Group 2</th>
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<tbody>
<tr>
<td>Release of COP22 Tools: FAST (includes PASIT and SRE), Target setting tool, Supply Planning Tool</td>
<td>February 15</td>
<td>February 15</td>
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<tr>
<td>Release of COP22 Guidance and COP/ROP22 Planning Level Letters</td>
<td>February 15</td>
<td>February 15</td>
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<tr>
<td>In-Country High-Level Preparation</td>
<td>February 21–24</td>
<td>February 21–March 3</td>
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<tr>
<td>COP23 Planning Meetings Global Convening in Johannesburg.</td>
<td>February 27–March 3</td>
<td>March 6–10</td>
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<tr>
<td>In-country Planning and Tool Development (2 weeks)</td>
<td>March 6–17</td>
<td>March 13–24</td>
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<tr>
<td>Strategic Checkpoint</td>
<td>March 20–24</td>
<td>March 27–31</td>
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<tr>
<td>In-Country Stakeholder Meeting to Discuss Plan Review and Finalization</td>
<td>March 27–31</td>
<td>April 3–7</td>
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<tr>
<td>Tool Checkpoint</td>
<td>April 3–7</td>
<td>April 10–14</td>
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<tr>
<td>Finalization</td>
<td>April 10–21</td>
<td>April 17–21</td>
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<tr>
<td>COP23 Submission Due</td>
<td>At least 5 working days before Approval</td>
<td>At least 5 working days before Approval</td>
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<tr>
<td>COP23 Virtual Approval Meetings</td>
<td>April 24–28</td>
<td>April 24–28</td>
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<tr>
<td>When?</td>
<td>What happens?</td>
<td>What can activists do?</td>
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| **Now!** | 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 2023 than in 2022. | 1. SDSs are up on the [PEPFAR Website](https://www.pepfar.gov/countries/cop/index.htm). Download them and have a meeting to go through and see what made it in there. What are you concerned about? 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 2023.  
3. Take a look at the PEPFAR data for 2022 as a tool for advocacy — it tells an important story of what is working and what is not. All PEPFAR data is now online! [pepfarwatch.org/resources](https://www.pepfar.gov/countries/cop/index.htm).  
4. In Haiti, South Africa, Tanzania, Mozambique, Malawi, Kenya, Zimbabwe and Uganda activists have completed a detailed analysis of PEPFAR’s responsiveness to activist demands, called “Measuring Up.” These are available for COP20, COP21 and COP22, email info@healthgap.org to get copies if you don’t have them.  
4. Start identifying who your strongest advocates are to attend the PEPFAR COP in country strategy retreats, and the Johannesburg review meeting.  
5. Get in touch with your PEPFAR coordinator to ask them for a calendar of important meetings and deadlines for your country.  
Draft COP23 Guidance

PEPFAR 2023 Country and Regional Operational Plan (COP/ROP) Guidance for all PEPFAR-Supported Countries

Comments deadline
Jan 23 2023
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<tr>
<td>Feb 2023</td>
<td>PLL and COP23 Guidance released Feb 15. The formal PEPFAR process begins—this is the time to identify your specific priorities for change.</td>
<td>1. Build a written priority list so you send it along with your representatives to country strategy retreats in February.</td>
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<td>2. Ask the PEPFAR coordinator for the materials you need to be engaged. They should provide:</td>
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<td>• A country calendar for the next few months, including the dates for the in-country Strategy Retreat</td>
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<td>• Quarter 4 POART slides</td>
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<td>• Access to the data (but you don’t have to wait, see <a href="http://mer.amfar.org">http://mer.amfar.org</a>)</td>
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<td>• Initial invitation for community to choose a representative to be invited for the Regional Management Review</td>
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<td>• Solutions Platform, previous SDS, SIMS outcomes</td>
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<td><em>Need to analyse the data and materials – what was good/bad?</em></td>
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Release of PEPFAR Planning Level Letters (and final Global COP23 Guidance)

United States Department of State
Washington, D.C. 2020

UNCLASSIFIED

INFORMATION MEMO FOR Ambassador Tseki Nkabinde, Barnard
FROM: SGAC – Chair Julius Miriti and PEPFAR Program Manager Puja Vyasak
THROUGH: Ambassador Deborah L. Ross, MD
SUBJECT: Fiscal Year (FY) 2023 PEPFAR Planning Level and Strategic Directions

Dear Ambassador Redfield,

I am deeply grateful for your leadership, and your work to ensure that our health and global community is being protected.

This year, we have faced a significant challenge with the COVID-19 pandemic impacting the entire global community. Despite the current pandemic, we have maintained our commitment to our partners and stakeholders to work together to ensure that the fight against HIV continues.

The Global Guidance, tools, and COP23 Planning Level Letters are essential to our efforts. These letters provide guidance and tools necessary to effectively respond to the dual pandemics of HIV and COVID-19.

In FY 2023, PEPFAR has committed to focusing on:

- Improving access to ART and supporting sustainable health systems
- Strengthening HIV surveillance and monitoring systems
- Increasing investments in HIV testing and treatment

We are committed to ensuring that our partners have the necessary resources and support to effectively respond to these challenges.

Thank you for your continued support.

Sincerely,

Julius Miriti
SGAC Chair
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<td>Feb 2023</td>
<td>PEPFAR teams in each country have a “strategic retreat.” Timing to be determined.</td>
<td>In person meeting for analysis of the docs shared in last slide and Q4 data and focus on solutions that will form basis of COP23 – they will share other data and results. 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 in advance for Quarter 4 results &amp; POART slides.</td>
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<td>Feb-March 2023</td>
<td><strong>Internal USG CO23 strategy meetings</strong></td>
<td>Request stakeholder meeting after country retreats but before Internal USG meeting to follow up the recommendations from the country retreats with what communities think should change.</td>
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<td>USG teams meet internally to discuss initial thinking around COP23 strategy in anticipation of the Johannesburg meeting.</td>
<td>• Consult with communities, especially those outside capitals, get their input and their evidence about why changes are needed.</td>
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<td>• Use data from PEPFAR, gather other evidence, stories, and experiences.</td>
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<td>• Be specific about what should change from last year’s Country Operational Plan. What should be added? Who should be covered? Where?</td>
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<td>Feb 21-24 (Group 1 Countries)</td>
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<td>• Make sure to share your priorities with global civil society networks who can make sure staff in PEPFAR headquarters in Washington are aware.</td>
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**When?**

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<th>Date</th>
<th>Event Description</th>
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<td>Feb 27–March 3, 2023 (Group 1 countries)</td>
<td>COP 23 Global convening with Stakeholders in Johannesburg</td>
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| March 6–10 (Group 2 Countries) | Day 1: plenary sessions; partner-country governments speak on national priorities  
Days 2 - 4: country-specific meetings  
Day 5: country use as needed |

**What happens?**

- COP 23 Global convening with Stakeholders in Johannesburg
- PEPFAR country & Washington D.C. teams, local and international civil society groups, representatives from recipient country governments, UNAIDS and Global Fund gather virtually for meetings where they will lay out priorities.

This is a key advocacy moment where civil society can influence what PEPFAR funds.

**What can activists do?**

1. **Send your best, boldest advocates** well prepared to push for your priorities.
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**, 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 us to find out who is going from the international civil society community.
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| March 6-17<br>(Group 1 Countries)<br>March 13-24<br>(Group 2 Countries) | **In-country Planning and Tool Development.** Country team will work in country to continue discussions (with national and global stakeholders) on high level outcomes from Joburg meeting, refine strategies and work to incorporate widely supported strategy into tools. | What was discussed during the virtual meeting in Feb-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 your community priorities as they write the COP and develop the tools.  
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 routinely shared with civil society.  
4. Stay in touch with the Country Chair, consider scheduling bilateral meetings with the Chair as planning continues. |
| March 20–24<br>(Group 1 Countries)<br>March 27-31<br>(Group 2 Countries) | **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. Notifications of the slides and tools sent to all Joburg delegation participants.  
2. Most recent versions of all draft data tools (budget, data pack, Table 6, etc) MUST be shared with CSOs for analysis and feedback.  
3. During this Strategic Checkpoint, country teams must have at least one formal meeting with CSOs (in-personhybrid) to receive feedback on the strategy slides and draft tools. |
| March 27–31<br>(Group 1 Countries)<br>April 3-7<br>(Group 2 Countries) | **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, activities. Continue to edit and refine tools. | 1. This is 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! |
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<td>April 3-7 (Group 1 Countries)</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 comment before the Tool Checkpoint meeting.</td>
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<tr>
<td>April 10–14 (Group 2 Countries)</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 analyse draft PEPFAR tools. Need support to unpack and analyse the data? Reach out to <a href="mailto:info@pepfarwatch.org">info@pepfarwatch.org</a></td>
</tr>
<tr>
<td>5 working days before COP approval</td>
<td><strong>COP Submission</strong></td>
<td>Request review of draft COP and create tracked changes for submission before finalization</td>
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<tr>
<td>April 24-28 (All Countries)</td>
<td><strong>Virtual Approval Meetings:</strong> Meeting of all stakeholders with country team, chair, 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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How can we win?
1. Clearly outline key recommendations & 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) – focus on a short, strategic list.

• **What is PEPFAR doing on this currently?** Take a look at the 2022 SDS and our “Measuring Up” 2021-2022 report 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 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 PEPFAR data

By using PEPFAR’s own data and evidence to formulate demands we can make them sharper, and our proposals more specific.

• Maybe there should be more focus on underperforming geographic areas?
• 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’s own data will help strengthen our advocacy...
3. Community-led monitoring at PEPFAR sites

As communities, we can generate our own data through community-led monitoring at some PEPFAR sites. Community-led monitoring helps us to have first hand information at our fingertips when engaging with PEPFAR in order to:

+ Call out PEPFAR’s poor performance; or
+ Prove why PEPFAR must prioritise our interventions

• We can design simple monitoring surveys to systematically collect data in a handful, or more expansive, set of health facilities
Community-led monitoring example: South Africa
What is community-led monitoring?

+ Community-led monitoring highlights challenges where HIV and TB services are actually delivered — at public clinics.

+ Monitoring of health services is routine, ongoing, and led by communities.

+ Evidence gathered from community-led monitoring leads to demand for corrective action from PLHIV and communities.

+ It allows us to hold decision makers like PEPFAR accountable for fixing them.
What evidence do we gather?

+ Ritshidze collects both qualitative and quantitative data in clinics and the community in order to systematically gather evidence for analysis and potential action.

+ The questions help to identify the main challenges that healthcare users including PLHIV + KPs find at the clinic and the underlying reasons for them — for example, identifying that waiting times are long because of shortages of staff and a messy filing system, or that people are not accessing the HIV or TB services they need because they are scared of being treated badly or shouted at by staff members.

https://ritshidze.org.za/category/tools/
5. Engage with PEPFAR

• **Before the planning meeting** – we must outline demands before the COP23 planning meeting. Hold a community accountability meeting inviting the Office of the Global AIDS Coordinator (OGAC) and the PEPFAR Country team.

• **At the planning meeting** – we must continue to make our demands. Keep track of what PEPFAR promises in COP23 planning meetings. After the COP23 planning meeting, we must write to the Country Chair and Country Coordinator outlining what promises we heard them make & get it on record, in writing.

• **After the planning meeting** – we must use the new COP23 timeline to our advantage—the “Strategic Checkpoint” and “In-Country Strategy Meetings” are new moments to fight for our demands. Analyse the draft COP23 and Tools. Are our demands and targets included? What is missing? Suggest language they should include in the SDS. Write back to the Country Chair and Coordinator with consolidated suggestions.

• **Make it impossible for them to ignore our demands!**
1. Make clear asks
2. Use PEPFAR’s own data
3. Gather community-led data
4. Amplify community voices
5. Engage with PEPFAR
COP preparation tools for activists
People’s COPs as Advocacy Tools
Upcoming COP23 Webinars — to support the development of activist recommendations to PEPFAR

Sign up at: bit.ly/PEPFARWatchWebinars2023
Want to participate more on PEPFAR Watch Activism? Join us!

Email us to join our mailing list and WhatsApp group: info@pepfarwatch.org

Website + member resources: Sign up to our member only area on the PEPFAR Watch website to access more resources: http://pepfarwatch.org/

Facebook closed group: Join the PEPFAR Watch closed Facebook group for more updates.