PEPFAR Watch Planning Call
Midterm Review COP23
Presentation overview

- PEPFAR refresher
- What is the new COP planning process, introduced in 2023?
- How can we use the 2024 Midterm Review to advance our demands and recommendations?
- Can we win changes to this new process?
- Next steps
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 for prevention, treatment, and care.

Most funding is focused in country programs in Sub-Saharan Africa Haiti, and Ukraine. Smaller regional programs are in Asia, West Africa, and the Western Hemisphere.
PEPFAR Agencies

PEPFAR serves as the umbrella and coordinator for all U.S. government agencies providing funding for the AIDS response. - The U.S. Centers for Disease Control (CDC)
- USAID
- Department of Defense (DoD)
- Health Resources and Services Administration (HRSA)
- 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 PEPFAR 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 had been closed — a confidential U.S.-government-only set of discussions that excluded affected communities. Activists fought to open the process. 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.”

⏰ COP planning processes changed in 2023. Now COPs run on a two year cycle, with only a 2024 “Midterm Review” of performance. Less program oversight will weaken PEPFAR accountability and impact. PEPFAR also has not released “Strategic Direction Summaries” online, reducing program transparency and community trust.
Midterm Review of COP23 performance & Regional Operational Plan 2024
PEPFAR’s COP planning changes, started in COP23:

Less time: Remember, COP23 planning happened on a much shorter planning timeline, with a later start.
- Only 10 weeks of COP planning, with materials shared later in 2023

Two-year COPs: instead of annual workplans, two year plans (covering FY24-25) and two year budgets (“notional budgets” for FY25) were approved, with a Midterm Review of COP23 performance (happening now)

Regional planning meeting: instead of 3 weeks of in person global meetings later in COP planning, with clear decision making, 2 weeks of planning meetings took place earlier, prior to COP approval.

COP23 finalization: 6 weeks of virtual and/or hybrid meetings after in person meetings, with virtual COP23 approval. Systematic oversight and advocacy more challenged, particularly regarding political issues (eg criminalization, sustainability), etc
PEPFAR’s changes in COP planning for the Midterm Review and ROPs (2024):

**Even less time:** The midterm review is an even shorter timeline than 2023.
- Only 2-5 days of midterm review; must be completed by Feb 16
- ROP meetings (duration unclear) and must be completed by Mar 8th
- Planning Level Letters and previously approved COP23 summary materials released/ disseminated (Jan. 19)

**No COP23 data, no SDSs:** Midterm Review will happen before any COP23 data country performance (Q1 or Q2 COP23) are available yet. It’s too early.
- PEPFAR has so far not released SDSs, backtracking on basic transparency commitments. Baseline COP23 PEPFAR commitments might only be known on Jan 19. There won’t be time for robust community analysis before the start of Midterm Review meetings
- PEPFAR’s stated rationale for 2 year COPs was to learn from COP23 implementation. The Midterm Review timeline PEPFAR has chosen contradicts their own stated rationale–because the review is happening too early.
PEPFAR’s changes in COP planning for the Midterm Review and ROPs (2024):

There will be no regional co-planning meeting + additional in-country meetings proposed: 2 weeks of regional co-planning meetings are not taking place in 2024.
- The COP23 Midterm Review or ROP24 Planning Meeting will only be in-country/hybrid between Jan-Feb. There are no additional meetings proposed with the country team outside of these.

Virtual Approval Meeting with Ambassador: COPs (Midterm Review) approval will be between March 14-28 - completed by April 1 and for the ROPs no later than April 30

Sustainability: There is a continued focus on sustainability roadmaps and the need for countries to report on “progress”
PEPFAR’s changes in COP planning for the Midterm Review (2024):

**Strategic Direction Summary (SDS) and Addendum to SDSs:**

- Only Regional Operation Plan (ROP) countries will be required to have a full Strategic Direction Summary Narrative.
- COP23 Midterm Review only requires submission of “Addendum” that describes any new data resulting in a need for a change to the two-year strategy and plans to address any change in strategy and summarize priority focus areas and resource commitments for the Sustainability Roadmap process and development.
- “The COP SDS Addendum will be under 5 pages and added to the end of the SDS submitted at the time of COP23 approval.” We don’t know whether draft COP SDS Addendum and ROP SDS will be shared for review with stakeholders.
PEPFAR’s changes in COP planning for the Midterm Review (2024):
Addendum to SDSs will include:

- New decisions, agreements, and significant geographic or strategic shifts for COP 23 Year 2
- Key agreements with community and civil society organizations
- Key activities that have ended or been delayed affecting the anticipated progress leading into FY25
- For target updates, add an updated version of relevant tables 1-4
- For budget updates, add an updated version of tables B.1.1-B.1.4
- For above site updates, add an updated version of table C. 1
- For USG staffing updates, add in new positions, repurposed positions, or eliminated positions by agency
- Brief summary of priority areas for sustainability roadmap development discussions, based upon the review of COP23 investments in strengthening and sustaining public health systems
- Brief summary of PEPFAR resource commitments to the Sustainability Roadmap Development process vis a vis UNAIDS and country commitments to the process (convening, consultants, or other resource commitments)
Measuring what activists have won
WHERE ARE THE SDSs?

Each year civil society assess the wins from recommendations made in past years as we make new recommendations.

The strategic direction summaries provide a critical view of what civil society was able to win and what lose. We have been unable to carry this analysis out, because for the midterm review, PEPFAR has not shared the SDSs for review.

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

COP23 Midterm Review Calendar for Activists
## COP 23 Midterm Review Meetings

<table>
<thead>
<tr>
<th>Country/OU</th>
<th>Dates</th>
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<tbody>
<tr>
<td>Ethiopia</td>
<td>January 22-26</td>
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<tr>
<td>Cameroon</td>
<td>TBD week of January 29</td>
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<tr>
<td>Dominican Republic</td>
<td>Jan 29-Feb 2, 2024</td>
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<tr>
<td>Lesotho</td>
<td>Week of Jan 29 (tentative)</td>
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<tr>
<td>South Africa</td>
<td>Week of Jan 29 (tentative)</td>
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<tr>
<td>South Sudan</td>
<td>Week of Jan 29th</td>
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<tr>
<td>Tanzania</td>
<td>Week of Jan 29 (tentative)</td>
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<tr>
<td>Uganda</td>
<td>Week of Jan 29th, prob. 30th and 31st</td>
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<tr>
<td>Vietnam</td>
<td>January 30, 31 8-10am Hanoi time</td>
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<tr>
<td>Zimbabwe</td>
<td>Jan 31 - Feb 1</td>
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<tr>
<td>Angola</td>
<td>February 5 - February 9</td>
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<tr>
<td>Botswana</td>
<td>February 5 - February 9 (tentative)</td>
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<tr>
<td>Burundi</td>
<td>February 5 - February 9 (TBC)</td>
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<tr>
<td>Haiti</td>
<td>Feb 5-Feb 9, 2024</td>
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<td>Kenya</td>
<td>Feb 5-Feb 9, 2024</td>
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<tr>
<td>Malawi</td>
<td>Feb 5-Feb 9, 2024</td>
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<tr>
<td>Nigeria</td>
<td>February 05-09 (tentative)</td>
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<tr>
<td>Mozambique</td>
<td>February 6 - February 8</td>
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<tr>
<td>Rwanda</td>
<td>Feb. 6-8</td>
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<td>Ukraine</td>
<td>February 8-9 (tentative)</td>
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<td>Côte d'Ivoire</td>
<td>Feb 12-16, 2024</td>
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<td>DRC</td>
<td>February 12- February 16</td>
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<tr>
<td>Eswatini</td>
<td>February 12 - February 15</td>
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<tr>
<td>Zambia</td>
<td>Feb 12th -16th</td>
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<tr>
<td>Namibia</td>
<td>February 20- February 23</td>
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Dear Stakeholders,

This invite is a placeholder for the COP23 Midterm Review/ROP24 planning meeting. This will be an in-country/Hybrid meeting scheduled to take place the week of February 5 – 8, 2024. A calendar invite and additional details including the venue and agenda will be shared. The meeting will collaboratively review COP23 implementation progress to date, review the strategic goals and targets set during last year’s COP23 process and discuss potential shifts. Please save the date.

Thank you for your time, engagement and continued partnership. We are looking forward to your participation.

Sincerely,

Sending on behalf of:
Brian Rettmann
PEPFAR Kenya Country Coordinator
United States Mission to Kenya
Rettmannbd@state.gov
The President’s Emergency Plan for AIDS Relief

Reach out and ask if you are yet to receive an invite from your country team
## COP Activist Calendar

<table>
<thead>
<tr>
<th>When?</th>
<th>What happens?</th>
<th>What can activists do?</th>
</tr>
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| Jan 2024 | 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 2024 than in 2023. | 1. Review and assess how the new PEPFAR engagement will affect your Advocacy, share thought with your country teams and sign on to letters to PEPFAR advocating for change to the PEPFAR’s 2024 engagement.  
2. Take a look at the PEPFAR data for 2023 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://pepfarwatch.org/resources), [https://mer.amfar.org/](https://mer.amfar.org/)  
3. Start identifying who your strongest advocates are to attend the PEPFAR COP in country strategy retreats.  
4. Get in touch with your PEPFAR coordinator to ask them for a calendar of important meetings and deadlines for your country  
5. Watch out for communication on when the SDSs are up on the [PEPFAR Website](https://www.pepfar.gov/countries/cop/index.htm)  
7. Join our activist update calls. Details will be share in due course |
When? | What happens? | What can activists do?
---|---|---
Jan 2024 | COP 23 Midterm Review and ROP 24 Kickoff Webinar and Tool Q&A Sessions (Jan. 17-23) Refresher Q&A sessions Jan 18: TST Q&A Jan. 22: SPT Q&A Jan. 23: FAST/PASIT/SRE Q&A | • Register and attend PEPFAR midterm review and ROP “Kickoff Townhall” Webinar January 17 (tomorrow!) [https://statedept.zoomgov.com/j/1606220371?pwd=Sy9ySWNaaGtzaHU2ZzRvVjZJMmp6QT09](https://statedept.zoomgov.com/j/1606220371?pwd=Sy9ySWNaaGtzaHU2ZzRvVjZJMmp6QT09) • Ask questions and share concerns about the changes to PEPFAR’s engagement with CSOs. • Be specific about what should change in this year’s engagement plan. What should be added? What data do we need to effectively engage? What do we do where engaging in your country’s process is not safe? What are the Challenges with PEPFAR country staff and why an in-country review meeting/ROP are challenging? Why regional planning meeting are important? • Make sure to share your priorities with global civil society networks who can make sure staff in PEPFAR headquarters in Washington are aware and can support issues raised
When? | What happens? | What can activists do?
---|---|---
Jan 2024 | PLL + previously approved COP23 summary materials will be released Jan 19. The formal PEPFAR process begins—this is the time to identify your specific priorities for change. | 8. Build a written priority list so you send it along with your representatives for the in-country midterm review meeting and ROP meetings. Need for communities to analyse the data and materials – what did/did not work?  
9. 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 midterm review meeting and ROP meetings  
• Quarter 4 POART slides  
• Access to the data (but you don’t have to wait, see https://mer.amfar.org/)
When?  
Jan - Feb 2024

What happens? 
COP23 Midterm Review or ROP24 Planning Meeting in-country/hybrid

- COP23 Midterm Review or ROP24 Planning Meeting in-country/hybrid
- PEPFAR country & Washington D.C. teams, local and international civil society groups, representatives from recipient country governments, UNAIDS and Global Fund gathering in person and 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. Ask the PEPFAR team to send you the **agenda** and presentations for the ROP and midterm review meetings at least two weeks in advance of the meeting.
2. **Send your best, boldest advocates** well prepared to push for your priorities.
3. Ask the PEPFAR team to send you the **data, draft tools** and presentations for the planning meetings at least a week in advance.
4. Have a **pre-meeting with all civil society** organizations to make sure your representatives are well prepared to represent all of your priorities.
5. Consider also doing a pre-meeting with (friendly) government and implementers to gather information.
6. Before the planning meetings **make sure PEPFAR knows your major priorities**, ask that they be included in the agenda for the meeting.
7. Consider a shorter list of your main priorities for the midterm review meetings.
8. Consider inviting the PEPFAR team to a meeting **hosted by civil society** to discuss priorities.
9. 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.
10. Ask your PEPFAR country team for written feedback on the recommendations you have submitted.
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<tr>
<td>Feb 2024</td>
<td>Virtual town hall with Ambassador Nkengasong and community/civil society, February 9</td>
<td>• Register and attend the February 9 town hall call with the Ambassador.</td>
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<tr>
<td></td>
<td><em>Call duration unclear</em></td>
<td>• Ask questions and share concerns about the changes to PEPFAR’s engagement with CSO. Use data from PEPFAR, gather other evidence, stories, and experiences.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Be specific about what should change in this year’s engagement plan. What should be added? The data we need to effectively engage? Where engaging in you country is not safe? Challenges with PEPFAR country staff and why an in-country review meeting/ ROP are challenging? Why regional planning meeting are important?</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 and can support issues raised on the call</td>
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How can we win?
1. Sign on to demand letters for a better, more transparent, more inclusive midterm review and ROP process

• How do you make your voice heard?
- Look out for emails requiring sign you to sign on
- Share the emails with allies in your network
- Share your concerns about the process with your in-country teams and country chairs
- Want to sign on but worried about backlash. Reach out to us on info@pepfarwatch.org and we will support you
2. 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 gay and bisexual men and other men who have sex with men) – focus on a short, strategic list.

• **What is PEPFAR doing on this currently?** Take a look at the 2023 SDS (if/when available) and dive into the Q3 and Q4 data for the current language on what they’re doing. — what does it tell us about progress, and why we need our interventions?

• **What should PEPFAR be doing on this in 2024?** 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?
3. 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...
4. Community-led monitoring at PEPFAR sites

As communities, we 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.
5. Engage with PEPFAR

• **Before the midterm review/ ROP meeting** – we must outline and share demands before the meeting. Invite PEPFAR representative to a civil society meeting where you share your priorities.

• **At the midterm review/ ROP meeting** – we must continue to make our demands and keep track of what PEPFAR promises in the meetings.

• **After the planning meeting** - After the meeting, we must write to the Country Chair and Country Coordinator outlining what promises we heard them make & get it on record, in writing.

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
COP23 Midterm Review Webinars

Calls will be scheduled as the midterm review and ROP meetings progress.
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.