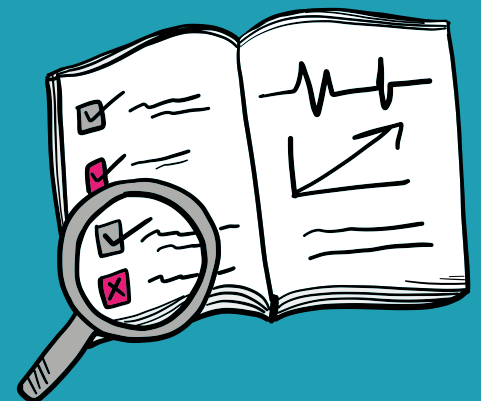


# **Rough Guide to Influencing and Monitoring PEPFAR Country Programs**

**An activist's tool for watchdogging the world's  
largest source of funding for the global HIV  
response where it matters most**



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## Important acronyms

|        |                                                    |
|--------|----------------------------------------------------|
| APR    | Annual Program Results                             |
| CDC    | Centers for Disease Control and Prevention         |
| COP    | Country Operational Plan                           |
| DoD    | Department of Defense                              |
| IP     | Implementing Partner                               |
| MER    | Monitoring, Evaluation and Reporting               |
| OGAC   | Office of the Global AIDS Coordinator              |
| PEPFAR | President's Emergency Plan for AIDS Relief         |
| POART  | PEPFAR Oversight Accountability Response Team      |
| ROP    | Regional Operational Plan                          |
| RPM    | Regional Planning Meeting                          |
| SDS    | Strategic Direction Summary                        |
| SAPR   | Semi-Annual Program Results                        |
| USAID  | United States Agency for International Development |

# 2020 PEPFAR Watch Timeline

## PEPFAR Countries

### Group 1:

Nigeria, Cameroon, Côte d'Ivoire, Ukraine, Democratic Republic of Congo, & West Africa Region

### Group 2:

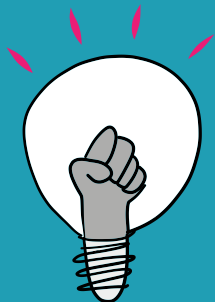
South Africa, Lesotho, Eswatini, Haiti/Dominican Republic, Namibia, Angola, Botswana, Zimbabwe, Zambia, & Mozambique

### Group 3:

Ethiopia, Kenya, Tanzania, Uganda, Burundi, Rwanda, South Sudan, Malawi, & Vietnam

| When?                        | What happens?                                                                                                                                                                                          | What can activists do?                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Dec 2019</b>              | 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 2020 than in 2019. | <ol style="list-style-type: none"><li>1. Start meeting to review <u>last year's COP</u> and begin building a list of recommendations and demands you can submit to PEPFAR by the end of January 2020.</li><li>2. Take a look at the PEPFAR data for 2019 as a tool for advocacy—it tells an important story of what is working and what is not. All <u>PEPFAR data is now online!</u><br/><br/>Need help with the data? Email us at <a href="mailto:data@pepfarwatch.org">data@pepfarwatch.org</a></li><li>3. Start identifying who your strongest advocates are to attend the PEPFAR COP reviews in Johannesburg in March 2020.</li><li>4. Get in touch with your PEPFAR coordinator to ask them for a calendar of important meetings and deadlines for your country.</li></ol>                                                                                                                                                                                                     |
| <b>Dec 2019</b>              | Quarter 4 PEPFAR Oversight Accountability Response Team (POART) meetings.                                                                                                                              | PEPFAR will hold conference calls with each country. Ask to see the data, briefings, slides, and outcomes of that meeting to help you prepare your input.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Nov 25 — Dec 13, 2019</b> | Draft COP guidelines are published, public comment is due December 13.                                                                                                                                 | Get in touch with us at <a href="mailto:info@pepfarwatch.org">info@pepfarwatch.org</a> for the draft guidelines and more information about how to submit your comments.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Jan 2020</b>              | The formal PEPFAR COP planning process begins—This is the time to identify your priorities for change.                                                                                                 | <ol style="list-style-type: none"><li>1. Build a written priority list so you send it along with your representative to the strategic retreat at the end of January. We've provided a template you can use to do this, below.</li><li>2. Ask the PEPFAR coordinator for the materials you need to be engaged. They should provide:<ul style="list-style-type: none"><li>• Global guidance that sets the priorities of PEPFAR headquarters</li><li>• Planning letter — Country-specific guidance that sets funding levels and priorities of PEPFAR headquarters (release January 15th 2020). Examples of planning level letters from past years can be <a href="#">found here</a>.</li><li>• A calendar for the next few months</li><li>• Quarter 4 POART slides</li><li>• Access to the data (but you don't have to wait, see above)</li><li>• Initial invitation for community to choose a representative to be invited for the COP regional planning meetings.</li></ul></li></ol> |

|                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Jan 13 —<br/>Feb 1, 2020</b>                                                                                                                                                                                                | PEPFAR teams in each country have a “strategic retreat.”                                                                                                                                                                                                                                                                                                                                                                                | <ol style="list-style-type: none"> <li>1. Contact your PEPFAR Country team and ask to be invited.</li> <li>2. Come with a clear set of initial demands/priorities.</li> <li>3. Start work on a formal submission from your groups about what you want to see in PEPFAR’s 2020 plan for your country.</li> <li>4. Ask for Quarter 4 POART slides.</li> </ol>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Feb 2020</b>                                                                                                                                                                                                                | Preparation for in-person planning meetings.                                                                                                                                                                                                                                                                                                                                                                                            | <p>Prepare a written submission regarding what you think should change and send it to them as soon as you can. To do this:</p> <ul style="list-style-type: none"> <li>• Consult with communities, especially those outside capitals, get their input and their evidence about why changes are needed.</li> <li>• Use data from PEPFAR, gather other evidence, stories, and experiences.</li> <li>• Be specific about what should change from last year’s Country Operational Plan. What should be added? Who should be covered? Where?</li> <li>• Make sure to share your priorities with global civil society networks who can make sure staff in PEPFAR headquarters in Washington are aware (send your submission to: <a href="mailto:info@pepfar-watch.org">info@pepfar-watch.org</a>)</li> </ul>                                                                                                                                                                                                                                                                                                                                                              |
| <b>Feb 17—21</b><br>(Group 1)<br><br><b>Feb 24—28</b><br>(Group 2)<br><br><b>Mar 2—6</b><br>(Group 3)<br><br><b>Mar 9</b><br>(Asia Region — Bangkok)<br><br><b>Mar 23</b><br>(W. Hemisphere region — Washington DC or Atlanta) | <p>2020 COP Planning Meetings: PEPFAR country and Washington D.C. teams, local and international civil society groups, representatives from recipient country governments, UNAIDS and Global Fund gather in Johannesburg for five-day meetings where they will lay out the priorities for the PEPFAR program in your country for FY 2020.</p> <p>This is a key advocacy moment where civil society can influence what PEPFAR funds.</p> | <ol style="list-style-type: none"> <li>1. Send your best, boldest advocates well prepared to push for your priorities; please email <a href="mailto:info@pepfarwatch.org">info@pepfarwatch.org</a> to share the names of those who will be going!</li> <li>2. Ask the PEPFAR team to send you the data and presentations for the planning meetings at least a week in advance.</li> <li>3. Have a pre-meeting with all civil society organizations to make sure your representatives are well prepared to represent all of your priorities.</li> <li>4. Consider also doing a pre-meeting with government and implementers to gather information.</li> <li>5. Before the planning meetings make sure PEPFAR knows your major priorities, ask that they be included in the agenda for the meeting.</li> <li>6. Consider inviting the PEPFAR team to a meeting hosted by civil society to discuss priorities.</li> <li>7. Get in touch with global civil society groups who can support you at the reviews. Email <a href="mailto:info@pepfarwatch.org">info@pepfarwatch.org</a> to find out who is going from the international civil society community.</li> </ol> |



## Tip: Health GAP We will host a civil society pre-meeting in Johannesburg the day before each COP20 Planning Meeting. Tentative dates are below.

Group 1  
**Feb 16**

Group 2  
**Feb 23**

Group 3  
**March 1**

Make sure to email [info@pepfarwatch.org](mailto:info@pepfarwatch.org) to let us know who the civil society organization representative is from your country and to get more information about these meetings.

**Feb / Mar 2020**

Country Operational Plan is drafted

What was decided in Johannesburg in February / March is only the first step and many details still have to be worked out including the exact activities, budgets, and areas of geographic focus.

1. Stay in touch with PEPFAR country teams, keep pushing for community priorities as they write the COP.
2. Ask your PEPFAR country team for written feedback on the recommendations you have submitted.
3. Make it clear you want to review the narrative of the COP (known as the Strategic Direction Summary) as soon as a draft is ready.

**Mar 2020**

Strategic Direction Summaries (SDS) are shared for feedback before the COP goes to the U.S. Ambassador in your country for sign off (which means these will come a few days before the due dates below)

Your input on this critical document is still required to be considered by the Ambassador and by PEPFAR headquarters in Washington.

- Read the Strategic Direction Summary and suggest changes and additions by sending these in writing to your PEPFAR Country team.
- If you have done a formal submission, you can just update this to note what has not been taken on board fully in the SDS (maybe in red ink).

**Mar 13, 2020**

(Group 1)

**Mar 20, 2020**

(Group 2)

**Mar 27, 2020**

(Group 3)

Asia region & Western Hemisphere dates TBC

COPs due to the Office of the Global AIDS Coordinator (PEPFAR's Headquarters) in Washington, D.C.

After COP submission, the work is not over. You can still influence by:

- Lobbying the PEPFAR team to make changes before the virtual COP approval.
- Coordinating with U.S.-based and global advocates to make sure PEPFAR Washington knows about further changes you still want. Remember OGAC is now reviewing the COP and changes may still be made.

**Mar 30 —**

**April 10, 2020**

(all groups)

In country COP approval

Ambassador Birx will officially decide whether to sign and approve the COP or not at a 2-day In-country approval meeting (for the West Africa Region it is still to be confirmed if this will be virtual and in-country)

**Oct 1, 2020**

Implementation of the 2020 COPs begin.

Write to your Country Chair and Country Coordinator reminding them of your priorities and that activists will be watching PEPFAR progress and holding them accountable throughout the year.

## 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](mailto:info@pepfarwatch.org)

# A few basics about PEPFAR

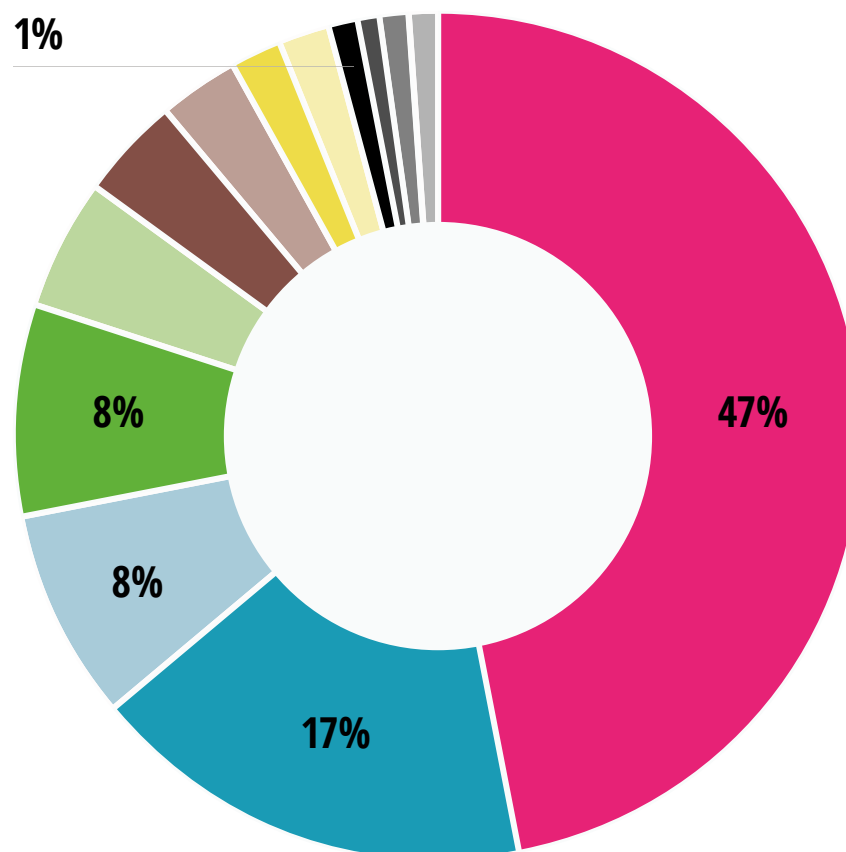
## What is PEPFAR?

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, and in smaller regional programs in Asia, the Caribbean, and Latin America. As of September 2017, this program was supporting access to HIV treatment for 14 million people, and has supported testing and counselling for more than 85.5 million people.

## Why is PEPFAR important?

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

## 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 bilateral
- Netherlands
- Germany
- Sweden
- UNITAID
- Australia
- Denmark
- Norway

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## 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 Labour, 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.

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## Who gets PEPFAR funding in recipient countries?

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

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## 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.

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## Why should you care about influencing PEPFAR?

PEPFAR is a dominant source of funding for HIV treatment, prevention, care and health systems strengthening in many countries. The stakes are higher than ever to make sure that this funding is put to the best possible use. With just two years left to achieve the 90-90-90 goals and progress toward epidemic control, many countries are dangerously off track.

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

# Key PEPFAR players

## U.S Global AIDS Coordinator

The current U.S. Global AIDS Coordinator is Ambassador Deborah Birx. Ambassador Birx approves all the final COPs. She holds the ultimate power to approve (or not approve) the COPs.

## The Country Chair

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

## The PEPFAR country teams

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

- **The Country Ambassador.** The U.S. Ambassador for each country is the supervisor of the PEPFAR Country Team. You may also meet the deputy chief of mission (DCM) or deputy ambassador. Some are very active on PEPFAR and some less so, but they can have 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 main point of contact with PEPFAR in country. They often do not make the final decisions, but they coordinate all the different team members.
- **Centers for Disease Control and Prevention (CDC), United States Agency for International Development (USAID), Department of Defense (DoD) Leaders.** Each agency also has a director and staff in every country, who are in charge of managing the implementation of PEPFAR. They often have a lot of power over the details of the COP and the deepest knowledge of particular areas.

## Implementing Partners

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

# Influencing PEPFAR country plans

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## 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 [2019 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.

*“We are  
Malawians.  
We know what  
our people  
want.”*

— Gift Trapence, Executive Director,  
Centre for Development of People, Malawi

Civil Society  
Meeting

## How can activists in recipient countries influence PEPFAR?

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

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



U.S. Global AIDS Coordinator, Ambassador Deborah Birx, responds at a town hall meeting hosted by local civil society organizations to share their priorities for PEPFAR in South Africa.

## Have activists actually had a real impact on these plans?

Yes! In 2019, Health GAP worked with civil society activists to use the COP process to win changes to PEPFAR programming that reflect community needs. These included:

- In **South Africa**, a reversal in funding cuts amounting up to \$730 million for the country program; and \$3 million to support communities of people living with HIV to monitor the state of service delivery at clinics and community healthcare centres across the country.
- In **Malawi**, increased investment in community nurses in four districts, equipped to bring ART and other essential medications, along with adherence support, closer to people living with HIV.

- In **Kenya**, \$18.4 million for key population service delivery up from \$16 million in COP 2018; as well as access to the option of dolutegravir for all women of reproductive age in Kenya.
- In **Mozambique**, PEPFAR's 2019 COP will fund civil society's proposal for innovative community-led monitoring to hold facilities and clinical partners accountable to deliver high quality HIV services.
- In **Tanzania**, PEPFAR's 2019 COP will fund civil society's proposal for innovative community-led monitoring to hold facilities and clinical partners accountable to deliver high quality HIV services.



## 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

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## 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 international civil society partners (such as Health GAP) 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 2019?** Take a look at your country's 2019 COP for the current language on what they're doing. Dive into the Q3 and Q4 data - what does it tell us about progress, and why we need our interventions?

**What should PEPFAR be doing on this in 2020?** What specific language should PEPFAR include in the COP? What should the target be? Be clear and specific! Do we know what budget is needed?

## 2. Dive into the data

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

### Overview of the PEPFAR COP Planning Cycle

|                            |                                                                                                   |
|----------------------------|---------------------------------------------------------------------------------------------------|
| December:                  | Time to outline your priorities                                                                   |
| January:                   | Chance for you to push PEPFAR on the things you think should change.                              |
| Late Jan / early February: | In-country PEPFAR planning retreats                                                               |
| February / March:          | COP20 Planning Meetings, Johannesburg, Bangkok (Asia region), Washington DC (Western Hemisphere). |
| March / April:             | Feedback on the draft COP requested before submission                                             |
| Early April:               | Don't stop now! Keep pushing because OGAC is still reviewing the COP!                             |
| Late April:                | Final COP is signed.                                                                              |

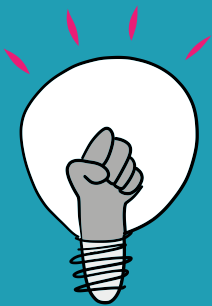
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### 3. Visit and Monitor PEPFAR sites

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

### 4. Engage with PEPFAR before and after the Regional 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 COP20 Planning Meeting in Johannesburg. Use the Planning Meeting to continue to make your demands. Keep track of what PEPFAR promises in the Planning Meeting in the [checklist](#). After the Planning Meeting, write to the Country Chair and Country Coordinator outlining what promises you heard them make. Get it on record. Ask to see the draft SDS when it is ready. Analyse the draft SDS. Are your demands and targets included? What is missing? Suggest language they should include in the SDS. Write back to the Country Chair and Coordinator with your suggestions. Make it impossible for them to ignore your demands!



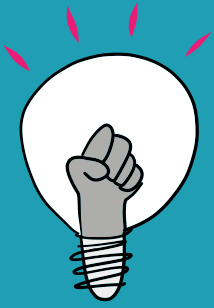
#### Tip: The COP20 Planning Meetings

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

### 5. Amplify community voices

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

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



## TIP: Experimenting with new tactics: “The People’s COP”

Following the success of the “People’s COP” in 2018—a tactic developed by the Treatment Action Campaign (TAC), SECTION27, Health GAP, Médecins Sans Frontières, and South Africa’s Positive Women’s Network—“People’s COPs” outlining community priorities were developed in three additional countries in order to influence PEPFAR’s plans in 2019.

Activists in [Malawi](#), [Kenya](#), [South Africa](#) and [Uganda](#) worked to collect community data at clinics and health centres in order to develop recommendations based on the needs at the frontline of HIV service delivery. These were then launched in high-profile events attended by people living with HIV and community members, alongside U.S. Ambassadors and the leadership of each of the U.S. agencies involved in PEPFAR in the countries. The events pushed the voices of grassroots people living with HIV, young women, and communities of key populations into PEPFAR discussions that too often focuses on numbers and targets instead of people and lives. The voices of people living with HIV such as [Thakane](#) and [Shadreck](#), were heard even by teams in the COP19 planning rooms, where decisions were actually being made.



*“The People’s COP is fantastic—it’s a clear best practice. It makes specific recommendations that we can really act on. I’ve asked the team to go point by point and be clear on what we are going to do on each point. We wish all countries had this.”*

— U.S. Global AIDS Coordinator Ambassador Deborah Birx

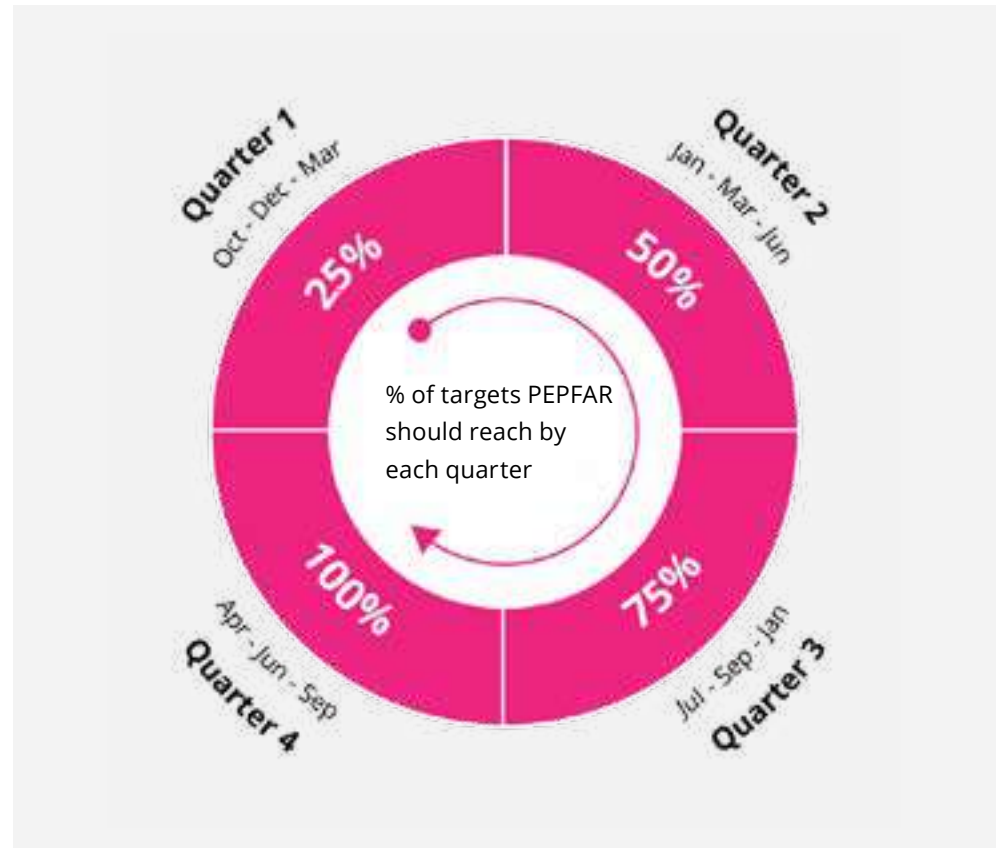
# Monitoring PEPFAR country plans

## 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.

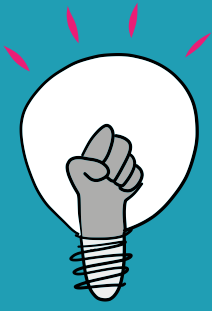


## How can you begin to make sense of PEPFAR's data?

We know that data can be quite overwhelming, but with a few pointers it gets easier! PEPFAR uses a lot of acronyms and codes – but with the [codebook](#), it becomes much easier to work with.

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

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



## TIP: Explore PEPFAR data using amfAR's PEPFAR Monitoring, Evaluation, and Reporting Database:

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

- **Exploring progress on treatment:** On the [website](#), first select your country. You will first see a page that describes the treatment cascade. PEPFAR monitors HIV treatment through a cascade of indicators: HIV testing (total tested and the number diagnosed with HIV), linkage to treatment, initiation on treatment, retention on treatment, and the total number on ART. Each of the relevant indicators is shown in the treatment page.
- **Exploring progress on prevention:** In the second tab, you can monitor PEPFAR HIV prevention programs. Here you can see indicators on the PMTCT program (pregnant women initiated on treatment, infants tested and treated), VMMC, prevention programs for key and priority populations, and PrEP.
- **Exploring progress by district:** By default, both of these pages will show you data at the national level and across the entire PEPFAR program. Selecting districts in the map will update the data to just the districts selected. The filters on the left of the page can look at the targets and results for direct service delivery (DSD) or technical assistance (TA) separately.
- **Identifying PEPFAR's geographic priority areas in your country:** Importantly, PEPFAR's district priorities mean it does much more work in some districts than others. You can identify those districts that are most important to PEPFAR on the left filters as Attained or Scale-Up versus those that are Sustained or Centrally-Supported. You can select a specific quarter or you can look at the overall year-to-date (YTD) results.
- **Understanding PEPFAR's indicators:** Definitions for all of the indicators that PEPFAR uses are available next to the map on the Indicator Trends & Performance pages, along with a link to the full text of each indicator. Also, under every graph on the website, there is a drop down menu which explains that indicator, how each indicator fits into the treatment and/or prevention programs, and desirable trends. Importantly, it will also show you examples of how you (and PEPFAR) should be interpreting the targets and results, as well as examples of misleading or inaccurate ways of describing the data. It's a good idea to read through these dropdowns as you look at the graphs to make sure that you notice any potential problems that should be raised in your next meeting.
- **Get data summaries for your country:** You can get a summary of the data for your country. At the top-right of each page, just click the 'Download Fact Sheet' and you'll see a PDF with all of the same information. The last page of the fact sheet has a convenient way to see the codes PEPFAR uses most frequently.
- **Digging deeper:** If you have concerns with the targets or performance for any indicator, you can dig deeper into the data by switching to the third tab ("Indicator Trends & Performance"). Select your indicator of interest from the dropdown menu. From this page you can see a map that will show you the number of services provided, indicator targets, and performance against targets in each district. Further down, you can see detailed trend data in each quarter. Under 'District Performance,' you can see which districts have the highest and lowest performance. Finally, at the bottom of the page (and every page!) there are data tables, which can be sorted by performance, target size, or district priority.

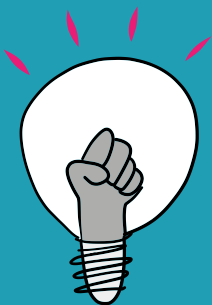
## How can you get ready for your next quarterly monitoring meeting with PEPFAR?

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

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

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

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



**TIP: Still need help making sense of the data?**

**Email us at:**  
**[data@pepfarwatch.org](mailto:data@pepfarwatch.org)**

## 5 Steps to Start Monitoring the Implementation of PEPFAR Country Plans

1. **Document your demands and PEPFAR's commitments:** First, it is very important to document the recommendations, demands, and commitments made during the COP review. You should also document the responses that you were given by the Country Coordinator and other PEPFAR staff during the COP Review. This should include who responded to your demands, when they responded, what they agreed to and in what timeframe.
2. **Review the Strategic Direction Summary carefully:** The draft Strategic Development Summary (SDS) document will be released shortly after the COP Review is finished with a very small window of opportunity to make comments or request edits to this document. Read through this document to see if your suggestions have been incorporated into the document. If you have requested changes to how programs are run and they do not appear in the SDS, it is much harder to get those changes implemented later.
3. **Stay in touch with your Country Coordinator:** Next, you should follow up with your Country Coordinator after the COP Review is concluded. You should first reiterate the demands that you have made and remind them of what they have agreed to do.
4. **Ask for the schedule of important quarterly meetings for your country:** You should also ask your Country Coordinator to send you the schedule of quarterly data review or PEPFAR Oversight Accountability Response Team (POART) meetings. These are meetings that happen every three months in which PEPFAR country teams outline progress against their quarterly targets. Country teams also report back to OGAC on their quarterly performance via conference calls. Make sure to request the dates for these calls as well. As part of these calls, country team are expected to report back on what civil society recommendations were given during the quarterly meetings. Meeting with your country teams before they do these calls to ensure the civil society input is reflected in the call.
5. **Get familiar with your country's PEPFAR performance data:** The most user-friendly way to obtain PEPFAR's program performance data is via amfAR's PEPFAR Monitoring, Evaluation and Reporting database described in detail above. Spend some time exploring the database and reach out to us at [data@pepfarwatch.org](mailto: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](mailto:info@pepfarwatch.org)

## About PEPFAR Watch

PEPFAR Watch is a growing network civil society organizations, non-governmental organizations, activists and data analysts that is working 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 technical assistance to activists and organizations interested in working to influence and monitor PEPFAR. PEPFAR Watch is convened and coordinated by the Health Global Access Project (Health GAP).

## 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, please email at: [info@pepfarwatch.org](mailto:info@pepfarwatch.org)

