

Preparing for Prime: Local Partner Knowledge Exchange on Managing Direct Funds

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Everyone needs to understand that they have a role in the successful transition process.”

– Grace Kumwenda,
Chief of Party, LEAP

In 2018, the U.S. President’s Emergency Plan for AIDS Relief (PEPFAR) announced ambitious local funding targets. While most funding is currently awarded to organizations based in the United States who then partner with local civil society organizations (CSOs), PEPFAR is working towards transitioning 70 percent of the United States Agency for International Development (USAID)/PEPFAR funding to local CSOs through direct awards. Local ownership of programming through direct delivery of HIV prevention, care, and treatment services is essential for long-term sustainability of the HIV response.

As part of its mission to attain and maintain HIV epidemic control among key and priority populations, the Meeting Targets and Maintaining Epidemic Control (EpiC) project, funded by USAID and PEPFAR, provides mentorship and technical assistance to local partners to enhance organizational management skills and strategic information tracking and reporting capacity to meet the standards needed to receive and manage direct funding. EpiC also strengthens partners’ technical capacity to deliver high-quality services and meet benchmarks.

The Pakachere Institute for Health and Development Communication (Pakachere) in Malawi partnered with EpiC, and previously the Linkages across the Continuum of HIV Services for Key Populations Affected by HIV (LINKAGES) project, from 2015 through 2019. LINKAGES led Pakachere through an organizational capacity assessment to evaluate their readiness to receive funding. From this assessment, a capacity development plan was created to identify areas for Pakachere to work on prior to receiving direct funding.

Pakachere was awarded funding under a USAID cooperative agreement for the period 2019–2024 to implement the Local Endeavors for HIV/AIDS Prevention and Treatment (LEAP) activity. EpiC continued to provide technical assistance as needed to address challenges, troubleshoot problems, and respond to questions and concerns.

EpiC, which also supports other local partners globally to receive direct funding from USAID, brought some of them together in March 2022 to share experiences and learn from each other. This excerpt from the conversation includes responses provided by Grace Kumwenda, Chief of Party, LEAP; Simon Sikwese, Executive Director; and Stanley Kalyati, Monitoring, Evaluation and Learning Director. The local partners preparing for direct funding were West Africa AIDS Foundation (WAAF) in Ghana, and Society for Women and AIDS in Africa (SWAA) and L’Association Nationale de Soutien aux Séropositifs et malades du sida (ANSS) [National Association for the Support of HIV-Positive and AIDS Patients] in Burundi.



Pakachere's Tips for Managing Direct Funds

- Understand USAID terminology
- Understand contractual obligations
- Ensure full compliance
- Be responsive to guidance and communication
- Meet targets
- Data must be credible and above board
- Align staff with donor needs
- Leverage technical assistance partnerships

Q: What are the most important factors in preparing for transition?

To prepare for transition, you have to understand your own organization. You have to think about: How is your organization going to embrace the transition? Will your staff's current capacity enable you to meet the needs of the donor? Do you have strong technical staff and M&E staff? Assessing your current team and their strengths and gaps is important in preparing for an award.

Understanding PEPFAR language is another key factor. There are a lot of documents to understand, and you will need to align your work with the country operational plans (COPs). This is not a one-off thing – you need to continuously check documents and ensure you understand what is being required of you.

Q: Meeting targets is critical, but does that mean there is no flexibility? What strategies do you employ to meet targets?

It is important to meet targets, but this does not mean you will never run into issues beyond your control. When this happens, you need to communicate the challenges clearly and early. Last year, the Pakachere team had an issue meeting one of our targets. There were challenges with government approval, and all partners were struggling. We were open with USAID about the challenges and what we were doing to address them. USAID was very understanding because we were open with them. Holding yourself accountable and closely tracking your progress is essential to identifying gaps and meeting targets.

Q: How do you create ownership among staff as you explore transition?

Make sure your staff understands the steps being taken and how these steps will impact them and the organization as a whole. If you do not communicate clearly, your staff may become worried that they will be pushed out or that they will lose jobs. Pakachere leadership framed the transition as an opportunity for staff to grow. Because of this, we transitioned with a team of people who were excited, instead of anxious. We also created expectation at all levels, so everyone understood what they needed to do to prepare for transition. We also created a system to address questions and concerns from our staff.

Q: How do you manage your relationship with USAID as a direct awardee?

You need to be proactive and responsive to all of USAID's requests. What has helped our transition is that we have a good relationship with our AOR. Our AOR is someone who will make a case for us and is willing to talk with us. Make sure you communicate when you have challenges and always ask questions if you are unsure about something. Sometimes we do not understand all of the information in an email, and we need to read everything carefully and ask, instead of assuming. At Pakachere, we still have much to learn and are always asking questions.

The three local partners expressed appreciation for hearing directly from a local organization implementing a U.S. Government award. "Many thanks [...] for organizing such an insightful exchange event," said Dr. Naa Ashiley Vanderpuye-Donton, Chief Executive Officer for WAAF. "WAAF has learned a lot [...] and [we] could literally put ourselves in the shoes of Pakachere and get an excellent idea of what the journey to direct funding looks like, which allowed [us] to more clearly see [...] what we could do to better [prepare for] transition."



[USAID is] looking at how they can provide the best support so that you can grow.”

– Simon Sikwese,
Executive Director,
Pakachere

In a recent training on subaward management, the WAAF team recalled what they learned during the session with Pakachere. Dr. Paul Sowah, Director of Programs, asked that technical assistance include a session on USAID terminology, saying “we’ve learned from other partners that terminology is really important.” In response, the EpiC team is planning a session to orient WAAF on contractual language that is used in a direct award and would need to be used in any future subawards to other local partners they manage.

Based on the success of this exchange, EpiC is hosting more of these sessions focusing on specific aspects of award management. These sessions will facilitate connections between local CSOs and encourage continued knowledge exchange between local partners after EpiC ends, contributing to the local ownership and sustainability of HIV programs.

For all other enquiries, please contact  Hally Mahler, EpiC Project Director : hmahler@fhi360.org

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