Grant-making

How to perform grant-making related steps in the Partner Portal

Before you begin

Click here for information on “The purpose of this guide”

Click here for instructions on “How to use this guide”
The **grant-making** process translates the funding request into grants ready for implementation. The **Technical Review Panel (TRP)** reviews the funding request and, if it receives a TRP recommendation, the funding request proceeds to grant-making. Grants are negotiated between the Global Fund and the selected Principal Recipient (PR), in consultation with in-country stakeholders and communities. The specifics of the program are registered in documents and submitted for **Grant Approvals Committee (GAC)** review. Once these grant documents are recommended by the GAC and approved by the **Board**, the grant is signed by the Global Fund and the PR and acknowledged by the Country Coordination Mechanism (CCM).

A number of critical grant-making exchanges - including notifications and final document submissions - between PRs and the Global Fund are facilitated through the **Global Fund Partner Portal**.

This document is an interactive guide for **PRs** to understand the **process and system steps involved in receiving and submitting grant-making documents**.

**Click here** for instructions on how to use this guide
1. To navigate the different sections of this document, click on the tabs to the right.

2. On the right side of this page, on the “End-to-end high-level process” tab, the highlighted boxes show the grant-making processes that involve the Partner Portal. The highlighted boxes indicate PR is involved in this step. In-Portal icon (     ) indicates this step is in the Portal. Click for system instructions.

3. To advance to the next step, click on the buttons marked with a purple square

4. The information in dotted brackets provides additional guidance

5. On the right side of this page, the “Additional resources” tab provides access to extra grant-making resources
Use of Global Fund Partner Portal for grant-making: Critical engagements between the PRs and Country Teams (CTs) during grant-making (such as notifications, document sharing and submission) are facilitated through the Global Fund Partner Portal. PRs nominate their contacts with grant deliverable access rights (editor or submitter) in the Partner Portal following the Grant Entity Data (GED) processes*.

**Key GED Definitions:**

**Organization information:** refers to information about the organization to be captured in the legally-binding documents for the successful execution of grant life cycle processes (such as official name, address and contacts).

**Banking Information:** provides details of the bank account that will be used to receive disbursements from the Global Fund (such as bank account number and account holder name).

**Contacts with Signatory Rights:** refer to persons that are duly authorized by the organization to sign or acknowledge legally-binding documents and/or to sign disbursement requests.

**Contacts with Notice Rights:** refer to the persons that will serve as the contact point for Global Fund notices regarding contractual matters (as per the terms of the relevant Grant Agreement) and/or grant or portfolio-specific correspondences.

**Contacts with Access Rights:** refers to the person that will have access to the Global Fund Partner Portal to manage GED

**Contact with Grant Deliverables Access Rights – Editor:** Contacts responsible for accessing, completing, and attaching grant deliverables (e.g., grant-making, pulse checks, PU/DRs) and any supporting documents through the Partner Portal. Editor rights are assigned per grant/portfolio, and one contact can be editor for either one or multiple grants/portfolios.

**Contact with Grant Deliverables Access Rights – Submitter:** Contacts responsible for submitting grant deliverables (e.g., grant-making, pulse checks, PU/DRs) to the Global Fund through the Partner Portal, in addition to having editor rights (access, complete and attach).

**Note:**
- At a **minimum**, each grant is required to have one **Submitter**. It is recommended having **two Submitters** per grant.
- Editors and Submitters have access to Grant-making, PU/DRs and Pulse Checks (where applicable). PRs must ensure the appropriate contacts are assigned these rights to be able to engage with one or more of these modules

*For further in-system instructions on GED, refer to the GED Interactive Guide*
The Global Fund registers PR in the system. (only applicable for new PRs)

The PR attaches and submits final grant-making documents in the Partner Portal.

The Global Fund reviews documents.

GAC reviews the documents and Board approves the grant.

PR signs and shares the Grant Confirmation.

Additional resources

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End-to-end high level process
Please ensure that the Editor and Submitter contacts have **Access to Grant Deliverables** selected for the relevant grant(s).

See the **GED Interactive Manual** for instructions on how to update Grant Entity Data.

To go back to the **end-to-end high-level process page**, [click here](#) or on the tab to the right.
Step 5.1 – PR downloads documents submitted by the Global Fund

1. Click **Grant-making**

**Note:**
- For a better user experience, please use the zoom browser at 90% or 100%.
The grant status is shown in the ECU-H-SPU section.

- Step 5.2 – PR downloads documents submitted by the Global Fund

Note:
- The grant will not be visible on this page if the Global Fund has not yet shared the documents.
- The PR won’t be able to access the grant details if the GED setup is incomplete.
For more information on the grant-making process, access the highlighted link.

Close the pop-up by clicking **Cancel**.
PARTNER PORTAL LEARNING SERIES
Grant-making: System Steps

1. At the top, key grant information is displayed.

2. Key GED contacts appear on the top of the page. Hovering over the box triggers a message with information on where to find GED guidance if GED roles or contacts need to be added or changed.

3. The chevron bar indicates the current status of the grant-making process and future steps.

4. Under Download grant-making forms, click the button Download to access the forms individually or Download All to access all documents at the same time.

Note:
- Make sure cookies are enabled in the browser to ensure all buttons function correctly.
After downloading the documents, save them on your computer.

The links below provide instructions on how to complete the main documents:

- Guidance for Developing and Reviewing Performance Frameworks
- Instructions for Completing the Detailed Budget Template

**After the documents are completed, send them back to the Global Fund by following these steps.**

This completes Step 5 of the process, “PR downloads documents submitted by the Global Fund”
Step 7.1 – PR attaches GM documents in the Portal

To attach the documents for submission, click **Attach Documents**

**Note:**
- PRs only submit the final versions of the documents for **GAC review** after these are negotiated and agreed upon between the PR and the Global Fund.
Step 7.2 – PR attaches GM documents in the Portal

Note:
When attaching either a Performance Framework or a Detailed Budget please note that only one file of each type can be attached at a time. If changes or new versions of these documents are needed, these can be attached and they will supersede the prior version when selecting documents for submission.

1. Select the document you want to attach and click Open.

Note that the Performance Framework must be attached before the Detailed Budget!
Step 7.3 – PR attaches GM documents in the Portal

1. Select the **Document Type** and **Language** in the drop-down lists

2. Click **Save and Close**

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**Note:**
- The **Performance Framework** and **Detailed Budget** languages are preselected. For other documents, it is necessary to select the language.
- The system will save only the **latest version of the attached Performance Framework and Detailed Budget**. Make sure you attach the most up-to-date versions.
- It is necessary to select the **Document type** and **Language** to enable the **Save and Close** button.
Step 7.4 – PR attaches GM documents in the Portal

Note:
When attaching either a Performance Framework or a Detailed Budget please note that only one file of each type can be attached at a time. If changes or new versions of these documents are needed, these can be attached and they will supersede the prior version when selecting documents for submission.

1. Follow the same process for the Detailed Budget. Select the document you want to attach and click Open.

Note that the Performance Framework must be attached before the Detailed Budget!
Step 7.5 – PR attaches GM documents in the Portal

1. Select the Document Type and Language in the drop-down lists.

2. Click Save and Close.

Note:
- The Performance Framework and Detailed Budget languages are preselected.
- For other documents, it is necessary to select the language.
- The system will save only the latest version of the attached Performance Framework and Detailed Budget. Make sure you attach the most up-to-date versions.
- It is necessary to select the Document type and Language to enable the Save and Close button.
The documents are attached under the **Grant Documents for submission to the Global Fund** section.

1. **Step 7.6** – PR attaches GM documents in the Portal

2. Check the boxes under **Final PR Submission**.

**Note!**
Documents selected below will have a green checkmark in the list above.

3. Click **Submit to the Global Fund** to complete the process.
You are submitting documents for ECU-H-SPU

One or more required documents have not been attached or selected, please confirm this is the final submission.

By clicking "Submit" you confirm these files have not been unprotected or tampered with and are the final documents for review by the Global Fund.

1 A pop-up asks you to confirm this is your final submission.

2 To confirm, click Submit.

This completes Step 7 of the process, “PR attached GM documents in the Portal”
PARTNER PORTAL LEARNING SERIES
Grant-making: Additional Resources

• **GED Interactive Manual** – This document provides instructions on to manage Grant Entity Data in the Partner Portal.

• **Guidance for Developing and Reviewing Performance Frameworks** – This document describes the process for developing and reviewing the Performance Framework prior to grant signing.

• **Instructions for Completing the Detailed Budget Template** – This document provides guidance for the development and review of a Global Fund grant budget (and budget revisions when applicable), using the detailed budget template.

• **Modular Framework Handbook 2023-2025** – This document details the standard modules, interventions and performance indicators to support in the development of funding requests and grant documents for the Global Fund.