GRANT-MAKING – QUICK PLANNING GUIDE
(for new grants submitting to TRP W1 and starting new IP in January 2021)

ONGOING GRANT IMPLEMENTATION (Y3 OF IP)

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**PLAN**

- Agree on Deliverables & Timelines
  - CCM, PR, CT, LFA

- Prepare & finalize Implementation Arrangement Map
  - CCM, PR, CT, LFA

- Complete Capacity Assess.
  - CT, LFA

- Discuss need for advance payment mechanism, as applicable
  - CCM, PR, CT

**NEGOTIATE: TIMELY & QUALITY GRANT-MAKING**

- Prepare & finalize Detailed Performance Framework
  - CCM, PR, CT, LFA

- Prepare & finalize Detailed Budget
  - CCM, PR, CT, LFA

- Prepare & finalize Health Product Management Template (previously List of Health Products)
  - PR, CT

- Address TRP clarifications identified for grant-making
  - PR, CT

- Complete & validate Grant Entity Data (previously Master Data)
  - CT, LFA

- Identify residual risks & mitigating actions
  - CT, LFA

**IMPLEMENTATION READINESS**

- Submit to GAC
  - (1) Finalize grant docs
  - (2) Prepare Financial Calculator
  - (3) Prepare Grant-making Final Review Form
  - (4) Create Purchase Order

- GAC MEETING for grant recommendation
  - DATE TBD

- BOARD DECISION
  - ~3-4 weeks after GAC

- CCM MEETING for grant recommendation
  - DATE TBD

- GAC SUBMISSION DEADLINE
  - DATE TBD

- TRP REVIEW OUTCOME
  - <10 days after TRP Review

- TRP SUBMISSION WINDOW 1
  - 23 – 11

- TRP REVIEW WINDOW 1
  - 23 – 11

- TRP REVIEW OUTCOME WINDOW 1
  - <10 days after TRP Review

- ONGOING GRANT IMPLEMENTATION (Y3 OF IP)

- TIMELY GRANT SIGNING
  - Negotiate Grant Confirmation
  - CT, PR

- PLAN FOR IP RECONCILIATION & GRANT CLOSURE
  - CCM

- All stakeholders in a gray icon ( ) are involved in the respective step through an oversight capacity.

Issue Date: March 2020
## Capacity Assessment
- Implementation Arrangements Map
- Detailed Performance Framework
- Detailed Budget
- Health Product Management Template

## Grant Entity Data
(Previously Master Data)

## Implementation Readiness Checklist

## Grant Confirmation

### Templates
- Global Fund generated Excel template
- Sample template in guidelines
- Global Fund generated Excel template
- Global Fund generated Excel template
- Partner Portal
- Implementation Readiness Checklist forthcoming
- Global Fund generated Word template

### Estimated Timeline
|--------------------------------|----------------|----------------|----------------|----------------|----------------|---------------|

### Stakeholder Responsible
- CT and LFA to assess the capacity of Principal Recipients.
- CCM to be informed of results.
- PR to complete with consultation with CCM.
- PR to negotiate with CT.
- LFA to review as requested by CT.
- CCM to oversee timelines and quality.
- LFA to review as requested by CT.
- CT to submit final version to GAC.
- CT to generate Performance Framework template.
- PR to complete and negotiate with CT.
- CCM to oversee timelines and quality.
- LFA to review as requested by CT.
- CT to review and submit to GAC.
- CT to generate Budget template.
- PR to complete and negotiate with CT.
- CCM to oversee timelines and quality.
- LFA to review as requested by CT.
- CT to review and submit to GAC.
- CT to generate Health Product Management Template.
- PR to complete and negotiate with CT.
- CCM to oversee timelines and quality.
- LFA to review as requested by CT.
- CT to review and submit to GAC.
- CCM to enter and submit information via Partner Portal.
- PR to enter and submit information via the Partner Portal.
- Global Fund to review and validate the information.
- CT to collaborate with PR and fill out Implementation Readiness Checklist at start of grant-making to identify road blocks to fulfilling the requirements.
- CT to update the form after grant signature and up to 2 weeks before the implementation start date to provide a final status check and an IR rating.
- CT and PR to negotiate grant requirements.
- Global Fund Secretariat and PR to sign grant confirmation upon Board approval.
- CCM to endorse the grant confirmation through signature.

### Guidance
- OPN on Risk Management
- Implementation Arrangements Mapping Guidelines
- Global Fund website - grant-making
- Global Fund website - grant-making
- Detailed budget template instructions
- Guidance in template
- Global Fund website - grant-making
- Forthcoming link
- OPN on Grant Signing and Amendments

For details of LFA involvement, refer to relevant LFA guidance.