Quick Planning and Reference Guides
2020-2022 Allocation Period

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ISSUE DATE: JUNE 2020

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2. Quick Reference Guide ([link](#))
GRANT-MAKING – QUICK PLANNING GUIDE
(for new grants submitting to TRP W1 and starting new IP in January 2021)

ON GOING GRANT IMPLEMENTATION (Y3 OF IP)

JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC

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**TRP SUBMISSION WINDOW 1**

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**TRP REVIEW OUTCOME**

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**GAC SUBMISSION DEADLINE**

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**TRP MEETING**

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**BOARD DECISION**

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**ONGOING GRANT IMPLEMENTATION (Y3 OF IP)**

**DEVELOP & SUBMIT FUNDING REQUEST**

- Confirm Program Split
- Submit to GAC

**ONGOING GRANT IMPLEMENTATION**

- Ongoing Grant Implementation (Y3 of IP)
- New IP

**GAC**

- Grant recommendation
- Date TBD

**TRP REVIEW**

- <10 days after TRP Review

**IMPLEMENTATION READINESS**

- Prepare & finalize Implementation Arrangement Map
- Prepare & finalize Detailed Performance Framework
- Prepare & finalize Budget
- Address TRP clarifications identified for grant-making
- Workplan: agree on implementation work plan for year one of the implementation period

**NEGO T IATE: TIMELY & QUALITY GRANT-MAKING**

- Agree on Deliverables & Timelines
- Prepare & finalize Health Product Management Template (previously List of Health Products)
- Complete & validate Grant Entity Data (previously Master Data)
- Identify residual risks & mitigating actions

**IMPLEMENT**

- Sign Grant Confirmation
- Negotiate Grant Confirmation
- Implement Readiness Checklist

**TIMELY GRANT SIGNING**

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

**PR Human Resources**

- early identification & contracting

**PR Sub-recipients (SRs)**

- early identification & contracting

**PR Suppliers**

- early identification, contracting for health products & critical services

**PR Workplan**

- agree on implementation work plan for year one of the implementation period

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

**ISSUE DATE: JUNE 2020**
# GRANT-MAKING – QUICK PLANNING GUIDE

For new grants submitting to TRP W2a and starting new IP in January 2021

## ONGOING GRANT IMPLEMENTATION (Y3 OF IP)

### CT SUBMISSION TO TRP

- **Application Submission**
- **30 Days**

### TRP REVIEW & OUTCOME

- **(Outcome is delivered <10 days after TRP review)**
- **See specific dates**

### GAC MEETING

- **DATE TBD**

### BOARD DECISION

- **~3-4 weeks after GAC**

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### JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC

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### PLAN

- **Agree on Deliverables & Timelines**
- **Prepare & finalize Implementation Arrangement Map**
- **Complete Capacity Assessment**
- **Discuss need for advance payment mechanism, if applicable**

### NEGOTIATE: TIMELY & QUALITY GRANT-MAKING

- **Prepare & finalize Detailed Performance Framework**
- **Prepare & finalize Detailed Budget**
- **Prepare & finalize Health Product Management Template**
- **Address TRP clarifications**
- **Complete & validate Grant Entity Data**
- **Identify residual risks & mitigating actions**

### IMPLEMENTATION READINESS

- **PR Human Resources:** early identification & contracting
- **Sub-recipients:** early identification & contracting
- **Suppliers:** early identification, contracting for health products & critical services
- **Workplan:** agree on implementation work plan for year one of implementation period

### TIMELY GRANT SIGNING

- **Submit to GAC**
  1. Finalize grant docs
  2. Prepare Financial Calculator
  3. Prepare Grant-making Final Review Form
  4. Create Purchase Order
- **Negotiate Grant Confirmation**
- **Sign Grant Confirmation**
- **Sign Grant Confirmation**

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All stakeholders in a gray icon are involved in the respective step through an oversight capacity.
GRANT-MAKING – QUICK PLANNING GUIDE
(for new grants submitting to TRP W2b and starting new IP in January 2021)

ONGOING GRANT IMPLEMENTATION (Y3 OF IP)

APPLICANT SUBMISSION TO TRP

CT SUBMISSION IN GOS

TRP REVIEW & OUTCOME

(OUTCOME IS DELIVERED <10 DAYS AFTER TRP REVIEW)

GAC SUBMISSION DEADLINE

GAC MEETING for grant recommendation

DATE TBD

BOARD DECISION ~3-4 weeks after GAC

DEVELOP & SUBMIT FUNDING REQUEST

CT LFA CONFIRM PROGRAM SPLIT

JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC

PLAN

☐ mark complete

☐ CCM PR CT LFA Agree on Deliverables & Timelines

☐ CCM PR CT LFA Prepare & finalize Implementation Arrangement Map

☐ CT LFA Complete Capacity Assessment

☐ Discuss need for advance payment mechanism, as applicable

NEGOTIATE: TIMELY & QUALITY GRANT-MAKING

☐ CCM PR CT LFA Prepare & finalize Detailed Performance Framework

☐ CCM PR CT LFA Prepare & finalize Detailed Budget

☐ PR CT Address TRP clarifications

☐ PR CT Complete & validate Grant Entity Data

☐ CT LFA Identify residual risks & mitigating actions

IMPLEMENTATION READINESS

☐ PR Human Resources: early identification & contracting

☐ PR SR Sub-recipients: early identification & contracting

☐ LFA Suppliers: early identification, contracting for health products & critical services

☐ CT PR LFA Workplan: agree on implementation work plan for year one of implementation period

TIMELY GRANT SIGNING

Submit to GAC

(1) Finalize grant docs

(2) Prepare Financial Calculator

(3) Prepare Grant-making Final Review Form

(4) Create Purchase Order

☐ CT Negotiate Grant Confirmation

☐ PR Sign Grant Confirmation

☐ CCM Sign Grant Confirmation

JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC

All stakeholders in a gray icon (    ) are involved in the respective step through an oversight capacity.
GRANT-MAKING – QUICK PLANNING GUIDE
(for new grants submitting to TRP W2c and starting new IP in January 2021)

APPLICANT SUBMISSION TO TRP

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CCM CT LFA DEVELOP & SUBMIT FUNDING REQUEST

- Develop & submit funding request

IMPLEMENTATION READINESS

- Suppliers: early identification, contracting for health products & critical services
- Sub-recipients: early identification & contracting
- Human Resources: early identification & contracting

TIMELY GRANT SIGNING

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

NEGOTIATE: TIMELY & QUALITY GRANT-MAKING

- Complete & validate Grant Entity Data
- Identify residual risks & mitigating actions
- Address TRP clarifications

DEVELOP & SUBMIT FUNDING REQUEST

- Agree on Deliverables & Timelines
- Discuss need for advance payment mechanism, as applicable

CCM CT LFA CONFIRM PROGRAM SPLIT

- Confirm Program Split

TRP REVIEW & OUTCOME

(OUTCOME IS DELIVERED <10 DAYS AFTER TRP REVIEW)

GAC MEETING for grant recommendation DATE TBD

BOARD DECISION ~3-4 weeks after GAC

TRP REVIEW & OUTCOME

- Complete & finalize Detailed Performance Framework
- Prepare & finalize Detailed Budget
- Prepare & finalize Health Product Management Temp.

GAC SUBMISSION DEADLINE

- GAC submission deadline for grant recommendation

GAC MEETING

- GAC meeting for grant recommendation

GOAL: TIMELINESS GRANT SIGNING

- Agree on implementation work plan for year one of implementation period
### EARLY PLANNING

<table>
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<tr>
<th>Templates</th>
<th>Stakeholder Responsible</th>
<th>Guidance</th>
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<tbody>
<tr>
<td>Global Fund generated Excel template</td>
<td>CT and LFA to assess the capacity of Principal Recipients. CCM to be informed of results.</td>
<td>OPN on Risk Management</td>
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<tr>
<td>Sample template in guidelines</td>
<td></td>
<td>Implementation Arrangements Mapping Guidelines</td>
</tr>
<tr>
<td>Global Fund generated Excel template</td>
<td>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.</td>
<td>Global Fund website - grant-making</td>
</tr>
<tr>
<td>Global Fund generated Excel template</td>
<td>PR to complete with consultation with CCM. PR to negotiate with CT. LFA to review as requested by CT. CT to submit final version to GAC.</td>
<td>Global Fund website - grant-making</td>
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<tr>
<td>New! Global Fund Excel template</td>
<td>CT to generate Budget 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.</td>
<td>HPMT User Guidelines</td>
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<td>Health Product Management Template (previously List of Health Products)</td>
<td>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.</td>
<td>Global Fund website - grant-making</td>
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<tr>
<td>Partner Portal</td>
<td>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.</td>
<td>OPN on Grant Signing and Amendments</td>
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For details of LFA involvement, refer to relevant LFA guidance.