

ANNEX 7  
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RCM CCM PR DASHBOARD

Terms of Reference to Facilitate the  
Implementation of the Principal Recipient  
Management Dashboard

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2016

## Background

In the context of its risk mitigating strategy the Global Fund, in collaboration with two partners namely, Grant Management Solutions and SAP (a German IT multinational private-sector partner), developed a tool called the “Principal Recipient (PR) Management Dashboard” to give the PRs and decision-makers critical and essential information on their grant.

These terms of reference were prepared in order to identify and deploy a Technical Assistance (TA) provider that is capable of supporting a PR in the implementation of the Dashboard for their Global Fund grants.

## **Technical Assistance for the Implementation of the PR Dashboard**

### **I. Objectives**

The main objectives of the assignment are to install the PR Dashboard tool for the PR, and to provide the necessary technical support that allows for the effective usage of this tool, in the PR management of Global Fund grants.

### **II. Methodological approach for Technical Assistance providers**

#### **The technical support will be divided into three phases**

#### **1.1. Phase 1 : Planning**

The objective of this phase is to plan and organize the consultants’ intervention through a coordinating meeting with the PR management, and also by gathering the relevant documentation relating to the grant and the organization of the PR (for example, the grant agreement, an organigram, the monitoring and evaluation plan and the costed workplan).

During this phase, the TA provider should also determine the technical prerequisites to the installation of the software.

***Estimated level of effort*** : two days remotely

#### **1.2. Phase 2 : Implementation**

The objective of this phase is to install and configure the PR Dashboard software along with the relevant files.

The main activities, to be built upon by the TA provider, includes the following specific tasks:

- Brief analysis of the grant through carrying out stakeholder interviews and examining the received documents ;
- Installation of the SAP Crystal Dashboard Design software;
- In collaboration with the PR focal points who will be managing the tool, configuring the data-entry application using the grant indicators;

- One day training on the data-entry process with a workshop that includes all the Sub-Recipients (SRs) and the PR technical team;
- Specific training for the PR Dashboard focal point on the configuration and generating of the dashboards;
- Data input of the actual grant information into the corresponding files (SR file and PR Master file);
- Support the analysis and understanding of the Dashboard and how it can be integrated into the PR grant management process; and
- Support the development of a manual/guide for the PR Dashboard.

**Estimated level of effort** : 30 days in total in the PR offices in-country

### 1.3 Phase 3 : Guidance / coaching

The objective of this phase is to assist the PR with producing a high quality Dashboard **after** the first Dashboard has been generated at the end of the second phase.

**Estimated level of effort:** three days remotely by one consultant for a period of three months after the generation of the first PR Dashboard by the PR.

### III. Main activities and level of effort for each assignment (indicative)

The Ideal team composition is two consultants for an assignment duration of three weeks with an extra 5 days remotely – (total of 35 level of effort days).

It is expected that the combined consultant expertise reflects the varying needs of the PR (i.e excellent experience in PR Dashboard implementation and proven expertise in the management and financial monitoring of Global Fund grants as well as IT/Applications particularly, management software).

<b>Phase</b>	<b>Main Activities</b>	<b>LoE (days)</b>
<b>I</b>	Review of all available documentation and the adaptation of the tools for the mission	2 days
<b>II</b>	Analysis of both the PR and the Global Fund grant	6 days
	Mapping of the grant indicators	6 days
	Training/coaching for the input of the data	9 days
	Generating, analyzing and understanding of the Dashboard	9 days
<b>III</b>	Post-mission follow-up and support	3 days
	<b>Total number of days</b>	<b>35 days</b>

### III. Deliverables for the TA provider

The primary deliverable of the assignment is to set-up an operational PR Dashboard which covers all the information relevant to the Global Fund grant.

To achieve this objective, the intermediary results to be reached by the TA provider during the course of the mission are :

- Configuration of the tool for discussion with the PR ;
- A training module on the data-entry ; and
- A training module on the generation of the Dashboard.

### IV. Required qualifications, expertise and competencies of Consultant(s)

- All types of university degrees in public health, social sciences, international relations, management **OR** in other fields if combined with relevant experience.
- Demonstrated expertise and experience of consulting multi-stakeholder bodies in the areas of CSOs engagement, management, capacity development and/or rights advocacy of KP/PLWD groups.
- Demonstrated knowledge/ understanding /experience of the Global Fund Grant Architecture and management process: NFM (The New Funding Model)
  - Roles of the Global Fund Board/Global Fund Secretariat/Technical Review Panel (TRP)/Office of the Inspector General (OIG), Local Fund Agent (LFA), Country Coordinating Mechanism (CCM), Principal Recipients (PRs), Sub-Recipients (SRs)
- Demonstrate having received training in the EPA methodology developed by The Global Fund
- Demonstrated knowledge/ understanding/experience of CCM Governance related issues:
  - CCM Eligibility Requirements,
  - CCM Functions and responsibilities
  - CCM structure
  - CCM oversight function (process, activities, responsibilities, tools)
  - Conflict of interest in CCM and associated Global Fund policies
  - CCM Governance documents.
- Demonstrate having received training in the EPA methodology developed by The Global Fund
- Demonstrated experience in successful TA provision in the short and medium term.
- *Skills and competencies:*
  - Leadership; Integrated approach to consultancy; Strategic approach to consultancy; Qualitative data collection; Conduct of negotiations; Relationship management; Facilitation; Diplomacy; Cultural sensitivity; Ability to synthesise and summarize results; Ability to independently develop work-plans aimed at achieving specified impact and execute them with limited guidance and oversight; Teamwork and team building skills.
- The consultant(s) must be fluent in English and the official language of the country (if the official language of the country where services are offered is French, Spanish or Russian).
- The consultant must be able to travel and work in the country requiring technical support.

## V. Mission Contacts

- At the Global Fund: Fund Portfolio Manager/Program Officer, and a member of the CCM Hub (on demand)
- In-country: The PR - Consultant to liaise with the PR focal point to agree on start date for the in-country visit.

## VI. Reference Documents

[Dashboard User Guide](#)

[Dashboard user guide annexes](#)

[Dashboard bundle \(including three files required to run the dashboard – the dashboard, data feed and data management tool\)](#) – can be downloaded from the Global Fund website