Tool for submitting applications to the Community Engagement Strategic Initiative

Short-Term Technical Assistance Program targeted to the new Global Fund (NMF4) funding models.

Latin America and Caribbean Regional Platform of the Community Engagement Strategic Initiative (LAC Platform)

August 2022

Table of Contents

Acronyms

TA	Technical Assistance
CRG	Communities, rights and gender
GF	The Global Fund to Fight AIDS, Tuberculosis and Malaria
MSM	Men who have sex with men
CE SI	Community Engagement Strategic Initiative
LAC	Latin America and the Caribbean
CCM	Country Coordinating Mechanism
RCM	Regional Coordinating Mechanism
MH	Ministry of Health
WT	Woman Trans
WTW	Women Sex Workers
NFM	New Financing Model
UN	United Nations
CSO	Civil Society Organization
NHIVP	National HIV Program
PR	Principal Recipient
SR	Sub Receiver
SSR	SubSub Receiver
TdR	Terms of Reference
TB	Tuberculosis
RSHS	Resilient and Sustainable Health Systems
HIV	Human Immunodeficiency Virus

Introduction

Meaningful engagement and inclusion of people most affected by HIV, TB, and malaria are crucial to ensuring that Global Fund investments are evidence-based and built on a strong rights-based approach. It is also critical that issues such as gender and lifecycle become cross-cutting themes in funding requests and grants. Achieving these goals will help maximize the impact and reach of Global Fund grants while strengthening transparency and local accountability.

To ensure that civil society and communities meaningfully engage in Global Fund-related processes, the Global Fund Board has approved the **Community Engagement Strategic Initiative (CE SI)** for implementation from January 2021 to December 2023.

The CE SI works through three mutually reinforcing components:

Component 1	**Component 2**	**Component 3**
A short-term technical assistance program to support the meaningful engagement of civil society and community organizations in Global Fund-related national processes.	**Long-term capacity strengthening** of key and vulnerable population networks and organizations	**Community, rights and gender regional platforms**
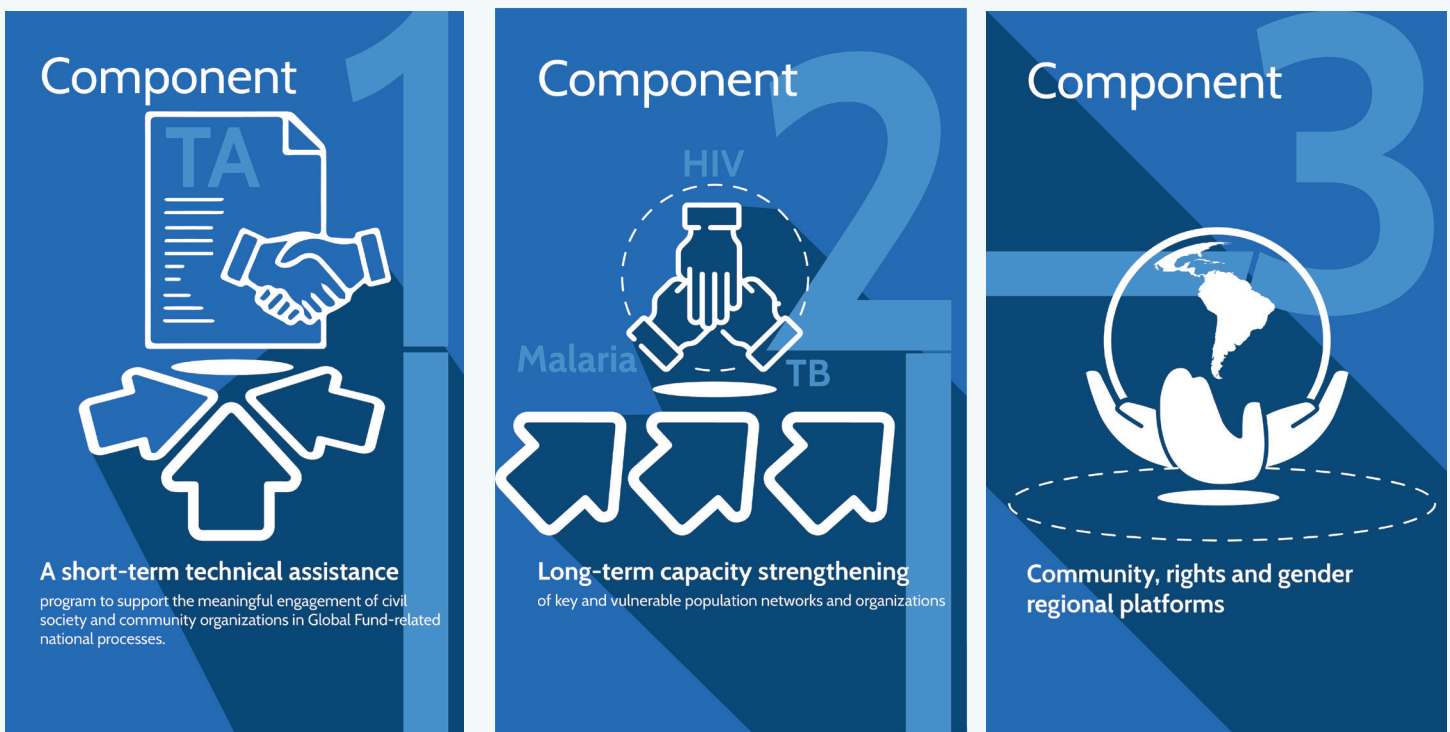
Meaningful engagement of communities and key populations is fundamental in the development of grant proposals to the Global Fund. For that reason, this tool centers on "**Component 1: Short-Term Technical Assistance,**" focused on the new Global Fund funding cycle 2023-2024 (NFM4).

The purpose of this tool is to guide the filling out of the technical assistance request form. To do so, we will walk you, in detail, through the short-term technical assistance request form, which has been adjusted to the Global Fund's New Financing Model NFM4. We will describe the key information you need to know, provide instructions on how to fill out the form, and offer examples of technical assistance requests that will make it easier to understand the submission process of the technical assistance request.
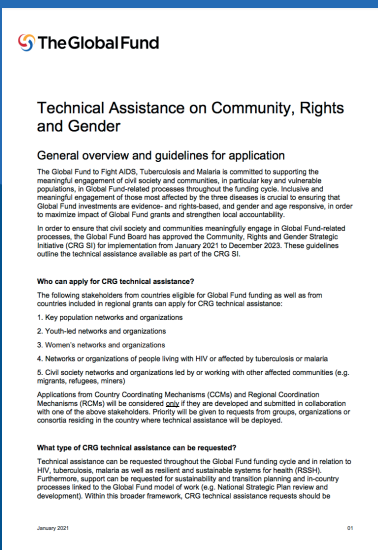
Short-Term Technical Assistance Program from the Community Engagement Strategic Initiative (CE SI)

The CE SI intends to ensure that civil society and communities meaningfully engage in Global Fund-related processes at a national or regional level. The short-term nature of this technical assistance foresees that community experts can be deployed for approximately 30 days over a period of up to three months.

Before elaborating a technical assistance request, it is necessary to conduct a thorough analysis of the needs identified by the organization that is requesting the Technical Assistance. This step is essential since technical assistance is often confused with projects or initiatives for developing a programmatic strategy related to the grant implementation.

As mentioned above, this tool focuses on providing support to communities and key populations to meaningfully engage in the development of national funding requests for HIV, tuberculosis, and malaria under the Global Fund's New Funding Model NFM4, which will begin in 2023. For more information on the TA process and frequently asked questions, please follow this link:

https://www.theglobalfund.org/media/10403/crg_technicalassistanceguidance_note_en.pdf

Before reviewing the technical assistance form, we will outline the areas of work that comprise the Short-Term Technical Assistance Program of the Community Engagement Strategic Initiative and have become a priority for the Global Fund's New Funding Model NFM4. To learn more about this framework, please consult the presentation available at the following link *https://www.plataformalac.org/en/2022/07/community-engagement-si%e2%80%8b-%e2%80%8bshort-term-technical-assistance-for-nfm4/*

1 Situational analysis and needs assessment

1.1   Community, rights, and gender-related assessments that generate strategic information to make decisions and inform NFM4 funding request development.

1.2   NFM3 program review to ensure that community perspectives contribute to improved service delivery and inform NFM4 funding request development.

2 Engagement in country dialogue processes

2.1   Virtual or face-to-face community consultations to inform the inclusion of priorities in the development of NFM4 funding requests.

2.2   Coordinating community input into the development of NFM4 funding requests.

3 Supporting design and implementation agreements

3.1   This area includes activities that support communities and key populations to cost the priorities and identified needs to be included in the NFM4 funding requests for HIV, tuberculosis, and malaria. Such activities may involve resource development, information sessions, or direct support. The costing support is to assist communities in costing community-led interventions and other priorities identified by communities for inclusion in the NFM4 request

Community Engagement Technical Assistance Request Form

A continuación, presentamos cada una de las secciones del formulario de solicitud de asistencia técnica.

CRG Technical Assistance Request From

Download here the request form in

- Inglés   - Francés   - Español

Applicant details

Fill this section with information related to the applicant organization: name, address, country, focal point contact (the person who will follow up on communications related to the application), e-mail address, and telephone number.

- Applicant details

Applicant details	
Name of organization	
Type of organization	☐ Key population network or organization ☐ Youth-led network or organization ☐ Women's network or organization ☐ Network or organization of people living with HIV or affected by tuberculosis or malaria ☐ Civil society network or organization led by or working with other affected communities (e.g., migrants, refugees, miners) Other:
Address	
Country/ies	
Focal point	
E-mail	
Phone number	
Is your organization a	☐ PR ☐ SR/SSR ☐ CCM member ☐ CCM observer ☐ None of the options
Date of request	
Envisaged start date of assignment[1]	
Envisaged country NFM4 submission window[2]	*Guidance: Please submit your TA request **at least** six months before the NFM4 submission window*

Which organizations were involved in preparing this request? Please outline their level of involvement.

Guidance: Please include a list of all organizations/networks engaged in request development as well as their level of involvement (e.g., request writing, request review) and state if any are a PR, SR, SSR, CCM member, CCM observer. If the request is submitted by a consortium of organizations, which is strongly encouraged, please mention all organizations and outline the request development process.

Who can apply for CE SI Technical Assistance?

Key population networks and organizations

Youth-led networks and organizations

Women's networks and organizations

Networks or organizations of people living with HIV or affected by tuberculosis or malaria

Civil society networks and organizations led by or working with other affected communities
(e.g. migrants, refugees, miners)

Applications from **Country Coordinating Mechanisms (CCMs)** and **Regional Coordination Mechanisms (RCMs)** will be considered only if they are developed and submitted in collaboration with one of the above stakeholders.

Please select the appropriate box in this section to specify if the applicant organization has any role in the Global Fund grant implementation in the country (as representatives of key and vulnerable populations, people living with the diseases, or the civil society sector). Please specify whether you are a Principal Recipient, a Sub-Recipient, or a Sub-Sub-Recipient. Civil society networks, communities, and key population networks and organizations that do not fall into any of the categories above may also apply for Technical Assistance, either as CCM observers or by specifying their role in the "none of the options" field.

Please be aware that, in general, organizations with a regional focus are eligible to apply if they belong to any of the types of organizations listed above. However, the TA application must be linked to Global Fund-related processes in eligible countries of Latin America and the Caribbean and, specifically, to the NFM4.

At any rate, the TA application must be submitted in collaboration with a network or organization representing the populations mentioned above. Although it is advisable to have the technical capacity to assist and facilitate the implementation process after the application approval, this is not a prerequisite.

Applicant details

Name of organization	*Write the name of the organization(s) requesting technical assistance.*
Type of organization	*Select the appropriate option:* ☐ Key population network or organization ☐ Youth-led network or organization ☐ Women's network or organization ☐ Network or organization of people living with HIV or affected by tuberculosis or malaria ☐ Civil society network or organization led by or working with other affected communities (e.g. migrants, refugees, miners) ☐ Other:
Address	*Write the full address of the requesting organization(s).*
Country/ies	*Indicate the country where the organization is located. Remember that they should be countries eligible for Global Fund financing or that are implementing a Global Fund-related process.*
Focal point	*Provide the name of the person the Global Fund can contact for any communication related to the technical assistance request.*
E-mail	*Provide your e-mail address.*
Phone number	*Provide a contact number; specify if it is a landline or cell phone. Specify if the person can be contacted via WhatsApp, Telegram, or other apps.*
Is your organization a	*Select the appropriate option:* ☐ RP ☐ SR/SSR ☐ Miembro de MCP ☐ Observador de MCP ☐ Ninguna de las opciones
Date of request	*Provide the date of submission of the TA request.*
Envisaged start date of assignment *	*The estimated date for starting the TA should be entered once the activity schedule has been defined in the following sections of the form. Ideally, plan 2 to 3 months between request submission and the start of the TA.*
Envisaged country NFM4 submission window	*Indication: Submit the request for technical assistance at least six months prior to the date of submission of the (NMF4).*

* Please note that the mobilization of technical assistance may take 2-3 months from the date of submission.

Which organizations were involved in preparing this request?

Please outline their level of involvement.

The last box in this section is particularly relevant. In this section, you should explain the collaborative work that took place during the preparation of the application, whether it was between members of civil society organizations, organizations of people affected by the diseases, or key and vulnerable populations. It is also worth mentioning if the request was discussed with CCM members, particularly representatives of key populations or other key stakeholders, such as the Principal Recipient. Evidence of a comprehensive collaboration in the preparation of the request will demonstrate that the beneficiaries of the technical assistance will include a broad group of individuals or organizations within a country or region. In this section, it is advisable to mention which organizations were involved in developing the request, who they represent, and what role they play in the GF funding model (SR, SSR, CCM member, CCM observer). If multiple organizations were involved, please specify which organization will be the focal point and whether this was a joint decision. The following is an example of a TA request from Belize.

> *GOBelize supported the development of this request as the coordinating body of the Civil Society Organization (CSO) Hub. The CSO-Hub has been identified as the coordinated effort of civil society organizations in the HIV and TB response to collaborate among each other and with key government Ministries, in particular, the Ministry of Health, to reach key populations such as men who have sex with men, transgender persons, and youth.*
>
> *Members of the CSO-Hub include organizations:*
>
> 1. *Representing youth - GOBelize, BYEC, BFLA;*
> 2. *Representing LGBT community - TIABelize, PETAL, UNIBAM, Belize Trans Colour, EYBM, Our Circle;*
> 3. *Representing PLHIV - CNET+, Hand in Hand Ministry*
> 4. *Representing women and children - POWA, Cornerstone*

Workshop to identify TA needs in Haiti.

Section 1: Background and rationale

1.1 Please describe the reason for requesting CE SI technical assistance.

In this section, you should provide a concise explanation and justification of the needs that the Technical Assistance will address. Give context and background information, emphasizing the TA needs that have been identified. Remember that, in this specific case, you should include as background the funding request submission to the Global Fund under the NFM4, in addition to the need for meaningful engagement of communities and key populations in country dialogues and their identified needs in the context of the response to the HIV, TB or malaria epidemic.

The following is a **"fictitious"** example of the content provided in this section:

1.1 Please describe the reason for requesting CE technical assistance.

Guidance: Please make a link to planned NFM4 processes in your country.

In November 2023, Guatemala will submit a new HIV funding request to the Global Fund in Window 3 under the NFM4. Meaningful participation of key populations in the development of such an application is an essential requirement of the Global Fund and a right of communities.

Civil society organizations (CSOs) that work on HIV and represent key populations have become disjointed, and their participation in various areas of the response, as well as in Global Fund grants, has been weakened. For this reason, fifteen organizations and leaders representing trans women, MSM, and female sex workers need support to organize themselves, discuss their priorities (mainly related to stigma, discrimination, violence, and social exclusion), and propose alternative solutions to be included in the new funding request.

1.2   Is the request linked to any of the Global Fund's main areas of work?

Select the appropriate option: HIV, TB, Malaria, or Resilient and Sustainable Systems for Health (RSSH). Please specify if the area of work refers to a combination of HIV/TB. Do not check more than one box. Check only the one that will be related directly to the technical assistance.

1.2   Is the request linked to any of the Global Fund's main areas of work?

(please select all that apply)

Our example is a request for HIV under the NFM4, so we should select the appropriate box.

- [X] HIV
- [ ] Tuberculosis
- [ ] Malaria
- [ ] Resilient and sustainable systems for health (RSSH)

1.3   How will the technical assistance strengthen the engagement of civil society and communities in Global Fund-related processes?

Explain the TA's impact on strengthening civil society engagement, emphasizing on how it relates to Global Fund processes. Below is an example of an application from Ecuador.

1.3   How will the technical assistance strengthen the engagement of civil society and communities in Global Fund-related processes?

The Technical Assistance will enable us to have a meaningful engagement and input in the development of the NFM4 funding request. As national organizations representing the key populations prioritized by the GF in Guatemala, we will guarantee the inclusion of our needs (identified broadly through participatory methodologies), the identification of alternative solutions to these priorities, as well as the design and costing of appropriate activities.

In addition, we believe that technical assistance can strengthen the articulation of CSOs working with key populations, which in turn would have a more significant impact on the response of this sector to the epidemic in the country.

1.4 Which key and vulnerable population communities will be engaged in this technical assistance?

Select all appropriate options according to the purpose of the TA request. However, ONLY communities that will be actively involved in the development of the technical assistance (e.g., through interviews, focus groups, and so on) should be selected.

In the case of our illustrative example, it is clear that the key and vulnerable populations that would benefit from this technical assistance are MSM, sex workers, and transgender people. Therefore, we should select the boxes as follows:

1.4	Which key and vulnerable population communities will be engaged in this technical assistance ?

(please select all that apply)?

- X Men who have sex with men
- X Sex workers
- X Transgender people
- ☐ People who inject or use drugs
- ☐ People living with HIV

- ☐ People in prisons and other closed settings
- ☐ Migrants, refugees and internally displaced people
- ☐ Miners and mining communities
- ☐ Adolescent girls and young women

Other: _____

Representatives of Civil Society and key populations in Colombia.

Section 2: Objectives

Before you start developing the general and the specific objectives, you should check again the technical assistance need that the application intends to address. The first step is to verify whether the identified need is eligible according to the areas of work of the CE SI Short-Term Technical Assistance Program. Please remember that there are three priority areas of work for TA requests under the NFM4.

2.1 Which of the following CE SI priority area(s) for NFM4 technical assistance would best meet your need?

Once you have identified the areas of technical assistance that relate to your request, you should check them in the table provided in the form. Please select the options that are most relevant to the identified need.

Priority areas for CE SI short-term TA under the NFM4:

1

A Situational analysis and needs assessment

A.1 CRG-related assessment to inform NFM4 funding request development

A.2 NFM3 program review to inform NFM4 funding request development

3

C Supporting design and implementation agreements

C.1 Costing support

2

B Engagement in country dialogue processes

B.1 Community consultation(s) to inform priorities for NFM4 funding requests.

B.2 Coordinating input into key GF-related documents (e.g., funding request or grant-making documents)

The following is an illustrative example:

> **2.1** Which of the following CE SI priority area(s) for NFM4 technical assistance would best meet your need?

1 **A Situational analysis and needs assessment**

    X **A.1** Community, right and gender-related assessments to inform NFM4 funding request development.

    ☐ **A.2** NFM3 program review to inform NFM4 funding request development.

3 **C Supporting design and implementation agreements**

    X **C.1** Costing support

2 **B Engagement in country dialogue processes**

    X **B.1** Community consultation(s) to inform priorities for NFM4 funding requests.

    ☐ **B.2** Coordinating input into key GF-related documents (e.g., funding request or grant-making documents).

Representatives of Civil Society and key populations in Colombia.

Please note that the CE SI Short-Term Technical Assistance Program does **NOT** support any project that is not related to community and key population engagement in the development of funding requests under the NFM4:

- **CCM strengthening**
  (e.g. training of CCM members in their roles and responsibilities);

- **Long-term capacity development of civil society networks and organizations**
  (e.g. organizational development, support to become a Global Fund recipient);

- **Development of stand-alone tools that lack a focus on community engagement**;

- **Any other activity intended to support the design and implementation of execution agreements**.

Formulation of Objectives

Once you have verified that your technical assistance need is eligible according to the areas of work of the CE SI Short-Term TA Program, you should proceed to translate that need into a situation of change. To do so, you should think that once the technical assistance is completed, the need should no longer exist, or it should have changed in a way that will contribute to modifying some reality. The fundamental principle for drafting objectives is to change a situation through intervention. Under this logic, the general objective is a sentence that describes the ultimate goal for which technical assistance is requested and expresses what you want to achieve. It answers the questions: What do we want to achieve? What do we want to change? With whom? The phrasing of the objectives should begin with an infinitive verb such as the following: to improve, to strengthen, to expand, to grow, to increase, to generate, to create, to change, to reduce, to diminish, to abate, to identify, to assess, to learn, to promote, to participate, to collect, and so on.

It answers the questions:

what do we want to achieve?

what do we want to change?

with whom?

The phrasing of the objectives should begin with an infinitive verb such as those suggested below:

to reduce   to expand
to increase
to diminish   to grow
to strengthen
to improve   to abate
to generate

It is advisable to include some specific objectives in this section to clarify further the ultimate goal that you want to achieve. Specific objectives have the same characteristics as the general ones, but they are more precise and narrow because they focus on a part of the expected change. They may refer to the anticipated outcome or deliverable in a given population or situation, achieved through the implementation of one or several actions. It is advisable to limit the number of specific objectives to a maximum of three.

SMART
Guidelines for drafting general and specific objectives

Specific – state clearly what actions will be taken

Measurable – deliverables, outcomes, and changes obtained from the technical assistance should be measurable

Achievable – the fulfillment of the community needs should be attainable within the context, available resources, etc.

Relevant – identify priority areas for the short-term Technical Assistance Program

Timely – results should be achievable within the duration of the technical assistance

Representatives of Civil Society and key populations in Colombia.

Examples of objectives to ensure the meaningful engagement of communities and key populations in the development of funding requests to the Global Fund, organized by priority areas:

1. Situational analysis and needs assessment

- To identify the needs of key populations related to HIV prevention services access in Belize.
- To understand the communities' and key populations' priorities in reducing their vulnerability to tuberculosis in Bolivia.
- To assess the impact that the criminalization of homosexual behavior among men under the Criminal Law Act of 1893 has had on MSM and transgender people's access to HIV services. This evaluation will be carried out through a consultative process with organizations working with LGBTI people and stakeholders in the national response to HIV.
- To improve the understanding of the gaps regarding communities' and key populations' human rights to reduce vulnerability to HIV in Guyana.
- To analyze critically, together with key populations, the responses implemented by the Global Fund under the NFM3 in Honduras.
- To assess the quality of prevention and health services for key populations that the Global Fund implemented during the lifecycle of the previous grant.
- To describe in detail the access barriers to HIV-related health services linked to Human Rights, stigma, and discrimination, in order to include a work plan to address them through interventions in future HIV grants.

Representatives of Civil Society and key populations in Ecuador.

Describe in detail the barriers to accessing HIV-related health services that are related to Human Rights, stigma and discrimination and contribute to establishing a work plan to address them through interventions to be included in future HIV grants.

2.   Engagement in country dialogue processes

- ✎ To enhance the broad and meaningful engagement of communities and key populations in the development of the HIV funding request to the Global Fund in Paraguay.

- ✎ To promote the engagement of communities and key populations in national dialogues that prioritize strategies for the TB funding request to the Global Fund in Ecuador.

- ✎ To facilitate prioritization and build consensus regarding the needs of key populations to be included in the funding request to the Global Fund in El Salvador.

- ✎ To support detailed planning of peer-led community interventions in key activities such as testing and treatment, differentiated by key population.

- ✎ To develop a costed plan to intensify advocacy efforts to repeal discriminatory laws that are barriers to HIV services for MSM and transgender women.

- ✎ To propose some follow-up and tracking measures to assess progress related to the elimination of legal barriers for key populations.

3.   Supporting design and implementation agreements

- ✎ To provide communities and key populations with training in budget preparation for the priority activities included in the new grant application to the Global Fund.

- ✎ To accompany community leaders in the identification and costing of activities that address their needs so that they include them in the funding request.

Section 3: Scope of work

In this section, you will find three tables that describe the **areas**, **tasks**, **activities**, **remarks**, and the approximate *number of days* required for their implementation. Please note that these tables are based on the three priority areas or tracks of the CE strategic initiative under the NFM4. **Cannot be modified.**

Please pay close attention to both the rows and the columns of the tables. In the first column, you should select the activities you consider a priority. In the second column, there is a description of the tasks/activities that will contribute to the fulfillment of the technical assistance objectives. In the third column, you should specify whether the task or activity is in-country or desk work. In the fourth column, assign an estimated number of days to complete the activity.

These tasks/activities provide a first general description. Once the TA request is approved, the CE SI will develop detailed terms of reference (ToR) where the activities and the level of effort (LOE) for each one will be refined.

If you are considering a consultancy where only one consultant is to be hired, you should enter only the total number of days. If it involves a team that will include a lead consultant and a support consultant (usually local), distinguish between how many days will be allocated to the lead consultant and how many days will be assigned to the local consultant.

3.1   Please select _one or several_ TA tracks and sub-activities that you would like to request technical assistance for. Prioritize tasks that you consider essential for strengthening engagement and that are not yet covered by other funding sources.

Track A: Situational analysis and needs assessment

No.	Task/activity	Remarks (in-country or desk work)	No. of expert days
X 1.1	_CRG-related assessment_		
☐ 1.2	_NFM3 program review to generate strategic information for decision-making to inform NFM4 funding request development_		
1.	**Preparatory activities**		
☐	Preparation: Organize kick-off call, refine scope of work and finalize budget with TA requestor, rapid desk review of relevant documents and development of inception report (e.g., sampling, data collection tools)		4
X	Data collection and analysis: Training of data collectors, data collection (KIIs or FGDs) and analysis		5 - 8 (por confirmar)
☐	Reporting and validation: Report development, validation and presentation to key stakeholders, integration of comments and finalization		3
☐	Mentoring: Guidance on use of assessment / program review outcomes to inform NFM4		3

Section 3: Scope of work ✏️

Track B: Engagement in country dialogue processes

☐ **B,1** *Virtual or face-to-face community consultation(s) to inform the inclusion priorities for NFM4 funding requets*

No.	Task/activity	Remarks (in-country or desk work)	No. of expert days
2.	**Preparatory activities**		
☐	Preparation: Organize kick-off call, refine scope of work and finalize budget with TA requestor, rapid desk review of relevant documents and development of inception report (e.g., agenda, participant lists, timeline)		4
X	Community consultation(s): Prepare, facilitate, and document virtual or face-to-face community consultation(s) to identify, systematize and prioritize community priorities in line with GF templates and technical guidance.		5 - 8 (por confirmar)
☐	Reporting and validation: Report development, validation, integration of comments and finalization		3

Track B: Engagement in country dialogue processes

☐ **B.2** *Coordinating input into NFM4 funding requests and grant-making (e.g., review of draft funding requests or grant-making documents)*

No.	Task/activity	Remarks (in-country or desk work)	No. of expert days
2.	**Preparatory activities**		
☐	Community consultation(s): Prepare, facilitate, and document virtual or face-to-face community consultation(s) to review draft funding request or grant-making documents		4
X	Mentoring: Guidance during funding request writing or grant-making		5 - 8 (por confirmar)

Track C: Supporting design and implementation agreements

Please only select one costing option. This support is only available in cases where communities are not in the position to cost interventions themselves or do not have access to national costing support (e.g. through writing team, PR).

No.	Task/activity	Remarks (in-country or desk work)	No. of expert days
☐ **C.1**	*Costing support*		
3	**Preparatory activities**		
☐	Virtual backstopping and mentoring support on costing, including clarification on costing resources and tools or review of and comments on draft budgets		2
X	Virtual support to cost civil society and community priorities		5

Activities

Activities are a series of actions to be conducted. Collectively, they constitute strategies to achieve the objectives (e.g., training workshops, consultations or focus groups, work meetings to elaborate participatory work plans, meetings to develop needs assessments, forums to increase capacities, field visits, and so forth).

There are three tables below. The first column identifies the **key deliverables** of the proposed assignments or activities for each priority area of the CE SI short-term TA under the NFM4. It is advisable to ensure that each activity or task has a deliverable developed in the table.

Examples of key results may include documents that report on the activities implemented, e.g., lists of priorities, results of the needs assessments, a work plan, a strengthening plan, an advocacy strategy, a budget, among others.

Please provide the dates of delivery in the second column; the anticipated use of deliverables to move on to other activities in the third column; and the timeframe for the use of deliverables in the fourth column.

Note that these deliverables will be used to influence Global Fund processes, particularly to include the priorities of communities and key populations in the funding requests to the Global Fund under the NFM4. For this reason, the third column of the table should describe the use of each deliverable in the process. The fourth column indicates the dates when the deliverables or outcomes will be used.

3.2 Please select the key deliverable(s) of the assignment and state how they will be used by civil society and communities to influence Global Fund and related processes.

Track A: Situational analysis and needs assessment

Key deliverable(s)	Date of delivery	Anticipated use of deliverable(s)	Timeframe for use of deliverable(s)
☐ *CRG-related assessment* ☐ *NFM3 program review to generate strategic information for decision-making to inform NFM4 funding request development*			
Updated TA request and budget	(Week 1)	Annex to contract with TA provider	/
Inception report	(Week 2)	Inform stakeholders and implementation of TA	/
Assessment or program review report	(Week 6-12)	Inform NFM4 funding request writing	CE SI TA survey: 3 months after assignment

Track B: Engagement in country dialogue processes

Key deliverable(s)	Date of delivery	Anticipated use of deliverable(s)	Timeframe for use of deliverable(s)
☐ *B. 1 Virtual or face-to-face community consultation(s) to inform priorities for NFM4 funding requests*			
Updated TA requests and budget	(Week 1)	Annex to contract with TA provider	/
Inception report	(Week 2)	Inform stakeholders and implementation of TA	/
Consultation report	(Week 6-12)	Inform NFM4 funding request writing	CE SI TA survey: 3 months after assignment

Key deliverable(s)	Date of delivery	Anticipated use of deliverable(s)	Timeframe for use of deliverable(s)
☐ *B.2 Coordinating input into NFM4 funding requests and grant-making (e.g. review of draft funding requests or grant-making documents)*			
Review and comments on funding request or grant-making documents		Inform NFM4 funding request writing or grant-making	/

Representatives of Civil Society and key populations in Colombia.

Track C: **Supporting design and implementation agreements**

Key deliverable(s)	Date of delivery	Anticipated use of deliverable(s)	Timeframe for use of deliverable(s)
☐ *Costing support*			
Review of and comments on costed community priorities		Inform NFM4 funding request and budget	CE SI TA survey: 3 months after a ssignment
Cost estimate of com-munity priorities		Inform NFM4 funding request and budget	CE SI TA survey: 3 months after assignment

Since the development of the technical assistance request takes time, it is advisable to establish outcome delivery dates once the request is scheduled for submission. Please note that once the request has been received, it takes a few weeks for the internal review process to approve the request. Projected dates should take into account that the implementation of the technical assistance could start two or three months from the submission date. **It is recommended that the technical assistance request should be submitted at least six months before the submission window for the country's funding request to the GF.**

Deliverables or outcomes

Deliverables are the most critical or valuable materials to be generated during the technical assistance (e.g., a report, handbook, recommendation document, costed workplan, advocacy plan, and so on).

Typically, each key activity will generate a deliverable. When possible, it is recommended to clearly differen-tiate which activities and outputs correspond to each specific objective.

The following is a table of deliverables and dates from a Technical Assistance request from LANPUD, a regional network of people who use drugs in Latin America:

Key deliverable(s)	Date of delivery	Anticipated use of deliverable(s)	Timeframe for use of deliverable(s)
Protocol with corresponding survey instruments	May 7, 2021	The protocol will be used to establish the diagnostic methodological framework, and the instruments will be the tool used to collect this information.	May 21, 2021
Stakeholder mapping for the application of survey instruments	May 21, 2021	The mapping will be used to design and program the application of survey instruments.	May 28, 2021
Results systematization and elaboration of a diagnostic report and a concept note	May 28, 2021	The results systematization will serve as an input basis for the diagnostic report and the concept note elaboration.	June 4, 2021

Technical Assistance Cost Item Table

In the following table, you should develop a **minimum budget** of resources required to meet the TA objectives.

If applicable, please list other expenses in the table below (e.g. workshop-related costs such as room hire, catering, transport reimbursement, personal protective equipment during COVID-19, data collection related travel or material). Add rows in the table if the planned activities require it.

Cost category/item	Number of units	Price per unit (USD)	Total (USD)
General guidance: include the budget in USD or add a column for currency conversion if you prefer budgeting in a local currency; costs related to the consultant (e.g., daily fee, travel, DSA) will be costed by the TA provider and do not need to be included			
Guidance for costing data collection (KIIs, FGDs) during rapid assessments or program reviews include training and travel costs for data collectors (if applicable), include PPE (masks, sanitizer) for data collectors and participants			
Guidance for costing meetings: include the breakdown of meeting costs for all required meetings (e.g., transport, coffee break, lunch, accommodation) per person and per day, make a differentiation for participants from the capital and outside the capital, include a cost estimate for PPE (masks, sanitizer), include translation costs for workshops or final reports (if applicable), include data support for virtual meetings (if applicable). Virtual or hybrid consultations are encouraged wherever possible.			
Total:			

Workshop-related expenses (such as room hire, catering services, transport reimbursement, lodging, food, personal protective equipment during COVID-19, and financial support to buy data for virtual meetings) should be itemized in the following table. Some administrative costs may include stationery, materials, and supplies (coffee break for team meetings, gas, and so on). Please indicate the estimated number of participants in the meetings or workshops.

When preparing the cost item table, keep in mind that you should **NOT** include the cost of the consulting team fees. That calculation is made by the technical assistance provider and varies according to each provider's internal policies. Based on the number of days required, the vendor will have a clear idea of how to calculate the costs related to the team fees.

The following is an example of a table of expenses from El Salvador:

1 -	Consultation with civil society organizations and groups of key populations and people living with HIV		
Cost category/item	Number of units	Price per unit (USD)	Total (USD)
Room hire	1	150	150
Catering (3 workshops - 15 participants per workshop)	45	15	675
Daily Subsistence Allowance ($15 per person)	45	15	675
PPE (masks, alcohol gel)	45	2	90
Subtotal			**1,590**
2 –	Rapid Community Assessment		
Zoom licence	1	150	150
Phone recharge for participants	15	10	150
Subtotal			**300**

Technical assistance provider profile

Next, applicants should suggest a profile of the individual or team responsible for providing the technical assistance.

Please list the required language skills of expert(s) as well as other qualifications or expertise you consider important for this assignment.

4. Other information

This section contains information on the preparation process of the technical assistance request. For example, Item 4.1 should include information on the members of the CCM that the organization contacted to prepare the request. Item 4.2 should include information concerning any discussions the organization had with the Global Fund country team members regarding the request. Item 4.3 refers to the support provided by Via Libre/Platform LAC if any. Item 4.4 should indicate whether the request has been submitted to other technical assistance providers. Finally, to complement the application, item 4.5 can be filled out with any information relevant to the process that has not been provided in the previous sections.

The following is an example of how a requestor from Colombia filled this section:

4.1   **Have you liaised with your CCM regarding this technical assistance?**
        Please provide full information and details of the people that you contacted.

> Yes, the current CCM members, the Technical Secretariat, and the consultants working on
> the CCM Evolution process are aware of this request.

4.2   **Have you liaised with the Global Fund country team regarding this technical assistance?**
        Please provide details of people that you contacted.

> Yes, the Global Fund country team, the portfolio manager, and the LAC team are aware of this request.

4.3   **Has your organization received support from any CE SI Regional Platform to complete this application?**
        Please provide details of the people that you contacted.

> LAC Platform.

4.4   **Has your organization applied to other technical assistance providers with the same or a similar request**
        (e.g., UNAIDS country offices, UNAIDS TSF, WHO, GIZ, L'Initiative)? If yes, please provide details, including
        the outcomes.

> No

4.5   **Please state any other relevant information that might support this application.**

> Colombia is a country that faces several challenges derived from its territorial extension. During the social dialogues
> celebrated before the elaboration of the C19RM resource request, a lack of understanding of Global Fund processes
> and weakness in the communication and accountability mechanisms were identified. For this reason, it is vital to
> receive technical support, which will help improve the processes that accompany the meaningful engagement of
> civil society.
>
> Among the inputs derived from previous consultancies, there is a document that enables CCM members to carry
> out communications processes both within their networks and with their constituencies. This document is intended
> to guide and encourage effective dialogue and engagement of the entire population.
>
> We have held discussions with the consulting team leading the **CCM Evolution** process in Colombia to define the
> scope of this technical assistance and avoid duplication.

Technical Assistance Request Submission Process

The Latin America and the Caribbean Platform (LAC Platform) is hosted by Vía Libre, a historical organization headquartered in Lima, Peru, that has been crucial in the response to HIV in Latin America. The LAC Platform is entrusted with various activities to generate demand for the CE SI Short-Term Technical Assistance Program. These activities include:

- Support in information dissemination about the Short-Term TA Program through their communication channels: social networks (Facebook, Instagram, and Twitter), monthly newsletters in Spanish and English, and organization of informative webinars about the CE SI Short-Term Technical Assistance Program.

- Development of tools for the Short-Term TA Program.

- Sessions centered on skill development and understanding of the Short-Term TA Program with a sub-regional focus: Central America, South America, and the Caribbean.

- Accompaniment in the development of Short-Term TA requests.
  This personalized accompaniment focuses on preparing the request, structuring the application and filling out the form.

- Clarification of roles and responsibilities (requestor, CE SI Short-Term TA program, TA providers).

- Accompaniment concludes when the request has been submitted to the CE SI Short-Term Technical Assistance Program.

Approach
Communities can approach the LAC Platform in various ways

Communities can approach the LAC Platform in various ways: either by express request of the organization interested in preparing an application or by addressing the LAC Platform in countries where there are processes related to the funding model, such as elaboration or review of National Strategic Plans, elaboration of Funding Requests (specifically, preparations for the development of national funding requests to the GF under the NFM4), Grant Implementation, etc.

It is also possible that the Technical Secretariat of the CCM may liaise between civil society groups and the LAC Platform to address technical assistance needs derived from the funding model processes (e.g., responding to the Technical Review Panel).

Likewise, Global Fund country teams usually have a clear understanding of the country's needs and can help facilitate coordination with civil society organizations, the CCM, and the LAC Platform.

The LAC Platform has offered to the community and key population representatives in the CCMs that, once a country funding request is scheduled for submission, it can be conducted through webinars, direct messaging, or messaging through the CCM technical secretariats.

Coordination

Technical Assistance requests have a greater chance of success when other key stakeholders in the country are allowed to provide feedback on it.

Technical Assistance requests have a greater chance of success when other key stakeholders in the country are allowed to provide feedback on it. Establishing communication channels with other stakeholders (National TB or HIV Programs, Principal Recipients, CCM, GF Country Teams, UNAIDS, cooperation agencies that form part of CCMs, among others) becomes particularly important during the TA request elaboration process.

For TA requests related to needs that affect the civil society and/or key populations in their entirety, it is essential to organize informative coordination meetings and allow the different key stakeholders to engage and participate in the TA request elaboration.

Identification of Needs Related to the TA and Eligibility Check

First, it is crucial to verify that the identified need related to the TA is eligible according to the CE SI Short-Term TA Program areas of work. Once eligibility has been confirmed, the LAC Platform team will support the requesting organizations in drafting the general and specific objectives of the request.

Definition of General and Specific Objectives

Having clear goals aligned with the TA Program is fundamental for developing key activities to achieve the objectives related to the technical assistance. The LAC Platform accompanies requesting organizations in the following tasks:

Definition of Key Activities

- Defining the expected deliverables of each activity
- Establishing workdays: in-country and desk work
- Designing an activity timeline
- Identifying actions that require funding
- Developing a minimum budget

The following table describes the most important steps and actions involved in elaborating an application to the EI CDG Short-Term Technical Assistance Program.

No.	Description	Activities	Links to online resources
1	Approach to the CE SI and the TA form. Development of the TA request form.	- Download the TA form. - Become familiar with the GF's Community, Rights and Gender Strategic Initiative. - Review the form and the Technical Guidance Note.	- Request forms in: Spanish, English, French - Community Engagement Strategic Initiative (CE SI) - Technical Assistance Guidance Note
2	Contact with the LAC Platform to organize an accompaniment and support session for filling out the form	The LAC Platform will answer questions and help identify needs related to the TA and fill out the form.	- LAC Platform Technical Coordinator, Anuar Luna ct.plataformalac@vialibre.org.pe - Caribbean: Liz Aldana y Derricia Castillo: lizet.aldana@gmail.com y derricia.castillo.salazar@gmail.com - Centroamérica Rosa González: rosaameliagonzalez79@gmail.com - Sudamérica Lídice López: lidilt@hotmail.com
3	Request submission	Before submitting the request, it is advisable to share a draft with key stakeholders: PRs, CCM, key and vulnerable populations, GF teams, other strategic partners, etc. Please note that the application should be submitted at least six months before the funding request deadline (see the expected dates for each of the NFM4 windows).	crgta@theglobalfund.org
4	Request review	The following criteria will be considered: • Eligibility of the requesting organization; • LAC Platform involvement in the request elaboration; • Link to GF-related processes (in this case, to the development of national funding requests); • Clear anticipated outcomes; • Opportunity to strengthen community engagement; • Strategic eligibility related to any of the three priority areas of the CE SI Short-Term Technical Assistance Program under the NFM4. • Appropriate partnerships and collaborations.	
5	Decision	- The review of the request may take several weeks. - Requesting organizations will receive an e-mail with the eligibility decision.	

Once a request has been approved, detailed terms of reference and a budget will be developed. This process involves the requestor, the Global Fund, and the technical assistance provider. A suitable technical assistance provider will be selected and will be tasked with identifying **the community experts**. The peer-to peer nature of technical assistance means that, wherever possible, community experts from the country or region of the assignment are engaged in a lead or supporting role.

The time it takes for an eligible request to be implemented depends on the complexity of the work and the availability of CE technical assistance providers and can take up to three months. The roles and responsibilities of the requestor, technical assistance provider and the Global Fund during **implementation** of technical assistance are outlined in more detail in the terms of reference. Upon completion of the assignment, the Global Fund reviews and approves the final deliverables.

The requesting organization plays an important role in **monitoring and evaluation** of CE SI assignments. The Global Fund requires requestors to complete a brief survey after the completion of each assignment. Around 6-12 months after completion of the assignment, recipients of technical assistance are further required to complete a second brief survey to assess to what extent key deliverables of the assignment have been used to apply influence.

Who provides the CE technical assistance?

Twenty-six (26) civil society and key population networks and organizations around the world have been pre-qualified as CE technical assistance providers for the 2021-2023 implementation period. These organizations were selected through an open and competitive tender process, to ensure providers have a strong track record and relevant expertise in relation to human rights, gender, community responses and community systems strengthening. Technical assistance providers will be selected in line with the specific requirements of each technical assistance request. Each provider is responsible for contracting qualified community experts and ensuring the highest quality of final deliverables.