



South Africa Global Fund Country Coordination Mechanism

PRINCIPAL RECIPIENTS' SELECTION MANUAL

April 2018

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Acronyms

GF CCM Country Coordinating Mechanism

GF The Global Fund to fight AIDS, TB, and Malaria

GFCT Global Fund Country Team

LFA Local Fund Agent

NGO Non-governmental organization

NSP National Strategic Plan for HIV, TB and STIs 2017-2022

PR Principal Recipient

PSM Procurement Supply Chain Management

PSP Principal Recipient Selection Panel

PUDR Performance Update and Disbursement Request

RFF Request for funding

SANAC South African National AIDS Council

SDG Sustainable Development Goals

SR Sub-Recipient

TTT Technical Task Team

1. Introduction and Background

1.1 The purpose of the Global Fund to Fight AIDS, Tuberculosis and Malaria (GF) is to attract, manage and disburse additional resources in order to make a sustainable and significant contribution to the reduction of the impact caused by the three diseases, while also contributing to poverty reduction and to the achievement of the Sustainable Development Goals (SDGs).

1.2 The South Africa Global Fund Country Coordination Mechanism (GF CCM), a partnership of all key stakeholders in the country’s response to the three diseases, is responsible for submitting proposals to the GF based on priority needs that respond to the invitation from the GF. It is also responsible for nominating the Principal Recipients (PRs) that will be legally responsible for program results and financial accountability to the GF.

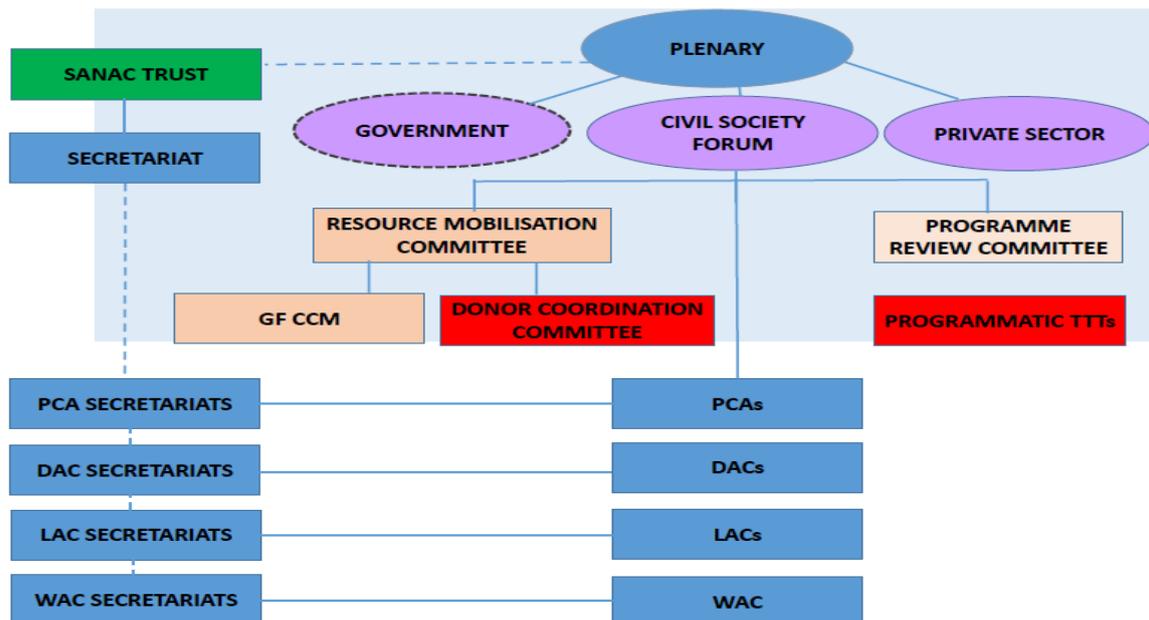


Figure 1: SANAC Structure showing the South African Global Fund Country Coordinating Mechanism

1.3 The GF Country Team (GFCT) is South Africa’s interface with the GF and is responsible for guiding the GF CCM and others on the development of requests for funding, PR selection and day-to-day grants management. The Local Fund Agent (LFA), an independent organization contracted by the GF to undertake an objective examination of and provide independent advice and information relating to grant implementation, assists the GFCT. The LFA is also responsible for assessing the capacity of nominated PRs.

1.4 The GF¹ requires the GF CCM to nominate one or more PRs at the time of submission of the application for funding, document the PR nomination process based on clearly defined and objective criteria, and document the management of any potential conflicts of interest that may affect the PR nomination process.

1.5 The GF has outlined the roles and responsibilities, selection process, minimum requirements and assessment guidelines for PRs².

1.6 This PR selection manual outlines the key aspects of the PR selection process of the GF CCM in the interest of achieving a transparent, fair and objective selection process. It can also serve as a guide to other entities considering the possibility of becoming a PR to implement GF funded programmes in South Africa.

2. The Role of Principal Recipients

In accordance with GF requirements, the GF CCM nominates potential PRs best able to implement specific program activities, based on a documented and transparent selection process. The nominations are subject to GF approval. PRs are generally responsible for the following:

2.1 Grant Implementation

- Sign GF grant agreements and contracts with SRs under the guidance of the GFCT and GF CCM.
- Lead and ensure implementation of grants under the oversight of the GF CCM and take ultimate responsibility for the performance of the SRs.
- Manage the implementation of the grants by SRs and gather reports from the SRs.
- When necessary, propose changes to work plans and funding allocations to the SRs based upon discussions with and endorsement by GF CCM Oversight Committee (GF CCM OC) for non-material programmatic and budget changes and the GF CCM for material programmatic and budget changes, prior to final submission to GFCT.
- Participate in, and lead as necessary, Operational Performance Excellence and Co-ordination meetings, deep dives and Country Portfolio Review meetings to improve programme performance and impact.

¹ *Global Fund Guidelines on the Requirements for Country Coordinating Mechanisms*

² *Fiduciary Arrangements for Grant Recipients*

2.2 Progress Reporting to GF CCM and GF

- Report on programme progress and challenges to the GF through a Progress Update and Disbursement Request (PU DR) form.
- Use a dashboard tool to report progress against programme indicators and finances to the GF CCM on a quarterly basis.
- Identify key issues and implementation bottlenecks and escalate to GF CCM for guidance through the CCM OC.
- Routinely share with CCM OC progress and financial reports sent to the LFA and GFCT.
- Provide information to the GF CCM, GF CCM Secretariat, GF CCM OC and any other GF CCM committee when requested to do so.

2.3 Maintain Partnership with GF CCM

- Attend and participate in GF CCM meetings when invited.
- Attend and participate in Country Portfolio Review and CCM OC meetings as invited.
- Collaborate with the GF CCM Secretariat to organize site visits.
- Carry out other responsibilities in accordance with the grant agreement.

3. General Principles Guiding PR Selection

3.1 The GF CCM shall document and follow a transparent process as required by the GF¹.

3.2 Section 217(1) of the South African constitution requires an organ of the state to have a fair, equitable, transparent, competitive and cost effective system of contracting for goods and services.

3.3 The PR selection process shall be one that complies with section 217(1) of the SA constitution, conducted at an early stage in the request for funding (RFF) process so that any capacity building needs inform technical support planning within the new program's budget.

3.4 The GF CCM shall transparently identify and nominate potential PRs based on a set of objective criteria that assesses the capacity and skills to serve as a PR.

3.5 Where possible, the GF CCM aims to nominate both government and non-government PRs for each disease programme in order to strengthen the national response.

¹ See clauses 24 and 25 of the *Global Fund Guidelines on the Requirements for Country Coordinating Mechanisms*

- 3.6 The National Department of Health (NDOH) is exempted from the PR selection process and shall be one of the PRs to implement key priorities identified by the GF CCM as a means of ensuring sustainability of programmes. The GF CCM shall decide the specific programme interventions to be managed by NDOH together with all other implementation arrangements for the grant.
- 3.7 The PR selection process, as outlined in Annexure A, shall offer both existing and potential PRs fair and equal opportunities of being nominated as PRs.
- 3.8 While the GF CCM nominates potential PRs, the final appointment of PRs lies with the GF working closely with the GF CCM. The GF shall sign grant agreements with PRs once the RFF process has been successfully concluded.
- 3.9 The GF CCM shall ensure that PRs, once confirmed, work closely with it, to undertake an open, fair and objective process to identify prospective SRs. The actual SR selection process to be followed by PRs shall be detailed in the *SR Selection Manual*.

4. Advancing Transformation

- 4.1 The GF CCM supports the transformation objectives of the South African government, to redress the injustices of the past, and shall include PR and SR selection requirements that contribute to this objective.
- 4.2 The GF CCM shall specify the pre-qualification criteria for each grant, intended to advance transformation, including ring-fencing PR spots or reserving certain programme areas for implementation by organisations led by women, youth, people living with HIV (PLHIV), key populations and people with disabilities.
- 4.3 The GF CCM shall use BBBEE¹ status as part of the pre-qualification criteria to ensure that organisations that access GF funding are transformed. For the 2019-2022 grant, the GF CCM has determined that all potential PR applicants need to have at least BBBEE level three (3) or better while potential SR applicants should be at least BBBEE level two (2) or better.
- 4.4 The GF CCM shall also use BBBEE points² in the overall evaluation score for potential PR applicants using either a 90/10 or 80/20 points scoring system. The applicable BBBEE points scoring system shall be indicated in the call for applications. The balance shall be reserved for the ability to deliver, determined according to the evaluation criteria.

¹ In accordance with the requirements of the Broad Based Black Economic Empowerment (BBBEE) Act as amended from time to time.

² In accordance with the requirements of the Preferential Procurement Policy Framework Act (PPPFA) as amended from time to time.

- 4.5 All PRs are required to assign 20% weighting for BBBEE points when selecting potential SRs. The balance shall be reserved for the ability to deliver, determined according to the evaluation criteria.
- 4.6 The GF CCM requires all nominated PRs to consider transformation requirements in the selection of SRs, as outlined in the *SR Selection Manual* to be provided to all PRs.
- 4.7 PRs shall complete SR selection before grant negotiation, once there is approval from the GF Technical Review Panel (TRP), so that SRs can be involved in grant negotiation with actual costs identified.

5. Implementation Arrangements

- 5.1 The GF funded programmes in South Africa generally focuses on the two diseases of HIV and Tuberculosis (TB) implemented across the country in targeted districts and sub-districts. The programme interventions and targeted geographical locations may vary per grant and intervention.
- 5.2 The GF CCM shall consider the following in deciding on the implementation arrangements of each GF grant:
- 5.2.1 The number of PRs required to implement shall not be too many to manage or too few such as to create concentration risk.
 - 5.2.2 Past experiences and policy considerations shall inform the types of PRs better suited to implement certain interventions e.g. the procurement of antiretroviral treatment drugs may better be managed by the NDOH while community level interventions may best be implemented by civil society organisations (CSOs).
 - 5.2.3 The extent to which implementers are expected to leverage existing relationships with key stakeholders in the locations where interventions are targeted.
 - 5.2.4 Feedback and recommendations from the GF CCM OC based on experiences from implementing past grants.
 - 5.2.5 Feedback and recommendations from the GFCT based on experiences from implementing past grants.
 - 5.2.6 The need to address transformation.
- 5.3 The GF CCM shall decide on the implementation arrangements prior to a call for proposals with the understanding that the final arrangements shall be subject to change as the RFF process unfolds. The GF CCM shall decide on the final implementation arrangements of each

grant prior to finalisation of PR contracting by the GF in order to maximise the economy, efficiency and effectiveness of programme interventions.

5.4 The GF CCM and the GF CT shall have the right to review implementation arrangements during grant implementation if it is deemed to be in the best interests of improving the economy, efficiency and effectiveness of programme interventions. In such cases, the GF CCM, GF CT and affected PRs shall work closely together to find and implement the best solution.

6. PR Selection Panel

6.1 The GF CCM shall appoint a PR Selection Panel (PSP), including its Chairperson, comprised of at least five members with the time, qualifications and commitment for such a critical process.

6.2 The LFA shall be allowed to attend meetings of the PSP as an observer.

6.3 The terms of reference of the PSP shall be as follows:

6.3.1 Work closely with the GF CCM OC and the RFF Sub Committee to develop a call for applications to serve as PRs, together with evaluation criteria, to be approved by the GF CCM.

6.3.2 Manage the PR selection process in accordance with the requirements in this manual.

6.3.3 Objectively evaluate, assess and score any applicants responding to the call for applications.

6.3.4 Recommend to the GF CCM, applicants for nomination as PRs.

6.3.5 Respond to requests for information and documents related to appeals lodged in respect of the PR selection process.

6.3.6 Prepare a final report to GF CCM including making recommendations to improve the PR selection process.

6.4 All potential PSP members shall sign a special declaration of conflict of interest (COI) forms, in line with the requirements in the GF CCM Governance Manual, before their membership is confirmed by the GF CCM.

6.5 Any person affiliated with any organisation applying to serve as a PR or to be considered as an SR shall be disqualified from membership of the PSP. A person is affiliated with a prospective PR or SR if he/she is board member, director, officer, employee or agent of a prospective PR or SR. A person is also affiliated with a prospective PR or SR if a family

member, life partner, friend, business partner or member of a commercial enterprise is a board member, director, officer, employee or agent of a prospective PR or SR.

6.6 All PSP members shall remain liable to comply with the requirements of the GF CCM COI policy for the duration of their service in the selection process.

6.7 The enforcement of the conflict of interest requirements' relies on self-declaration and full disclosure by potential PSP members. A PSP member may be removed from his/her position should any undeclared conflict of interest come to the attention of the GF CCM. In that case, the matter will be referred to the full GF CCM for a decision as required by section 10.5 of the GF CCM Governance Manual.

6.8 All PSP members shall be oriented on key GF PR selection requirements, the GF CCM structures and procedures, and the key PR selection requirements and tools at the start of their term.

6.9 The quorum for PSP meetings is 50% plus one. A quorum must be in place before a decision can be validated. Proxy voting shall not be permitted.

6.10 Decisions of the PSP shall be made by a simple majority (50% plus one).

6.11 The GF CCM Secretariat, together with an auditor to be appointed through the GF CCM Secretariat procurement process, shall support the work of the PSP.

6.12 All proceedings of the PSP shall be minuted by the GF CCM Secretariat.

6.13 The auditor shall ensure that the actual PR selection process is in compliance with the requirements of the manual and that the list of applicants, the list of disqualified applicants and the tallying of evaluation scores, and the outcome reported to the GF CCM are accurate.

6.14 The PSP shall be disbanded once their recommendations have been presented to the GF CCM and the GF CCM has made the final decision about which PRs to nominate for the RFF.

7. Call for Application for PR Services

7.1 The GF CCM shall call for applications from CSOs, private and public sector bodies through a competitive and transparent application process to identify and select potential PRs.

7.2 The terms of reference (TORs) for the call shall be jointly developed by the GF CCM OC, the PSP and the RFF Committee but final approval rests with the GF CCM.

7.3 The TORs for for the call shall include the priority programme areas, the target provinces and districts if possible, eligibility criteria, technical and management capacity required, templates to be used, date and place of submission among other information.

7.4 The eligibility criteria shall show the requirements applicants must meet to qualify to submit a PR application and the evidence they should provide.

7.5 The final TORs must be approved by the CCM prior to publication.

7.6 The call for applications shall be circulated widely including on the SANAC website, SANAC mailing list and at least one national newspaper with wide circulation.

7.7 Potential applicants shall be afforded at least 15 working days to prepare their submissions.

7.8 Applicants shall be allowed to bid as a consortium if they so wish as long as they can demonstrate their capacity to manage large volume programmes efficiently and effectively, clearly demonstrating outcomes and value for money, the contribution and necessity of each consortium member and the management arrangements.

8. Submission of Applications by Interested Parties

8.1 All applications shall be on standard forms to be supplied at the time the call for applications is published.

8.2 Both physical and electronic submissions shall be acceptable as long as they are received before the closing date and time indicated in the call for applications.

8.3 Physical submissions shall be deposited in a dedicated and sealed tender box to be located at the SANAC offices and clearly marked as such.

8.4 The tender box shall be opened, immediately after the closing date and time, in the presence of at least two officials mandated by the PSP including an auditor, with all submissions being recorded and signed for by the parties present at the opening.

8.5 All electronic submissions shall be made using a dedicated email address.

8.6 A comprehensive list of all submissions received shall be circulated to members of the PSP and published on the SANAC website within two working days of the closing deadline.

9. Evaluation of PR Applications

9.1 The evaluation criteria for applications shall be specified in the call for applications and shall not be changed midway through the process unless all applicants are notified and afforded the opportunity to amend their submissions. In any event, such a decision shall only be made by the GF CCM.

9.2 The PSP shall apply the same evaluation criteria to all applicants, including existing PRs.

9.3 All submissions shall be screened by the GF CCM Secretariat for compliance with administrative requirements as per the requirements in Annexure B and any other requirements specified in the call for applications including pre-qualification criteria. Disqualified submissions will not undergo technical evaluation.

9.4 A list of disqualified submissions, with reasons thereof, shall be certified by the auditor and submitted to PSP members for endorsement.

9.5 Only copies of applications that passed the administrative requirements screening shall be delivered to PSP members for further evaluation.

9.6 The further evaluation process shall be a three-stage process that involves technical evaluation, presentations and field assessments.

9.7 Technical evaluation

9.7.1 All submissions that passed the administrative and pre-qualification requirements screening shall undergo technical evaluation based on criteria specified in the call for applications.

9.7.2 The technical evaluation criteria shall, to the extent possible, be objective, relevant to understanding an applicant's potential to serve as a PR and be capable of being substantiated with verifiable evidence.

9.7.3 The technical evaluation must include an assessment of the ability to discharge the duties of a PR including satisfying the minimum requirements as set out in annexure C.

9.7.4 Technical evaluation must also assess the expertise and experience of the applicant in implementing similar interventions as those prioritised under the grant including working relationships in the target districts.

9.7.5 Each PSP member shall individually evaluate and score each applicant according to the set criteria and using a specially designed scoring tool. The PSP members shall discuss each applicant before finalisation of scores to ensure that members have the same understanding of the submissions.

9.7.6 The scores of a PSP member who fails to evaluate all eligible submissions shall be disregarded in the interest of fairness.

9.7.7 The scores of all PSP members for each applicant shall be aggregated and an average score assigned.

- 9.7.8 The top scoring applicants, those that meet the minimum threshold for technical evaluation scores, shall be invited to make presentations.

9.8 Presentation

- 9.8.1 Shortlisted applicants shall be invited to present before the PSP based on a set of requirements to be supplied at least five working days before the presentation date. The presentations are intended for PSP members to seek clarification from potential applicants, to inform their recommendations to the GF CCM, while affording potential applicants the opportunity to demonstrate their commitment to serve as a PR.
- 9.8.2 The PSP must assess demonstrated commitment and willingness of the applicant to serve as a PR, including the “soft” requirements for success, such as flexibility and willingness to work as part of a team.
- 9.8.3 Applicants who have been shortlisted and invited to present but then fails to present before the PSP shall be disqualified.
- 9.8.4 Each presentation shall be scored by all PSP members using a specially designed scoring tool.
- 9.8.5 All scores from PSP members for each applicant shall be aggregated and an average score assigned.

9.9 Field Assessments

- 9.9.1 The PSP may undertake field assessments particularly in cases of applicants that have not served as PRs before.
- 9.9.2 Field assessments visits are not mandatory for all shortlisted applicants as they are only necessary in cases where the PSP still needs further clarification on the capacity of a PR or experience with similar interventions.
- 9.9.3 No points are awarded for field assessments as they are for clarification purposes.
- 9.10 The final score for each applicant shall be a combined score based on the following weight:
- 9.10.1 85% for technical evaluation.
- 9.10.2 5% for presentation; and
- 9.10.3 10% for BBBEE points.

9.11 The GF CCM can vary this weighting for ring-fenced applications provided the specific call for application had indicated the amended weighing.

9.12 The PSP shall use the consolidated score of each applicant to recommend the top scoring applicants to be nominated as PRs by the GF CCM, informed by the number of PRs to be nominated and the desired split between government and non-government PRs.

10. Communication of PR Selection Decisions

10.1 The PSP shall make recommendations to the GF CCM on applicants to be nominated as PRs.

10.2 The GF CCM, through the GF CCM Secretariat, shall keep the GFCT informed about the PR selection process and have an opportunity to discuss nominations with GFCT before the GF CCM makes final nominations.

10.3 Once the GF CCM has made a decision on potential PRs, the GF CCM Secretariat shall formally inform the GF of the nominated PRs.

10.4 The PSP, assisted by the GF CCM Secretariat, shall inform all unsuccessful bidders on the outcome of the process.

10.5 Nominated PRs shall only be formally informed of their selection once the GFCT has indicated no objection to their nomination.

11. Appeals Against PR Selection Decisions

11.1 The GF CCM shall appoint a PR Selection Appeals Committee (PSAC), comprised of independent professionals, the chair of which must be a lawyer, to address any concerns raised by applicants. The same conflict and ethics requirements applicable to GF CCM members and the PSP shall apply.

11.2 The terms of reference of the PSAC shall be as follows:

11.2.1 Receive and attend to all appeals related to the PR selection process.

11.2.2 Establish rules governing its work to the extent that they do not contradict any provisions in this manual.

11.2.3 Manage the PR selection appeal process in a fair, objective, transparent and timely manner intended to achieve successful resolution of disputes.

11.2.4 Request information, documents, presentation and testimony from witnesses necessary to understand the nature and causes of a dispute and potential resolution.

- 11.2.5 Subpoena applicants and any members of the GF CCM or its committees to testify and provide further evidence.
- 11.2.6 Provide written recommendations to the GF CCM on how to resolve appeals referred to it.
- 11.3 An applicant unhappy with a decision of the GF CCM regarding PR selection shall lodge an appeal with the Chairperson and co-Chairperson of the GF CCM within seven working days of receiving the GF CCM's communication regarding the outcome of the PR selection process.
- 11.4 Such an appeal shall be lodged using a prescribed form clearly setting out the grounds for appeal and providing any suitable evidence to support the appeal.
- 11.5 The PSAC shall endeavour to report back to the GF CCM, with recommendations, within seven working days from the day an appeal is referred to it.
- 11.6 The GF CCM shall make a decision within seven working days of receiving recommendations from the PSAC.
- 11.7 Such a decision shall be communicated to the appellant, through the GF CCM Secretariat, within five working days of the GF CCM decision.
- 11.8 It is important to note that the GF rules are clear that the GF CCM is the final decision-making body and hence all appeals should be managed by the Chairperson and co-chairperson of the GF CCM.

12.Revision of manual

- 12.1 This manual shall be reviewed by the GF CCM before any new call for applications. The GF CCM OC shall lead a technical task team to review and submit for GF CCM consideration, any proposed changes and/or amendments. The review process shall consider lessons learnt from implementing past and present grants. All changes to the manual shall require GF CCM approval before they become effective.

Approved and adopted on this day: – _____

Signed:

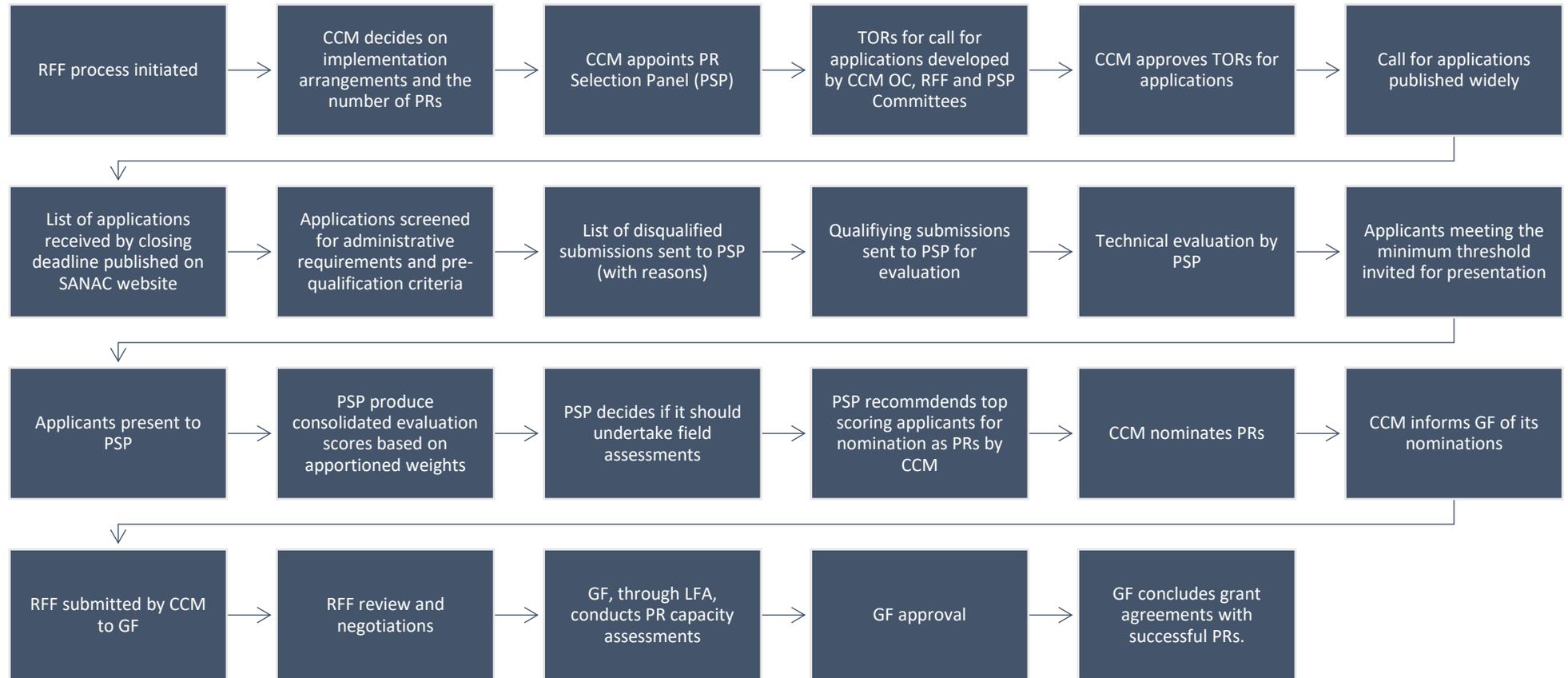
Chairperson of GF CCM:

Name: _____ Signature: _____

Co- Chairperson of GF CCM:

Name: _____ Signature: _____

Annexure A. High level PR selection process



Annexure B. Administrative requirements for acceptance of PR application

The administrative requirements include the following in addition to any other requirements specified in the actual call for proposals:

- Use of the prescribed application form and adherence to length of submission limits (number of pages).
- Submission of the following documents (in addition to any other evidence submitted by an applicant):
 - Board resolution authorising submission of application.
 - Proof of legal entity (NPC, Trust, Voluntary Association, Close Corporation, Pty (Ltd)).
 - NPO registration status and confirmation of compliance with Department of Social Development requirements.
 - Profile of the organisation showing its history and some of its work relevant to the application process.
 - List of board members and management, their current job titles and certified copies of IDs.
 - Valid SARS tax clearance certificate together with tax compliance status pin.
 - Valid BBBEE certificate. Beneficiary recognition certificates will not be accepted.
 - Latest employment equity report submitted to the Department of Labour.
 - Last two audited Annual Financial Statements signed by Board chairperson. If your last audited annual financial statement is older than 2 years then supply the most recent management accounts pack.
 - Audit management letter for the last audit.
 - Organogram for all management and administrative positions (Human resources, finance, PSM, M&E, project management).
 - Policies and procedures documents addressing financial management, procurement, travel, human resources, inventory management and occupational health and safety.
 - An executive summary of a recent report to a donor for any of the high-level areas that this grant will focus on.

Annexure C. Minimum Requirements for PRs

It is essential that all applicants understand that whilst the GF CCM nominates PRs to be part of the grant, the GF makes the final decision about the PRs based on an assessment of the organisation's ability to optimally meet the GF criteria to function as a PR. A potential PR must have proven ability to manage programmes in the specific focus areas chosen by the GF CCM (that may change with each concept note) and must also be capable of performing the functions of a PR as set out by the GF, which includes:

Effective management structures and planning

- Adequate skilled and experienced staff to manage key programme areas such as grants management, procurement, monitoring and evaluation, and finance.
- Effective organizational leadership using transparent decision-making processes.

Adequate capacity and systems for management and oversight of Sub-Recipients (and relevant Sub-Sub-Recipients)

- Ability to oversee multiple SRs and contractors in order to safeguard both financial and physical assets.
- Ability to provide or contract for capacity strengthening to ensure timely and quality programme implementation.

Effective internal controls and management of conflicts of interest

- Internal control systems to prevent and detect misuse or fraud.
- Organization's policies and procedures.
- Internal control systems used for compliance.

Financial-management system that can disburse US \$10 million or more annually.

- Accounting system that can correctly and promptly record transactions and balances with clear references to budgets and work plans.
- Ability to monitor actual spending in comparison to budgets and work plans and how the organization investigates variances as well as protocols for taking follow-up actions.

Warehousing capability or key regional warehouses, their conditions and security to store health products and maintaining quality, as applicable.

- Storage capacity and conditions (including ventilation), equipment, and size.
- Security measures/protocols/insurance for theft.
- Facilities that are equipped with a temperature monitoring and controlling mechanism.

Ability to avoid treatment disruptions, as applicable

- Experience with distribution of supplies, dispatches as well as security measures for transportation.
- Logistics-Management Information System (LMIS) with requisition and stock-reporting tools to anticipate and minimize stock-outs (incl. accurate forecasting and timely ordering).

Data collection capacity and the tools in place to monitor programme performance

- Monitoring and Evaluation (M&E) system for routine monitoring of activities/interventions that are aligned to the goals and objectives of the programme in question.
- Mechanisms and tools to report accurate and quality-assessed data from Sub-sub Recipient / Sub-recipient to the PR.

Routine reporting system

- Routine reporting system/ Health Management and Information System.

Quality assurance and monitoring of product quality throughout the in-country supply chain

- Experience with quality-assurance plans specifying quality monitoring activities on a national basis.

Annexure D. List of other supporting tools

- Call for applications template
- PR application form
- PR applications register
- Register of disqualified applications
- Administrative requirements checklist
- PR applications evaluation sheet
- PR presentation evaluation sheet
- PR field assessment sheet
- Evaluation scores aggregation sheet
- Appeal form