Grant Management Solutions

FINAL TECHNICAL REPORT #2: Regional Partner Strengthening—Approach and Results of an Innovative Development Strategy

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Funding provided by the United States President's Emergency Plan for AIDS Relief and the United States Agency for International Development under contract No. AID-OAA-C-12-00040.

This document is made possible by the support of the American People through the U.S. Agency for International Development and the U.S. President's Emergency Plan for AIDS Relief. Grant Management Solutions is funded by the U.S. President's Emergency Plan for AIDS Relief and the U.S. Agency for International Development under contract No. AID-OAA-C-12-00040. The contents of this report are the sole responsibility of Grant Management Solutions, and do not necessarily reflect the views of the U.S. Agency for International Development, the U.S. Government, or the Global Fund to Fight AIDS, Tuberculosis and Malaria. Grant Management Solutions is a U.S. Government–funded partnership consisting of Management Sciences for Health, Abt Associates, International HIV/AIDS Alliance, Pact, Palladium, Realizing Global Health, Training Resources Group, and committed to strengthening the performance of Global Fund grants.

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Acronyms

CCM	Country Coordinating Mechanism
CIF	Curatio International Foundation
EFCA	Eurasia Foundation of Central Asia
ESOP	employee stock ownership plan
FEI	*France Expertise Internationale*
GCC	Global Challenge Corporation
GIZ	*Deutsche Gesellschaft für Internationale Zusammenarbeit*
Global Fund	Global Fund to Fight AIDS, Tuberculosis and Malaria
GMS	Grant Management Solutions
GMS2	Second phase of GMS
ICB	institutional capacity building
IQC	indefinite quantity contract
IRESCO	*Institut pour la Recherche, le Developpement Socio-Economique et la Communication*
IT	information technology
LAC	Latin America and the Caribbean
NTAP	Network of Technical Assistance Providers
OD	organizational development
P2PX	peer-to-peer exchange
PR	principal recipient
RPCAT	Regional Partner Capacity Assessment Tool
RFP	request for proposals
RP	regional partner
TF	task force
TAI	Technical Assistance, Inc.
TRG	Training Resources Group
TSF	Technical Support Facility
TS	technical support
UN	United Nations
UK	United Kingdom
UNAIDS	Joint United Nations Programme on HIV/AIDS
UNICEF	United Nations Children's Fund
UNFPA	United Nations Population Fund
USAID	United States Agency for International Development
WAG	West African Group

Executive Summary

Grant Management Solutions (GMS) was a five-year project financed by the United States Agency for International Development (USAID). GMS began operations in October 2007 and closed on September 30, 2017. GMS had three objectives: (1) provide short-term, management-related short-term technical support to country coordinating mechanisms (CCMs) as well as principal recipients (PRs) and subrecipients to resolve implementation bottlenecks; (2) build the capacity of local entities so that they can, in turn, provide management-related technical support through direct contracting with Global Fund to Fight AIDS, Tuberculosis and Malaria (Global Fund) grantees; and (3) build knowledge dissemination platforms. This report focuses on Objective 2, particularly the second of its two workstreams, the Regional Partner (RP) Strengthening Initiative.[1]

Based on contract requirements, 12 RPs were selected. The first wave was included in the proposal (ALMACO Management Consultants, Ltd. in Kenya, Curatio in Georgia, OASYS Financial and Management Services in Senegal, Q Partnership in Zimbabwe, and Technical Assistance, Inc. [TAI] in Bangladesh), and a second group was selected at the end of Project Year 1 (PY1) that consisted of Advantech in Kenya, Eurasia Foundation of Central Asia (EFCA) in Kazakhstan, *Institut pour la Recherche, le Developpement Socio-Economique et la Communication* (IRESCO) in Cameroon, Global Challenge Corporation in Côte d'Ivoire, Khulisa in South Africa, *Fundación Plenitud* in the Dominican Republic, and Upward Bound in Kenya. All, except Curatio and EFCA, which are foundations, are private for-profit companies.

The initiative was originally envisioned as a phased, linear approach to institutional capacity building (ICB). In Phase 1, each RP was paired with a Tier 1 mentor partner and underwent a capacity assessment followed by a series of strengthening interventions, as necessary, to achieve readiness for Phase 2. In Phase 2, RPs provided short-term technical assistance to CCMs, PRs, and subrecipients, either by direct contracting or by subcontracting GMS assignments, wholly or partially. This approach was based on several assumptions: that RPs would, thanks to their wealth of high-quality Global Fund–related consulting experience under GMS and others, need minimal ICB from their mentor partner to become "Phase 2 ready"; mentors were equally able to provide such support; and the direct contract market would develop and be profitable.

In reality, this was a highly iterative process: not only were all assumptions swiftly challenged, but a vital element was shown to have been neglected at the outset. Whereas "traditional" ICB in the developing world tends to focus on organizations' compliance with donor requirements to receive funding, the majority of RPs in this case was private-sector businesses, and as such required a different order of strengthening, generally categorized as organizational development (OD). Furthermore, RPs were much more heterogeneous than had been realized, in particular with regard to entrepreneurial attitudes and skills, such as strategic planning, business modeling, and marketing. Similarly, not all Tier 1 partners possessed equal ability to support this type of OD. In parallel, the direct contracting market singularly failed to develop. Without a simple, rapid contracting mechanism (as with applications for GMS support), countries shied away from the complexity and effort involved despite the availability of funds. From the RPs' perspective, other mechanisms, such as the Global Fund's own indefinite

[1] Capacity building under Objective 2 comprised two workstreams: individual consultant development and RP organizational strengthening. The two were clearly interlinked, because RP organizations were a key source of the consultants who carried out assignments under Objective 1.

quantity contracts (IQCs), the 5% Initiative, or *Deutsche Gesellschaft für Internationale Zusammenarbeit*'s BACKUP Health initiative, did not generate sufficient consulting work to meet RPs' profitability targets.

In light of this, the GMS team made multiple innovative revisions to the approach, creating a systemic package of business-strengthening interventions implemented by a variety of experts through a marketplace approach that allowed RPs to select technical support providers among the most suitable Tier 1 partners and locally as appropriate. To create a "red thread" linking technical strengthening interventions, GMS encouraged RPs to undergo regular executive coaching, in person or virtually, which contributed greatly to business results. One effort that failed was the development of a charter to establish consensus about a set of quality standards to which RPs would adhere; this failure spurred GMS to foster greater trust between the partners, first by grouping them into four "innovation pods," each tasked with developing an innovative product or service to support rollout of the Global Fund's New Funding Model. The last major GMS support, in PY4, established peer-to-peer exchanges among RPs to foster reciprocal sharing of skills, knowledge, and experience to help solve real business challenges.

In keeping with the dissimilarity among RPs, uptake of service offerings was highly varied, from one or two (Curatio and EFCA) to almost the entire group (Advantech, OASYS, and Upward Bound). Regular coaching definitely enhanced and cemented the results, whether individually (OASYS and Q Partnership) or collectively (Nairobi Group and West African Partners innovation pods).

In addition to encountering considerable individual success, with streamlined systems and procedures leading to more focused and proactive business seeking and, most importantly, bottom-line results, the extent to which GMS RPs grew to trust and collaborate with one another was demonstrated by a growing number of successful joint ventures unprompted by GMS, in which partners shared consultant rosters to bid on contracts, including IQCs, for which they would not have individually qualified.

Last, but far from least, in December 2016, in anticipation of the GMS closeout, 10 RPs joined together to create the Network of Technical Assistance Providers, an effort to preserve the GMS legacy of results-focused consulting that many of them had helped to craft. Headquartered in Nairobi, this network aims to build on partners' shared experiences and values as well as complementary skillsets. It is hoped that applying their new and/or improved entrepreneurial tools will allow them to succeed in a market that continues to be challenging and where the low-hanging fruit of GMS assignments is no longer available.

However, despite the best efforts of the RPs, it is clear that the demand for direct contracting by PRs and CCMs for technical support from regional organizations has not materialized. Although the Global Fund has renewed its provision of grant monies for the latest round of grantmaking, it remains to be seen whether, as throughout the GMS project, existing sources of free technical support—largely donor-led and funded—are not once again to be the preferred technical support access mechanisms. This is due in part to the very low transaction costs associated with such requests compared with the sometimes lengthy procurement processes for direct contracting by PRs and CCMs, even when such contracting is legally possible. Furthermore, many bilateral and multilateral technical support agencies have been reluctant or unwilling to contract with small consulting groups, preferring to engage individual consultants and to forego the additional team coordination, quality control, and logistics services that the RPs offer. In addition, the Global Fund's IQC process, on which several RPs have successfully bid, has not yielded a steady flow of revenue through task orders. This failure of market development means that regional consulting groups, such as the RPs, cannot depend on Global Fund consulting in its current form as their principal revenue source.

1. Background

The Global Fund for AIDS, Tuberculosis and Malaria's (Global Fund's) Technical Assistance 2.0, known as Grant Management Solutions (GMS), was awarded by the U.S. Agency for International Development (USAID) on September 30, 2012, under contract AID-OAA-C-12-00040, which was implemented from October 1, 2012, to December 2017.

Building on its first phase (2007–2012), the mission of GMS's second phase (GMS2) was to improve the performance of Global Fund grants so that they would achieve their goal of accelerating the end of the AIDS, tuberculosis, and malaria epidemics. GMS carried out this mission through three objectives:

- Objective 1: Provide short-term technical support to country coordinating mechanisms (CCMs) and principal recipients (PRs), facilitating access to Global Fund grants and building the capacity of implementing partners to use grant resources effectively and efficiently
- Objective 2, Part 1: Strengthen the institutional capacity of 12 GMS regional partner (RP) organizations, enabling them to independently provide high-quality technical support to Global Fund countries and stakeholders
- Objective 2, Part 2: Build the capacity of individual consultants and certify them, making a sufficient pool of skilled and knowledgeable Global Fund management and governance experts available to Global Fund recipient countries and stakeholders
- Objective 3: Innovate and document tools and best practices for effective technical support and grant management (including the PR management dashboard), and disseminate them via electronic platforms, training, and consulting

2. Introduction

This report focuses on Objective 2, Part 1, referred to henceforth as the RP Strengthening Initiative. As noted above, this objective aimed to strengthen the institutional capacity of 12 GMS RPs to independently provide high-quality technical support to Global Fund countries and stakeholders.

In several cases, the second part of Objective 2 (building the capacity of and certifying individual consultants) overlapped with the first part. That is, many RP leaders also served as trainer-facilitators at GMS training events. RP consultants who met GMS selection criteria were invited to participate in these events, thus becoming eligible for inclusion in short-term technical support assignment teams, and hence entering the project's consultant development pathway.[2] It was believed that this investment in local and regional capacity would create a more sustainable and accessible supply of high-quality technical support for CCMs and PRs using technical support funds from their Global Fund grants, a further step toward country ownership.

RP entities comprised the second tier of a three-tier partnership structure established by the project's lead implementing agency, Management Sciences for Health. The first tier of major partners comprised seven United States–based organizations with a broad spectrum of technical expertise: Management Sciences for Health, Abt Associates, the International HIV/AIDS Alliance, Pact, Palladium, Realizing Global Health, and Training Resources Group (TRG). Tier 3 comprised 10 short-term technical support provider companies based in four continents. GMS was thus implemented by a consortium of 29 partners.

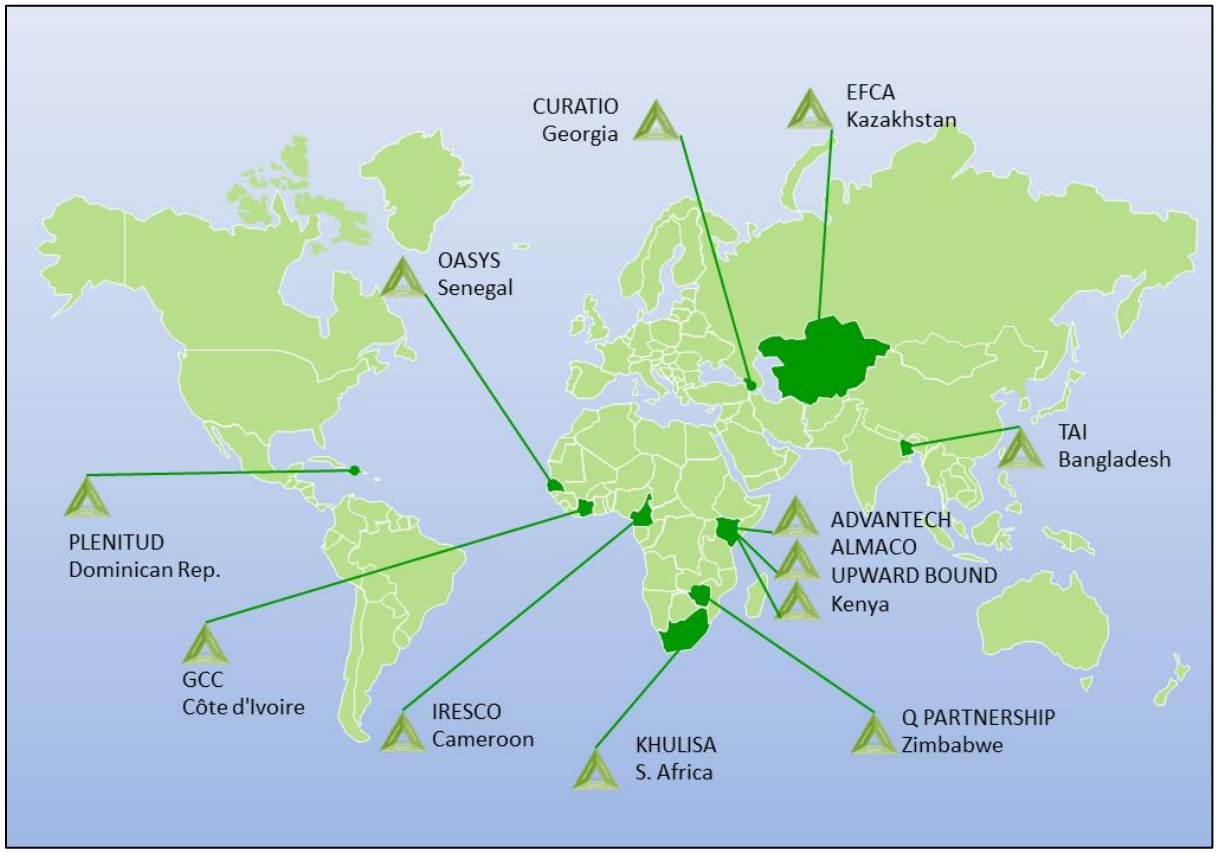
[2] The consultant development pathway enabled consultants to pursue virtual, face-to-face, and on-the-job learning throughout their relationship with the GMS project. Their efforts and successes were recognized by GMS with certification for different experience levels in different technical specialties.

3. Selection of Regional Partners

The project was expected to build the capacity of two local or regional entities in six regions: Asia, Eastern Europe, East Africa, West Africa, Southern Africa, and Latin America and the Caribbean (LAC). These entities were to be in country and headquartered in the aforementioned regions. They needed to be either small businesses or small non-governmental organizations (defined as having annual revenues of $7 million or less), not affiliated with any multilateral organization, and not affiliated with each other. Their core business (defined as 50% of total revenues) was not to have been providing management-related technical support to Global Fund grantees in the past. GMS was to identify, select, and include one entity per region in the response to the request for proposals (RFP), with the remainder to be identified in the base period of performance of the resultant contract.

The resulting 12 RPs that are shown in Figure 1 were chosen in two waves, as detailed in the sections below.

Figure 1: GMS RPs Selected for Objective 2 (Names and Countries)



3.1. Wave 1 Selection

The first six entities, referred to as Wave 1, were selected from among the regional entities that had applied in response to GMS solicitations in 2008 and 2010, during the first phase of the project. These partners were paired with a Tier 1 mentor, whose role is further described in Section 2. Wave 1 RPs included the following:

- Asia (Bangladesh): Technical Assistance, Inc. (TAI)
- East Africa (Kenya): ALMACO Management Consultants, Ltd.
- West Africa (Senegal): OASYS Financial and Management Services
- Southern Africa (Zimbabwe): Q Partnership
- LAC (Dominican Republic): *Fundación Plenitud*
- Eastern Europe and Central Asia (Georgia): Curatio International Foundation (CIF)

Four of the six—ALMACO, OASYS, Q Partnership, and TAI—were well known to GMS inasmuch as the founder or directors had participated in and/or led GMS teams and had provided other consultants from their rosters for teams. CIF appeared to meet all of the criteria set out in the RFP, whereas *Fundación Plenitud* was recruited through a request for expressions of interest disseminated on January 9, 2013.

3.2. Wave 2 Selection

As per the contract, the second group of RPs was selected after project start-up through an open and competitive process. In October 2013 (i.e., the beginning of Project Year [PY] 2), GMS sent out a request for expressions of interest. GMS then short-listed applicants and carried out virtual interviews, followed by visits to selected entities. The organizations contracted to complete the group of 12 RPs were as follows:

- East Africa (Kenya): Advantech and Upward Bound
- West Africa (Côte d'Ivoire): Global Challenge Corporation (GCC)
- West Africa (Cameroon): *Institut pour la Recherche, le développement Socio-économique et la Communication* (IRESCO)
- Southern Africa (South Africa)**:** Khulisa Management Services
- Eastern Europe and Central Asia (Kazakhstan): Eurasia Foundation of Central Asia (EFCA)

Two of the above organizations, GCC and IRESCO, had been short-term technical support providers during the first phase of GMS.

4. The Conceptual Framework: From Capacity Building to OD

4.1. Initial Assumptions

4.1.1. Initial USAID Assumptions

Intrinsic to USAID's RFP and subsequent project award was the underlying assumption that a market existed or might develop for direct contracting of regionally based technical support providers by Global Fund beneficiaries, CCMs, PRs, and lead subrecipients.

This assumption was both functionally and behaviorally based. It was functionally based because in about 2009, the Global Fund made a contractual provision for the use of grant funds (including to CCMs) for technical support to beneficiaries. Given the scope, novelty, and sophistication of processes for funding requests (e.g., country dialogue, allocation by disease priority, emphasis on risk identification, and management and mitigation), it was expected that countries would use available funds to avail themselves of technical support from qualified local or regional providers.

In behavioral terms, given repeated expressions by beneficiaries of a self-identified "technical support fatigue syndrome" (too much technical support at the wrong time and technical support that was not always linguistically or culturally appropriate), it was expected that countries would seize the opportunity to obtain technical support directly and choose qualified providers themselves.

4.1.2. Initial GMS Assumptions

Inherent in the GMS proposal were the following assumptions:

- From prior assignment success as well as through assessment, Wave 1 RPs could demonstrate baseline skills and capacity to provide high-quality services to Global Fund beneficiaries, as defined by GMS standards and as recognized by the Global Fund and USAID.
- A single RP strengthening model would suffice that would cover the usual intervention categories and would be based on a linear progression in two phases. Phase 1 would comprise more or less intensive institutional capacity-building interventions, and Phase 2 would involve the GMS-supervised rollout of interventions, potentially even involving subcontracting of all or part of a GMS assignment.
- There was potential for all GMS Tier 1 partners (i.e., major partners) to effectively provide strengthening to the RPs.

4.2. Regional Partner Profiles

For detailed profiles, contact information, and Global Fund support services, see Annex 1.

5. RP Strengthening: An Iterative Experience

5.1. Initial Approach: "Classic" Capacity Building

Previous experience and knowledge of partner organizations, not only the technical quality of work they had undertaken but also a certain longevity for several firms (notably ALMACO, CIF, and TAI, whereas OASYS, albeit more recently founded, had deep roots through its founder in the International HIV/AIDS Alliance), allowed the inference that a "classic" set of capacity-building interventions would rapidly close any (minimal) knowledge or procedural gaps and allow partners to function optimally. Strengthening would be carried out through a phased approach. During Phase 1, RPs would receive needed strengthening and capacity-building interventions until they achieved Phase 2 readiness and were deemed able to carry out GMS-style consulting assignments. In some cases, it was even envisaged that GMS assignments in their country or region would be subcontracted to RPs. When the second wave of RPs was recruited, these assumptions still held, and they informed the preparation and rollout of strengthening interventions.

5.2. Groundwork: Defining "Capacity"

At the GMS launch on November 1–3, 2012, a special meeting of the Objective 2 partners (GMS and representatives of Tier 1 and 2 partners) was held to develop capacity-building approaches to both consultant development and RP strengthening. The Objective 2 partners first selected a set of core competencies that defined the GMS consultant. These competencies would be used to focus training, evaluation, and certification of individual consultants. In a similar fashion, a set of core organizational competencies was defined to guide RP strengthening. These competencies focused on: (1) business development; (2) finance; (3) contracts; (4) operations and administration; and (5) technical oversight and backstopping. These areas were deemed to be critical for the provision of high-quality, management-related, technical support in keeping with GMS standards.

A task force (Objective 2 staff, with support from GMS finance and operations staff and TRG) was formed to create an assessment tool, to establish benchmarks for readiness for each of the five competency areas, and to form a basis for detailed individual strengthening plans. The Regional Partner Capacity Assessment Tool (RPCAT) was finalized in mid-March 2013. It comprised more than 100 statements of excellence pertaining to the five main areas, each with three to eight subareas. Each area was scored on a scale from 1 to 4, with 3 being the benchmark for Phase 2 readiness. Detailed instructions as well as templates for the strengthening plan and assessment reporting were also developed. It was expected that RPs would assess themselves, share findings with GMS and Tier 1 mentors, and develop an implementation plan for priority interventions aimed at bringing the organization to Phase 2 readiness within the two-year timeframe allotted. The tool was shared with all RPs on completion, and all organizations duly completed the self-assessment and co-developed an intervention plan with their Tier 1 mentor (see below) that was vetted and validated by GMS.

All RPs were visited by GMS staff at least once during the project in addition to the coaching or technical visits they received from Tier 1 partners. Shortlisted Wave 2 partners, who were less well known to GMS than their Wave 1 peers, received a scoping visit before contracts were finalized to verify partner information and confirm suitability for inclusion in the initiative.

5.3. Initial Approach: Individual Mentoring

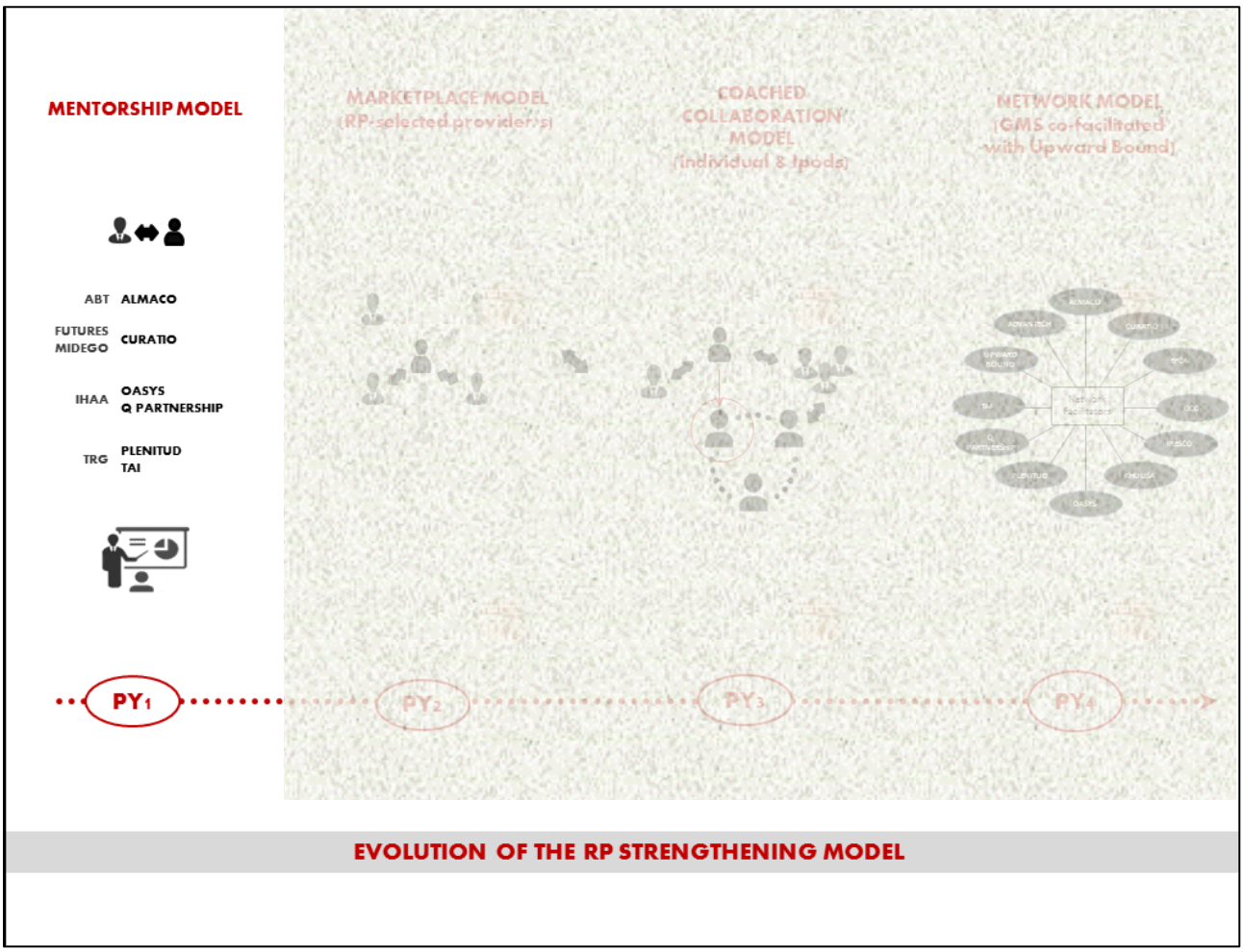
Table 1: Wave 1 Mentor-Mentee Pairings

Region	Entity	TIER I MENTOR
Asia (Bangladesh)	TAI	TRG
East Africa (Kenya)	ALMACO	Abt Associates
West Africa (Senegal)	OASYS	Abt Associates
Southern Africa (Zimbabwe)	Q Partnership	International HIV/AIDS Alliance
Eastern Europe and Central Asia (Georgia)	CIF	Futures (Palladium) MIDEGO (currently Realizing Global Health)

- Asia (Bangladesh): TAI
- East Africa (Kenya): ALMACO Management Consultants, Ltd.
- West Africa (Senegal): OASYS Financial and Management Services
- South Africa (Zimbabwe): Q Partnership
- LAC (Dominican Republic): *Fundación Plenitud*
- Eastern Europe and Central Asia (Georgia): CIF

In PY1, for the Wave 1 RPs, GMS used a one-on-one mentor-mentee approach, pairing each RP with one of the United States–based Tier 1 partners (see Figure 2). It was expected that Tier 1 partners would draw on appropriate resources in house or from their consultant roster to support RP priorities as determined by the RPCAT assessment. In the case of Eastern Europe and Central Asia, as a small business with special expertise (marketing) but limited resources, Realizing Global Health was teamed with Palladium to offer CIF a broader selection of service offers.

Figure 2: Iterations of RP Strengthening Model: PY1



Between project launch and the end-of-year meeting, RPs completed their self-assessments, diagnostic visits were carried out, and strengthening plans were codeveloped with the mentor partner. The strengthening plans were then submitted, reviewed, and validated by GMS. As this process advanced, however, it became increasingly apparent that there was considerable variation among the RP organizations. Some had scored themselves quite low on a majority of competencies described in the RPCAT, whereas CIF gave itself a score of at least 3 in all areas. The strengthening plans generated much debate because it was often hard to select high-priority actions when all scores were low.

Furthermore, the limitations of the mentor-mentee pairings rapidly began to surface; in one case, the mentor partner could not mobilize an OD expert with appropriate language skills. In other cases, limited mentor expertise in one or more of the key competency areas led to a partial or unbalanced assessment of the regional entity's capacity with varying amounts of detail and focus. The variety of proposed strengthening interventions made it difficult for GMS to determine appropriate levels of effort, which made contract negotiations with Tier 1 mentors lengthy and overly iterative.

By May 2013, it had become apparent that the original regional strengthening approach was unsatisfactory and warranted comprehensive revision. First, the compliance-based, functional focus of the assessment and

strengthening plans failed to take into account a fundamental element of RPs' organizational capacity development as private-sector businesses: the need to develop a solid strategic business framework for the organization, including how to integrate the new Global Fund business into its activity base. This strategic analysis needed to include a definition of the organization's overall vision for itself, including its core products and services; its business development vision (growth versus consolidation); its costing and pricing structures; as well as its sales and marketing strategies, plans, and systems.

GMS Consultant Training and Certification as RP Business Development

Throughout the project's lifetime, RPs continued to provide consulting services for short-term technical support assignments. Initially, the business leaders were the primary service providers. As GMS developed its blended learning approach and formalized consultant certification, RPs also increased the quality and scope of their consultant rosters by enrolling their consultants in GMS development programs. Not only did this increase revenue potential for RPs because their consultants participated in more and more GMS assignments internationally, but it also boosted organizational credibility at all levels, which was further supported by GMS certification. Now, 25 RP consultants are certified team members, 8 are certified team leaders, and 1 is a certified coordinating team leader. By the GMS closeout, 30% of assignments were carried out by RP-affiliated consultants.

The original approach of one-on-one mentor-mentee partnerships also proved to be inadequate for meeting the full gamut of RPs' needs. Although some partners thought that they had been appropriately matched with their mentor organization in terms of peer experience and ability to fully support their capacity development, others were less satisfied. Furthermore, it was clear that certain types of sought-after services (e.g., website creation or upgrading, development of marketing materials, and business coaching) could be more effectively delivered by local providers.

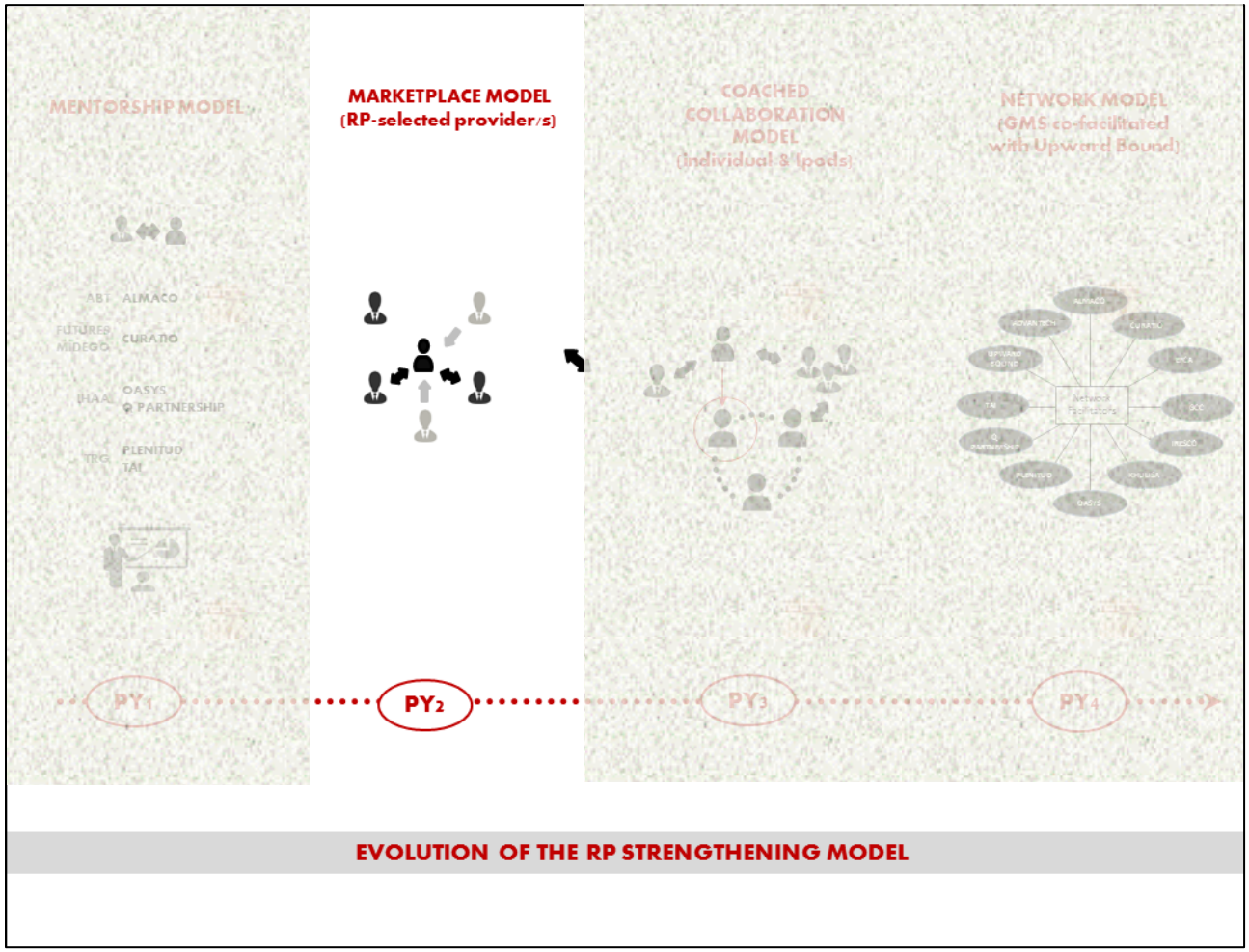
Finally, a growing understanding of the evolving Global Fund technical support landscape provided further impetus to revise the approach. Originally, there were only two options for Global Fund contracting for regional entities—through GMS or by PR subcontracting. However, since 2009, a number of additional donors had emerged. Three of these donors presented opportunities with only a slightly higher risk and investment cost than the GMS work. These were (1) the Global Fund secretariat, which had begun publishing indefinite quantity contract (IQC) tenders for technical support services; (2) *France Expertise Internationale* (FEI; now *Expertise France*, the French 5% Initiative); and (3) GIZ's BACKUP Health. Potentially, opportunities might arise for smaller amounts of work from United Nations partners and other bilateral donors that support specific countries. In addition, a few governments and CCMs had indicated interest in possibly engaging direct support for issues around the New Funding Model. These new opportunities materially affected the timeframe for RP capacity development. It was no longer feasible to implement a linear process of RP strengthening over two or three years. Tier 2 partners needed immediate support to be able to respond to emerging opportunities and build their regional reputations. By June 2013, GMS staff decided to revise the approach.

5.3.1. RP Strengthening Version II: Marketplace Approach and Business Focus

During July and August 2013, GMS's project director, the Objective 2 team, resource persons from the Tier 1 partners, and the GMS contracting officer's representative developed a more business-focused approach to RP strengthening. In this approach, RPs would carry out strategic analysis and business planning to initiate development of new lines of Global Fund technical support work based on each organization's core business

capabilities and vision of future development. This accelerated Phase 1 included functional analysis and optimization of business systems, a costing and pricing analysis, business plan development, marketing plan development, support for proposal development, and additional support services to be provided by local contractors.

Figure 3: PY2 Marketplace Approach



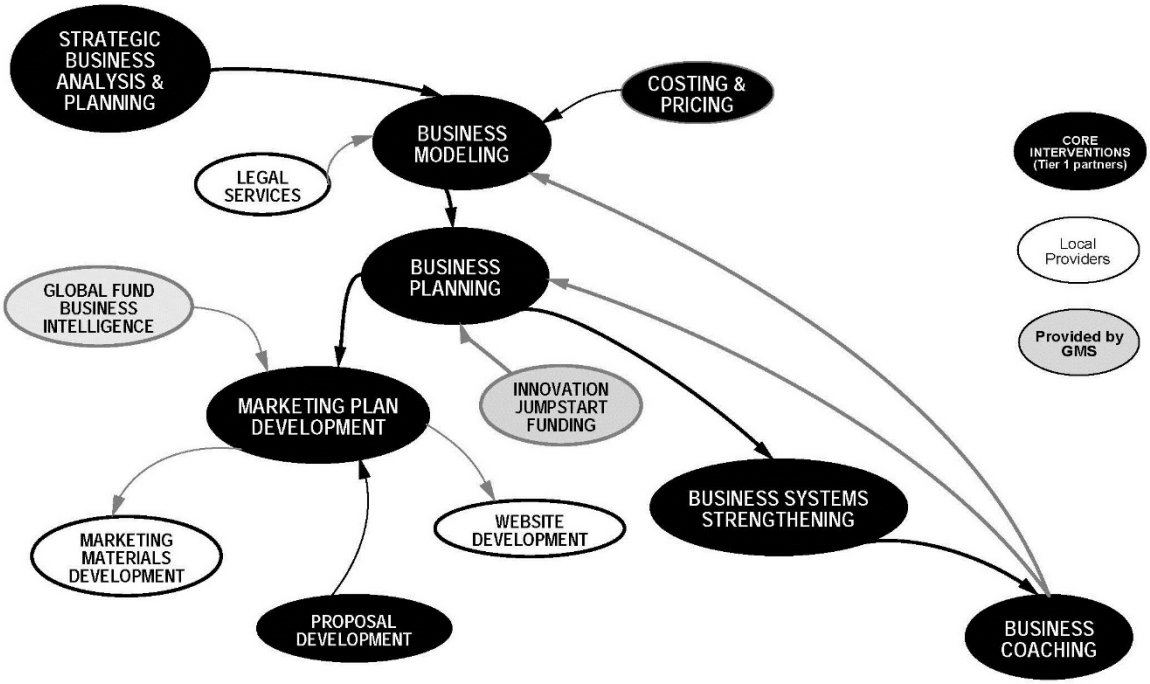
Rather than acting as paired mentors, Tier 1 partners would henceforth provide technical strengthening in their areas of greatest expertise. To encourage appropriate matching between Tier 1 and Tier 2 partners, strengthening interventions were offered on a marketplace basis (see Figure 3). Supply (based on Tier 1 partners' organizational expertise and ability to deliver support on a timely basis in the appropriate language) was paired with demand (based on RPs' analysis of their high-priority needs after undergoing the comprehensive strategic analysis process outlined above). In addition, RPs were encouraged to contract directly with qualified local service providers whenever appropriate, subject to vetting by GMS.

The first marketplace exercise was carried out at the annual RP meeting, held in Arlington, Virginia, in December 2013. By this time, the second wave of RPs was on board and thus benefited directly from the new approach.

5.3.2. The "What" and "How" of Interventions: A Systemic Vision

With this enhanced business focus in mind, rather than offering narrowly targeted institutional capacity building interventions in linear sequence to achieve a predetermined performance benchmark, GMS created a holistic framework for interventions that covered all aspects of organizational systems and processes, including strategic thinking and planning, business modeling, market analysis, and marketing planning. In this way, GMS created a systemic package to support OD to a level meeting GMS and Global Fund standards for technical support. The unifying component was business coaching, intended to provide an ongoing "red thread" to allow each organization to regularly take stock of the effect of strengthening interventions on the overall organizational system.

Figure 4: The RP Interventions Package



For each intervention, the RP and the GMS Objective 2 team assessed the alignment with the partner organization's stated business objectives and goals before issuing the provider contract through bilateral (recipient and provider) reporting after the intervention. This approach allowed GMS to revise strengthening interventions' content and provision on an ongoing, results-focused basis to apply lessons from assessments, including substitution of more appropriate providers when necessary. RPs were asked to monitor organizational change based on application of what they had learned or refined, in alignment with their organization's business model and strategic planning.

5.4. Innovative Additions

Over time, additional facets were added to the RP Strengthening Initiative package that arose from ongoing observations by the GMS team and partners. These additions were intended to ensure that momentum was maintained throughout the project lifetime.

5.4.1. The Charter: Challenges to Implementation

At the same time as the approach shifted from mentoring to marketplace, GMS sought to support development and adoption of a quality assurance approach that would be applicable to all RPs. The idea of organizational certification, similar to that applied by GMS to individual consultants, was explored and rapidly abandoned. It was felt that although it was completely appropriate for the project to define and recognize consultant core competencies and individual performance, GMS had no mandate or authority to certify organizations, particularly given the wide spectrum of institutional structures and business models. One of the GMS Tier 1 partners, the International HIV/AIDS Alliance, offered a viable alternative, namely a charter, defined as "a formal document describing the rights, aims, or principles of an organization or group of people."[3] Creating such a charter was viewed by GMS and the 12 RPs as a step toward ensuring that high-quality technical support would be provided to Global Fund recipients by RPs operating as a group of services providers, rather than as individual companies or organizations after the end date of GMS2.

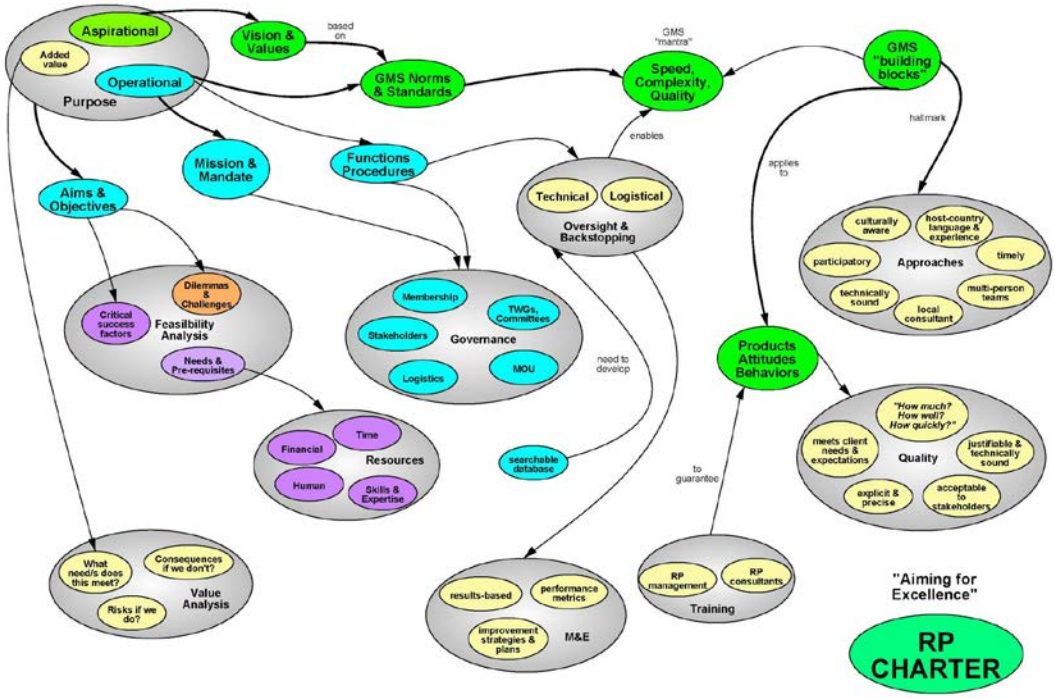
The idea of an RP Charter was introduced and discussed among the initial six RPs during the annual partners meeting in October 2013. During the RP meeting on April 30 to May 2, 2014, the 12 RPs committed to developing an RP charter that would allow them to share expertise in Global Fund technical support areas, maintain quality standards of technical support, increase coverage and reach of technical support services, and allow more opportunities to work in diverse geographic regions.

GMS committed to supporting a task force (TF) of individual RP representatives to begin drafting the charter, periodically report on their progress, and present the status of the charter at the next RP meeting in October 2014**.** A scope of work was drawn up accordingly for five TF members.

The TF initially brainstormed around key questions, shown in Figure 5 below.

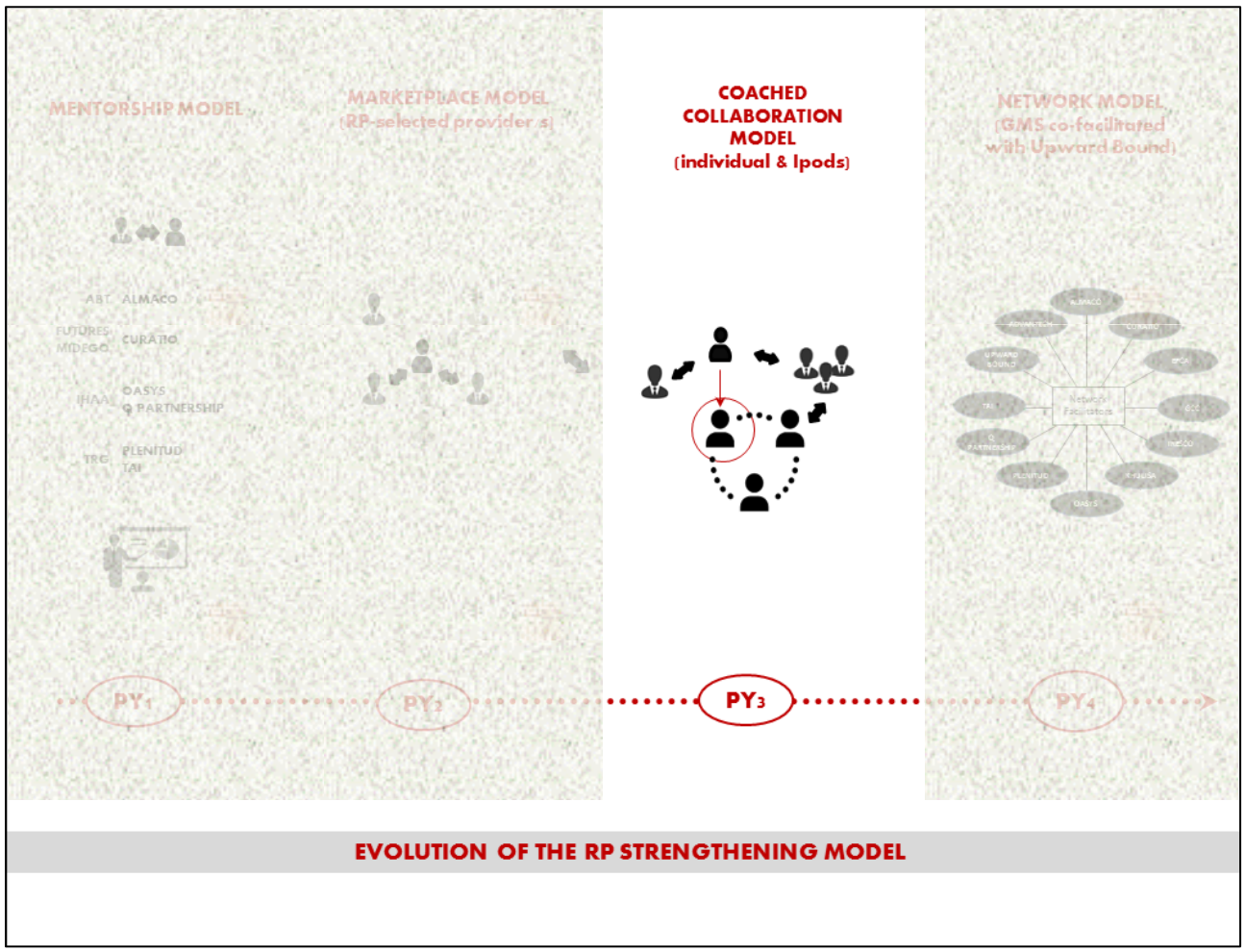
3 International HIV/AIDS Alliance: Our Charter & Linking Agreement, March 2013.

Figure 5: RP Charter Brainstorming



By early July 2014, the TF had produced a draft document, "Memorandum of Understanding Between RPs on Technical Support Provision to Global Fund Beneficiaries," and a statement, "RPs' Strategic Alliance: Core Principles and Values." However, despite encouragement from GMS, the idea failed to gain momentum. By the October 2014 meeting, the charter was not ready for ratification as planned. It was clear that as a group, the RPs were unwilling, unready, or both to commit to a formal undertaking of this nature and did not see the added value it would convey.

Figure 6: Evolution of the RP Strengthening Model



5.4.2. Innovation Pods

The GMS team hypothesized that a possible issue was a lack of trust between RPs. Certainly, they were more used to seeing each other as competitors for GMS and other tender-driven business, rather than as collaborators. Furthermore, GMS supportive interventions had thus far focused, for reasons described earlier, on strengthening individual entities rather than the RP group. Coaching in particular had emerged as a critical red thread linking technical interventions. To attempt to remedy this situation, GMS devised the notion of creating four subgroups of RPs based on geographical or language affinities. This led to the West Africa francophone group consisting of OASYS, GCC, and IRESCO (WAG); the Nairobi Group of ALMACO, Advantech, and Upward Bound; and the Mandela Group of Khulisa, Q Partnership, and TAI; leaving a rather mixed group comprising *Fundación Plenitud*, CIF, and EFCA.

The rationale for creating these groups was task driven but situated firmly outside the usual assignment context. Each group was asked to create an innovative product or service, using the group's core expertise and targeting the Global Fund's policy objectives under the New Funding Model. The intent was for each group to create innovative, potentially revenue-generating products or services for which a genuine need was identified and

demand might reasonably be generated among Global Fund stakeholders. It was expected that working as a group would enable RPs to break complex tasks into parts and steps and thus tackle more complex problems than individuals alone, refine understanding through discussion and explanation, share diverse perspectives, and challenge assumptions to develop new approaches to solving differences and building trust.

GMS would provide 20 days of effort and coaching support. Groups would meet (mostly virtually) every two weeks and report back to GMS monthly. The groups, soon called "innovation pods," embraced the idea with enthusiasm and rapidly set to work to generate their innovations, as described below.

5.4.3. WAG

After formalizing their collaboration by drawing up a memorandum of understanding, the WAG members brainstormed repeatedly using Skype. The group initially generated ideas (e.g., training and deploying a joint pool of procurement and supply management consultants) that, although potentially saleable, were not considered sufficiently innovative by GMS. Subsequently, applying the process used by OASYS to develop its successful country dialogue technical support package, the WAG reviewed the New Funding Model and decided to focus on implementation mapping. It was felt that given the novelty of this new requirement by the Global Fund, countries would, as with country dialogue, benefit from a clearly defined, facilitated process.

However, GMS felt that implementation mapping was not a stand-alone service. To replicate the country dialogue support, WAG needed to extend its offer to the whole grant-making process, particularly because WAG leaders and consultants were among the most experienced GMS technical support providers in this area. WAG agreed to this but, to date, has been unsuccessful, despite several expressions of interest from target countries, in obtaining a contract for this service, probably due to the "rival" (familiar, simple, and rapid) option offered by GMS. It is hoped, therefore, that this service offering may be viewed more favorably once GMS has closed.

5.4.4. Nairobi Group

Building on shared contextual knowledge and experience and bolstered by extensive stakeholder consultation, this pod decided to focus on developing a solution to an identified challenge regarding high-quality, community-level data collection and transmission. The objective was to increase the availability, accessibility, quality, and use of health information from the community level for evidence-based decision-making at organizational, county, and national levels in Kenya. Leveraging the technology skills within the group, the innovation, called Quality Data Collection and Enhanced Transmission at Community Level (QADET), would use mobile technology for collecting standardized data at the community level to feed into an integrated national data warehouse.

At the time of this writing, the Nairobi Group has made significant advances in the development of the mobile platform, but it has yet to pilot test the innovation, largely because of pod member time and resource constraints. As with the WAG, it is hoped that with the absence of GMS, the pod will refocus its efforts to generate business, especially by mobilizing resources to fund the rollout.

5.4.5. Mandela Pod

Like the Nairobi Group, the Mandela Pod also imagined a technology-based innovation, in this case to address the challenge of involvement of key affected populations (KAPs) in Global Fund activities, which was typically

weak. KAPs are often stigmatized, criminalized, marginalized, unrecognized, and unheard; they need a platform for meaningful participation in country dialogue and the CCM. The Mandela Pod aimed to use mobile technology to enable two-way communication between KAPs and other stakeholders throughout the funding cycle.

To date, as with the two innovation pods previously described, this pod has failed to move to rollout, again mostly due to the competing commitments of the members.

5.4.6. Eos Group

This group, comprising the three woman-led organizations, initially generated promising ideas that focused on the need for support in countries or regions transitioning out of Global Fund funding. The innovation pod, under the leadership of *Fundación Plenitud*, initially floated the idea of an exit strategy dashboard tool, aimed at raising awareness of expenditure and financing of HIV/AIDS in the context of national health spending and at encouraging reflection by national authorities about the risks of not financing programs and identifying possible alternative sources of financing, particularly once the Global Fund grants have ended. Although *Fundación Plenitud* was geographically distant from the other two group members, it was hoped that this shared focus as well as their common nonprofit status and strong academic backgrounds would be sufficient to create a bond among the partners.

Unfortunately, this was not to be. By this stage, both CIF and EFCA were only marginally involved in the GMS RP initiative, the former because of its secure status and relative autonomy, the latter because it had been unable to sustain momentum for its ambition to develop a for-profit consulting arm, and it consequently refocused on its core donor-funded business. CIF did develop, in isolation, a service package for transitioning countries, which it subsequently offered to the Global Fund in an unsolicited—and highly successful—bid.

5.4.7. Conclusions: Innovation Pods—Success Disguised as Failure

Although finalization and rollout of the innovations is still a work in progress, collaborating as groups on a shared, unusual task clearly did strengthen relationships among pod members. This has been demonstrated not only by the genuine will to overcome logistical and other challenges to reach implementation, but also by increased collaboration in other areas, especially proposals of joint teams for consulting assignments, including GMS assignments and Global Fund task orders. In addition to continuing to complete and prepare next steps, the innovation pods further strengthened their relationships within and among innovation pods. One such experience resulted in a successful collaboration between OASYS and GCC (WAG) that held several Global Fund IQCs. In addition, two of the Nairobi-based partners aimed to jointly carry out a task order supporting the PR World Vision and UNICEF for the Somali Global Fund Steering Committee grants at their offices in Kenya (for security reasons). Once this technical support partnership arrangement was approved by the Global Fund, WAG leader OASYS acted as the contracting and technical backstop for the WAG and the new colleagues. It is hoped that this model may be extended in the coming months because the Global Fund intends to reissue a series of IQCs that might well lend themselves to such interregional collaborations.

5.5. Peer-to-Peer Exchanges

As RPs gained understanding and appreciation of their peer organizations, especially the potential for synergies, it became clear that organizations could not only benefit from Tier 1 interventions but also harness the considerable breadth and depth of complementary expertise of the partners themselves. During visits by GMS to three RPs (TAI, CIF, and EFCA) early in 2015, it became clear that there was a growing demand by partners to move, as they expressed it, "from theory to practice" or, in other words, to benefit from the real-world entrepreneurial experiences of other RPs. They felt strongly that this was a logical step forward after the more abstract interventions carried out by consultants, with the exception of TRG, which, as an employee-owned company, deployed its own staff rather than consultants.

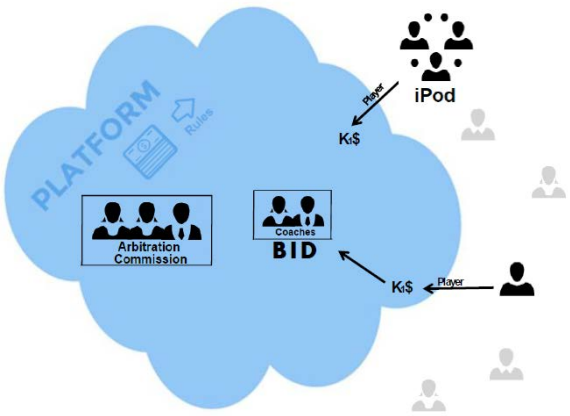
This led the GMS team to explore the idea of a peer-to-peer exchange (P2PX) program for PY4. Emphasis on collaboration had been a striking feature of the RP initiative because the 12 partners moved from a highly competitive environment to an exploration of potential synergies and mutual benefits. The P2PX program would allow RPs (singly or collectively) to collaborate with another partner to resolve an identified critical business challenge, leveraging the respondent's particular expertise, experience, connections, or a combination of these during a short internship with the respondent firm.

The P2PX marketplace was the business systems strengthening model for the remainder of the project.

Knowledge and Skills Bartering

A further component of the P2PX program would be an offer by the requester to provide their own expertise, experience, or both in return for the respondent's assistance. The requester and respondent would negotiate and agree on a fair rate of exchange to conclude the P2PX "contract," which would be vetted and supported (in the form of a finite number of days of effort plus travel and lodging expenses for one person) by GMS. This would encourage all RPs to revisit their unique value proposition to determine the currency with the highest rate of exchange on the P2PX marketplace (and potentially in the wider business environment). Out-of-the-box thinking, it was hoped, would lead them to discover a broader palette of marketable skills, expertise, and experience and enrich their current offer. For example, ALMACO's director, Nyamache Nyachienga, is GMS's only consultant currently certified as a coordinating team leader for Global Fund grantmaking; this unique skillset could well constitute currency in the RP P2PX. See Figure 7.

Figure 7: Knowledge and Skills Bartering

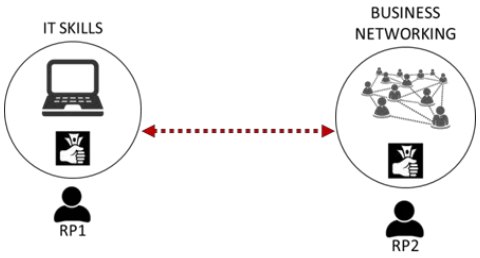


Reciprocity: A Phased Approach

Reciprocity is vital to P2PXs because it is the means by which users arrive at the network with a set of knowledge and skills services as well as demand for knowledge and skills services. Peers exchange knowledge services to satisfy their demands based on a direct reciprocity principle ("I help you and you help me") or an indirect reciprocity principle ("I help you and someone helps me"). Indirect reciprocity usually relies on credits to accomplish fair exchanges. In essence, the principle of reciprocity states that participants must contribute to the system with knowledge services to accomplish their business goals.

It was envisioned that Phase I (PY4) of the P2PX would operate on a *direct reciprocity* principle: any RP seeking peer assistance with a challenge must first establish a "bank account" of knowledge, skills, or services with which they would "pay" for assistance rendered (see Figure 8). Unlike parallel currency systems, such as Bitcoin, there would not be a universal valuation. Rather, RPs would negotiate a fair exchange based on *perceived* value ("We each have something the other wants and are prepared to trade for").

Figure 8: Direct Reciprocity in the P2PX



A more complex system of indirect reciprocity had been envisioned whereby RP 1 might request assistance from RP 2 but pay RP 3, which would assist RP 2. Deemed overly complex, this system was not implemented.

P2PX Rollout

The P2PX program was presented at the RP annual meeting in December 2015. As with previous iterations, GMS used an experiential teaching game to introduce RPs to the notion of direct reciprocity as a problem-solving approach. It was agreed that GMS would sponsor travel and accommodation of one person from any partner to any other partner for a very short visit, based on written concept notes.

RPs were initially slow to post challenges or respond to those that were posted. GMS brokered negotiations on both sides of exchanges when it was felt that RPs were unduly shy about either presenting their challenge or offering to resolve their peers' challenges. In total, exchanges were carried out between eight RPs.

Table 2: P2PX Rollout

Date	Challenger	Respondent	Nature of Challenge
Q4	Q Partnership (Mandela Pod)	Advantech	Information technology (IT) development of Mandela Pod's KAP Voices Matter mobile phone platform
Q2	Advantech	Q Partnership	Advice on marketing strategy
Q3	GCC	Upward Bound	Assistance to develop an organizational capacity evaluation tool
Q4	EFCA	CIF	Develop theories of change and monetize social impact
Q4	*Fundación Plenitud*	Advantech	Assistance for the continued development of *Fundación Plenitud*'s sustainability dashboard
Q4	IRESCO	GCC	Assistance to develop a business model and network

Results

All P2PX participants reported that the visits had a high level of positive impact, not only in the quality of the problem resolution but also in the production of far greater understanding and appreciation of the breadth and depth of other partners' expertise and experience. As a result, participants gained an appreciation of potential synergies and noncompetitive collaboration, which undoubtedly laid the foundation for the final phase of the RP initiative—the creation, by the RPs themselves unprompted by GMS, of the Network of Technical Assistance Providers (NTAP).

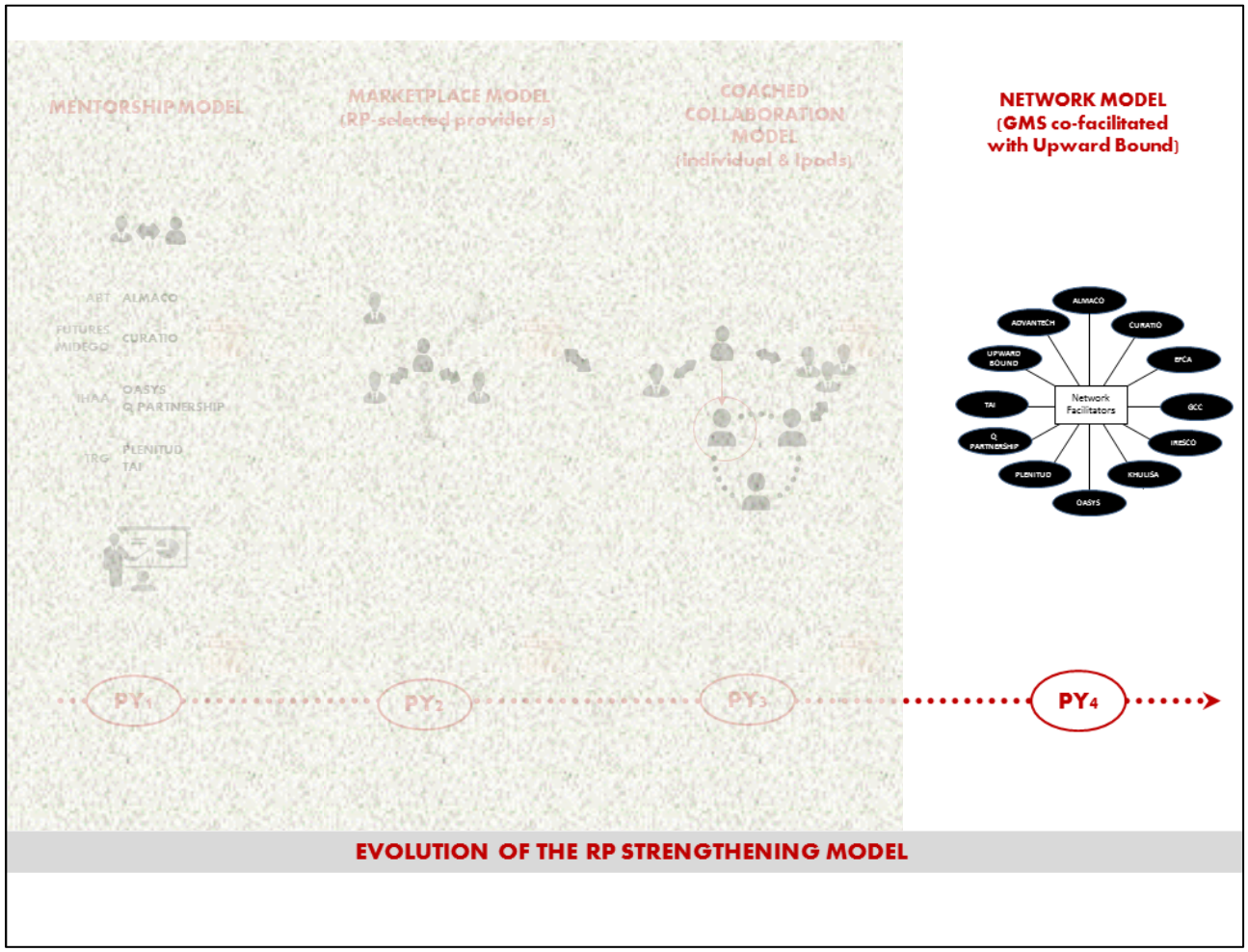
5.6. RP Technical Assistance Network

During PY4, a third mechanism for interinstitutional collaboration—an RP network—gained momentum. After discussion at the RP meeting in Abidjan in December 2015, Upward Bound carried out an initial survey of each organization's vision of a network of RPs, but no consensus was reached. Many RPs imagined an RP network as nothing more than a large database of RP and consultant curricula vitae that could potentially increase their chances of securing larger contracts. Upward Bound and a few other RPs were more ambitious.

To encourage thinking beyond business as usual—in other words, to stay alert for donor-issued tenders—GMS introduced partners to Sharon Drew Morgen's Buying Facilitation™ model through a webinar and short demonstration video.[4] Although well received, the model yielded few actionable responses. Based on the idea of forming an RP network in Abidjan, GMS decided to focus the final RP meeting, held in Nairobi in September 2016, on this possibility. This meeting turned out to be one of the most dynamic, stimulating, and engaging encounters that the GMS team and coaches had supported. The group of RPs had such radically divergent visions of what the network would be that, when they were left on their own without facilitators, they were unable to have a productive debate on the core substance of the network.

[4] http://www.buyingfacilitation.com.

Figure 9: The Emergence of the Network



To obtain broader perspectives, RPs met with a group of local and international stakeholders invited to the meeting. Using the Buying Facilitation model to gather information, this encounter provided new perspectives on donor and client requirements as well as preferences for contractor engagement. The stakeholders' positive perspectives on working with a network of partner organizations—rather than with individual, loosely connected organizations—convinced some RPs to create a formal, legal institution.

Ten of the 12 RPs voted to formally constitute NTAP (CIF and EFCA declined to join), and they passed resolutions on limited competition, vision, services, structure, functions, and funding. The new NTAP members nominated and confirmed a steering committee tasked with developing NTAP's next steps toward registration and effective contracting, demonstrating promising signs of ownership in the future of NTAP. Shortly afterward, Khulisa withdrew from the network pending further internal discussion on the viability and necessity of its membership.

NTAP's objective is to carry on the legacy of GMS by providing high-quality technical support and bring together their collective skills, training, and experience, not only from the GMS project, but also across a diverse and complementary range of other areas. They aim to "co-create positive, durable results with clients in the social, public and private sectors who work in the thematic areas of health, water and sanitation, education, agriculture, climate change, human rights, IT, finance, governance, resilience and post-conflict."[5]

Don Odera of Pact counts RP votes in the network voting process.

To date, the steering committee, chaired by Nyamache Nyachienga of ALMACO, has drawn up a roadmap to lead the committee through its start-up phase and, especially, its registration as a legal entity, pooling of seed funds, and development of a business strategy and model. GMS subsequently supported this virtually through email and weekly Skype meetings with NTAP's steering committee as well as a trade fair event, the Aid and Development Africa summit in Nairobi in late February 2017.

In October 2017, two NTAP representatives accompanied a GMS delegation to the Global Fund headquarters in Geneva and held separate meetings to introduce the network and its services, which sparked considerable interest on the part of Global Fund management. Because NTAP has encountered significant delays in operationalizing the roadmap while aiming for a lean start-up to economize seed funds, NTAP has engaged an executive secretary, who is seconded on a part-time basis from ALMACO in the company's Nairobi office. The executive secretary will expedite outstanding administrative procedures and allow NTAP to engage in official business-seeking activities at the earliest opportunity. NTAP also intends to budget for ongoing OD coaching to facilitate business and marketing plan development and help expedite start-up activities, which have not proceeded as speedily as had been hoped. NTAP is also receiving IT and coaching support from TRG to take over one copy of the GMS virtual learning hub, and it will hold internal sessions to decide how best to use and further develop this platform in the future.

On October 16, 2017, NTAP became officially incorporated as an international business.

[5] NTAP flyer, October 2017.

5.7. Evolution of the RPs and Final Organizational Status

Table 3: Number of Services/RP

Services Offered	Advantech	Khulisa	OASYS	GCC	ALMACO	IRESCO	Q	Upward Bound	CIF	EFCA	Plenitud	TAI	
Innovation pod jumpstart funds	1	1	1	1	1	1	1	1				1	9
Marketing plan (Phases 1 and 2)	1	1	1	1			1				1		6
Costing and pricing		1	1	1		1				1			5
Charter		1	1		1			1					4
Website redesign	1								1				2
Legal services	1												1
	4	4	4	3	2	2	2	2	1	1	1	1	**27**

As might be expected from such diverse organizations, there was considerable variation among RPs with regard to uptake of interventions.

However, it must be noted that the number of services received is not necessarily indicative of the scale or significance of organizational change. Although some organizations had scored themselves comparatively high in basic structures and systems, they were still open to high-level strategic change interventions, as shown by the following examples:

- Q Partnership used a business coach to facilitate formal organizational restructuring and a comprehensive review of the business strategy and model, which to date has generated tangible bottom-line results as well as greater visibility and focus.
- Khulisa, although arguably one of the most sophisticated organizations in the group, also chose TRG as a coach and mentor to assist with transitioning to an employee stock ownership plan (ESOP) model, in line with the founders' enduring mission to transfer company ownership to indigenous partners.
- Upward Bound, having downsized and relaunched itself after experiencing severe difficulties, used the package very comprehensively to "get out of the woods" and is also showing tangible results in terms of revenue, staffing, and business focus.

Business coaching proved to be a key component of the strengthening package, especially when RPs were willing and able to benefit from the real-life experiences of Tier 1 partners. TRG proved to be invaluable in this respect, because the company's own experience growing from a close-knit group of founders to its current position lent its coaching and mentoring immense credibility, particularly with organizations possessing decades of experience (ALMACO and TAI). Newer RP organizations also appreciated the TRG model, because it combined the wisdom of senior consultants with the business-seeking entrepreneurial approach favored by such organizations as

Coaching: A "Red Thread"

"OASYS has developed what we call the OASYS 20/20 vision with the support of GMS under Objective 2. They provided a consultant, a very top-level consultant in Senegal to work with us, help us design the vision for the organization and the three phases of our move to become a very… well-recognized [technical support] entity. And that process is still continuing until last month. I'm having some business coaching sessions with that mentor, and this is with GMS support."

Ousmane Sy, Director, OASYS, Senegal

Advantech, OASYS, GCC, Q Partnership, and Upward Bound.

A strong correlation of the positive results of this approach was found with the entrepreneurial attitude of the business owner (versus a more managerial, stewardship mindset demonstrated by foundations). In the case of CIF and EFCA, this manifested itself as an initial willingness to explore a private-sector–style business-seeking approach, such as creating a consulting arm of the institution to find alternatives in an era of dwindling donor funding, followed by a return to business as usual in responding to RFPs and other public tenders. In CIF's case, after experiencing an inability to gain traction for an idea within their innovation pod, this led to a successful spontaneous proposal to the Global Fund and significant new business.

Other partners have experienced various levels of success in new business seeking, largely dependent on the commitment of the business owner to devote the necessary time to strategy, marketing, and OD as opposed to service provision.

This transition from consultant to business owner is also a factor that influenced the establishment and promotion of NTAP. Although a theoretical consensus has been reached with regard to developmental needs, it has proved difficult to translate these ambitions into concrete activities and move ahead. Partners' competing commitments, as previously described, are a barrier, as are the lack of a formal coordinating entity (secretariat or similar) and geographic distance, especially in technologically challenged operating environments.

Table 4 summarizes the results of RP strengthening in terms of positive organizational changes.

Table 4: Organizational Changes Resulting from Interventions

RP	Structure	Systems	Human Resources	Business Results
Advantech	No change	- Business planning - Marketing - Website redesign - Budgeting - Proposal design	- Employee incentive scheme - Increased staff	- Global Fund IQC - AGRA - QADET (NTAP)
ALMACO	Restructuring (underway)	- Technical proposal policy guidelines - Costing and pricing	- More than 20 consultants - Collaboration on business plan development	- Increased international exposure
CIF	No change	- Marketing - Website and social media		- Global Fund and Joint United Nations Program on HIV/AIDS transition and sustainability contracts in new regions
GCC	No change	- Business planning - Marketing plan	- Consultant pool partnership and domestic networks	- Organizational capacity evaluation tool
IRESCO	Becoming a nongovernmental organization (underway)	- Strategic planning - Costing and pricing	- Increased trained consultants	- Increased technical support revenue (by 8%)
Khulisa	Developing an ESOP (underway)	- Strategic information group - Rebranding	- Increased trained consultants	- Prime for Global Fund work - Global Fund IQCs

OASYS	No change	- Strategic planning - Business modeling - Marketing - Costing and pricing	- Increased staff - Better consultant roster and rates	- Non-GMS international and domestic work (Global, GIZ, FEI, and government of Senegal)
Fundación Plenitud	Strengthening institutional function	- Strategic planning - Financial systems - Website update	- Increased staff - Increased bidding partners	- Increased revenue
Q Partnership	Creating a board of directors	- Stronger policies and procedures - Branding and marketing, including a new website	- Hired business development manager	- Increased revenue and financial reserves - Bigger contracts - Increased visibility
TAI	Deciding not to adopt an ESOP	- Standardized costing and pricing	- Expanded consultant base (Africa and Asia)	Global Fund IQCs
Upward Bound	No change	- Strategic planning, business focus - Costing and pricing - Marketing (P2PX with Q Partnership)	- Increased staff, leaner operations	From loss to profit

As the table shows, organizational change occurred in all RPs to a greater or lesser degree. A cross-cutting trend was an increased professionalism in the way RPs do business. They have now established more effective management, business development, and financial systems or are updating their existing systems. Even highly sophisticated organizations, such as Q Partnership and Khulisa, when given the incentive and opportunity to take a meta position, made significant changes in their governance practices. Q Partnership created a board of directors, and Khulisa set up an ESOP to allow the founders to ultimately transfer ownership of the company to its indigenous employees.

In keeping with the focus on a more entrepreneurial mode of business seeking and client engagement, nearly all partners requested marketing support to develop or revise a marketing strategy and plan and update the company website. Advantech, OASYS, Q Partnership, and Upward Bound have shown themselves highly receptive to the Buying Facilitation model.

As envisaged when a systemic intervention model was developed, business coaching emerged as a red thread that facilitated organizational change. Partners that worked closely with coaches (Advantech, OASYS, Q Partnership, and Upward Bound) were able to follow through on change efforts more effectively than those whose coaching interactions were more limited (EFCA and *Fundación Plenitud*). TRG was a valuable coaching ally, and it provided extensive support throughout the project to both Anglophone and Francophone partners through face-to-face and virtual innovation pod coaching.

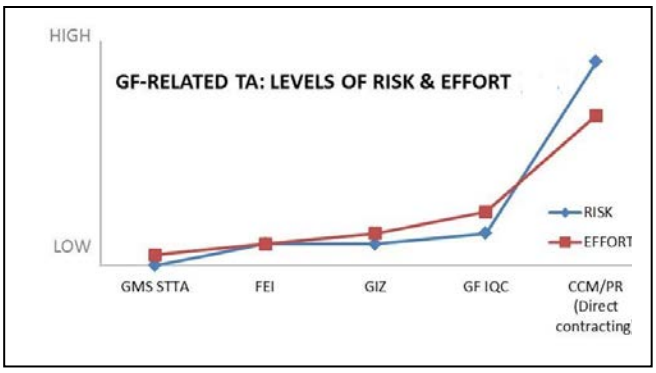
In addition to individual OD, a key outcome of the initiative was a shift away from a competitive paradigm to a collaborative one. The team approach to consulting adopted by GMS was undoubtedly a key building block, representing as it did a radical departure from the solo expert role, generated a collective lexicon of excellent teamwork and coordination. Partners established strategic and operational alliances that transcended geographic borders and narrow areas of technical expertise. Furthermore, the innovation pods and P2PXs fostered a climate of trust, transparency, and confidence among partners. The creation of NTAP is a clear indication of the will to maintain the GMS legacy and create a technical support whole that is greater than the sum of its parts.

"I think the big plus of this type of program is that a lot of the smaller firms would not embark on the sort of capacity building activities that GMS facilitated. A lot of small firms probably won't spend money on a really comprehensive marketing plan or a strategy or a business plan [to develop] their policy and procedure manuals…[and] other aspects of their business. And I think that's what GMS allowed these smaller firms to do, and I think that that was enormously advantageous for the smaller firms because it helped them to formalize their businesses. It gave them a way forward, and they've got standing websites and documents that they can present to clients that have a lasting benefit, which, I think, wouldn't have been the case [without this coaching].… The fact that the regional partners continued to request our participation speaks to the fact that I think it was a valuable service that GMS was able to make available to them."

Carl Schutte, Business Coach, Zimbabwe

5.8. Analysis of the Market for Regional Technical Support Services

Figure 10: Global Fund-Related TA: Risk vs Effort



When GMS2 began in October 2012, based on analysis of demand for management-related technical support for Global Fund grantees, the RP strategy focused on reducing financial risk. At that time, most of the organizations that would become RPs under GMS2 had provided consultants for short-term technical support under GMS1. This support was often a major revenue stream for these organizations, and they were confidently expecting the stream to continue. These organizations therefore considered GMS work to be a very low-risk, high-return proposition, both financially and in terms of work availability. FEI and GIZ, both governmental institutions, were considered almost equally low risk (but slightly higher risk in terms of the probability of securing assignments).

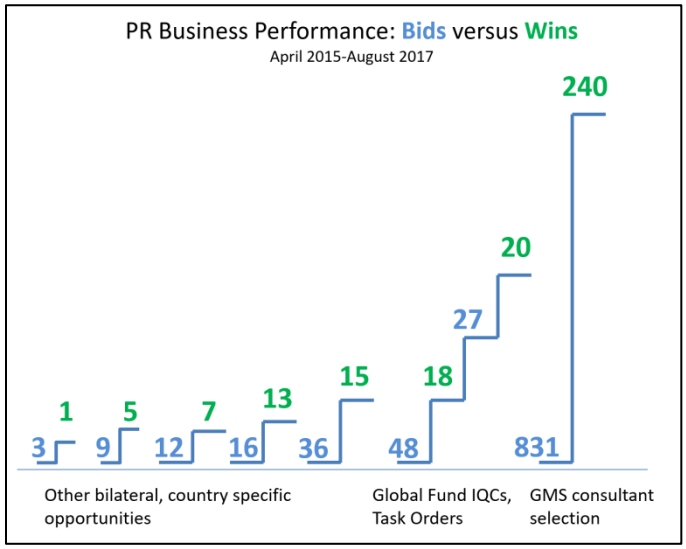
Direct contracting with CCMs and PRs was considered very high risk. These entities were unused to assuming responsibility for contracting with technical support providers and tended to opt for "traditional" methods of access using in-country or international donor mechanisms, even when funds were available through Global Fund grants. In addition to the preference for the more familiar technical support, procurement mechanisms for governmental PRs (i.e., funds flow through the treasury), in particular, significantly increase risk for RPs, whereas the absence of legal status of many CCMs adds complication and uncertainty to the contracting process.

In PY3, the technical support landscape presented more pitfalls than previously anticipated:

- The number of GMS short-term technical support assignments fell well below the anticipated number (60 per year), and this level only recently reached the cumulative 100-assignment mark, whereas medium- to long-term assignments did not afford RPs the hoped-for contracts.
- GIZ (BACKUP Health) experienced a budgetary slowdown.

- Global Fund IQCs did not lead to the issuance of task orders and therefore represented a negative revenue stream (cost) for RPs that had invested time and effort in responding to the RFPs.
- Direct contracting with CCMs and PRs failed to develop, despite some interest in RP products, such as the OASYS country dialogue process.

Figure 11: RP Business Performance



Consequently, the number of contracts signed by RPs was significantly lower than anticipated; in short, demand failed to meet supply. By the end of PY3, and despite the best efforts of RPs, it was clear that the demand for direct contracting of technical support from regional organizations by PRs and CCMs was not forthcoming to the extent initially hoped. Although the Global Fund had identified recurrent needs and included provisions for direct funding in grant and CCM budgets, existing sources of free technical support, largely donor led and funded, were still the preferred access mechanism. This trend continued until the project's end and was a source of disappointment and frustration for RPs and other stakeholders. In one instance, the WAG innovation pod had received clear expressions of interest from three CCMs in its target region regarding assistance with grant making for the upcoming cycle. However, technical support was ultimately sourced from Expertise France and the Joint United Nations Program on HIV/AIDS technical support facility, which was perceived to be less complicated in terms of contracting and financing, despite acknowledgment of the potential benefits of working with GMS-trained and experienced consultants from their own region.

At the outset, the Global Fund's own IQCs were seen as having great potential for new contracting opportunities. However, although RPs have successfully bid extensively on these, actual task orders were very meager.

GMS, in light of its project closure and the need to fill the technical support gap that will undoubtedly reveal itself as the latest wave of grants is launched, has repeatedly stressed the need for the Global Fund and funding partners to develop mechanisms to support simplified access to technical support for grantees if this market is ever to develop and match need to demand. One possibility is a pooled procurement mechanism, such as the one that is used for health commodities. Through this mechanism, the Global Fund would prequalify technical support providers and make funds available for inclusion in grants but leave the decision to issue contracts through this mechanism to the countries. Other options that NTAP will explore while developing its business model include

soliciting support from a broader pool of bilateral donors (e.g., the United Kingdom, Australia, and the European Union) as well as from private and institutional philanthropists, perhaps through innovative approaches such as crowdfunding or "piggybacking" on relationships with other product or service providers, which was tentatively explored at the 2017 Aid and Development Africa trade fair in Nairobi.

In short, as one coach expressed it, "NTAP is a business initiative, and so [it] will need to follow some general process guidance for start-ups if it is to take off and become viable."

6. Results

Tables 5 and 6 summarize GMS's level of achievement (as of August 31, 2017) with regard to Objective 2, Part 1, indicators in the project's performance monitoring plan. As shown, entrepreneurial behaviors, such as proactive business seeking and innovation, met or surpassed targets, and RPs demonstrated their ability to obtain non-GMS contracts, including via unsolicited original proposals. The proportion of RPs implementing a quality assurance process was the only relevant indicator that did not meet or exceed its established target. However, there is a clear shared understanding of the need to document and apply quality assurance policy, particularly in a landscape where the RPs will need to bolster their credibility with new partners, both collectively as NTAP and in their individual organizations. It is expected that all RPs will work on this in the coming months.

Table 5: GMS Achievement of Objective 2 Indicators with Targets (as of August 31, 2017)

Performance Monitoring Plan Objective 2 Indicators with Targets	Actual Results	Target Results
2.1a. Proportion of RPs implementing a quality assurance process	42%	75%
2.1b. Proportion of RPs reporting satisfaction with technical support provided by GMS and partners	80%	80%
2.1c. Number of innovations generated that have obtained funding	7	5
2.4e. Proportion of RPs implementing a business-seeking strategy	83%	75%

Table 6: GMS Achievement of Objective 2 Indicators Without Targets (as of August 31, 2017)

Performance Monitoring Plan Objective 2 Indicators Without Targets	Actual Results
2.4a. Number of non-GMS Global Fund–related contracts and grants awarded to RPs	62
2.4c Number of task orders awarded under a Global Fund IQC to RPs	20

7. Conclusions

Q Partnership, OASYS, Advantech, and Upward Bound clearly obtained results by fully using their coaches. In contrast, once GMS was no longer able to maintain the same level of support, initiatives floundered and, in the case of ALMACO and *Fundación Plenitud*, stagnated. GMS thus maintained the validity of the systemic service package approach, with particular insistence on business coaching throughout the project, regardless of the type and number of technical interventions that were offered.

As demonstrated at the GMS dashboard handover event in Dakar in May 2017 and at meetings in Geneva in early October 2017, the Global Fund and other institutional donors and technical support providers recognize the potential contribution of highly qualified regional organizations. It is hoped that individual organizations and NTAP will be able to fund ongoing coaching and OD support to continue to develop their capacity to respond to future technical support needs in a challenging environment.

Without a doubt, RPs have benefited significantly from the shift from competition to collaboration. Creating a collective database of consultants, including those that have GMS training and are experienced, will leverage a Global Fund skills matrix with exceptional depth, breadth, and geographical reach. However, as the results show, one major challenge will be for NTAP to pay closer attention to quality assurance if technical support provided by the network is to meet the standards and results-focused criteria that have been the hallmark of GMS consulting. Although all partners have demonstrated a clear understanding of these standards, it is not clear how they are to be maintained given resource constraints, particularly with regard to the technical management and backstopping functions. The GMS infrastructure—comprising not only strong traditional support functions in finance and operations, but also a unique cadre of field-experienced senior managers able to contribute significantly to consultant teams' technical results—is unparalleled in the current technical support landscape. NTAP will need to be highly creative if it is to mirror this, and it will need to factor this component into the business plan and mobilize adequate human, technological, and financial resources, especially in light of the additional challenges posed by this type of largely virtual infrastructure in locations that often have limited access to supportive technologies.

Despite the best efforts of the RPs, it is clear that the demand for direct contracting of technical support from regional organizations by PRs and CCMs has not been forthcoming. Although the Global Fund has renewed provision of direct funding of technical assistance in grant and CCM budgets, existing sources of free technical support—largely donor led and funded (including by GMS)—were still the preferred technical support access mechanisms, in part because of the very low transaction costs associated with such requests compared with the sometimes lengthy procurement processes for direct contracting by PRs and CCMs. Furthermore, many bilateral and multilateral technical support agencies were reluctant or unwilling to contract with small consulting groups, preferring to engage individual consultants and forego the additional team coordination, quality control, and logistics services that the RPs offered. In addition, the Global Fund IQC process, although it was accessible to RPs, did not yield a steady flow of revenue through task orders. This failure of market development means that regional consulting groups, such as the RPs, cannot depend on Global Fund consulting as their principal revenue source, unless countries are more actively encouraged to budget for technical support when developing their

funding requests. Most countries would need assistance for this, given the relative inexperience of CCMs and PRs in sourcing, pricing, and evaluating such service offers.

8. Annex 1: Regional Partner Brochure

Grant Management Solutions and Regional Partners

Regional partners and GMS mandate

Grant Management Solutions (GMS) is a multiyear project coordinated by the Office of the U.S. Global AIDS Coordinator. Since its inception in 2007, GMS has provided urgent, short-term technical support to beneficiaries of the Global Fund to fight AIDS, Tuberculosis and Malaria, through teams of consultants working to resolve urgent bottlenecks and systemic problems blocking governance, and the implementation and performance of grants.

In line with the tenets of USAID Forward, as of October 2012 GMS has the objective to scale up the number of individuals and institutional entities that have knowledge of the Global Fund and can provide high-quality management support to its grantees : Country Coordinating Mechanisms (CCMs), Principal Recipients (PRs) and subrecipients (SRs). To this end, GMS trains consultants, engages them to participate in short-term GMS technical assignments, and implements a strengthening program for regional organizations, known as “regional partners”.

Regional partners: Where are they?

GMS works with twelve organizations, based in regions where the Global Fund has grantees: East Africa, South Africa, West and Central Africa, Eastern Europe and Asia, Central Asia, Asia Pacific and Latin America/Caribbean. These partners are small, independent businesses or NGOs. In its first year (2012-2013), GMS worked with six partners and now collaborates with six more (profiles of all twelve are on the next pages).

Grant Management Solutions and Regional Partners

Kenya - ALMACO Management Consultants Limited
Founded in 1994, ALMACO focuses on health and community systems strengthening through leadership and governance, institutional development, procurement and supply management, financial management, M&E.
Expertise: Baseline surveys, institutional capacity assessment, project design and implementation, project monitoring and evaluation, and training.

Nyachienga Nyamache, Managing Director
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Tel: + 254 722 525 446, +254 890914/
nyamache@almaco.org, info@almaco.org
www.almaco.org

Georgia - CURATIO International Foundation (CIF)

CIF is a nonprofit NGO established in 1994 that has worked extensively on health-sector reforms in the Middle East and southern Caucasus, central Asia, North Africa. CIF has demonstrated the ability to design, implement and manage more than 150 projects. The company has worked with major institutions in international cooperation such as the World Bank, the European Commission, UN agencies, the Global Fund, the World Health Organization, national and international development agencies (DFID, SDC, Sida, USAID).
Expertise: Health-sector reforms in developing countries and transitional economies.

Dr. Ketevan Chkhatarashvili, President
37d Chavchavadze Avenue, Tbilisi 0162
Tel: +99532 2 253104
k.chkhatarashvili@curatio.com
www.curatiofoundation.org

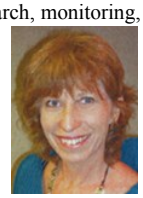
Senegal - OASYS Financial and Management Services
OASYS is dedicated to building capacity and strengthening management and reporting systems. Since 2009, through GMS and other development partners, OASYS has provided technical support to Global Fund grantees, bilateral and multilateral development agencies, international and local NGOs.
Expertise: Financial management, project planning and management, monitoring and evaluation, data and information systems, governance, organizational development, local governance, gender issues

Ousmane Amadou Sy, Managing Director
Cite Comico 3, Immeuble Ibrahima Toure,
Dakar-Fann
Tel: +221 33 867 90 11
o_sy@oasysgroupe.com
www.oasysgroupe.com

Dominican Republic - PLENITUD, a nonprofit NGO has dedicated itself since 2002 to improving performance of health, education and environment systems, providing technical assistance services, and to generating information and disseminating knowledge, regionally and internationally.
Expertise: Health financing, financial protection, health-sector assessments, costing analysis, health accounts (national and specific, including *National AIDS Spending Assessments*), tuberculosis, malaria, child health, maternal and reproductive health, chronic diseases).

Magdalena Rathe, Managing Director
Arabia No. 1, Arroyo Hondo Santo Domingo,
Tel: +809 563-1805, +809 549-7246
mrathe@fundacionplenitud.org,
info@fundacionplenitud.org
www.fundacionplenitud.org

Zimbabwe - Q Partnership
Q Partnership has since 2000 provided advisory, consulting, and program management services in the civil society and private sectors in Africa, Asia and Eastern Europe. The company comprises 5 managing partners and over 60 associates, in Zimbabwe, Mauritius and Botswana.
Expertise: Building organizational capacity in public, private and nonprofit organizations through consulting support in general management, finance, research, monitoring, evaluation, procurement and governance.



Caroline Trigg, Managing Director
Agriculture House
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Harare
Tel: +263 4 309848
admin@qpartnership.com
www.qpartnership.com

Bangladesh - Technical Assistance Inc. (TAI)
Since 1986, TAI has been working with leaders, policy makers and individual contributors in governments and development organizations. TAI has collaborated with international donors and technical-assistance providers, including USAID, the World Bank, UNFPA, the Asian Development Bank, Rockefeller Foundation, the Swiss Development Cooperation, and the Gates Foundation.
Expertise: Primary and reproductive healthcare services, logistics management, market-survey design and training. TAI also provides management-related technical support to Global Fund grantees—CCMs, PRs and SRs.

Abu Sayeed, Managing Director
House # 9, Road # 13, Baridhara, Dhaka
Tel: + (802-2) 9885335
asayeed@techai.com
www.techai.com | www.technicalassistanceinc.com

Kenya - Advantech Consulting
Advantech Consulting, based in Nairobi, Kenya, since 2003 helps organizations maximize value from their IT investment. Its consultants have a wealth of experience in Information and Communication Technologies (ICT) disciplines.
Expertise: ICT strategy development and implementation; business IT alignment; business process mapping and reengineering; ICT security policy, including business continuity and disaster recovery; design of change management frameworks.

Joseph Waruingi, Managing Director
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+254 20 2100 438/39/44
jwaruingi@advantech.co.ke
www.advantech.co.ke

Côte d'Ivoire – Global Challenge Corporation
Global Challenge Corporation-CI (GCC) provides training and consulting. It was established in 2007 with headquarters in Abidjan. GCC has no foreign branches, but focal points in Paris, Montréal, Bangui, Bamako, Conakry. It is certified by the Fund for the Development of Vocational Training (FDFP).
Expertise: Training and consulting, particularly in continuing vocational training (CVT), services management consulting, IT development. In CVT, GCC has a portfolio of training topics including finance, accounting and auditing, management and evaluation of projects; human resources; and procedures and guidelines of the Global Fund.

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Mob: +225 05 74 12 88
eustache.akpane@globalchallenge-ci.com
Skype: eustache.akpane
www.globalchallenge-ci.com

Cameroon - IRESCO
Established in 1993, the Institute for Research, Development and Socio-economic Communication (IRESCO) comprises multidisciplinary researchers with a common interest in action for economic and social development. IRESCO is nongovernmental, not-for-profit. Headquartered in Yaoundé, IRESCO has regional offices across Cameroon.
Expertise: Institutional development, capacity and skill techniques, research - action – development, marketing, advocacy and public relations, information, education and communication, documentation and management systems.

Gedeon Yomi
Director
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Tél. : +237 22 31 10 14 /22 31 97 78
Mob: +237 99 68 26 61
gede_yomi@yahoo.fr
www.iresco-cm.org

Kazakhstan – Eurasia Foundation
Eurasia Foundation of Central Asia, mobilizes public and private resources in Kazakhstan to help promote effective solutions to social problems at the national and regional levels that seek to involve citizens in improving social, cultural, legal and economic well-being.
Expertise: Development of civil society, improving services for population, education and youth development, economic development and business, corporate social responsibility (CSR).

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Mob: +7 701 951 6585
azalia@ef-ca.org
www.ef-ca.org · www.csrkz.org

South Africa – Khulisa Management Services
Since its establishment in South Africa in 1993, Khulisa Management Services has conducted nearly 200 studies and evaluations, including baseline, mid-term, and final evaluations; operations, behavioral research, market, and economic research; household surveys; desk studies; rapid appraisals; and quasi-experimental designs. Where possible, Khulisa conducts participatory evaluations or uses the client's own staff in data design and data collection, which has the proven advantage of building capacity for data collection, analysis, and utilization of program data. Khulisa's combined research strength and technical expertise makes it uniquely qualified to assist a diverse range of clients.
Expertise: Monitoring, evaluation, and research services in sub-Saharan Africa with sector specialization in education, health and social development.

Mary Pat Selvaggio, MPH, Director of Health
Khulisa Management Services (Pty) Ltd
26 7th Avenue, Parktown North 2193, Johannesburg
Tel: +27.11.447.6464 ext 3240
Fax: +27.11.447.6468
Mob: +27.82.896.2633
mpselvaggio@khulisa.com | mpselvag@global.co.za
Skype ID: mpselvaggio
www.khulisa.com

Kenya - Upward Bound
Upward Bound Company Limited, founded in 2002, is a strong team of professionals delivering consultancy, training, coaching and outsource services to organizations in the Eastern Africa region. The company has undertaken jobs to develop monitoring and evaluation frameworks and carried out numerous baseline surveys, mid-term reviews and end-term evaluations including several large, multi-country assignments. Upward Bound has strong capacity assessment and capacity strengthening competencies geared at improving partner viability, performance and impact. The company has delivered such assignments for a variety of organizations, including those in the health sector.
Expertise: governance structures, organizational values, strategic plans, operational plans, restructuring and performance frameworks, engagement with clients on organizational systems, processes and structures.

Munaweza Muleji
Team Leader - Operations
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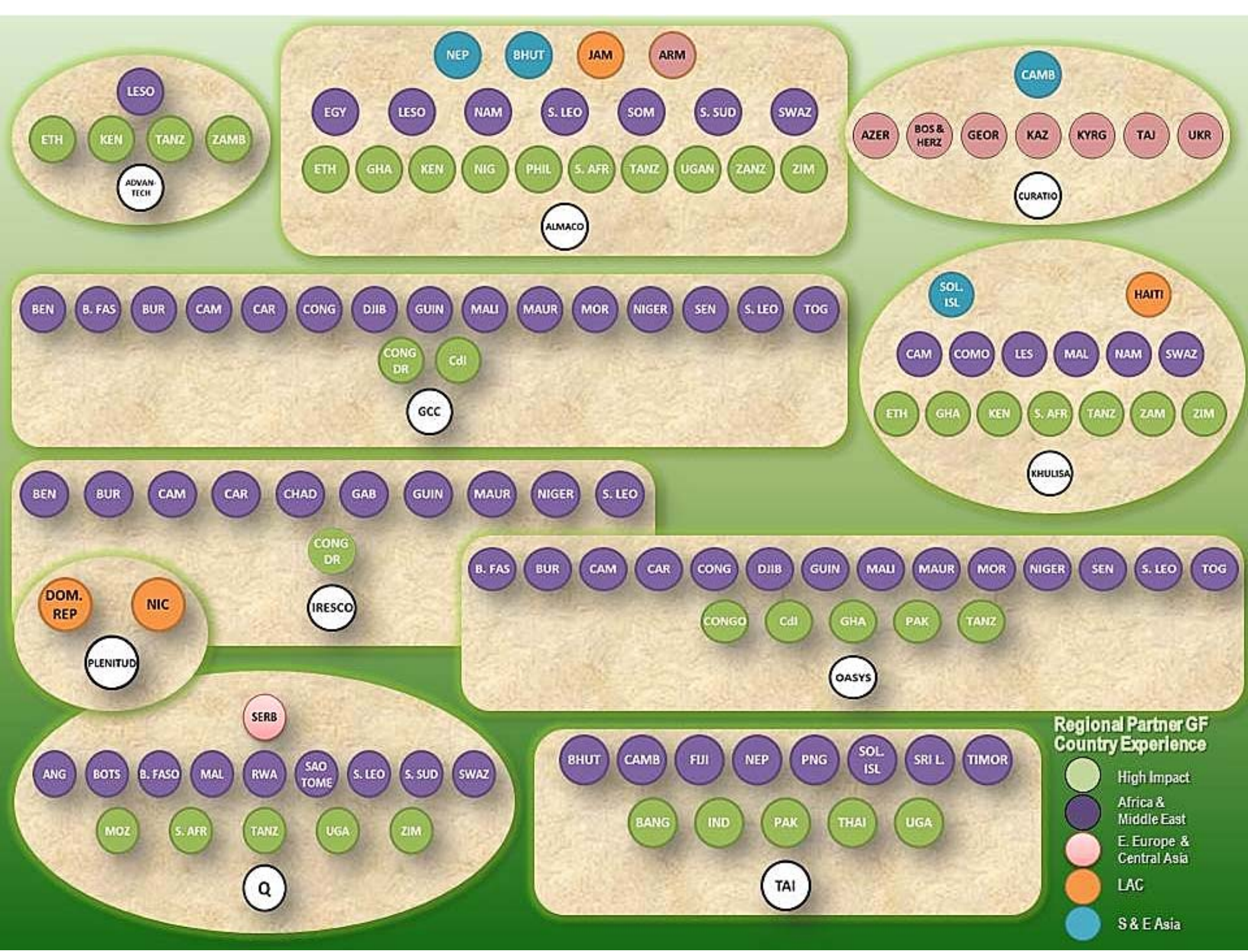
Tel +254 20 359 4 276
Mob: +254 721 912 276 / 733 250 483
munaweza.muleji@upwardboundkenya.org
Skype: munaweza.muleji1
www.upwardboundafrica.org

New Funding Model Services

	COUNTRY DIALOGUE	NATIONAL STRATEGIC PLAN	CONCEPT NOTE	CCM SUPPORT	GRANT MAKING	GRANT IMPLEMENTATION
LATIN AMERICA & CARIBBEAN		*Plenitud** Q Partnership	Plenitud	Plenitud	Plenitud	Plenitud
EASTERN EUROPE & CENTRAL ASIA	EFCA	Curatio EFCA	Curatio		Curatio	Curatio
ANGLOPHONE AFRICA	ALMACO Upward Bound	Advantech ALMACO Q Partnership Upward Bound	Advantech *ALMACO** Khulisa Q Partnership Upward Bound	ALMACO Khulisa Q Partnership Upward Bound	Advantech ALMACO Khulisa Q Partnership Upward Bound	*Advantech** ALMACO *Khulisa** Q Partnership Upward Bound
FRANCOPHONE, HISPANOPHONE & PORTUGUESE AFRICA	GCC *OASYS** Q Partnership	GCC *IRESCO** OASYS Q Partnership	GCC *IRESCO** OASYS Q Partnership	*GCC** *Oasys**	Advantech GCC IRESCO OASYS Q Partnership	GCC *IRESCO** OASYS
EAST ASIA & PACIFIC			Khulisa TAI	Khulisa TAI	Khulisa TAI	Khulisa TAI
MIDDLE EAST & NORTH AFRICA	GCC	GCC	GCC	GCC	GCC	GCC

** Partners with ongoing or completed services to Global Fund recipients*

Recruitment of the twelve TS Regional Partners (RP) was carried out in two waves. The first six (Tier 2, Wave 1) were selected from among the locally-owned subcontractors recruited by GMS through 2009 and 2010 calls for Expression of Interest (EOI). Selection criteria for this business-strengthening experiment were defined by contract. All qualified regional partners met the following criteria according to USAID guidelines set out in the GMS contract: a. Small business or small, nongovernmental organization, institution or consulting group. ("Small" is defined as having annual revenues of $14 million US dollars or less.), b. In operation for at least 5 years and be able to demonstrate relevant activity during that period, c. Not affiliated with any multilateral organization or existing GMS technical support partners, d. Founded and still be headquartered in its respective region, e. Core business (defined as 50% or more of total revenues in the last year) must be other than provision of management-related technical support to Global Fund grantees, and f. Not a principal recipient or sub-recipient of an active Global Fund grant. The second six (Tier2, Wave 2) RP were selected in PY2 through an EOI call following the guidelines set out in the GMS contract. Regional Partners (Tier 2) we required to provide a substantial roster of experts with at least 10 years of experience in relevant technical areas, and at least 5 years of experience working at national and regional levels. Consultants have appropriate language skills in one or more of the following languages: Arabic, English, French, Portuguese, Russian, and Spanish.


LESO
ETH
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TANZ
ZAMB
ADVAN-TECH
NEP
BHUT
JAM
ARM
EGY
LESO
NAM
S. LEO
SOM
S. SUD
SWAZ
ETH
GHA
KEN
NIG
PHIL
S. AFR
TANZ
UGAN
ZANZ
ZIM
ALMACO
CAMB
AZER
BOS & HERZ
GEOR
KAZ
KYRG
TAJ
UKR
CURATIO
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B. FAS
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IRESCO
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BHUT
CAMB
FIJI
NEP
PNG
SOL. ISL
SRI L.
TIMOR
BANG
IND
PAK
THAI
UGA
TAI
Regional Partner GF Country Experience
High Impact
Africa & Middle East
E. Europe & Central Asia
LAC
S & E Asia

Regional partner strengthening program

The GMS approach to RP strengthening is business focused, tailored to each organization, with a view to achieving significant and sustainable results.

A customized strengthening plan is co-developed with each regional partner. First, initial screening, due diligence visits and a baseline tool are used to assess each partner's capacity in five organizational competencies: business development, finance, contracts, operations and administration, and oversight of technical work. The plan prioritizes closing gaps between assessed and targeted capacity levels in alignment with each partner's unique vision and business model.

A comprehensive offer of strengthening interventions supports regional partners in the areas listed below.

- Strategic business assessment
- Costing and pricing
- Business systems strengthening
- Proposal development
- Marketing and communications
- Business coaching

The list above reflects discussion among regional partners and GMS project partners (Management Sciences for Health, Abt Associates, Futures Group, International HIV/AIDS Alliance, MIDEGO, Training Resources Group, and Pact). In addition, GMS facilitates easy access to Global Fund grant performance information to allow RPs to proactively seek new opportunities for direct contracting of technical support with Global Fund grantees. Finally, GMS offers "jump-start" one-time financial support to regional partners who develop innovative products or services and propose these directly to Global Fund grantees.

Strengthening interventions are carried out either by GMS project partners or, as appropriate, by local service providers. GMS systematically monitors progress and results as regional partners implement strengthening plans and build their capacity to achieve results through provision of high-quality management-related technical support to Global Fund grantees.

For more information, contact: GMSO2Team@msh.org | Phone: +1 703 667 3738 | Fax: +1 703 524 7898 .

GRANT MANAGEMENT SOLUTIONS

PEPFAR

USAID
FROM THE AMERICAN PEOPLE

A U.S. government-funded partnership consisting of Management Sciences for Health, Abt Associates, Futures Group, International HIV/AIDS Alliance, MIDEGO, Pact, Training Resources Group, and committed to strengthening the performance of Global Fund grants.