

Tool to present short-term Technical Assistance Request

Program Community, Rights and Gender Strategic Initiative

Tool to present short-term Technical Assistance requests Program Community, Rights and Gender Strategic Initiative, is a document prepared the Latin America and the Caribbean Regional Platform for Support, Coordination and Communication of Civil Society and Communities (LAC Platform)

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The Latin America and the Caribbean Regional Platform for Support, Coordination and Communication of Civil Society and Communities (LAC Platform), is an initiative implemented by Vía Libre, with financial support of the Global Fund to Fight AIDS, Tuberculosis and Malaria (Global Fund).

The Platform is part of several interventions of the Global Fund to support and strengthen community and civil society participation at all levels within their processes. It is a component of the Community on Rights and Gender, Strategic Initiative (CRG SI).

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Acronyms

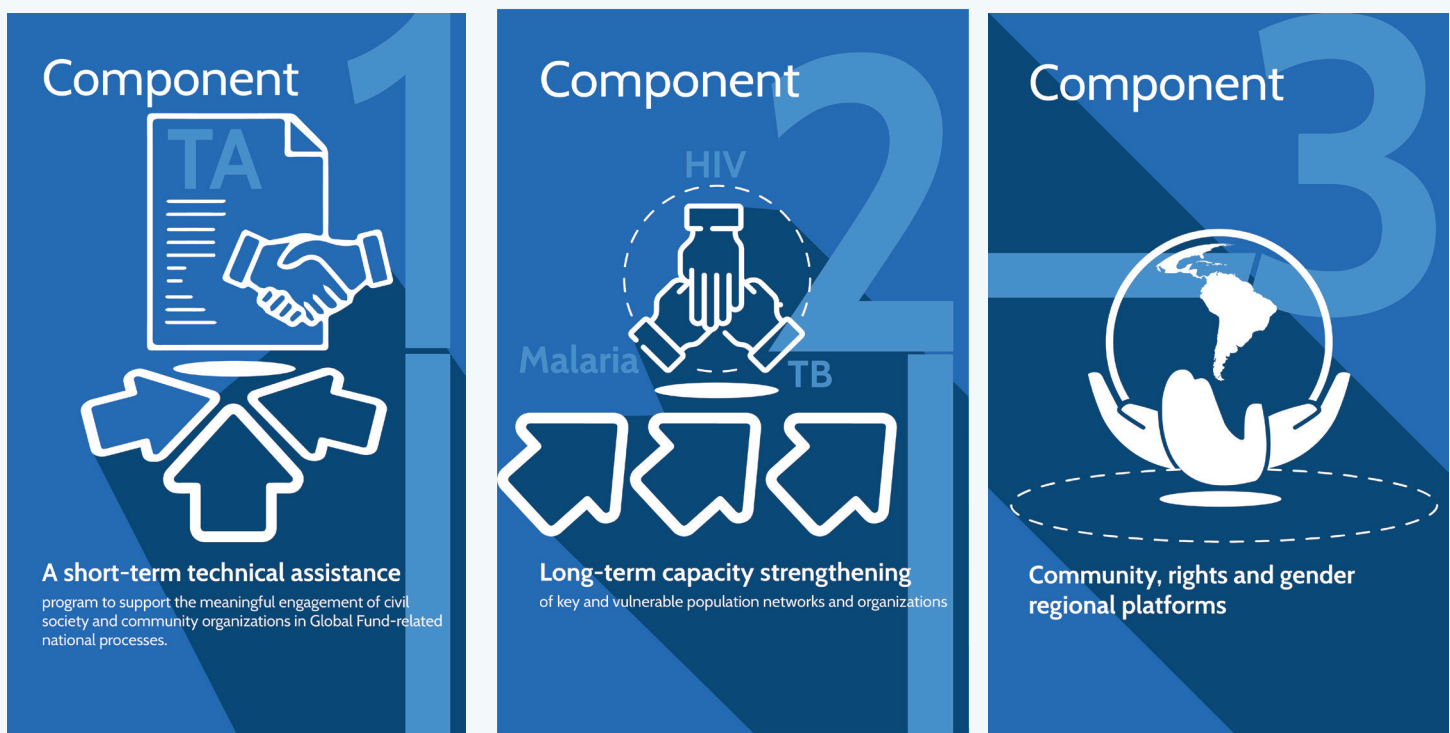
CCM	Country Coordinating Mechanisms
CRG SI	Community, Rights and Gender Strategic Initiative
CSO	Civil Society Organization
GF	The Global Fund to Fight AIDS, Tuberculosis and Malaria
HIV	Human Immunodeficiency Virus
LAC	Latin America and the Caribbean
MS	Ministry of Health
NHIVP	National HIV Program
PR	Principal Recipient
RCM	Regional Coordination Mechanisms
RSHS	Resilient and sustainable health systems
TA	Tecnical Assistance
TR	Terms of Reference
TB	Tuberculosis
UN	United Nations

1. Introduction

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

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


The CRG SI works through three mutually reinforcing components:



This tool focuses on **Component 1: Short-term technical assistance.**


This tool aims to provide guidance on how to fill out the technical assistance request form. We will walk you, in detail, through the short-term technical assistance request form and provide critical information, directions for filling it out, and examples of technical assistance applications that will facilitate your understanding and guide you through the application submission process. Click here to access the Technical Assistance Guidance Note on the Short-Term Technical Assistance Program by the Community, Rights and Gender Strategic Initiative.

Technical Assistance Guidance Note



Click here to access

Technical Assistance on Community, Rights and Gender



Technical Assistance on Community, Rights and Gender

General overview and guidelines for application

The Global Fund to Fight AIDS, Tuberculosis and Malaria is committed to supporting the meaningful engagement of civil society and communities, in particular key and vulnerable populations, in Global Fund-related processes throughout the funding cycle. Inclusive and meaningful engagement of those most affected by the three diseases is crucial to ensuring that Global Fund investments are evidence- and rights-based, and gender and age responsive, in order to maximize impact of Global Fund grants and strengthen local accountability.

In order to ensure that civil society and communities meaningfully engage in Global Fund-related processes, the Global Fund Board has approved the Community, Rights and Gender Strategic Initiative (CRG SI) for implementation from January 2021 to December 2023. These guidelines outline the technical assistance available as part of the CRG SI.

Who can apply for CRG technical assistance?

The following stakeholders from countries eligible for Global Fund funding as well as from countries included in regional grants can apply for CRG technical assistance:

1. Key population networks and organizations
2. Youth-led networks and organizations
3. Women's networks and organizations
4. Networks or organizations of people living with HIV or affected by tuberculosis or malaria
5. Civil society networks and organizations led by or working with other affected communities (e.g. migrants, refugees, minors)

Applications from Country Coordinating Mechanisms (CCMs) and Regional Coordination Mechanisms (RCMs) will be considered only if they are developed and submitted in collaboration with one of the above stakeholders. Priority will be given to requests from groups, organizations or consortia residing in the country where technical assistance will be deployed.

What type of CRG technical assistance can be requested?

Technical assistance can be requested throughout the Global Fund funding cycle and in relation to HIV, tuberculosis, malaria as well as resilient and sustainable systems for health (RSSH). Furthermore, support can be requested for sustainability and transition planning and in-country processes linked to the Global Fund model of work (e.g. National Strategic Plan review and development). Within this broader framework, CRG technical assistance requests should be

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Short-Term Technical Assistance Program by the Community, Rights and Gender Strategic Initiative

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

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

For this reason, before reviewing the technical assistance form, we will outline the three work areas that comprise the *Community, Rights and Gender Strategic Initiative Short-Term Technical Assistance Program*:

1

Situational analysis and needs assessment

- 1.1. CRG-related assessments to inform decision-making
 - 1.2. Program reviews to ensure community perspectives inform service delivery
-

2

Engagement in country dialogue processes

- 2.1. Community consultation to inform priorities for national policies, guidelines, plans and programs
 - 2.2. Coordinating community input into key GF-related documents
 - 2.3. Engagement planning to promote community participation in GF processes
 - 2.4. Caucusing and collective strategizing for coordinated community-led advocacy
-

3

Supporting design and implementation arrangements

- 3.1. Mapping of civil society and community organizations and identification of activities to strengthen community systems
- 3.2. Refining or validating tools that support community engagement in GF-related processes
- 3.3. Workshop(s) to strengthen knowledge of civil society and communities on the GF

Community, Rights and Gender Technical Assistance Request Form

Each section of the technical assistance request form is explained below.

CRG Technical Assistance Request Form

Download here the request form in

- Spanish - French - English



TheGlobalFund

CRG Technical Assistance Request Form

Community, Rights and Gender Technical Assistance provides support to civil society and community organizations to meaningfully engage in Global Fund related processes throughout the grant lifecycle.

Before submitting this application to the Global Fund please make sure that your application is reviewed by the CGC Regional Chairperson in your region.

Applicant details

Name of organization	<input type="checkbox"/> Key population network or organization <input type="checkbox"/> Youth-led network or organization <input type="checkbox"/> Women's network or organization <input type="checkbox"/> Network or organization of people living with HIV or affected by tuberculosis or malaria <input type="checkbox"/> Civil society network or organization led by or working with other affected communities (e.g. migrants, refugees, miners) Other:
Address	
Countries/ies	
Focal point	
E-mail	
Phone number	
Is your organization a	<input type="checkbox"/> PR <input type="checkbox"/> SR/SSR <input type="checkbox"/> CCM member <input type="checkbox"/> CCM observer <input type="checkbox"/> None of the options
Date of request	
Envisaged start date of assignment ¹	

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

1. Background and rationale (max. 1 page)

1.1 Please describe the reason for requesting CRG technical assistance.

1.2 Is the request linked to any of the Global Fund main areas of work (please select all that apply)?

¹Please note that the mobilization of technical assistance may take 2-3 months from the date of submission.

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Applicant details

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

- Applicant details



Applicant details

Name of organization	
Type of organization	<input type="checkbox"/> Key population network or organization <input type="checkbox"/> Youth-led network or organization <input type="checkbox"/> Women's network or organization <input type="checkbox"/> Network or organization of people living with HIV or affected by tuberculosis or malaria <input type="checkbox"/> Civil society network or organization led by or working with other affected communities (e.g. migrants, refugees, miners) Other:
Address	
Countries/ies	
Focal point	
E-mail	
Phone number	
Is your organization a	<input type="checkbox"/> PR <input type="checkbox"/> SR/SSR <input type="checkbox"/> CCM member <input type="checkbox"/> CCM observer <input type="checkbox"/> None of the options
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Applicant details

Name of organization	<input type="checkbox"/> Key population network or organization <input type="checkbox"/> Youth-led network or organization <input type="checkbox"/> Women's network or organization <input type="checkbox"/> Network or organization of people living with HIV or affected by tuberculosis or malaria <input type="checkbox"/> Civil society network or organization led by or working with other affected communities (e.g. migrants, refugees, miners) Other:
Address	
Countries/ies	
Focal point	
E-mail	
Phone number	
Is your organization a	<input type="checkbox"/> PR <input type="checkbox"/> SR/SSR <input type="checkbox"/> CCM member <input type="checkbox"/> CCM observer <input type="checkbox"/> None of the options
Date of request	
Envisaged start date of assignment ¹	

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1. Background and rationale (max. 1 page)

1.1 Please describe the reason for requesting CRG technical assistance.

1.2 Is the request linked to any of the Global Fund main areas of work (please select all that apply)?

¹Please note that the mobilization of technical assistance may take 2-3 months from the date of submission.

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Who can apply for CRG technical assistance?

Key population networks and organizations 	Youth-led networks and organizations 	Women's networks and organizations 
Networks or organizations of people living with HIV or affected by tuberculosis or malaria 	Networks or organizations of people living with HIV or affected by tuberculosis or malaria 	

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

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

Please be aware that, in general, organizations with a regional focus are eligible to apply if they belong to any of the types of organizations mentioned above. However, the TA application must be linked to Global Fund-related processes in Latin America and the Caribbean. At any rate, the TA application must be submitted in collaboration with a network or organization representing the populations mentioned above. Although it is advisable to have the technical capacity to assist and facilitate the implementation process after the application approval, this is not a prerequisite.

Name of organization	<i>Write the name of the organization(s) requesting technical assistance.</i>
Type of organization	<i>Select the appropriate option:</i> <input type="checkbox"/> Key population network or organization <input type="checkbox"/> Youth-led network or organization <input type="checkbox"/> Women's network or organization <input type="checkbox"/> Network or organization of people living with HIV or affected by tuberculosis or malaria <input type="checkbox"/> Civil society network or organization led by or working with other affected communities (e.g. migrants, refugees, miners) <input type="checkbox"/> Other :
Address	<i>Write the full address of the requesting organization(s).</i>
Country/ies	<i>Indicate the country where the organization is located. Remember that they should be countries eligible for Global Fund financing or that are implementing a Global Fund-related process.</i>
Focal point (contact person)	<i>Provide the name of the person the Global Fund can contact for any communication related to the technical assistance request.</i>
E-mail	<i>Provide your e-mail address.</i>
Phone number	<i>Provide a contact number; specify if it is a landline or cell phone. Specify if the person can be contacted via WhatsApp, Telegram, or other apps.</i>
Is your organization a	<i>Select the appropriate option:</i> <input type="checkbox"/> RP <input type="checkbox"/> SR/SSR <input type="checkbox"/> CCM Member <input type="checkbox"/> CCM Observer <input type="checkbox"/> None of the options
Date of request	<i>Provide the date of submission of the TA request.</i>
Envisaged start date of assignment	<i>The estimated date for starting the TA should be entered once the activity schedule has been defined in the following sections of the form. Ideally, plan 2 to 3 months between request submission and the start of the TA.</i>

Which organizations were involved in preparing this request?

Please outline their level of involvement.

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

The following is an example of a TA request from Belize.

GOBelize supported the development of this request as the coordinating body of the Civil Society Organization (CSO) Hub. The CSO-Hub has been identified as the coordinated effort of civil society organizations in the HIV and TB response to collaborate among each other and with key government Ministries, in particular, the Ministry of Health, to reach key populations such as men who have sex with men, transgender persons, and youth. Members of the CSO-Hub include organizations:


1. *Representing youth - GOBelize, BYEC, BFLA;*
2. *Representing LGBT community - TIABelize, PETAL, UNIBAM, Belize Trans Colour, EYBM, Our Circle;*
3. *Representing PLHIV - CNET+, Hand in Hand Ministry*
4. *Representing women and children - POWA, Cornerstone*

Section 1: Background and rationale

1.1 Please describe the reason for requesting CRG technical assistance.

Please provide a concise explanation and justification of the needs that the Technical Assistance will address. Provide context and background information, emphasizing the needs related to the Technical Assistance that have been identified. The following is an example of a request approved in Haiti.

Section 1: Background and rationale



1. Background and rationale (max. 1 page)

1.1 Please describe the reason for requesting CRG technical assistance.

1.2 Is the request linked to any of the Global Fund main areas of work (please select all that apply)?

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

☐ HIV
☐ Tuberculosis
☐ Malaria
☐ Resilient and sustainable systems for health (RSSH)

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

1.4 Which key and vulnerable population communities will benefit from this technical assistance (please select all that apply)?

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

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

2. Objectives (max. 1 page)

2.1 Which of the following CRG SI area(s) of technical assistance would best meet your need?

1. Situational analysis and needs assessment
☐ CRG-related assessments to inform decision-making
☐ Program reviews to ensure community perspectives inform service delivery

2. Engagement in country dialogue processes
☐ Community consultation to inform priorities for national policies, guidelines, plans and programs
☐ Coordinating input into key GF-related documents (e.g. NCP or funding request)
☐ Engagement planning of communities in GF processes
☐ Advocacy and collective strategizing for coordinated community-led advocacy

3. Supporting design and implementation arrangements
☐ Mapping of civil society and community organizations and activities to strengthen community systems
☐ Refining or validating tools that support community engagement in GF-related processes
☐ Working to strengthen knowledge of civil society and communities on the GF

Note: You can find more information about the areas of technical assistance in the [guidance note](#).

2.2 What are the main objectives of the technical assistance?

3. Scope of work (max. 2.5 pages)

3.1 Please provide details on the expected activities in the table below.

No.	Activity/Task	Remarks (Please attach a breakdown between in-country and work visits)	No. of expert days

Thanks to the efforts of national programs, donors (PEPFAR, Global Fund, Malaria Zero), and technical partners (WHO, UNAIDS), indicators regarding HIV, tuberculosis, and malaria in Haiti have improved significantly in recent years. Although the level of HIV- and TB-related stigma and discrimination is decreasing, it still represents a challenge for the response to the diseases. According to the Mortality, Morbidity and Service Use Survey conducted in 2016-2017 (EMMUS VI), 43% of women and 48% of men surveyed still think that children living with HIV should not attend school and share classrooms with HIV-negative children; 65% of women and 62% of men said they would not buy vegetables from an HIV-positive vendor. The stigmatization and discrimination that TB patients have experienced for a long time have turned into self-discrimination, making it difficult for them to seek care and access available services.

During a social dialogue conducted with the support of Via Libre / LAC Platform in December 2020, representatives of key populations that are members of the Haiti CCM recognized that they were facing a process of international funding reduction. Consequently, they understood that they had to change their discourse and strategies to ensure more rational use of funding and pressure the authorities to guarantee that the government will secure the right to health for the Haitians, especially those belonging to key populations.

Moreover, some challenges related to community inclusion, rights, and gender were identified:



Key populations need to develop their effectiveness capacities and advocacy techniques to pressure the Haitian government to guarantee the population's right to health.



Key populations continue to face stigma and discrimination.



A gendered approach in the HIV response is non-existent: there is a lack of recognition of the feminization of the HIV epidemic in Haiti.



An approach that addresses the needs of people with transgender identities in the HIV response is still lacking.



Civil society needs to change its discourse and become stronger (through platforms, multisectoralism, common fronts, and active participation in strategic decision-making) in developing health plans, strategic program plans, and funding requests.



There is a need to establish synergies between civil society sectors and between civil society and the State.



Members need to generate their own funding to continue leading the fight against stigma and discrimination.

Strengthening of advocacy was the most pressing need related to the TA that was identified during the social dialogue in 2020. Therefore, this TA request focuses on developing a civil society advocacy strategy to ensure that the implementation of the “Key Population Security Plan” and the “Action Plan 2021 - 2023 to improve civil society participation and involvement in Global Fund grant-related processes” yields more effective results.

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

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

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

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

Over the last decade, in Ecuador, civil society participation in actions and spaces related to their integral development has weakened due to the absence of organizational culture, lack of exercise of rights, and scarcity of public policies that promote citizen participation. The situation for civil society organizations (CSOs) working on HIV, sexual and reproductive rights, and sexual diversity is no different; these actors have become disjointed and their participation in various areas of the response, and in Global Fund grants has decreased.

The short-term technical assistance requested is intended to implement priority aspects of the Civil Society Action Plan developed last year in the context of the first technical assistance by the CRG SI of the GF. In this way, there will be an articulation of efforts and coordination of the organizations' actions to visibilize their work and contribution to the HIV response. We expect that the new space for dialogue will be a channel for implementing the Action Plan and a forum to facilitate communication, convergence, and exchange of experiences between all actors.

1.4 Which key and vulnerable population communities will benefit from this technical assistance?

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

Section 2: Objective(s)

Before you start drafting the general and the specific objectives, you should check again the technical assistance need that the application intends to address. The first step is to verify whether the identified need is eligible according to the areas of work of the CRG SI Short-Term Technical Assistance Program.

Section 2: Objective(s)

2. Objective(s) (max. 1 page)

2.1 Which of the following CRG SI area(s) of technical assistance would best meet your need?

1. Situational analysis and needs assessment

- ☐ CRG-related assessments to inform decision-making
- ☐ Program reviews to ensure community perspectives inform service delivery

2. Engagement in country dialogue processes

- ☐ Community consultation to inform priorities for national policies, guidelines, plans and programs
- ☐ Coordinating input into key GF-related documents (e.g. NSP or funding request)
- ☐ Engagement planning of communities in GF processes
- ☐ Caucusing and collective strategizing for coordinated community-led advocacy

3. Supporting design and implementation arrangements

- ☐ Mapping of civil society and community organizations and activities to strengthen community systems
- ☐ Refining or validating tools that support community engagement in GF-related processes
- ☐ Workshop(s) to strengthen knowledge of civil society and communities on the GF
- Other:

Note: You can find more information about the areas of technical assistance in the [guidance note](#).

2.2 What are the main objectives of the technical assistance?

- ☐ HIV
- ☐ Tuberculosis
- ☐ Malaria
- ☐ Resilient and sustainable systems for health (RSSH)

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

1.4 Which key and vulnerable population communities will benefit from this technical assistance (please select all that apply)?

- ☐ Men who have sex with men
- ☐ Sex workers
- ☐ Transgender people
- ☐ People who inject or use drugs
- ☐ People living with HIV
- ☐ People in prisons and other closed settings
- ☐ Migrants, refugees and internally displaced people
- ☐ Miners and mining communities
- ☐ Adolescent girls and young women
- Other:

2. Objective(s) (max. 1 page)

2.1 Which of the following CRG SI area(s) of technical assistance would best meet your need?

1. Situational analysis and needs assessment

- ☐ CRG-related assessments to inform decision-making
- ☐ Program reviews to ensure community perspectives inform service delivery

2. Engagement in country dialogue processes

- ☐ Community consultation to inform priorities for national policies, guidelines, plans and programs
- ☐ Coordinating input into key GF-related documents (e.g. NSP or funding request)
- ☐ Engagement planning of communities in GF processes
- ☐ Caucusing and collective strategizing for coordinated community-led advocacy

3. Supporting design and implementation arrangements

- ☐ Mapping of civil society and community organizations and activities to strengthen community systems
- ☐ Refining or validating tools that support community engagement in GF-related processes
- ☐ Workshop(s) to strengthen knowledge of civil society and communities on the GF
- Other:

Note: You can find more information about the areas of technical assistance in the [guidance note](#).

2.2 What are the main objectives of the technical assistance?

3. Scope of work (max. 2.5 pages)

3.1 Please provide details on the expected activities in the table below:

No.	Task/activity	Remarks (Please distinguish between in-country and desk work)	No. of expert days

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2

Once you have identified the areas of technical assistance that relate to your request, you should check them in the table provided in the form. Please select the options that are most relevant to the identified need. It is advisable not to check more than three options.

1 Situational analysis and needs assessment

- 1.1. CRG-related assessments to inform decision-making.
- 1.2. Program reviews to ensure community perspectives inform service delivery.

2 Engagement in country dialogue processes

- 2.1. Community consultation to inform priorities for national policies, guidelines, plans and programs.
- 2.2. Coordinating community input into key GF-related documents.
- 2.3. Engagement planning to promote community participation in GF processes.
- 2.4. Caucusing and collective strategizing for coordinated community-led advocacy

3 Supporting design and implementation arrangements

- 3.1. Mapping of civil society and community organizations and identification of activities to strengthen community systems
- 3.2. Refining or validating tools that support community engagement in GF-related processes
- 3.3. Workshop(s) to strengthen knowledge of civil society and communities on the GF

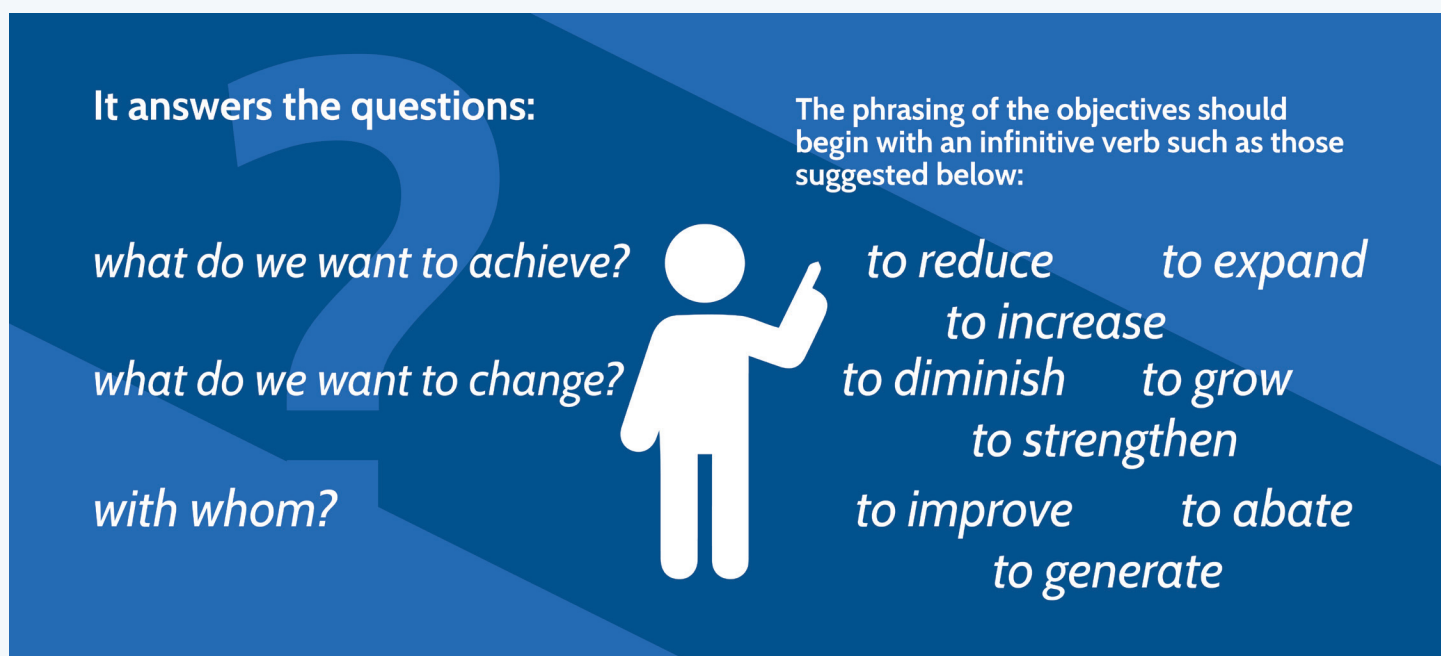
Other:

Please note that the CRG Technical Assistance does **NOT** support any of the following purposes:

- **CCM strengthening**
(por ejemplo, capacitación de los miembros del MCP en sus funciones y responsabilidades);
- **Long-term capacity development of civil society networks and organizations**
(e.g. organizational development, support to become a Global Fund recipient);
- **Development of stand-alone tools that lack a focus on community engagement;**

2.1 Formulation of Objectives

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

An infographic with a dark blue background. On the left, a large, light blue question mark is partially visible. In the center, a white stick figure stands with its right arm raised, pointing towards the list of verbs on the right. To the left of the figure, three questions are listed in white italicized text: 'what do we want to achieve?', 'what do we want to change?', and 'with whom?'. To the right of the figure, a list of infinitive verbs is arranged in two columns, also in white italicized text. Above this list, a sentence explains that objectives should begin with such verbs.

It answers the questions:

what do we want to achieve?

what do we want to change?

with whom?

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

to reduce to expand

to increase

to diminish to grow

to strengthen

to improve to abate

to generate

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

SMART

Guidelines for drafting general and specific objectives

- S**pecific - state clearly what actions will be taken
- M**easurable - products and changes obtained from the technical assistance should be measurable
- A**chievable - the needs of the communities should be attainable within the context, available resources, etc.
- R**elevant - identify priority areas for the short-term Technical Assistance Program
- T**imely - results should be achievable within the duration of the technical assistance



2.2 What are the main objectives of the technical assistance?

The following are some examples of the objectives from the technical assistance requests submitted by organizations in Latin America and the Caribbean.

Example of Objectives

Guyana

Main Objective: To facilitate a participatory process with organizations led by or working with LGBTI as well as key stakeholders in the national HIV response to develop an advocacy plan to remove key legal barriers faced by MSM and transgender women when accessing HIV services.

- 1** To assess the impact of criminalization of same-sex activity among males under the Criminal Law (Offences) Act 1893 on MSM and transgender women access to HIV services by means of a consultative process with organizations led by and working with LGBTI and key players in the national HIV response (e.g. service providers, technical partners, MoH).
- 2** To develop a 5–6-page costed plan to intensify advocacy to repeal discriminatory laws that serve as barriers to MSM and transgender women's access to HIV services.
- 3** To develop a proposal for Workplan Tracking Measures to measure progress related to removing legal barriers.

El Salvador

Objective: To support the meaningful engagement of key populations and people living with HIV, while addressing issues 1, 2, and 4 as outlined by the TRP:



Sub-objective 1: To contribute to the detailed planning of peer-led community interventions in key activities such as differentiated testing and treatment for key populations.



Sub-objective 2: To describe in detail the access barriers to HIV-related health services linked to Human Rights, stigma, and discrimination and to contribute to establishing a work plan to address them through interventions included in future HIV grants.



Sub-objective 3: To strengthen the effective engagement of key populations, people living with HIV, and civil society organizations in the Global Fund grant transition and sustainability processes, emphasizing processes to obtain public funding for CSOs (social contracting).

Section 3: Scope of work

This section contains two tables. The first one refers to the activities or tasks to be conducted by the person(s) in charge of providing the technical assistance service. The second table refers to the key deliverables or outcomes of the technical assistance, dates of delivery, anticipated use, and expected timeframe for use of the deliverables. A table to outline a minimum budget is also included. The profile of the person(s) who will provide the technical assistance should be included in the final section.

[illegible]

3.1 Please provide details on the expected activities

Please specify whether each of the tasks or activities is fieldwork or desk work, and assign an estimated number of days to complete the activity. These tasks/activities provide a first general description. Once the TA is approved, the CRG SI will elaborate detailed terms of reference (ToR) to refine the activities and the level of effort (LOE) of each one of them.

The first column contains a consecutive number for each task/activity. The second column provides a clear description of each task or activity. The third column distinguishes the type of work to be performed (in-country or desk work), and the fourth column contains the number of days to complete the activity. In the case of consultancies for which a single expert is to be hired, the total number of days should be entered. For teams involving a lead consultant and a support consultant (usually a local consultant), distinguish how many days will be assigned to the lead consultant and how many days will be assigned to the local consultant.

Activities

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

The following is an example of a Technical Assistance request from Suriname:

No.	Task/activity	Remarks (Please distinguish between in-country and desk work)	No. of expert days
1.	Actividades de preparación		
1.1	Develop a gender assessment framework and tools based on input and recommendations received from preliminary stakeholders' consultations and conduct a Teach-in session for the assessment team.	Desk Work/In-country	4
1.2	Develop a roadmap that will guide the incorporation of key findings, feedback, and recommendations from the assessment in the implementation of the grant programming and activities.	Desk Work	2
1.3	Plan and host community-led discussions about upcoming assessments and Focus Group Discussions/sessions with subpopulations to deliberate key matters and gather relevant information such as defining the subgroups within the target populations to be researched, for example, migrants, miners, and the prison population.	Desk work/In-Country	3
2.	Assessment Activities		
2.1	<p>Carry out documentary review using the Gender Assessment Tool to:</p> <ul style="list-style-type: none"> Identify key gender differences in the HIV/TB epidemic and within the socio-cultural, economic, and political context. (epidemiological & context analysis). Determine existing gaps in addressing gender differences within the current HIV/TB policy. Identify key programming gaps including those related to particular communities with a particular focus on testing (response and gap analysis). 	Desk Work	7
2.2	Organize and hold consultations with CSOs, KVP's and other stakeholders to determine the impact of gender on differentiated HIV/TB service delivery for KVPs in particular men.	In-Country	9
2.3	Organize and hold consultations with CSOs and KP groups and persons affected by HIV on the need for a differentiated approach for KPs in testing & treatment to prioritize peer-led community interventions in testing and treatment.	In-Country	5

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

This table focuses on the outcomes or deliverables derived from the activities or tasks. The first column should contain the key deliverables. It is advisable to make sure that the outcome of each activity or task is clearly articulated in this table. The second column should provide the delivery dates for each product or outcome. The third column should describe the influence of each deliverable on the Global Fund’s processes. The broad decision-making processes and the processes for elaborating documents derived from the technical assistance must be clearly indicated. The fourth column contains a timeframe for the use of the deliverables.

Elaborating the technical assistance request takes time, so it is advisable to schedule the delivery dates only after the request submission date has been determined. It is also important to note that the internal review process may take a few weeks before approval once the request has been received. When projecting dates, it is a good idea to consider that the implementation of the technical assistance could start two months after the request’s reception.

Deliverables or outcomes

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

When possible, it is recommended to clearly differentiate which activities and outputs correspond to each specific objective.

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

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

3.3 Technical Assistance Cost Item Table

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

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

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

1 - Consultation with civil society organizations and groups of key populations and people living with HIV			
Room hire	1	150	150
Catering (3 workshops - 15 participants per workshop)	45	15	675
Per diem (\$15 per person)	45	15	675
PPE (masks, alcohol gel)	45	2	90
Subtotal			1,590
2 – Rapid Community Assessment			
Zoom licence	1	150	150
Phone recharge for participants	15	10	150
Subtotal			300

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

In this brief section, you should provide information on the skills and qualifications of expertise that the technical assistance provider team should have.

Other information

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

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

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

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

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

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

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

LAC Platform.

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

No

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

Colombia is a country that faces several challenges derived from its territorial extension, as well as from the lack of understanding of Global Fund processes and weakness in the communication and accountability mechanisms (aspects identified during the social dialogues before elaborating the C19RM resource request). For this reason, it is vital to receive technical support, which will help improve the processes that accompany the meaningful engagement of civil society.

Among the inputs derived from previous consultancies, there is a document that enables CCM members to carry out communications processes both within their networks and with their constituencies. This document is intended to guide and encourage effective dialogue and engagement of the entire population.

We have held discussions with the consulting team leading the *CCM evolution* process in Colombia to define the scope of this technical assistance and avoid duplication.

Technical Assistance Request Submission Process

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

- Help in information dissemination about the Short-Term TA Program through their communication channels: social networks (Facebook, Instagram, and Twitter), monthly newsletters in Spanish and English, and organization of informative webinars about the CRG SI Short-Term Technical Assistance Program.
- Development of tools for the Short-Term TA Program.
- Sessions focused on skill development and understanding of the Short-Term TA Program with a sub-regional focus: Central America, South America, and the Caribbean.
- Accompaniment in the elaboration of Short-Term TA requests. This personalized accompaniment focuses on preparing the request, structuring the application and filling out the form.
- Clarification of roles and responsibilities (requestor, CRG SI Short-Term TA program, TA providers).
- Accompaniment concludes when the request has been submitted to the CRG SI Short-Term Technical Assistance Program.

Approach

Communities can approach the LAC Platform in various ways



Communities can approach the LAC Platform in various ways: either by express request of the organization interested in preparing an application or by addressing the LAC Platform in countries where there are funding model-related processes, such as elaboration or review of National Strategic Plans, elaboration of Funding Requests, Grant Preparations, Grant Implementation, etc.

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

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

Coordination

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



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

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

Identification of Needs Related to the TA and Eligibility Check

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

Definition of Key Activities

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

Definition of Key Activities

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



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

No.	Description	Activities	Links to online resources
1	Elaboration of the TA request form	<ul style="list-style-type: none"> - Download the TA form. - Become familiar with the GF's Community, Rights and Gender Strategic Initiative. Review the form - Technical Guidance Note. 	<ul style="list-style-type: none"> - Request forms in: spanish, english, french - Community, Rights and Gender Strategic Initiative (CRG SI) - Technical Assistance Guidance Note
2	Contact with the LAC Platform to organize an accompaniment and support session for filling out the form	The LAC Platform will answer questions and help identify needs related to the TA and fill out the form.	<ul style="list-style-type: none"> - LAC Platform Technical Coordinator, Anuar Luna ct.plataformalac@vialibre.org.pe - Caribbean: Liz Aldana and Derricia Castillo: lizet.aldana@gmail.com and derricia.castillo.salazar@gmail.com - Central America Rosa González: rosaameliagonzalez79@gmail.com - South America Lídice López: lidilt@hotmail.com
3	Request submission	Before submitting the request, it is advisable to share a draft of it with key stakeholders: PRs, CCM, key and vulnerable populations, GF teams, etc.	crgta@theglobalfund.org
4	Request review	<p>The following criteria will be considered:</p> <ul style="list-style-type: none"> - Eligibility of the requesting organization - LAC Platform involvement in the request elaboration - Linkage to GF-related processes - Clear anticipated outcomes - Opportunity to strengthen community engagement - Strategic eligibility with any of the three eligible areas of the CRG SI - Appropriate partnerships and collaborations. 	
5	Decision	<ul style="list-style-type: none"> - The review of the request may take several weeks. - Requesting organizations will receive an e-mail with the eligibility decision. 	

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

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

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

Who provides the CRG technical assistance?

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