



Independent observer  
of the Global Fund

## Innovative partnership launches PR Management Dashboard

Grant Management Solutions, the Global Fund and SAP SE have developed a new management dashboard for principal recipients (PRs), which provides users with an overview of a grant's implementation progress.

Developed from June 2013 to November 2014, the dashboard was handed over to the Global Fund for dissemination to PRs in February 2015.

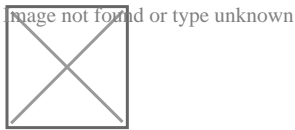
The PR management dashboard is a two-part application: an Excel-based data entry application and a single screen dashboard display. An SAP software license is required to produce the dashboard display, which is available in English, French and Spanish.

The dashboard provides a comprehensive window into how grant implementation is unfolding over the duration of a grant, and at a given point in time. The primary aim is to help grant managers identify and rapidly solve actual and potential problems related to the grants and sub recipients (SRs), and to provide easily understood data on grant performance to country coordinating mechanisms (CCMs) and to SRs. To do this, the tool tracks four sets of indicators for each selected grant: financial, programmatic, general management, and procurement and supply management.

SRs use a template to record their grant performance data, which is then shared with the PR who uploads it into a master data file. Collated data are exported to the dashboard's color-coded display to signal the level of performance against Global Fund or PR-determined thresholds.

The PR bases action to improve grant performance on these data. They also use the data to examine achievements with SRs and flag problems for further review or action with the idea that actions taken will help to improve both the performance of individual SRs and the grant as a whole.

Figure 1 is a screenshot of the dashboard, depicting a fictitious country.



Seven PRs from six countries, with a total of 61 sub-recipients in Côte d'Ivoire, Dominican Republic, Senegal, South Africa, Uganda and Laos, piloted the dashboard.

Pilot participants expressed both enthusiasm and skepticism about the dashboard, appreciating that it was a way to improve communication between PRs and SRs about grant performance. Some SRs expressed concerns about making dashboard data public without an accompanying explanation of poor performance.

PRs expressed concerns related to data management, particularly with respect to data quality. Certain dashboard data initially entered by SRs had to be updated by the PR after validation. Where procurement of health products was done by SRs, certain PRs had difficulties in understanding and tracking procurement indicators because they were unaccustomed to close monitoring of procurement activities.

CCMs had a positive reaction to this new dashboard as a mechanism for PR management, with some showing interest in using the data for CCM oversight. One CCM even proposed creating a simplified version of the PR dashboard for use by CCMs. Other CCMs signaled their preference for the existing CCM dashboard platform developed by GMS and the Global Fund and released in 2010. The CCM dashboard — currently in use in 40 countries — provides a three-page strategic summary of key financial, programmatic, and management information drawn from existing data sources (Progress Update/Disbursement Request) for each Global Fund grant.

GMS and the Global Fund confirmed that the existing CCM dashboard will be replaced. This new dashboard will display a subset of data uploaded from multiple PR management dashboards on one screen. CCMs will coordinate with PRs to obtain the data necessary to produce the CCM dashboard. This updated tool will be completed by August 2015.

As to the concerns about transparency and competition, the developers of the PR dashboard remain optimistic that a little friendly competition among SRs is healthy and should be encouraged. They observed that during the piloting phase, some SRs were keen to see how other organizations were performing and to draw lessons from those who were doing well. Most saw that increased transparency led to SRs having a stronger sense of ownership and understanding of their role in grant implementation, with all implementers able to better visualize their results and thus work more effectively towards the same goal of alleviating the burden of disease.

Multiple mechanisms will exist for PRs that wish to adopt the PR management dashboard and to receive technical support for doing so. Interested PRs should begin by contacting their Global Fund country team. Global Fund staff will assist PRs in identifying appropriate technical support. PRs that are eligible to receive assistance from GMS may submit requests to the United States government. See the technical support application on the GMS web site at [www.gmsproject.org](http://www.gmsproject.org) to learn which types of PRs are eligible to receive such assistance and how

To expand the pool of organizations that can introduce the dashboard to PRs, the Global Fund will train other technical support providers. Training by the Global Fund for technical support providers is planned

for May 2015 onwards.

GMS is a US government-funded technical support agency which since 2007 has supported PRs and country coordinating mechanisms (CCMs). SAP, a private-sector global developer of enterprise application software, has been part of the Global Fund's Innovation Coalition since 2013.

The software licenses required for producing dashboards are being made available to interested PRs at a significantly discounted rate through The Global Fund. A free setup and installation guide for PRs will also be made available through the Global Fund website.

More information on the PR management dashboard will be made available on the Global Fund website's technical support page: <http://www.theglobalfund.org/en/fundingmodel/technicalcooperation/>

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