



Health Communication Capacity Collaborative (HC3)

# PROGRES\_SBCC

**User's Guide**

MSH  
03/16/2016



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## Introduction

### What is PROGRES\_SBCC?

The Program for Organizational Growth, Resilience and Sustainability for Social and Behavior Change Communication Organizations (PROGRES\_SBCC) is a participatory organizational assessment process that helps civil society organizations (CSOs) and government institutions identify areas requiring support to foster sustainability and resilience. PROGRES\_SBCC can also be adapted for use by organizations working in areas outside of health.

PROGRES\_SBCC gathers data on an organization's capacity along a broad range of performance parameters. It then formulates these into 12 organizational capacity domains: eight core and four optional domains. Assessment of the latter will depend on the mandate of the organization being assessed. These domains include:

#### Core Domains

- Governance and Leadership
- Finance, Operations and Administration
- Resource Mobilization
- Human Resources Management
- Program Management
- Communications
- Monitoring and Evaluation (M&E) and Knowledge Management (KM)
- Social and Behavior Change Communication

#### Optional Domains

- Advocacy, Networking and Alliance Building
- Service Delivery and Quality Assurance
- Coordination and Collaboration
- Grants and Sub-grants Management

Each domain has sub-domains with three to six ideal practices within each sub-domain. The domains and sub-domains in the assessment are designed to be adaptable according to the organization's context.

#### Sustainability Factors

In this time of local ownership and scaled-back resources, it is imperative that organizational performance be linked with organizational sustainability. Management Sciences for Health (MSH) separates sustainability into three distinct areas: institutional, financial and programmatic. PROGRES\_SBCC allows organizations to see how the domains contribute to each area of sustainability; the program illuminates where organizational stunting occurs, so that capacity building efforts can focus not only on underperforming domains, but also on those domains that are impeding an organization's sustainability.

Sustainability Factors	Definitions
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<b>Institutional</b>	The organization has a strong yet flexible structure and accountable, transparent governance practices. Its structure and good governance allows it to respond to the shifting priorities of its supporters and to new responsibilities toward its clients, while creating a positive work climate for its staff.
<b>Programmatic</b>	The organization delivers products and services that respond to its clients' needs and anticipates new areas of need. Its success enables it to expand its client base.
<b>Financial</b>	The organization draws on various sources of revenue, allowing it to support its ongoing efforts and to undertake new initiatives.

### What is the purpose of PROGRES\_SBCC?

PROGRES\_SBCC is used to measure, monitor and evaluate changes in organizational capacity as a result of capacity strengthening interventions. PROGRES\_SBCC assesses CSOs and government institutions working in health and health-related areas. The tool is designed to assess organizational capabilities to enhance performance toward achieving organizational goals. In addition, it:

- Provides baselines of the major institutional capacity domains so that areas of relative weakness can be identified and prioritized.
- Measures an organization's capacity before a capacity building program is implemented.
- Monitors and quantifies an organization's capacity building efforts over time.
- Provides evidence of what works and does not work in organizational capacity building.
- Generates a score for each of the three areas of sustainability (institutional, financial and programmatic), which will be used in creating an action plan to address identified areas of weakness.

### Who should use PROGRES\_SBCC?

PROGRES\_SBCC was developed to be administered by or with a broad range of CSOs and governmental and other organizations that undertake social and behavior change communication activities to measure organizational capacity. It can also be used by development organizations and agencies, including government line ministries.

## The Phases and Steps of PROGRES\_SBCC

### Phase 1: Pre-Assessment

The pre-assessment phase can either be done face-to-face or virtually by phone or skype. In either case, it is critical the following two steps are completed by the end of phase one.

### **Step 1: Meeting with CSO or Institution Senior Management**

Initial preparatory meetings that introduce PROGRES\_SBCC and its requirements ensure buy-in and ownership of the assessment process and results, and identify change champions. During these meetings:

- Designated lead facilitators and the participating organization agree on the assessment participants, who should represent a mix of all competency skills, levels and departments; the assessment date; and the venue for the assessment (it is always preferable to conduct the assessment at the location of the organization being assessed).
- Participants agree on the aims and objectives of the OCA, the agenda (see Annex 1 for a sample) and the documents to be prepared in advance for the assessment. See Annex 2 for a suggested list of documents, by domain, to be reviewed.

The team members who are chosen to participate in the assessment should include at least one representative from each key department, including human resources, finance, M&E, social and behavior change communication, program implementation and resource mobilization, as well as other relevant departments, if they exist. In addition, participants should represent all levels of the organization, such as senior and middle management, professional staff and general staff. Ideally, at least one board member and the chief executive officer (CEO) or director should also participate. The ideal group size is around eight participants to facilitate manageable discussions and encourage contributions from all participants. It is possible for an assessment to be conducted with a larger group, although the work will proceed more slowly. In small organizations, it may be preferable to involve everyone.

### **Step 2: Training the Facilitators**

Two outside facilitators should serve as the lead facilitators. In addition, 3-5 internal co-facilitators from key departments within the organization are recommended for this program. The two outside facilitators will lead the entire assessment process while the co-facilitators lead the actual assessments for their assigned domains. These co-facilitators should have technical expertise in the domains they are responsible for facilitating.

An orientation for the co-facilitators is conducted over about two days to ensure all content and processes are covered. The orientation addresses use of the assessment tool, the types of organizational documents to be reviewed, the assessment process and facilitation skills. Lead facilitators must:

- Set clear objectives.
- Set ground rules and instructions.
- Determine the amount of time for each discussion and ensure comments are focused.
- Encourage participation from all levels.
- Ensure objectivity by following the PROGRES\_SBCC user guide.
- Be prepared and know the relevant documents.
- Facilitate data capture.

By the end of Phase 1, the pre-assessment phase, the group should have:

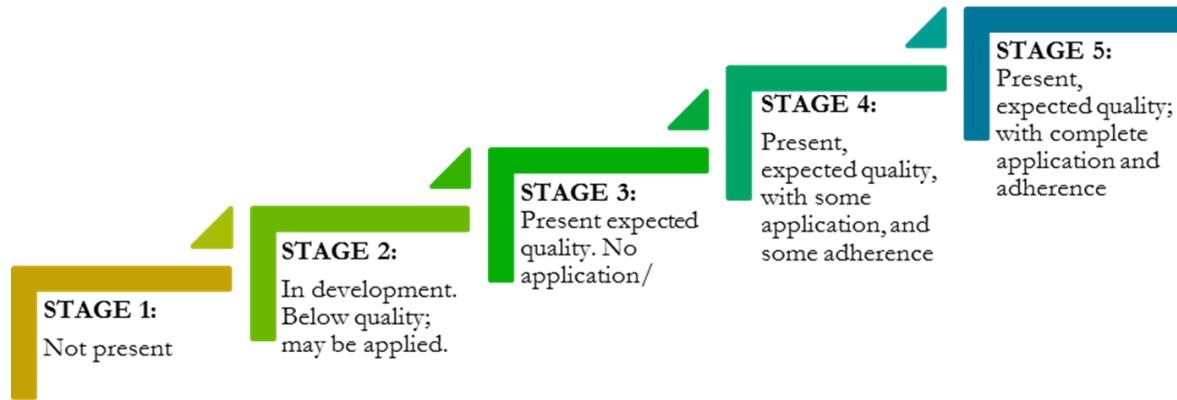
- Co-facilitators who are prepared to lead the PROGRES\_SBCC assessment.
- A list of participants.
- An agreed-upon agenda.
- A common understanding of the assessment program and key documents for review (examples in Annex 2).
- Agreed-on session dates and other logistics.
- Documents in hand for review.
- Identified change champions.

Lastly, it is important that the co-facilitators become fluent in how to administer the tool so the organization has the capacity to conduct an end line (or any other future assessments) independently.

### **Phase 2: Review of Systems in Each Domain**

The assessment is conducted in a participatory manner. Using documents such as those listed in Annex 2, the co-facilitators and staff from the CSO or government institution who are responsible for each domain review the systems and assess the level of development and use of documents, policies and practices/behaviors related to each domain. A review of relevant policies, procedures and other pertinent documents related to each sub-domain guide the co-facilitator and the CSO staff to document evidence of existing capacity strengths and weaknesses within the organization. See Annex 2 for examples.

After the document review, the co-facilitators and CSO or government institution staff discuss the results and agree on the level of performance in each sub-domain. PROGRES\_SBCC defines five stages of capacity (see image below): a rating of one represents the least capacity (no evidence of capacity) and a rating of five represents the highest level of capacity. The group should select the stage they feel most accurately reflects the state of the organization at the time of the assessment. This score is presented during the consensus workshop.



The review process can be done in two ways:

1. The two lead facilitators divide up the domains and, over the course of one week, work with the co-facilitators to complete the assessments for their respective domains at the organization's worksite. The main role of the lead facilitator during each discussion is to input the score into the tool and document any important notes or data in the comments section. This is usually the ideal method for completing the assessment as it allows the lead facilitators to work around the participants' work schedules rather than keep them away from their responsibilities for a three-day workshop.
2. In a three-day workshop (either onsite or offsite) divide the participants into groups. The groups and their respective co-facilitators then simultaneously complete the assessments for each domain. This method works well with larger organizations that have leads for almost every domain in the assessment tool. However, this option is more challenging with smaller organizations that have one person involved in various departments and thus have to be present in multiple assessments. It is also critical that in this scenario the co-facilitators and participants bring all the materials/evidence required to establish their rating.

At the end of Phase 2, the lead facilitators should help the co-facilitators put together a PowerPoint presentation of the results of the assessment process. In addition to developing a presentation, the lead facilitators should also coach the co-facilitators or department leads on how to present the findings of the assessment and facilitate a discussion for the consensus workshop (Phase 3) of the program.

### Phase 3: Scoring During the PROGRES\_SBCC Assessment

#### Step 1: Rate the Organization's Domains and Sub-domains

The co-facilitators explain the rating scale presented above, introduce the first domain and associated sub-domains, and read in full the description of the five levels of capacity (scored 1 through 5) for each sub-domain before asking the participants to discuss scores. The CSO staff present documented evidence for each sub-domain and domain to support their scoring decisions.

### Step 2: Review and Discuss the Scores

The co-facilitator leads all participants in a discussion about each sub-domain score. If no one disagrees about any of the scores for the sub-domains, there is consensus, and the consensus score can be recorded in the tool for each subdomain. If there are questions or concerns, the experts within the specific domain address them and provide evidence to support claims for raising or lowering the score. Evidence on the presence, quality and use of the systems is based on review of key documents (examples in Annex 2). If participants make changes to their scores, the lead facilitators should note all relevant comments in the tool, located in the comments column next to the consensus score.

Discussions of each domain should conclude after 30–45 minutes (depending on the number of sub-domains). At the end of the discussion of each domain, the lead facilitator should guide participants in identifying any improvements or changes that could be made to the way the organization works under particular sub-domains. These should also be noted in the relevant comments section of the tool.

### Step 3: Data Entry, Verification and Analysis

PROGRES\_SBCC employs an Excel workbook that consists of one worksheet per domain. It is formatted to automatically calculate the scores for each domain and sub-domain upon entering consensus scores for each sub-domain. The worksheet also automatically calculates the organization's sustainability score for each of the institutional, financial and programmatic areas featured in Table 1. Thus, data are captured in real time and feedback is provided to the participants at the end of the assessment. After participants have agreed on the sub-domain scores, the score (a selection between 1 and 5) is entered into the consensus score column of the tool. **NOTE: the workbook automatically rounds the score down to the closest whole number.**

By the end of the assessment, the group will have:

- Reviewed organizational documents related to all domains.
- Conducted a review of each domain.
- Identified the capacity strengths and gaps of the organization being assessed.
- Conducted the consensus workshop to agree on the domain scores.
- Reviewed the dashboards that summarize scores for each domain and sub-domain, and each of the three areas of sustainability.

### Online Instructional Video

For step-by-step instructions on how to input scoring and other data into the PROGRES\_SBCC assessment tool, please view the [PROGRES\\_SBCC Instructional Video](#).

### Phase 4: Consensus Workshop

Next, the lead, co-facilitators and staff from the CSO or government institution conduct a workshop attended by all staff and key stakeholders. During the workshop, the persons responsible for different capacity domains present their findings about the stage the organization is in along with the evidence



gathered during the review of systems in that domain. The co-facilitators guide the domain representatives in discussions about the reasons behind their decisions, based on the evidence contained in the checklists, notes in the comments section of the tool and means of verification mentioned above. In this activity, the co-facilitators should ask probing questions to stimulate discussion among all workshop participants about whether the organization is at the suggested stage (or not). All members of the organization finally agree on a consensus score for each sub-domain that is recorded in the assessment. During this workshop, lead facilitators should allow the internal co-facilitators to lead the presentations and subsequent discussions. The lead facilitators are primarily responsible for capturing key points from the discussion and making any necessary changes to the scoring within the tool.

*It is important to note that the staff representing the organization being assessed take the lead in determining the relative capacity-level scores.* The lead facilitator simply guides the discussion and does not determine the final ratings. This approach ensures that the CSO or government institution owns the results and thereafter can commit to addressing the identified capacity gaps.

Ultimately, the consensus workshop produces an overall score linked to a stage of capacity for each domain. Details about scoring are given below.

### **Creating and Implementing Action Plan for Performance Improvement**

The assessment is followed by a session for creating a capacity building action plan. By reviewing the dashboards in the tool, participants can see at a glance which dimensions of organizational capacity are most in need of improvement. Subsequently, the PROGRES\_SBCC participants and other key stakeholders in the organization review the findings and discuss appropriate steps to improve areas of weakness and build on areas of strength, taking into consideration the comments and suggestions that arose during the assessment. This also helps determine priorities for capacity building.

The last tab in the tool provides a simple template that could be used to develop the action plan. In creating the action plan, identify the desired deliverables or outputs, necessary resources and the person(s) in the organization who can support the delivery and monitoring of the plan. Monitoring and status notes about the action plan can be entered as often as desired in the last column.

At the end of the feedback process and action planning, the group will have:

- Reviewed dashboard and domain scores, their meaning and implications for the organization.
- Prioritized the domains and sub-domains needing capacity development.
- Completed a capacity building action plan.

The performance improvement action plan can succeed only with careful and active monitoring. It is necessary to:

- Clearly document findings during the assessment to ensure that the organization's current priorities are identified and taken into account during action plan development.



- Identify a change champion to support the implementation and monitoring of the action plan.
- Schedule regular meetings, preferably monthly, to review progress on the action plan.
- Communicate work plan adjustments, if required, to the change champion during regular review meetings (at least quarterly).
- Identify specific challenges to the action plan early on, to ensure they receive support.

## Glossary of Terms and Definitions

Key Term	Definition	Source
<b>Advocacy</b>	A strategy used by civil society organizations (CSOs), activists and even policymakers to influence policymaking. Advocacy is about creating or reforming policies and also about effectively implementing and enforcing them.	Sprechmann, S. and Pelton, E. <i>Advocacy Tools and Guidelines: Promoting Policy Change</i> . Atlanta: Cooperative for Assistance and Relief Everywhere Inc., 2001.
<b>Capacity Building</b>	Any action that improves the effectiveness of individuals, organizations, networks or systems—including organizational and financial stability, program service delivery, program quality and growth.	Management Sciences for Health. <i>Challenges Encountered in Capacity Building: A Review of Literature and Selected Tools</i> , Position Paper No. 1, April 2010. Accessed at <a href="http://www.msh.org/sites/msh.org/files/as2_technicalbrief_1.pdf">www.msh.org/sites/msh.org/files/as2_technicalbrief_1.pdf</a> 12 [December 2014].
<b>Cooperative Agreement</b>	An award of financial assistance that is used to enter into the same kind of relationship as a grant and is distinguished from a grant in that it provides for substantial involvement between the federal agency and the recipient in carrying out the activity contemplated by the award.	U.S. Government (USG) Grants Glossary. Accessed at <a href="http://www.grants.gov/web/grants/support/general-support/glossary.html#G">www.grants.gov/web/grants/support/general-support/glossary.html#G</a> [12 December 2014].
<b>Grant</b>	An award of financial assistance, the principal purpose of which is to transfer a thing of value from a federal agency to a recipient to carry out a public purpose of support or stimulation authorized by a law of the United States (see 31 U.S.C. 6101(3)). A grant differs from a contract, which is used to acquire property or services for the federal government's direct benefit or use.	USG Grants Glossary. Accessed at <a href="http://www.grants.gov/web/grants/support/general-support/glossary.html#G">www.grants.gov/web/grants/support/general-support/glossary.html#G</a> [12 December 2014].

Key Term	Definition	Source
<b>Institution/ Organization</b>	An entity such as a CSO, government ministry, government department or government program.	As defined by the authors of this user guide, to clarify readers' understanding of how "institution" and "organization" are used in this document.
<b>Monitoring and Evaluation (M&amp;E) Framework</b>	A comprehensive system for monitoring and evaluation, usually developed during the design phase of a project or program; it usually includes a logical framework/log frame/logic model/results chain, as well as indicators, data collection instruments, a data management system and reporting templates.	Adapted from International Fund for Agriculture Development (IFAD). <i>Managing for Impact in Rural Development: A Guide for Project M&amp;E</i> . Rome: IFAD, 2001.
<b>Mission Statement</b>	Explanation of why an organization exists—its overall purpose. The mission statement also describes the organization's current efforts, in the most general sense.	Adapted from Galer, J. B., Vriesendorp, S., and Ellis, A. <i>Managers Who Lead: A Handbook for Improving Health Services</i> . Cambridge, MA: Management Sciences for Health, 2005.
<b>Organizational Development</b>	A discipline aimed at improving the effectiveness of organizations and their members, by means of systematically planned interventions and a planned process of developing an organization to become more effective in accomplishing desired goals.	DCT, <i>Organisational Development Portfolio</i> . Accessed at <a href="http://www.dct.co.za/portfolio-1.htm">www.dct.co.za/portfolio-1.htm</a> [12 December 2014].
<b>Performance Monitoring Plan/M&amp;E plan</b>	A plan that outlines the M&E requirements for a program or project (such as indicators, data sources, data collection instruments, data analysis methods, reflection and learning events) with roles, responsibilities, time frames and a budget.	Adapted from IFAD. <i>Managing for Impact in Rural Development: A Guide for Project M&amp;E</i> . Rome: IFAD, 2001.

Key Term	Definition	Source
<b>Stakeholders</b>	Individuals and groups who have an interest or concern in the outcomes and success of an organization's activities.	Adapted from Galer, J. B., Vriesendorp, S., and Ellis, A. <i>Managers Who Lead: A Handbook for Improving Health Services</i> . Cambridge, MA: Management Sciences for Health, 2005.
<b>Vision Statement</b>	An articulation of the future of the organization and the community it serves. It defines how the organization wants to evolve and what the organization wants to become or achieve over the long term. The vision provides a picture of a desired future.	Adapted from Galer, J. B., Vriesendorp, S., and Ellis, A. <i>Managers Who Lead: A Handbook for Improving Health Services</i> . Cambridge, MA: Management Sciences for Health, 2005.

## Tips and Recommendations

- Inform senior management that the assessment is a prime opportunity to hear from their staff.
- Remember to link the pre-assessment meeting to the PROGRES\_SBCC assessment process during the opening session.
- Ensure there is adequate time for all participants to understand the questions and terms used.
- Use encouraging terms to validate participants and move the discussion along. Examples are: *I think I get a better picture...Could you give an example...I hear you saying that...The impression I get...Based on what you have said...Reflecting on the discussion we had...*
- Don't emphasize the scores, but rather focus on the stages of capacity building, and describe capacity as a progression of skills, practices and behaviors. Otherwise, participants may interpret their assessment results in a negative way.
- In some cases, participants may try to state that they are in between two stages. In these instances, the facilitators must guide them to commit to one specific stage. A review of evidence can help with clarifying the stage.
- The facilitators should be impartial and objective, ask participants probing questions and request supporting evidence to bolster their decisions regarding capacity stages.
- It is important that facilitators are familiar with the respective sub-domains; all participants need to understand the difference between a vision statement and a mission statement, and know the elements of a good strategic plan.
- Allow space for organizational participants to revise and give their scores again. Remember that different organizations use different terminologies. Allow the participants enough time to think and discuss.
- Ask all participants to refrain from providing specific feedback in a particular domain or sub-domain while they are participating generally in the overall assessment.
- Be prepared with creative ways to make the exercise interesting when introducing terms and domains.
- Have a polite way of verifying that documents and systems are in place. Politely inquire about this practice in the organization.
- When necessary, refer to the documents previously provided.
- Remember that you may not always have the answer. Keep emphasizing that your role is to help the organization move to the next stage.

## Resources and Templates

### Annex 1: Sample Agenda for an Organizational Capacity Assessment

#### Day 1

Agenda Item	Responsible
Welcome Introductions of organization staff and PROGRES_SBCC facilitators Brief presentation from the organization being assessed, with an emphasis on its strategic plan	Partner organization
Objectives Expectations and fears Ground rules	Lead Facilitators
Brief introduction to PROGRES_SBCC capacity building program Introduction and overview of the program	Lead Facilitators

#### Day 2-4

Agenda Item	Responsible
Review of performance in various domains and scoring: collection of relevant evidence and documents	All

#### Day 5

Agenda Item	Responsible
Welcome and recap	Lead Facilitators
Consensus workshop	Co-Facilitators
Sharing of preliminary results, discussion of priorities and development of prioritized action plan	Co-Facilitators
Next steps and time lines	Lead Facilitators
Wrap-up and close	Partner, facilitator

## Annex 2: Key Illustrative Documents<sup>1</sup> for Review, by Domain

Core Domains	
GOVERNANCE AND LEADERSHIP	FINANCE, OPERATIONS, AND ADMINISTRATION
Constitution Registration documents Board manual Board evaluation tools Board evaluation reports Strategic plan Board minutes Board appointment letters Financial statements Strategic plan Annual operation plan Resource mobilization strategy/plan Succession plans	Financial and procurement policies Payment vouchers Cash book Donor contracts Donor financial reports, financial statements Asset register Payroll Staff files with curriculum vitae and job descriptions Annual audit reports Management reports Engagement letters Budget variance reports Audit reports and management letters Chart of accounts Financial management system Asset management and disposal policy Operations and administration policy Approved financial reports
HUMAN RESOURCES MANAGEMENT	RESOURCE MOBILIZATION
HR policies and strategies HR structure and job descriptions Strategic plan Organogram Personnel files Recruitment files HR data management system Staff performance reports Staff development plans Payroll Pay slips	Resource mobilization plans and strategies Resource mobilization operational plans Organogram and job descriptions Funding pipelines Donor matrix Donor scoping reports Contracts and memorandums of understanding (MOUs) Financial statements

<sup>1</sup> These are suggested documents. Other documents identified by the facilitators or organizational participants during the pre-assessment meeting may be included and reviewed.



<b>Core Domains</b>	
<b>COMMUNICATIONS</b>	<b>PROGRAM MANAGEMENT</b>
<p>Communications policy            Communications strategy            Branding and marketing plan            Websites            Intranet            Publicity materials, flyers, brochures            Organogram</p>	<p>Baseline/formative evaluation reports            Situational analysis reports            Program start-up plans            Program work plans            Work plan review reports            Program documents and proposals            Program management guidelines            Risk plans            Program quality plans            Close-out plans            Advisory committee minutes            Work plan status matrix and reports            Program internal and external review reports            Individual staff work plans</p>
<b>M&amp;E AND KM</b>	<b>SOCIAL AND BEHAVIOR CHANGE COMMUNICATION</b>
<p>Relevant results frameworks            Project M&amp;E plans            M&amp;E guide            M&amp;E budget            M&amp;E work plan            M&amp;E reports            Project progress reports            Data management system and filing system            KM system and plan            Data analysis matrices            Audience analysis            Data collection reports            Data quality assessment and audit reports            Data quality improvement plans            Project review meeting reports or minutes            Research protocols            Mid-term reports (where applicable)            End-of-project report (where applicable)</p>	<p>Situation analysis reports            Formative research plans and reports            Data use workshop reports or agendas            Communication strategy workshop agendas            Communication strategies            Communication creative briefs            Communication products            Workplans            Media plans            Advocacy strategy</p>

<b>Optional Domains</b>	
<b>ADVOCACY, NETWORKING AND ALLIANCE BUILDING</b>	<b>SERVICE DELIVERY AND QUALITY ASSURANCE</b>
<p>Advocacy strategies            Advocacy action plans            Organogram            Research reports (advocacy issues)            List of membership networks            Reports of networking activities            Policy briefs, fact sheets, briefing cards, advocacy audiovisuals, memos, petitions            Advocacy reports, materials, acknowledgment documentation            Situational analysis reports and situational analysis consultative meeting reports            Audience analysis worksheets            Advocacy process reports on messaging            Annual advocacy budgets</p>	<p>Brochures or informational materials specific to services provided            Program review reports or minutes            Outdated and reviewed materials            Distribution lists            Client survey report            Standards and protocols            Quality assurance reports            Reports or minutes initiating or developing service improvement            Report or documentation on analysis of best practices            Service delivery protocols, guidelines, standards; program progress technical reports            Reports or documentation on changes made based on learning</p>
<b>COORDINATION AND COLLABORATION</b>	<b>GRANTS AND SUB-GRANTS MANAGEMENT</b>
<p>List of coordination platforms            List of members and participants in those platforms            Draft or final Terms of Reference (TOR) for the forums            Agendas and minutes of meetings            Reports of issues addressed or feedback            Reports or minutes initiating or developing TOR            Minutes of joint planning, action, and technical working groups            Organization’s coordination mandate document; policy documents; reports and minutes of coordination meetings            Strategic or operational plans showing activities in line with mandate; partner meetings’ attendance lists            List of stakeholders and groupings; minutes or report of meetings with stakeholders</p>	<p>Grants management manual            Financial statements            Organogram            Staff training records            Grants and sub-grants management system            Contracts and MOUs            End-of-project reports            Grants closeout plans</p>



Reports of assistance or support given to stakeholders	
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