JOINT FUND WINDOW FOR SOCIAL PROTECTION FLOORS

A pooled financing mechanism to implement social protection floors, including in fragile and crisis conflicts, and realize Sustainable Development Goal 1.3

TERMS OF REFERENCE

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THE 2030 AGENDA FOR SUSTAINABLE DEVELOPMENT

With the adoption of the Sustainable Development Goals (SDGs), world leaders renewed and expanded their commitment to furthering global development gains achieved in recent decades. The SDGs go beyond the scope of their predecessor, the Millennium Development Goals (MDGs), as they seek to eliminate rather than to simply reduce poverty, to address the causes and effects of climate change, to promote more sustainable production and consumption processes, and to bring about more peaceful and just societies.

While some progress in these areas had already been made, some of the most vulnerable communities, including a rising number of forcibly displaced persons, are being left behind.¹

To address this, the SDGs have articulated ambitious targets that include reaching previously excluded populations with essential provisions such as universal primary and secondary education, universal health coverage, and putting into place “social protection systems and measures for all [emphasis added], including [social protection] floors” (SDG 1.3).²

Poverty is not just a lack of money, it is not having the capability to realize one’s full potential as a human being.

– Amartya Sen

To achieve the ambitious aims of the new development agenda, the capacity of governments to implement protections at appropriate national scale, together with sufficiently inclusive legislative and policy frameworks, determines whether no one is indeed left behind. Strengthening social protection systems in more difficult contexts with low government capacity and exclusion of vulnerable groups (including non-nationals in displacement contexts) can be challenging. Therefore, proper sequencing of social protection systems-building efforts and joint action among humanitarian and development actors, in concert with civil society, trade unions, employers’ associations and private sector enterprises, will be necessary to ensure that the SDGs are implemented in the same universal spirit in which they were conceived.

¹ The Road to Dignity by 2030: Ending Poverty, Transforming All Lives and Protecting the Planet, 2014
² Resolution adopted by the General Assembly on 25 September 2015: Transforming our world: the 2030 Agenda for Sustainable Development (http://undocs.org/a/res/70/1)
Today, 50 per cent of the world’s population currently lives without any social protection. The ambitious social protection objectives of the SDGs will require innovative financing mechanisms and integrated support that builds long term capacities of countries to develop and operate social protection floors and bridges the humanitarian-development divide in a growing number of economic, political and natural disaster related crises situations found today around the world.

PROGRESS AND FUTURE CHALLENGES

Many countries are already designing and implementing new policies to inaugurate some of the protections that make up a national social protection floor (SPF), which should, at a minimum, provide access to essential health care and to basic income security across the lifecycle (children, working age and old age). However, comprehensive and inclusive national frameworks are needed to ensure such provisions are made available to all to stem the rising tide of inequality and reverse longstanding exclusion.

Despite their efficacy at achieving these aims and relative affordability, efforts to implement SPFs may be stymied by a lack of available financing or political support. According to ILO data, SPFs that cover a standard set of lifecycle risks are affordable in many middle income and even in low-income countries when using domestic resources for the recurrent costs of social transfers and services. International support for start-up costs related to programme design, implementation and evaluation can make the establishment or expansion of SPFs even more feasible.

At a time when much of the world’s attention is focused on addressing urgent social protection deficits, including for many displaced by conflict and other shocks, interventions with both immediate and longer-term protection objectives should be planned in an integrated manner for comprehensive support from the international community.

This means adopting an approach to SPF implementation that immediately enhances the resilience of individuals and households and improves government capacities over the long-term to assume the fulfilment of social protection entitlements, with international support.

The ILO estimates that a social protection floor package covering most lifecycle risks is affordable even in many low and middle income economies.
Building upon the essential protections, there is then space for more comprehensive, contributory social protection components, such as social insurance, that guarantee higher levels of protection as part of a country’s multi-layered social protection system, at the base of which is the SPF.

**THE JOINT FUND FOR THE 2030 AGENDA**

In order to attain the objectives set out in the 2030 Agenda for Sustainable Development, it is necessary to approach policymaking from a multi-dimensional perspective and in a more integrated manner by national and international stakeholders. For this, the UN Development System has come together to develop a major new initiative for integrated policy support to advance the SDGs, underpinned by a new pooled fund: “The Joint Fund for the 2030 Agenda” (the Joint Fund).

Through pooled funds, the UN has effectively delivered as one by encouraging joint planning and coordinated implementation. This was notably the case through the Delivering Results Together Fund that has allowed UN agencies to provide joint technical support to governments in the field of social protection and many other priority areas. Furthermore, and as articulated in the UNDG’s recently commissioned discussion paper entitled “The Role of UN Pooled Financing Mechanisms to Deliver the 2030 Sustainable Development Agenda,” the following five elements were identified as key comparative advantages of pooled financing mechanisms: (i) improving aid coordination and coherence; (ii) promoting better risk management; (iii) broadening the donor base for UN activities; (iv) facilitating transformative change; and (v) bridging the silos between humanitarian, peace, security and development assistance.

To support the implementation of the 2030 Agenda as it relates to social protection, and to increase coherence with the broader efforts on integrated policy support by the UN, the creation of Thematic Window for SPFs (SPF Window) within the Joint Fund is proposed.

The SPF Window will enhance the capacity of the participating UN agencies to support as the implementation of social protection floors in countries while ensuring that the approaches used at the national level are aligned with a common vision and approach, while at the same time joining up operations for greater impact. The approach and activities of the SPF Window will be aligned with other national and global development frameworks strengthening UN coherence and development effectiveness. To this end, for
countries in conflict or crisis situations, the SPF Window would offer integrated support linking humanitarian responses to recovery and development efforts, including early investments in social welfare institutions.

**VALUE-ADDED OF A JOINT FUND SPF WINDOW**

**FIVE PROGRAMMATIC ENHANCEMENTS**

In addition to the already comparative advantages of pooled financing mechanisms and that of being embedded in the Joint Fund, the SPF Window will unlock several programming enhancements to support the development of SPFs in a new development era.

- **Facilitating integrated programming:** The programme proposal and award process of the SPF Window envisages a maximum of one SPF proposal per country per round(s) of funding. This will enforce joint programme formulation, coordination and implementation efforts at the country level. This approach will also strengthen programmatic and economic efficiency and effectiveness. In more difficult contexts this will also ensure joint programming efforts between humanitarian and development agencies. The UN country teams through existing task teams or working groups will identify and agree on the common objectives, strategies, indicators and resources needed through national dialogue with the government, trade unions, employers’ associations, civil society and private sector enterprises the integrating and participatory theory of change, or logical framework formulation, process.

- **Supporting large scale and coherent programmes with results and impact:** The SPF Window will increase the scale and impact of social protection interventions by pulling together otherwise smaller, piecemeal contributions and individual activities, by systematically identifying synergies between the respective strengths and added value of participating agencies, and by providing a harmonized management approach among multiple participating agencies.

- **Bridging the silos between humanitarian, peace and security, and development assistance:** Countries face multiple and particularly complex challenges following crises and conflict that require equally particular and unique policy support. Some countries are repeatedly impacted by natural disasters and disease or suffer from environmental disasters and degradation that limit their
ability to build national systems of social protection. Because of weak national institutions and a lack of capacity to formulate and implement policies and timely provision of basic social services, technical assistance, capacity building and aid flows from the international community ought to be holistically planned and delivered. Therefore, the SPF Window will assist countries in establishing and enhancing their social protection floors to provide adequate protection against the financial consequences of life cycle risks, and – in addition – to address issues related to transition from humanitarian assistance to development, including in conflict and disaster settings. It will also strengthen SPFs to ensure that, once in place, these systems are made more resilient against inevitable shocks in the future.

BOX 1: PRINCIPLES FOR JOINT SPF SUPPORT IN FRAGILE AND CRISIS CONTEXTS

1. HARMONIZATION AND INSTITUTIONALIZATION
   National social protection systems are developed from existing humanitarian and development efforts.
   In humanitarian contexts, efforts to provide rapid relief may result in disparate programs being sponsored by several international actors. Harmonization efforts (of social protection packages, of targeting methodologies, information management, payment technologies, etc.) and capacity building will serve to create a more coherent and coordinated set of social protection programs for eventual take-up by government.

2. PREPARATION AND PREVENTION
   The resilience of national systems is enhanced prior to shocks to improve absorptive capacity and avert larger humanitarian or displacement crisis.
   Prior to a shock, developing shock-responsive or adaptive mechanisms that can scale-up payment and coverage of national social protection programs can reduce delays and increase efficiency of domestic responses. With adequate contingency funding or international support, the system can yield additional payments for beneficiaries and relax criteria for the enrolment of new participants.

3. REINFORCEMENT, NOT REPLACEMENT
   National social protection systems are leveraged and strengthened through humanitarian responses to shocks.
   In humanitarian contexts, a country’s existing social protection system may serve as effective means for relief distribution supported by international actors. International interventions may also be designed and implemented in a way that strengthens national system capacities.

4. INCLUSION OF THE FORCIBLY DISPLACED
   Inclusion of displaced persons in state-led social protection systems is supported.
   Support for the inclusion of displaced people in state-led social protection systems, coordinated with the global scaling-up of social protection floors as part of the SDGs, is critical for providing predictable access to relief, social services and decent work to many who need it.
- Monitoring progress and long-term impacts of collective programming on people over time: The relatively short reporting cycles associated with individual projects do not lend themselves to monitoring impacts that projects have over institutional changes and institutional changes have on people’s lives over the long term. A national social protection strategy or piece of legislation may only be the starting point of a process leading to tangible increases in the social protection coverage after several years. A common approach and Results-based Management Framework (RBMF) across a wider breadth of interventions would allow for more evidence on the contribution of the UN system in bringing about sustainable and systemic social protection changes leading to improvements in social protection coverage and adequacy of benefits.

- Blending different sources of funding resources and mitigating risk: Through the SPF Window of the Joint Fund, it is possible for UN agencies to develop programmes with partners active in the area of social protection that are outside the UN system, including civil society organizations and like-minded actors in the private sector. As partners committed to common objectives and strategies, all SPF Window stakeholders will share and manage risks associated with programme implementation.

SUPPORT FOR UN COORDINATION AND COHERENCE

The United Nations and its partners regularly provide Member States with expert advice and financial support to expand and improve their systems of social protection. While its exact definition may differ slightly across organizations according to their specific mandates, social protection can be found in the mandates and activities of a large number of UN agencies, funds and programmes. In recent years, there have been calls for greater coherence in policies promoted and for increased coordination of technical assistance activities carried out by UN and other development actors.

One such effort is the Social Protection Floor Initiative (SPF-I), established in 2009 by the UN Chief Executives Board to align the approaches and operations of UN system actors active in the field of social protection. The SPF-I work continues in countries through United Nations Country Teams (UNCTs), financed using the existing resources of individual agencies, and in regions under the auspices of the United Nations.
Development Group (UNDG), where the work has been chiefly supported by a core set of UN agencies, notably ILO, UNICEF, UNDP and UNHCR.

Meanwhile, the Social Protection Inter-agency Cooperation Board (SPIAC-B) was inaugurated in 2012 following a G20 request for a mechanism to support coordination of in-country development activities related to social protection, including advocacy work.

And, most recently at the 71st UN General Assembly in New York, the Global Partnership for Universal Social Protection was launched as a new initiative among top development donors and international agencies to implement SDG targets related to social protection by 2030.

The SPF Window of the Joint Fund is designed to create the links now missing in the network of global social protection coordination efforts including the structural links between the national, regional and global levels of operations and between willing collaborators at country level.

CLOSING A GAP IN THE FUNDING LANDSCAPE

A variety of individual appeals and multi-agency funding mechanisms exist to finance pieces of the SPF Window scope of activities, as shown in Box 2 below.

**BOX 2: COMPARATIVE FUNDING LANDSCAPE**
While humanitarian responses are predominantly financed through appeals launched by individual agencies, pooled financing mechanisms for non-emergency relief activities do exist. The World Bank’s Rapid Social Response Fund, for example, was established to coordinate the Bank’s efforts on safety nets, labour and access to basic social services. The Fund supports interventions aimed at establishing temporary, donor-funded safety net programmes in stable contexts using innovative delivery mechanisms and technologies. The MPFF-SPF will complement resource mobilization efforts carried out by participating agencies through their specific programmes and initiatives such as the ILO’s Global Flagship Programme on Building Social Protection Floors for All that focuses on supporting countries in developing the requisite institutional and policy frameworks for state-led and financed social protection systems.

The SPF Window would unite humanitarian and development actors to bridge the divide and fill several gaps in the landscape for financing of multi-stakeholder projects for systems building, linking activities related to institutional change for and implementation of expanded social protection guarantees, including in fragile and crisis contexts.

**THEORY OF CHANGE AND PROGRAMMATIC SCOPE**

With the type of programmes promoted by the SPF Window, the UN will be able to assist countries in the design and implementation of social protection floors that are in line with national development priorities and in accordance to international labour and social security agreements. The focus will be on bringing the institutional and other changes necessary to deliver sustainable improvements in people’s lives.

The SPF Window will not seek to replace existing forms of bilateral or other financing arrangements for projects with scope limited to a single reform or social protection branch (pensions, child benefits, etc.). Instead, it will seek to fill the gap in global development assistance and capacity enhancement available for social protection systems-building and improvement that cannot be undertaken by any single agency on its own. By doing so it will therefore foster the deliver as One UN and increase also coordination of national institutions and policies.

The set of core cross-cutting activities are:

- **Conduct national dialogues** to devise and implement national social protection strategies, with representation from relevant government sectors and other stakeholders. This process follows the conduct of studies and assessments to
identify potential coverage gaps, and facilitates discussion of expansion priorities, which may include the development of adaptive programs that can respond rapidly to new deprivation created in times of crisis. Policy priority setting is based on evidence, such statistics of coverage, projected cost of policy scenarios, fiscal space available and potential impact of policy options on the reduction of poverty, empowerment of women, reduction of inequalities and other sustainable development goals.

- **Establishment and improvement of institutional coordination mechanisms** and streamlining of frontline benefits and service delivery through joint mapping and planning exercises,

- **Development and reform of legislative frameworks** to provide legal bases for social protection, including umbrella social protection laws covering multiple sectors,

- **Articulation of financing options** for social protection expansion (fiscal space) and development of national financing strategies necessary to support a wide range of social protection schemes,
- Creation and improvement of monitoring and evaluation protocols and mechanisms to improve data collection and governance across the national social protection system,

- Technical support on designing, piloting and scaling up of social protection programs.

The SPFs must be based on nationally-defined sets of basic social security guarantees aiming at preventing or alleviating poverty, vulnerability and social exclusion.

By bringing a cross-section of agencies active on social protection together into broad-ranging exercises, the collective expertise of the UN system is made available to countries seeking significant expansions or improvements to their social protection system. While agencies come with valuable competencies, they also bring in the voices of different constituent groups (children, refugees, workers, etc.) and national interlocutors, including their primary government counterparts, trade unions, employers’ associations, civil society, etc. to promote more comprehensive and participatory policymaking.

In fragile and crisis contexts, the core set of SPF support activities should be devised in line with the SPF Window’s four (4) principles to bridge the divide between humanitarian and development interventions: support for i) harmonization and state institutionalization of existing donor-driven social protection programmes, for ii) preparation and prevention activities include building the resilience of the social protection system against future shocks, for iii) reinforcement, rather than replacement, of existing social protection systems and capacities when designing and implementing humanitarian interventions, and for iv) the inclusion of displaced persons in state-led social protection systems. (For additional details, see Box 1: Principles for SPF Support in Fragile and Crisis Contexts.)

THEMATIC WINDOW GOVERNANCE

The Thematic Window will be placed inside the Joint Fund and operate in concert together with other Joint Fund bodies and governance procedures. Under the Joint Fund, there exist:

- Joint Fund Board – As the primary Joint Fund organ, the Board is responsible for overall leadership, strategic direction, and ultimate decisions on eligibility,
funds allocation and other managerial and oversight aspects. It is composed of representatives from five (5) UN agencies.

- **Advisory Group** – The Advisory Group provides advice on leadership and strategic issues to the Joint Fund Board. Its members include UN agencies, donors, representatives from programme countries and think tanks. It is not directly involved in proposal review or approval.

- **Joint Fund Secretariat** – Hosted by the UN Development Operations Coordination Office (DOCO), the Secretariat serves as the operational and technical support unit executing Board decisions. It reviews and awards “concept note” submissions with seed money for further development, and coordinates technical reviews of concept notes submitted to the Board for decision. It also organizes calls for proposals and supports resource mobilization activities.

- **Participating UN Organizations** – Participating UN Organizations (PUNOs) eligible to receive Joint Fund resources have entered into a Memorandum of Understanding (MoU) with the Fund. All Joint Fund-eligible agencies are, by extension, eligible to submit proposals and receive funds from the Thematic Window on SPFs.
- **Administrative Agent** – The Joint Fund is administered by the Multi-Partner Trust Fund Office (MPTF Office) who manages the Joint Fund account, including a sub-account for the SPF Window, and executes disbursements of funds to PUNOs as approved by the Joint Fund Board. It receives a fee of one per cent of the amounts contributed to the Joint Fund to recover associated administrative costs.

Meanwhile, the SPF Window itself will consist of two (2) bodies:

**SPF POLICY GROUP**

Within the SPF Window, the SPF Policy Group is the primary organ responsible for reviewing SPF proposals to ensure coherence with Window specifications, including the six core cross cutting activities and the principles applied when supporting social protection efforts in fragile and crisis contexts. For the award of funds earmarked to the SPF Window, the Joint Fund Board provides *ex ante* approval of final award decisions made by the SPF Policy Group who, in turn, provides a report of decisions made for *ex-post* endorsement by the Joint Fund Board through signature of the Joint Fund Board Chair on the fund allocation decision.

The SPF Policy Group also promotes the SPF Window among members of the SPIAC-B and other donor groups. Its membership includes representatives of four (4) UN agencies (ILO, UNDP, UNHCR and UNICEF) responsible for the SPF Window design, up to three (3) development partners (having contributed more than US$ 1 million each to the SPF Window) and a representative of the Joint Fund Secretariat (DOCO).

Upon request, the SPF Policy Group may also provide advice on strategic issues to the Joint Fund Board or Secretariat, including support for the review of social protection components of proposals submitted in response to general Joint Fund calls for proposals. For region-specific issues related to project proposal review, the SPF Policy Group will also draw upon the expertise of Regional Technical Review Committees.

The ILO will serve as the SPF Policy Group Secretariat, organizing and financing joint fundraising activities carried out by UN members of the group. Secretariat operations will be financed through a direct cost budget prepared and submitted to the SPF Policy Group for approval. The budget shall not typically exceed 2 per cent of total earmarked contributions to the SPF Window. Exceptionally in the first year of operation, however,
the budget may reach up to 20 per cent of those of earmarked contributions to meet needs for joint resource mobilization efforts and other initial start-up costs.

REGIONAL TECHNICAL REVIEW COMMITTEES

The SPF Regional Technical Review Committees (RTRCs) will provide an initial review of proposals submitted from UNCTs in their respective regions. The RTRCs are made up of social protection specialists from a wide breadth of UN agencies with relevant regional experience. The RTRCs regularly convene to review country proposals and provide technical advice and funding award recommendations to the SPF Policy Group.

The RTRCs may also convene periodically to respond to requests by Joint Programme Steering Committees, UNCTs or individuals PUNOs to provide technical advice on proposal formulation, monitoring and evaluation, including preparation of terms of reference for mid-term reviews or evaluations.

Where possible, existing social protection thematic working groups (TWG) or issue-based coalitions (IBC) operating under regional UNDG auspices will serve as RTRCs. TWGs and IBCs for social protection have already been established in the Arab States and MENA, Asia-Pacific and Europe and Central Asia regions with TORs defining chairmanships and other internal governance procedures.¹ All TWGs and IBCs on social protection have participation from at least three of four agencies of the SPF Policy Group. In regions where no suitable TWG or IBC exists to perform RTRC functions, a proposal will be reviewed solely by the SPF Policy Group.

SPF PROPOSAL SUBMISSION, REVIEW AND AWARD

Subject to availability of funds in the SPF Window sub-account, the SPF Policy Group will determine the volume and number of rounds of funding. It will also determine if there will be a reserve of funds (Fast Funding Track) assigned for countries under special consideration (e.g., humanitarian, natural disasters, or political crisis). Calls for proposals to the SPF Window sub-account will be disseminated by the Joint Fund Secretariat either in tandem with or independently from calls issued for proposals to the general Joint Fund account.

¹ Specific addenda to TWG and IBC TORs that outline roles and responsibilities as they relate to the RTRCs and the SPF Window of the Joint Fund may be considered in the future.
UN Resident Coordinators may submit a concept note to the SPF Policy Group with a request for seed funding ("formulation advance") that are part of a proposal’s overall budget to develop a full project document. UNRCs then have up to three (3) additional months following the issuance of the advance to develop the full joint programme proposal, which should also include a robust risk assessment and analysis, and a risk log to manage anticipated exigencies. Where available, the SPF Regional Technical Review Committees may be available to support those selected UNCTs with the development of their final project document, in line with the objectives of the SPF Window, relevant national development strategies and the UNDAF.

All proposals for Joint Programmes should adhere to UNDG Guidelines for Joint Programmes regarding the establishment of minimum thresholds per agency (budget, transfers), duration, and number of PUNOs, among others. Any UNCT that wishes to submit proposals for funding will have prepared an underlying logical framework and articulated a causal hypothesis describing the intervention and anticipated outcomes. A Results-based Management Framework (RBMF) for proposals will be developed as an integral part of the SPF Window to monitor and report on performance indicators and will be the basis for the SPF Window’s performance evaluations. Additionally, proposals should include a financing strategy, a programmatic document, a budget and a work plan. Inter-agency assessment and costing tools already available through the UN SPF-I and SPIAC-B should be used as appropriate (e.g. the Rapid Assessment Protocol, UNDG Coordination toolkit, ISPA tool suite, etc.) for the implementation of the project. The programmes will focus on at least one of the core cross-cutting SPF Window activities.

The joint programme proposal document will be reviewed by the respective RTRC, where available, who will make a recommendation to the SPF Policy Group on the suitability of each proposed project document. In countries with no suitable inter-agency body to perform RTRC functions, those proposals shall be submitted directly to the SPF Policy Group for review.

For all Joint Fund awards, the Joint Fund Board is ultimately responsible for all funding decisions and will notify the UN Resident Coordinator, through the Secretariat accordingly. In the case of submissions to the SPF Window, the Joint Fund Board provides ex ante approval of final award decisions made by the SPF Policy Group who, in turn, provides a report of decisions made for ex post endorsement by the Joint Fund Board, with the Secretariat of the SPF Policy Group informing UNRC of the funding
decision. To increase coherence and reduce fragmentation, the Joint Fund may channel funding through other funds, for example, stand-alone joint programs or Delivering as One funds.

Subject to availability of funds, the SPF Policy Group will determine the number of rounds for funding and establish the deadlines for: i) proposal preparation, ii) proposal submission, iii) proposal review and iv) funding award.

**REPORTING**

Programmes funded by the SPF Window will submit reports to the Joint Fund Board Secretariat by 28 February of each year. The SPF Policy Group Secretariat will consolidate the reports of the SPF Window to be submitted to the Joint Fund Secretariat for incorporation to the overall Joint Fund annual narrative report. Financial reporting will be provided per the regular reporting process of the Joint Fund.

**MONITORING AND EVALUATION ARRANGEMENTS**

The SPF Window monitoring and evaluation arrangements are in line with the standard UNDG Memorandum of Understanding and Standard Administrative Agreement. A Results-based Management Framework (RBMF) will support the monitoring and evaluation functions of the SPF Window. The RMBF will guide the collection, recording, analysis, verification and reporting of results and general relevant data, as outlined in the RMBF established through the Theory of Change process. The RMBF will allow the Board to assess Fund’s performance, make allocation decisions and monitor the Risk Management Strategy. The monitoring and evaluation of the SPF Window will be based on the agreed indicators, as elaborated in the RBMF.

**MODIFICATION AND EXPIRATION OF THE SPF WINDOW**

These Terms of Reference may be modified at any time by the SPF Policy Group, and endorsed by the Joint Fund Board. Detailed guidelines will be defined and approved by the Board including criteria or thresholds for establishment, and how it will be managed.