

# **2024 IEP Annual Report**

## **53<sup>rd</sup> Board Meeting**

GF/B53/09

7 – 9 May 2025, Geneva, Switzerland

### **Board information**

Purpose of the paper: This paper presents the 2024 Independent Evaluation Panel Annual Report. In its advisory capacity, the Independent Evaluation Panel is mandated to prepare “an annual report to the Board through the SC including an opinion on the independence, quality, capacity and working modalities of the evaluation structure of the Secretariat and recommendations on improvements.”

# Report

## Developments Within the Evaluation Function

1. The year 2024 was the second full operation year for the new evaluation function of the Global Fund. During this time, the Independent Evaluation Panel (IEP) worked closely with the Evaluation and Learning Office (ELO) to safeguard the independence and quality of commissioned evaluations and utility. The main actions taken included:
  - Ensuring that one IEP quality assurance focal point observes the end-to-end evaluation process, including bidder selection by the Technical Evaluation Committee (TEC), to enable assessment of technical, operational, organizational, and political independence. **The IEP recommends the continuation of this practice.**
2. In 2024, ELO/IEP sought to have early Strategy Committee (SC) approval of the 2025 work plan to ensure that evaluation requests for proposals (RFPs) could be advertised early enough to get ahead and start evaluations in early 2025. This would reduce the clustering of evaluation activities in the year, extend the time for bidders to respond, and inform decision-making periods in 2025. **The IEP recommends the continuation of this practice when feasible in terms of the replenishment process, acknowledging that it may not be possible for the 2026 plan.**
  - Developing a series of normative guidance documents, including a quality checklist for developing evaluation terms of reference (TORs) and guidance to evaluators on right-sizing inception and final reports. **The IEP recommends adhering to these guidance documents moving forward.**
  - At the 51<sup>st</sup> Board Meeting, the Chief Evaluation and Learning Officer and the IEP Chair presented a pre-day session to foster the dissemination of evaluation results and increase engagement with the board and its constituency members. This exercise was regarded as an effective means of communicating evaluation outcomes. **The IEP recommends continuing pre-Board engagement in the future.**
  - In its 2023 annual report, the IEP recommended developing a learning strategy. Progress on advancing the learning component within evaluation and learning function in 2024 was less prominent than progress on evaluation. **The IEP reiterates that the learning component is critical for the Global Fund and strongly recommends advancing it during 2025.**
  - Finally, IEP recognizes that the forthcoming period may be affected by resource constraints that would require rationalizing spending levels for the evaluation

function. That said, the IEP underscored that in the context of resource constraints, it is crucial to preserve the spirit, philosophy, and vision that guided the creation of the IEP as a guarantor of the quality and independence of the Global Fund's evaluations. **To fully and effectively achieve this, IEP underscores that it must continue to benefit from operational autonomy and independence**, both fundamental for maintaining and meeting the standards and expectations of stakeholders.

## Implemented and Ongoing Evaluations

3. Evaluations: In 2024, the IEP provided inputs for the development of five evaluation TORs (Malaria Subnational Tailoring, Community Engagement, Community Responses and Systems Strengthening, HIV Prevention, and Gender). Three of these evaluations have already been commissioned and are well underway, and all are expected to be completed in 2025. As of December 2024, the IEP prepared and presented three commentaries. All were shared with the SC and discussed with the committee members.
  - i. Independent Evaluation of the Global Fund Allocation Methodology in June 2024<sup>1</sup>
  - ii. End-of-term Strategic Review (2017-2022) in July 2024<sup>2</sup> and
  - iii. Funding Request and Grant-Making evaluation in December 2024<sup>3</sup>

The overall workload carried by IEP is summarized in Annex 1.

4. Most evaluations overseen to date by IEP (from the start of the evaluation function at the end of 2022) have had different types of questions and scope and thus required different methodological approaches to produce a quality evaluation. Each methodological approach in turns requires an specific timeline and resources, so it would be expected to define those (timeline and budget) tailored to the specific methodological approach that would allow to answer the evaluation.
5. The IEP believes that achieving better quality evaluations requires better tailoring with regards to methodology, timelines, and budgets versus using the similar approach (in terms of timeline, and budget) observed for most of the evaluations to

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<sup>1</sup> GF/B51/11A - Independent Evaluation Panel Commentary: Allocation Methodology Evaluation [https://archive.theglobalfund.org/media/14287/archive\\_bm51-11a-allocation-methodology-evaluation\\_report\\_en.pdf](https://archive.theglobalfund.org/media/14287/archive_bm51-11a-allocation-methodology-evaluation_report_en.pdf)

<sup>2</sup> GF/B51/10B - Independent Evaluation Panel Commentary Strategic Review 2023 (SR2023): [https://archive.theglobalfund.org/media/14285/archive\\_bm51-10b-iep-commentary-2023-strategic-review\\_report\\_en.pdf](https://archive.theglobalfund.org/media/14285/archive_bm51-10b-iep-commentary-2023-strategic-review_report_en.pdf)

<sup>3</sup> GF/ELO/2024/04/03 - Independent Evaluation Panel Commentary: Evaluation of the Global Fund Funding Request and Grantmaking Stages of the Funding Cycle [https://www.theglobalfund.org/media/15334/iep\\_gf-elo-2024-04-iep\\_commentary\\_en.pdf](https://www.theglobalfund.org/media/15334/iep_gf-elo-2024-04-iep_commentary_en.pdf)

date. Currently, evaluations often adhere to pre-defined timelines and budgets, regardless of the specific methods employed and the questions being addressed. Additionally, there is a strong reliance on key informant interviews and focus group discussions, which could lead to limited variability and potentially affect the evaluation outcomes. Also, upcoming resource constraints for the Global Fund and its evaluation function may require the ELO to be more agile, seek out alternative methods, and reflect these in the next multi-year evaluation plan, allowing for some degree of flexibility in approach.

6. Imbizo: IEP continued its ongoing involvement with Imbizo, the independent country stakeholder feedback mechanism of the Global Fund. It is required to better clarify how Imbizo will be used by ELO to further support the work of the evaluation and learning function. Being a learning activity rather than an evaluation, Imbizo differs significantly from the usual approach used by IEP/ELO with the help of the Quality Assurance Framework. It is necessary to discuss how the quality assessment will be carried out by IEP for this work and IEP underscores the need for and the urgency of building out the learning component of the evaluation and learning function where Imbizo could also make contribution.

## **IEP Transition, Composition, and Way Forward**

7. In 2024, the IEP faced leadership and membership transitions of voting and non-voting members. During the summer of 2024, the IEP chair, Mira Johri, stepped down due to her appointment to a new position with her university. Two voting IEP members also resigned in early 2024 due to changing employment status, and two of the non-voting members (SC representative and Executive Director representative) were also replaced. The IEP acknowledges the immense contributions made by the outgoing chair and former members to establishing the function.
8. While the voting members were not replaced, the SC did appoint a temporary chair, Nina Schwalbe, who played a crucial role in successfully maintaining IEP functioning, irrespective of member transitions. All of this reduced the IEP membership from eleven voting members to nine, which created some risks to the function. Given the more limited membership, the IEP reallocated the workload and made some changes to the processes. Namely, instead of assigning two quality assurance focal points per evaluation, the IEP only assigned one for some assignments, causing some risk to the quality assurance function.

9. At its 9th meeting, the IEP reflected on the time required based on a full year of operation and recommended further streamlining some processes managed by ELO to balance the available resources (within ELO and IEP) with the work ahead by achieving greater efficiency. This streamlining of evaluation processes and IEP recruitment (hoped to take place mid-2025) should aim to relieve or reduce some of the current “pain points” while ensuring the IEP is “right-sized” to the workload.

## **Reflections on the IEP Governance Performance Assessment**

10. In 2024, the Global Fund Legal and Governance Department commissioned SRI Executive to assess the IEP's governance performance. The interviews took place in July and August 2024, and findings and recommendations were shared and discussed with the IEP during its 9th meeting in Geneva, Switzerland, from 3 to 5 December 2024. The assessment focused on two evaluation processes and the reports produced by the IEP since its inception<sup>4,5</sup>.
11. Although the IEP's overall performance was perceived as positive (overall score of 3.83 out of 5 maximum), the assessors found significant discrepancies in the perceptions of performance between the IEP, SC, and Secretariat respondents. Observed discrepancies could be due to the establishment of the ELO-IEP processes just in 2023, as some performance norms and standards were still in development and in discussion between ELO, IEP, and the Secretariat.
12. The report notes areas for improvement, including the alignment and relevance of the evaluation outputs and further clarity in the division of responsibilities between the IEP and the ELO (some of which have now been clarified in the July 2024 amended IEP TORs).

## **Status of Previous Year Recommendations**

13. The IEP had made five recommendations to the Global Fund in its 2023 report. This section provides a status update on actions taken.
14. *Support the emerging partnership among the evaluation units of the Global Fund, Gavi, and the Global Financing Facility of the World Bank on opportunities to expand the evaluator pool and redress power asymmetries in evaluation.* In 2024,

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<sup>4</sup> GF/B51/11A - Independent Evaluation Panel Commentary: Allocation Methodology Evaluation  
[https://archive.theglobalfund.org/media/14287/archive\\_bm51-11a-allocation-methodology-evaluation\\_report\\_en.pdf](https://archive.theglobalfund.org/media/14287/archive_bm51-11a-allocation-methodology-evaluation_report_en.pdf)

<sup>5</sup> GF/B51/10B - Independent Evaluation Panel Commentary Strategic Review 2023 (SR2023):  
[https://archive.theglobalfund.org/media/14285/archive\\_bm51-10b-iep-commentary-2023-strategic-review\\_report\\_en.pdf](https://archive.theglobalfund.org/media/14285/archive_bm51-10b-iep-commentary-2023-strategic-review_report_en.pdf)

jointly with Gavi, ELO announced an expression of interest in expanding the evaluation pool of companies, especially from LMICs. The work has advanced, and ELO has shortlisted companies that will be invited to submit RFPs in due course.

15. *Develop guidance on considering human rights, gender, poverty, and intersectionality in Global Fund evaluations.* While progress has been made, the work was not completed in 2024. Finalization is expected in 2025.
16. *Use External Consultation Groups (ECG) to strengthen conduct and use for specific evaluations.* In 2024, ELO acted upon this suggestion, and an EAG was formed for the Malaria Subnational Tailoring evaluation. The experiences of this evaluation will be documented and reflected upon the completion of the evaluation in 2025.
17. *Develop a meta-learning approach for Imbizo.* Imbizo aims to drive insights generated by country stakeholder feedback to promote learning and discussion among the Board, Secretariat, and implementation partners. Specifically, considering that 2024 was a pilot year for Imbizo and ELO was experimenting with a number of methods and approaches for large-scale real-time country consultation, and learning by doing. The IEP recommended ELO use this opportunity and ensure that if and when Imbizo is extended, it is also strongly evaluable. Thus, IEP requested ELO to clearly define the objectives, success criteria and indicators of the initiative during the pilot phase. This type of approach was not developed or shared with IEP and will require attention for delivery in 2025.
18. *Strengthen the learning strategy.* As discussed above, the learning strategy has not been fully completed and will require attention for delivery in 2025.

## **Recommendations to the Board/Strategy Committee**

19. The new independent evaluation function is making solid inroads and has gained momentum. It is well-placed to deliver oversight for high-quality, independent evaluations and meet the learning needs of the Global Fund. To reinforce this positive momentum, the IEP recommends:
  - i. The ELO conducts a scenario planning exercise, reflecting likely future resource availability. This plan should make explicit strategic thinking about planned evaluations and associated methods, their importance, the structure of the function (for both ELO and IEP), and options for process adjustments to make them more efficient and less resource-demanding.

- ii. The Secretariat plans a dedicated session by ELO/IEP with Board members and Constituencies during pre-board meetings in the future to discuss evaluation results.
- iii. ELO better tailors the evaluation methodology, timeline, and budget to the topic(s) being evaluated, and this is reflected in the multi-year evaluation calendar as well as in the budget for the evaluation function.

20. The IEP has also requested from ELO a written response to the following **recommendations from 2023**:

- i. ELO develop a meta-learning approach for Imbizo, that is, an approach to understand how learning is produced by Imbizo, i.e. the mechanism and process involved: This approach would use initial implementation experiences to ensure that if and when Imbizo is extended, it is also strongly evaluable.
- ii. ELO develop a formal learning strategy: ELO to dedicate the required resources to the learning component of the evaluation and learning function and strengthen the learning strategy. Learning from evaluation is a key responsibility of the Global Fund's evaluation function and is needed to ensure that it is well integrated into the fabric of the Global Fund's evaluations.
- iii. ELO develop guidance on considering human rights, gender, and intersectionality in Global Fund evaluations: While progress has been made, the work was not completed in 2024, and finalization is expected in 2025.

## **Annexes**

The following items can be found in Annex:

- Annex 1: IEP Points of engagement on evaluations through end-2024

## Annex 1 – IEP points of engagement on evaluations through end-2024

Evaluations  (Reporting in Parentheses)	1. Scoping		2. Contracting	3. Inception	4. Data collection & Analysis	5. Reporting		6. Response	
	<i>ToR Review</i>	<i>ToR Approval IEP</i>	<i>Observer on TEC</i>	<i>Review and input (Inception Report)</i>	<i>Receive progress updates</i>	<i>Co-Chairs Recommendations workshop</i>	<i>Review of draft / final reports</i>	<i>Endorsement of report;</i>	<i>QA &amp; IEP commentary;</i>
Imbizo: Learning from country stakeholder feedback (ongoing)	x	x	x	x	x	N/A			
Malaria Sub-national Tailoring (Q1 2025)	x	x	x	x	x	x	x		
Community Engagement (Q1 2025)	x	x	x	x					
Community Response Systems Strengthening (Q2 2025)	x	x	x	x					
HIV Prevention (Q3 2025)	x	x	x						
Gender (Q3 2025)	x	x	x						
Funding Request Grant-Making	x	x	x	x	x	x	x	x	x
Allocation Methodology	x	x		x	x	x	x	x	x
End-term Strategic Review (2017-2022)	x	x		x		x	x	x	x