Approach to Evidence & Learning

55th Board Meeting

GF/B55/11
9-10 July 2026, Geneva, Switzerland

Board Input

Purpose of the paper: This paper presents for Board input a proposed approach to evidence and learning, following the Office of the Inspector General (OIG) audit on the evaluation function.

Note to the Board

Recent months have included substantive and constructive engagement with Governance on the approach to evidence and learning – including at the 54th Board meeting pre-day, a Strategy Committee (SC) call in March 2026, and at the 30th SC meeting, and through bilateral discussions with constituencies. These engagements have provided important steer on how evaluative evidence and learning could continue to evolve following the OIG audit of the Independent Evaluation Function. Building on this, the Secretariat is now bringing forward a proposed path for Board consideration.

Rather than waiting for the 31st Committee cycle (October 2026)—followed very shortly thereafter by the 56th Board meeting, the Secretariat is proactively sharing this proposed approach with both the Strategy Committee and the Board to enable reflection and guidance. The Secretariat recognizes that this approach diverges somewhat from our usual governance sequencing and may feel out of step for some.

However, this timing reflects a combination of considerations: the reputational implications of maintaining the status quo following an ineffective audit finding over an extended period; the need to prioritize Board, Strategy Committee and Secretariat agendas as we approach an already dense October cycle (including Executive Director selection, OPEX decisions, strategic direction and transformation); and the significant human impact on the team concerned, where future work has already been paused while staffing commitments remain in place.

The Secretariat is not seeking a formal decision at the 55th Board meeting. Rather, it is inviting reactions and guidance, which will also be informed by a call scheduled with the SC on 26 June 2026. Subject to the Board's direction, the Secretariat will move forward at pace – following consultation with Committees as relevant – or allow for additional time and discussion.

Throughout, the intent is to respect governance principles of inclusion and due process, while also remaining responsive and pragmatic as a partnership in addressing a time-sensitive issue.

Executive Summary

Context

- The Global Fund is operating in a more complex, constrained and fast-moving environment than when the current evaluation function was established in 2021. Since its establishment, the broader ecosystem of data and information has matured significantly, with substantial enhancements in strategic performance reporting, risk analysis, audit and advisory work undertaken by the Office of the Inspector General (OIG), and partner and scientific community generated evidence. Against this backdrop, the central question is not whether the Global Fund should evaluate its work, but rather: ***What evaluative insights are needed, for whom, and when (i.e., at what point in decision-making), and how that insight is best generated and used.***
- Building on the findings of the OIG audit of the Independent Evaluation Function[1] which found the Independent Evaluation Function ineffective and that it had not met its objectives, the Secretariat, with the Strategy Committee (SC), has reassessed the purpose, value, risks, and opportunities of evaluation and learning. The OIG audit found that while the Global Fund's systems and the broader evidence ecosystem have matured, large, one-off, evaluations by external firms have not delivered timely, relevant insights or learning proportional to their cost, including senior management and staff time. Additionally, separate assurance mechanisms intended to ensure the quality and independence of evaluations have not added value or addressed the function's challenges.
- Board and Committee feedback on what should be the focus of an evaluation function received to date, considering the OIG audit findings, converges around three main themes. ***First***, the need for a fundamentally redesigned approach to evaluation with a clearer mandate better aligned to end-user needs and practical utility and learning. ***Second***, evidence should be timely, targeted and decision-oriented, prioritizing outputs aligned with decision windows. ***Third***, consideration of greater value for money, including more efficient use of OPEX and management attention.
- To deliver this, the Secretariat proposes a redesign of the Global Fund's approach to evaluation, moving away from a standalone evaluation function toward an integrated evidence and learning model. This model is anchored in a mature internal evidence system and leverages an extensive body of independent, high-quality assessment available through multilateral and technical partners, national and programmatic reviews, Lancet Commissions, peer-reviewed research, etc., and focuses on systematically harnessing evidence for decision-making. Advances in AI technology allows for rapid generation and synthesis of evidence supporting more timely decision-oriented insight.
- This redesign responds to a) the findings of the OIG audit, b) directional guidance from SC and c) the need to ensure the Global Fund's approach to evidence, learning and assurance is fit for purpose in the current context.

[1] GF-OIG-26-003: Review of the Independent Evaluation Function

Input Sought

- Does the Board support shifting to an integrated approach to generating evidence, targeting independence where it adds most value, that is agile, learning-focused and better leverages internal and external evidence, OIG capabilities and selective external evaluations?
- Input from the Board, together with the SC's input on 26 June, will be used to refine the final proposal.

Input Received

- The OIG presented the findings of the Audit of the Independent Evaluation Function to the Board at a pre-day session of the 54th Board Meeting. The Board expressed appreciation for the OIG's recommendation of areas to consider for improvement for the function, including clear definition of mandate, and end-user audience, and stronger oversight. Board members highlighted the need for evaluations to provide relevant recommendations on a timeline to inform key decisions and emphasized the need to strengthen learning.
- SC input was sought through a call in March 2026 and written consultation, providing views on the scope ("what") and purpose ("why") of evaluations with examples of when evaluative evidence has informed decision-making. Members acknowledged the evolved operating context demands greater agility and faster inputs for decision-making.
- At the 30th SC meeting, members emphasized a future evaluation function should: a) be designed around a clearly defined audience with differentiated needs; b) prioritize the use of existing internal and external evidence before generating new analyses; c) focus on underlying reasons for outcomes; and d) emphasize learning. Evaluation outputs should be timely and aligned with decision-making windows, with independence applied where it adds value. SC members suggested the Secretariat develop a more concrete proposal to support Board deliberations on a future model.
- The OIG was consulted on the proposed approach and its use. The Inspector General has confirmed it aligns with the OIG's mandate and independence and does not affect its oversight role. The approach preserves the OIG's independent assurance role, with their work driven by risk and professional judgement. Where in-depth evaluation or specialized expertise is required, the model appropriately envisages targeted use of external independent expertise to ensure sufficient rigor and capability.

Background

1. Global Fund decision-making is informed by a broad and sophisticated set of inputs, including: (i) strategic performance reporting and KPIs, (ii) risk and financial analysis, (iii) OIG audits, advisories and investigations, (iv) partner data and technical guidance, (v) Technical Review Panel (TRP) reviews, (vi) scientific and academic publications, and (vii) country-level and programmatic evidence. At the same time, the operating environment has become more demanding – there are greater resource constraints, more complex trade-offs and prioritization decisions, and increased expectations for timely and actionable insight.

2. Evaluation needs to be considered as part of the broader system it supports – learning, decision-making, accountability and assurance. Understanding what is working, why and under what conditions is critical to performance management and informing strategic and operational decisions – including course correction.

3. The Global Fund's approach to evaluation has evolved over time. Since 2003, the Global Fund has commissioned independent evaluations from external experts to support Global Fund decision-making. Evaluations were initially conducted by contracted evaluation experts, managed by independent experts forming the Technical Evaluation Reference Group (TERG).[2]

4. In 2021, the Global Fund's evaluation function was fundamentally redesigned to create closer linkages between the evaluation function and the Secretariat to enhance learning while preserving quality and independence. The Independent Evaluation Function is comprised of two bodies: (1) an Evaluation and Learning Office (ELO) located within the Secretariat managing evaluations according to a Board-approved multi-year evaluation calendar; and (2) the Independent Evaluation Panel (IEP), an advisory body charged with providing assurance on evaluation quality and independence.[3] This redesign was intended to strengthen accountability, learning, and evidence-based decision-making in response to the identified limitations of the TERG model, particularly fragmentation, limited relevance of outputs to decision-making, and weak uptake of findings. While there was no requirement or expectation that contracted evaluation experts undertake all evaluations in this revised model, this practice continued as a tangible safeguard of independence.

5. In November 2022, a Monitoring & Evaluation (M&E) Framework[4], including Key Performance Indicators (KPIs) and a Multi-Year Evaluation Calendar (MYEC) for the 2023-2028 Strategy[5], was approved to support performance management, learning and decision-making. The MYEC was designed to prioritize strategic evaluations to fill thematic gaps in the KPI reporting, improve coordination, and reduce ad hoc evaluations. Evaluations carried out by the ELO have been aligned with the MYEC and the SC approved annual Evaluation Workplan.

[2] The TERG also advised the Board on monitoring and evaluation matters. The TERG was supported by a small secretariat team that enabled their work, notably by managing procurement and governance processes and facilitating engagement with external consultants.
[3] The IEP is composed of external evaluation experts and non-voting ex-officio members representing the Secretariat and the SC, accountable to the Board through the SC.
[4] Four interrelated components comprise the M&E Framework: Strategic Monitoring; Strategic and Thematic Evaluation; Program Monitoring; and Secretariat Monitoring, with the first two under Board oversight.
[5] GF/48/DP06

6. When the new evaluation function was created, the OIG indicated its intent to conduct a review of the function[6]; the final report of which was published in March 2026. The audit found that the Function was ineffective and had not met its objectives.[7] It noted the Evaluation Function's performance was undermined by role misalignment between the ELO and the IEP, the prioritization of independence over quality assurance, and limited strategic oversight. The full outsourcing of evaluations without adequate supervision was found to have resulted in inconsistent quality, high costs, and long timelines, which reduced the usefulness for evaluative products for decision-making.

7. The audit also noted the Function had not delivered on its learning mandate, with delayed dissemination of activities, insufficient monitoring of Secretariat management responses to recommendations, and inconsistent, complex reporting. Concerns around the cost-effectiveness, in addition to senior management and staff time, of the model were also raised. The OIG found that despite efforts to establish the Independent Evaluation Function, and an investment of US$ 9M over the past three years, it has not achieved its intended objectives. Additionally, the audit noted that the high ratio of delivery (US 1.4M annually for external evaluators) versus oversight (US$ 2.2M for ELO and IEP) costs *"…raises concerns about the cost-effectiveness of the current model, given the variable quality and lack of quality assurance safeguards for evaluations during the execution phase."*[8] In response to the audit findings, the 2026 Evaluation Workplan was reviewed by the SC, resulting in pausing evaluation activities that had not yet been started.

8. At its 30th Meeting, the SC provided directional steer on the 'what' and the 'why' and purpose of evaluations. The SC emphasized that evaluations should be designed around expected outputs and clearly defined audiences; prioritize the use of existing internal and external evidence before generating new analysis; and place a strong emphasis on learning. It also noted outputs should be timely, aligned with decision-making windows, with independence applied where it adds value.

9. This paper seeks Board input on a proposed redesign of the Global Fund's approach to evidence and learning. This redesign would move away from a standalone evaluation function to an integrated approach, where evaluation is one of many tools to provide evidence and insights, and independence and assurance are delivered through existing structures.

10. The Secretariat has considered the planning for governance discussions and decisions linked to this proposal. Various options were considered, starting from an extended consultation period leading to a discussion at the October SC and a proposed decision to the 56th Board Meeting. However, there is a clear and compelling case for presenting a proposal now, which would be translated to an electronic decision point as soon as practical taking into account Board inputs.

Proposal

11. Based on the directional steer and the SC's request for a concrete proposal, the Secretariat is proposing an approach to evidence and learning that is aimed at reconciling the tensions and goals expressed throughout the review process. This proposal is grounded in the following principles:

[6] GF/B46/05 rev1, para 22
[7] GF-OIG-26-003
[8] GF-OIG-26-003, pages 4- 5

i. Evaluative work should be designed around clearly defined audiences and expected outputs and be aligned with decision-making timelines;

ii. The use of internal and external evidence should be prioritized over generating new evidence/analysis through externally contracted work;

iii. Independence should be preserved where it adds value; and

iv. Value for money is maximized – both in terms of cost of outputs and use of Secretariat time.

12. Given the clear steer from the Board and SC on the purpose and value of evaluation, the Secretariat has articulated a proposal for a practical operating model to deliver these principles. It strengthens the synthesis and use of available internal (Strategic Performance Reporting, grant monitoring, financial data, etc.) and external (partner data, scientific data, reviews, etc.) sources of evidence and is complemented by an increased and intentional use of the OIG's capacities for independent strategic reviews, advisories and assurance work. Together, these two pillars are intended to enhance continuous learning and evidence-informed decision-making at both operational and strategic levels. Consequently, the need for external evaluations is expected to be more limited and focused, with targeted independent work commissioned only where critical evidence gaps arise. This shifts the approach away from a fixed multi-year evaluation calendar toward a more agile, demand-driven model, with tailored products delivered in a timely manner to meet decision-makers' needs.

What options were considered?

13. The options were assessed at a conceptual and structural level – whether to retain and revise the current model or shift to a new approach, and how the work should be delivered. Three options were considered:

i. ***Retain*** the current model: this option was set aside in light of the OIG audit findings that found the model ineffective, having not met its objectives;

ii. ***Revise*** the current model: this option was not pursued considering the evolution of the value sought from evaluation and learning, and noting a revision would likely entail preservation of structure and costs; and

iii. ***Redesign***: adopt an integrated evidence and learning system, with the Strategy and Policy Hub of the Secretariat (SPH) and OIG as core pillars and external evaluation by exception. The third option is recommended.

What is the proposed approach?

14. The proposed approach redesigns how evaluative evidence is generated, synthesized, and used, with external evaluations commissioned only when there are gaps in other available evidence, capacity constraints or unmitigable conflicts of interest. It shifts away from a standalone evaluation function, involving complex reporting lines and separate assurance and oversight features, to an approach placed within the current Global Fund mechanisms. It is focused on continuous and adaptive learning to support decision-making. The proposal entails:

i. ***Leveraging a mature evidence system***: The Secretariat will synthesize available and reliable evidence and data within the broader internal and external evidence ecosystem and will determine whether additional evaluative evidence should be commissioned. SPH will support organizational learning and evidence-informed decision-making by leveraging performance monitoring and synthesizing data, evidence and insights generated across the Secretariat. Using internal Secretariat capacity for learning and evidence synthesis will help ensure relevance, timeliness and utility for decision-making.

ii. ***Leveraging OIG assurance work and advisory and strategic reviews:*** The OIG will play a strong and complementary role by providing assurance and generating independent insights and evidence. With its recent restructuring, the OIG has evolved beyond traditional assurance toward greater strategic insight, foresight and prevention, better positioning it to provide more integrated and forward-looking oversight. This has resulted in the creation of a new unit – Strategic Advice, Insights and Prevention – which will be a substantive and complementary contributor to generating evidence and data-based insights and advice, in particular through strategic reviews and advisories. In addition to its direct reporting line to the Board through the Audit and Finance Committee (AFC), structural safeguards to OIG independence include OIG employees being prohibited from performing operational duties outside of the OIG or directing activities of other Global Fund staff. The OIG is also restricted by its Charter from conducting evaluations of the impact of Global Fund financed programs.

iii. ***Quality*** will be strengthened through cross-functional coordination within the Secretariat, replacing the separate structurally independent assurance mechanism. Coordination will support consistency and coherence in how evidence is generated and used, and together, through the OIG's existing processes, including audits, in-country reviews, and the annual opinion, will provide system-level confidence in the effectiveness of the overall evidence and learning framework.

iv. **Cross-functional oversight** will be led by SPH and include the OIG and other relevant Secretariat functions. A leadership group will be created to define evaluative priorities, scope, outputs and responsibilities. The Secretariat will proactively consult the SC for input to identify strategic gaps for which additional evaluative evidence and/or analysis is needed to inform governance deliberations and support oversight and decision-making in line with governance workplans. It will also determine the appropriate product(s) to be delivered and whether an independent perspective is needed.

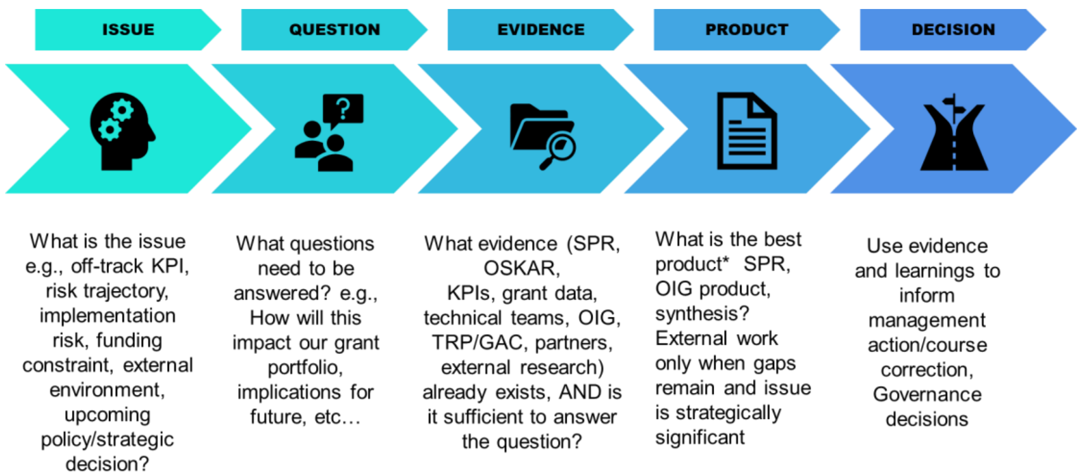
15. Through this approach it is anticipated that decision-making will be strengthened by systematically grounding choices in timely, targeted, and decision-oriented insights aligned with key decision timelines, thereby enabling faster course correction and more effective prioritization. At the same time, it harnesses a mature evidence ecosystem—integrating performance data, risk analysis, partner inputs, and scientific evidence—to generate more holistic and context-specific insights. This approach is forward-leaning in that it prioritizes the rapid use and synthesis of existing evidence, strengthens continuous learning, and calibrates the use of independent or external analysis where it adds the greatest value, thereby increasing both relevance and overall quality of evidence for decision-makers.

How will the Secretariat determine what type of evidence is needed?

16. The proposed approach uses a disciplined, decision-driven pathway for learning rather than relying on a static evaluation calendar. It will also set a clear process for triggering independent reviews. For each issue raised, the Secretariat would first clarify the question to be answered and the decision to be informed, whether internal or requested by the Board or Committees. Governance bodies, in exercising their oversight role, Governance bodies may challenge the framing of issues, assess the robustness and objectivity of the evidence base and conclusions, and may request additional or alternative analysis, independent validation to inform its deliberations.

17. The Secretariat will use a decision pathway (see graphic 1) to determine when independent review is required. The process would begin with an assessment of whether existing internal evidence is sufficient to meet the need. Where independent evidence or review is required, priority would be given to using established existing mechanisms, primarily the OIG. External evidence would be sourced only if neither internal evidence nor OIG assurance is suitable, or if both lack the necessary capabilities. It is anticipated that such instances would be the exception rather than the norm, ensuring a proportionate approach while preserving independence in a targeted way and specifically where it adds demonstrable value or responds to a clearly defined requirement. When evidence is sourced externally, the Secretariat may draw on external independent expertise to inform methodologies and refine key questions.

Graphic 1: Decision Pathway



18. Objectivity remains a key element of the quality and credibility of evidence, findings and recommendations. Awareness and management of potential or perceived conflicts of interest would be preserved, leveraging existing quality and risk management processes, as well as the activities of the Ethics Office. Structural independence would be leveraged through the OIG, noting that OIG provides the Global Fund with independent and objective assurance over key risks impacting the Global Fund's programs and operations.

Key Risks and Mitigations

19. This redesign entails several known but manageable risks which will require appropriate safeguards to mitigate potential biases and conflict of interest. These risks can be better identified and mitigated through the Secretariat's and OIG's usual course of business, relying on internal safeguards and management processes.

20. **Risks, trade-offs, mitigation, and safeguards**: The proposed shift offers clear benefits but also involves inherent trade-offs that should be recognized and actively managed:

- **Independence and bias risks:** Greater reliance on internally-led synthesis may create a perception – or risk – of bias, particularly where evidence is drawn from program or operational sources. Without appropriate safeguards, the level of independent challenge that standalone evaluations can provide may be reduced.

- **Risk of evidence gaps:** A more selective approach to external evaluations could lead to gaps in evidence coverage, particularly in complex or high-risk areas where existing data is fragmented, weak, or contested.

- **Risk of uneven quality and consistency:** Synthesizing diverse evidence from multiple sources may result in variable analytical quality unless common standards, methods, and quality assurance processes are clearly defined and applied.

21. These risks can be proactively mitigated through a set of deliberate structural and operational choices.

22. **A strong and clearly defined role for the OIG:** Under the proposed approach, OIG could provide targeted insight in areas of elevated risk or uncertainty, where deeper independent review or challenge would add value. In addition, rather than undertaking quality review of individual analyses, the OIG would provide periodic, independent assurance over the design and effectiveness of the overall evidence and learning system, including how evidence is generated, synthesized, and used in decision-making, on a risk-based basis, with timing, scope, and depth determined through their regular risk assessment and work planning. After discussion with the IG, the Secretariat confirms that this approach would not affect the OIG's ability to discharge its oversight responsibilities; rather, it is complementary and aligned with the OIG's recent evolution, reinforcing its role in providing independent assurance and strategic insight at a system level.

23. **Clear governance and accountability for evidence quality:** Roles and responsibilities for evidence generation, synthesis, and validation will be explicit, with regular reporting to governance bodies to ensure transparency and oversight. The Secretariat is proposing to provide an Annual Evidence and Learning Report to the Board; Strategic Evidence Notes that provide analyses on priority strategic and operational questions, tailored to specific decisions; and evidence and learning more systematically incorporated into governance papers.

24. **Transparent methods and standards:** The credibility of the model will depend on the consistency and transparency of how evidence is assessed and synthesized. This will require the use of

common analytical frameworks, clear documentation of data sources and methods, and explicit articulation of assumptions, limitations, and areas of uncertainty. This approach helps ensure that conclusions are traceable and well-substantiated - enabling decision-makers and oversight bodies to understand and scrutinize not only what the findings are, but how they have been reached. It will also support comparability across analyses, reducing the risk of uneven quality or selective interpretation of evidence.

25. **Targeted use of independent external evaluation:** External evaluations could be commissioned selectively in areas where independence, depth, or methodological rigor or subject matter expertise is particularly critical, or where internal evidence is insufficient. Governance bodies or the Secretariat could recommend this as an option should there be gaps in other available evidence, capacity constraints, or unmitigable conflicts of interest. The Secretariat would ensure a specific amount of funding is available for this, to be used on an as-needed basis, rather than an annual budget which, as the default, is fully utilized.

26. **Regular review and calibration of the model:** The effectiveness of the approach should be reviewed over time, with adjustments made to ensure that independence, quality, and coverage are maintained as the model evolves. The Secretariat proposes that the OIG audit the new model after 18-24 months.

27. With a more mature evidence system in place that can draw on existing analytical functions and the work of the OIG, maintaining the standalone structure of the Evaluation and Learning Office and Independent Evaluation Panel is no longer justified. Instead, the proposed approach aims to enhance existing feedback loops to the SC and Board, rely on existing evidence available – not just internal evidence but also external – and be more systematic and explicit about how evidence has been used to inform decision-making. Embedding evidence and learning within the Secretariat and leveraging the OIG's assurance and advisory capability will help to generate more relevant, timely, and cost-effective evidence to support strategic oversight and operational decision-making, remaining aligned with OPEX realities.

How does this proposal respond to the key findings of the OIG Audit and SC feedback?

28. The proposed approach has been developed in response to key findings from the OIG audit, feedback from the SC, and collaborative thinking across the Secretariat and OIG. Together, this feedback highlighted need for greater clarity on roles and accountability, improved efficiency and quality of evaluation outputs, better use of existing evidence and a greater emphasis on learning and supporting decision-making. The tables below outlines key feedback and how it was addressed in the proposal.

OIG Key Findings	Response
Misaligned understanding of roles and responsibilities between ELO and IEP, and limited strategic oversight undermine effectiveness	Moves away from overlapping ELO and IEP structures toward a more integrated model with clearer roles and stronger Secretariat accountability, complemented by

	strengthened assurance and independence through the OIG
Outsourcing evaluations with limited ELO oversight has led to costly outputs, long timelines, and variable quality	Reduces reliance on outsourced evaluations by prioritizing more targeted, exception-based external evaluations, with stronger internal oversight to improve cost, timeliness, and quality
Limited progress on learning, weak processes to monitor actions, and inconsistencies in reporting hinder effectiveness	Embeds evaluation within a broader evidence and learning system, strengthening processes for tracking actions, improving consistency in reporting, and supporting more systematic use of evidence in decision-making

SC Key Feedback	**Response**
Emphasize clearly defined outputs and target audiences	Focuses on producing more decision-oriented outputs and strengthening accountability within the Secretariat to translate evidence into actionable insights for defined governance and management audiences
Prioritize use of existing internal and external evidence before generating new analysis	Shifts toward better use of available internal and external evidence, reducing reliance on new standalone evaluations and promoting a more systematic use of existing data and analyses
Place a strong emphasis on learning	Embeds evaluation within a broader evidence and learning system, strengthening feedback loops, improving how evidence is used, and supporting more continuous and structured learning
Preserve independence where it adds value	Reinforces independence through OIG continuous assurance over the system and external commissioning of work where a question demands greater independence

How will Governance contribute to identifying evaluative need and have visibility on how evidence and learning inform operational and strategic decision-making?

29. The Secretariat recognizes the need to be clearer and more explicit on how and when evidence and learnings from all sources are being used to inform operational and strategic decision-making. The Secretariat is proposing the following:

i. **Annual Evidence and Learning Report**: A concise, governance-facing report, drawing from the Strategic Performance Report that could, for example, provide a synthesis of key lessons learned, evidence used to inform decision-making, where are remaining gaps, where independent challenge was used, etc.

ii. **Strategic Evidence Notes:** Short analyses on priority strategic and operational questions, tailored to specific decisions. Illustrative examples include: Why is malaria incidence rising, and what should be protected or adapted in GC8? What does the evidence say about the Global Fund's role in the changing global health architecture? How are GC8 strategic shifts changing grant design and prioritization?

iii. **Evidence and learning in governance papers**: Policy and decision papers going to SC or the Board would systematically integrate evidence and learning. For example, proposals would be clear about what evidence was used; what was learned; what uncertainty remains; whether independent challenge was used; and how the evidence shaped the recommendation.

30. When governance bodies consider a policy, decision, or other update as part of their oversight role, they may request additional evaluative evidence to inform their deliberations. The Secretariat will seek governance bodies' steer on focus areas or future decisions within their existing mandates that would benefit from additional evaluative evidence. Requests will be documented in meeting reports as action items and reflected in Committee and Board workplans as relevant. Thematic discussions at the SC and Board will inform whether additional evaluative evidence and analysis is needed. In addition to reports on specific areas, progress updates and annual opinions by the Inspector General to governance bodies will also highlight any reportable exceptions or trends and will provide an opportunity for the Board and relevant committees to reflect on and react to such findings.

What are the implications of this approach?

31. While the M&E framework will largely remain applicable, with minor adjustments anticipated, the shift towards a more flexible and agile approach to evaluation and learning will result in the discontinuation of the MYEC. This will be replaced by a series of new products and engagement touchpoints ensuring that Governance has visibility into how evidence and learning is being used to inform operational and strategic decision making.

32. Structurally, the proposal entails dissolving the ELO and the IEP, alongside two key changes: 1) clarifying how SPH will ensure accountability for evidence and learning across the organization; and 2) defining a complementary role for the Office of the Inspector General (OIG) in contributing strategic reviews and advisories, alongside its established mandate to provide independent assurance on the Secretariat's activities, including evaluations and learning.

33. The change in the model will require targeted technical modifications to certain legal and governance policy documents to reflect these changes. These include the Bylaws of the Global

Fund[9], SC Charter[10], Governance Performance Assessment Framework[11], Honorarium Framework[12], and the 2023-2028 M&E Framework[13]. The scope of the required modifications will be considered following the Board's input and the related change-management process will be part of the decision to be presented to the Board, following consultation with committees as relevant. There will be resource implications for both the Secretariat and OIG which will be managed in accordance with the principles around organizational transformation, with any resource implications being detailed as part of the Board decision.

Next Steps

34. The Board is invited to consider the role and purpose of evaluation within the Global Fund evidence, learning and decision-making system, and provide input on the proposed approach. Following Board input at the 55th Board meeting, the Board will be asked to consider and approve the proposed new approach to evaluation and learning which considers the feedback received.

[9] To remove references to the IEP as an advisory body.
[10] To modify SC composition and remove references to IEP oversight, including its terms of reference, membership recruitment and approval; annual performance assessments, and approval of the annual evaluation workplan.
[11] GF/EGC23/EDP03: Performance Assessment of Advisory Bodies of the Global Fund
[12] GF/B48/EDP01: to remove references to the IEP
[13] GF/B48/DP06

Annexes

The following items can be found in Annex:

- Annex 1: Summary of previous Committee Input
- Annex 2: Relevant Past Board Decisions & Links to Relevant Past Documents & Reference Materials

Annex 1 – Summary of Committee Input

Extract from the Draft Report of the 30th Strategy Committee Meeting: Future of the Evaluation Function

SC discussion on the future of evaluation and learning at the Global Fund, with a focus on the purpose of/need for evaluations.

Shared as written reports: 2025 IEP Annual Report and 2025 CELO Learning and Synthesis Report

***Reference Document**: GF/SC30/08 – Future of the Evaluation Function*

<u>Presentation</u>

1. Following the findings of the OIG Audit of the Independent Evaluation Function, the Secretariat solicited SC input on the purpose and scope (“what” and “why”) of evaluations and their unique added value within the Global Fund’s broader evidence ecosystem to inform the first phase of review of the Independent Evaluation Function. The Secretariat noted that the form (“how”) of the Independent Evaluation Function would not be discussed at this meeting, but the “what” and the “why” would inform future discussion on the “how.”
2. The Secretariat sought SC input on three specific questions: when evaluation is needed and its unique value-add; what types of decisions evaluations should inform (operational, programmatic, or strategic); and what trade-offs should be considered.

<u>Discussion</u>

3. <u>Purpose</u>: Several SC members stressed that evaluation should fill evidence gaps not systematically addressed elsewhere—particularly around efficiency, impact, and sustainability, and to provide additional context behind results. Some members referenced the importance of evaluations that can address longer time horizons for impact. Several members noted that accountability is served through other mechanisms and cautioned against evaluations serving as an additional accountability or assurance mechanism at the risk of duplication.
4. <u>Scope</u>: There was broad convergence that evaluations should be used strategically and selectively, with some members supporting a narrower focus on a limited set of high-priority strategic and programmatic questions. Members emphasized that evaluations should be deployed only where they add clear value relative to other evidence and can inform decision-making in a timely way. Some members pointed to specific areas where independent evaluations could be particularly useful, including transition and understanding trade-offs in blended-financing arrangements.
5. <u>Decisions, audience, and timeliness</u>: Several members stressed the importance of explicitly identifying at the outset of each evaluation the decision it is intended to inform and the primary

user/audience, rather than allowing evaluations to attempt to serve multiple audiences without prioritization. Several SC members emphasized that evaluations should serve the Global Fund and not necessarily the broader global health ecosystem to maintain findings that are applicable to the Global Fund. Several members noted a temporal mismatch between evaluation processes and decision-making timelines and emphasized that relevance and decision alignment should be treated as critical design parameters.

6. Learning: Several members encouraged strengthening the learning aspect of evaluations. Some members highlighted the need to better integrate evaluation outputs with broader institutional learning, including synthesizing insights across multiple evaluations and leveraging existing internal data that is not currently used for analytical purposes.
7. Value for money and resourcing: Several members raised value for money considerations, including queries about the cost of evaluations relative to their utility and references to the scale of resources involved. Some members questioned whether resource levels appeared high relative to output and impact.
8. Governance pathway: One SC member asked for clarity on next steps and options for how to accelerate Governance consideration of changes.

Secretariat Response

9. The Inspector General shared the OIG's experience to focus on how to best use the full ecosystem of existing data and evidence and only generating new analysis to fill existing gaps. She highlighted that the primary challenge is not a lack of information but a need to better synthesize and interpret existing evidence. She emphasized the need to prioritize efforts and allocate scarce resources where they add the greatest value, avoiding overlaps, and emphasized the need for creative and adaptive approaches to support faster decision-making. She noted the importance of a delivery model that balances independence with relevance and speed with institutional knowledge, as well as metrics for success.
10. The Executive Director highlighted the overarching theme of needing to "do better with less" and noted that evaluation outputs have not materially informed key decisions nor driven accountability within the Secretariat to date. He emphasized the need to strengthen learning and emphasized that retrospective evaluations are not appropriate for addressing complex, forward-looking strategic challenges. He underscored the value in systematically capturing and synthesizing existing data and pointed to relatively low-cost technology-enabled solutions to accelerate access to relevant insights. Governance pathway: The Secretariat thanked the Committee for its input and suggested sharing the synthesis of this discussion for concurrence with the SC ahead of discussion at the Board meeting in July 2026, including the request for Governance options for next steps.

Note for the Record – Follow-Up on the Evaluation Function, 5 March 2026

29th Strategy Committee Meeting Report – OIG Audit of the Evaluation and Learning Function, 10-11 December 2025

Annex 2 – Relevant Past Board Decisions & Relevant Past Documents & Reference Materials

Relevant past Decision Point	Summary and Impact
GF/B48/DP06: 2023-2028 M&E Framework, KPI Framework and Multi-Year Evaluation Calendar (November 2022)	Endorsement of the components of the M&E Framework; approval of the KPI Framework; approval of the topics for the Multi-Year Evaluation Calendar *The Multi-Year Evaluation Calendar portion of this decision would be superseded by the current proposal.*
GF/B46/DP06: Independent Evaluation Function (November 2021)	Creation of the Independent Evaluation Function, comprised of the Evaluation and Learning Office, led by the Chief Evaluation and Learning Officer, and the Independent Evaluation Panel. *The current proposal would supersede this decision.*

Additional Reference Materials

GF-OIG-26-003: Review of the Independent Evaluation Function (March 2026)	The OIG found the roles and responsibilities, governance, oversight and performance management of the Evaluation Function, as well as its processes, tools and systems ineffective to support effective and efficient delivery of the function's mandate.