

2025 IEP Annual Report

55th Board Meeting

GF/B55/18

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Board Information

Purpose of the paper: This paper presents the 2025 Annual Report of the Independent Evaluation Panel. 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.”

The Independent Evaluation Panel (IEP) is an advisory and oversight panel that reviews the quality and independence of Global Fund independent evaluation activities.

Leadership

Juan Pablo Gutierrez (Chair)
George Gotsadze (Vice-Chair)

Voting Members

Evelyn K. Ansah
Abdallah Bchir
Fred Carden
Floencia Guerzovich
Carrie Lynch
Dede Watchiba
Josephine Watera

Ex-Officio members (Non-voting members)

John Grove, Global Fund Chief Evaluation and Learning Officer
Massimo Ghidinelli, Global Fund Strategy Committee representative
Harley Feldbaum, Global Fund Head of Strategy and Policy (until Dec 2025)
Julia Martin, Global Fund Head of Strategy and Policy (from Jan 2026)

Foreword

The Independent Evaluation Function is increasingly relevant in today's challenging landscape –even more than before. It seems essential for the Global Fund (GF) to consolidate its efforts in this area while evolving to enhance its capacity to provide valuable insights for strategic decision-making.

The relevance of the Independent Evaluation Function is significant from two main perspectives: accountability and learning. However, there is a clear need to prioritize learning at this time given the external challenges and the need for almost real-time evidence that it is also contextualized and robust. It is important to note that accountability, as a component of evaluations, in addition to other monitoring mechanism used by the GF, remains crucial to offer additional depth. Therefore, thoughtful, and evidence-based evaluation to estimate the outcomes and impact of the GF are vital for investor trust and is the responsibility evaluation function must fulfill.

The focus on learning arises from the notion that creating a learning environment can impact operational and strategic decision making, and overall can lead to more efficient, data-driven strategic decisions. Therefore, the Independent Evaluation Function must not only generate evidence but also translate into actionable ideas that align with the GF's operational context/realities and strategic priorities. This includes how to effectively leverage the organization's interactions with countries and partners. This key area has been a topic of discussion within the Independent Evaluation Panel (IEP) throughout 2023-2025, with the goal for 2026 being to strengthen the learning component of the function in close collaboration with the Evaluation and Learning Office (ELO).

The IEP members are dedicated to contributing to the GF's critical role in the global health arena. With diverse expertise and professional backgrounds, the panel is united by the conviction that health is a fundamental driver of development and well-being and that investing in health is essential.

Annual Opinion

Introduction

The IEP is one half and key component of the Independent Evaluation Function, with the responsibility to oversee policies and guidelines related to evaluations, as well provide quality assurance for individual evaluations –portfolio-level strategic evaluations. In line with its Terms of Reference, the IEP provides an annual opinion on the independence, quality, capacity and working modalities of the evaluation and learning structure of the Secretariat, as well as recommendations on improvements, where necessary.

In formulating this opinion, the IEP reflects on the process during the year for the concluded and ongoing evaluations and learning products/approaches discussed during the year, including the interactions within the Focal Points of each evaluation with the Evaluation and Learning Office's (ELO) staff and the updates provided during the IEP meetings.

An additional input is the IEP's commentaries on each individual evaluation, providing an opinion on evaluations independence and quality, as part of the response to the final report for the evaluations, where the IEP reflects on its endorsement process discussion.

Opinion

The IEP has been able to observe evaluations from the contracting process up to the submission of the final report, and, overall, the process for all evaluations concluded during the year has been conducted independently, with no request by the external providers to escalate to the IEP any concerns regarding their independence stemming from their engagement with ELO or other GF stakeholders, as per the established safeguard mechanisms.

Regarding quality, all evaluations endorsed during the year met the required standards outlined in the Quality Assessment Framework (QAF) utilized by the IEP (also by ELO and Evaluators) to guide its oversight role to formally assess the quality of final reports. However, it is important to note the heterogeneity in quality (as described in section Independence & Quality), which indicates areas for improvement in both the evaluations themselves and the management of evaluators by the ELO.

One specific area for improvement identified by the IEP relating to working modalities is the planning process of evaluations, with the need to reconcile the 'planned/anticipated' average evaluation budget and timeline with the specificities and realities of individual evaluations.

A relevant improvement has been the more frequent use of theories of change (ToC) to both better represent the interventions being evaluated, as well as to inform on what evaluations should focus in order to test assumptions underpinning GF strategies as well as the potential success of the interventions. While the use of ToC is a welcome development, there is room for improvement on how it is used. For example, ToCs could be used more strategically by evaluators to enhance both explanatory power and robustness of findings. The IEP recommends that ELO consider more effective management of evaluations.

In addition, there is a broader need for organizational leadership to promote development and use of testable ToCs for all the GF strategies and interventions as a tool to guide implementation and inform evaluations. From experience, evaluation teams that developed ToC for an evaluation acknowledged the utility of the exercise.

Another key area for improvement which the IEP recommends to ELO relates to the recommendations stemming from completed evaluations, which in several instances remained within a 'comfort zone' and did not sufficiently challenge the Secretariat to inform course correction/refinements with a focus on strengthening GF operations. In addition, the uptake of recommendations is highly limited, which questions the utility of the recommendation workshops that are an independent part of the evaluation process.

There is an underutilized potential for positive synergies across evaluations that could enhance knowledge sharing. The IEP signaled that the Community Engagement (CE) and Community Responses and Systems Strengthening (CRSS) evaluations, as well as some parts of the Imbizo scope of work (SOW) had overlapping elements that were recognized in their ToRs. Similarly, there are potential synergies between the HIV Prevention, Gender, and Human Rights evaluations and rapid assessments. However, this potential for cross-fertilization has not yet been fully realized.

The existing quality assurance mechanism operationalized through QAF¹, identified the weakness in one of the ELO commissioned projects - Imbizo and prevented its release. A challenge in the current mechanism is its timely activation. Early warning of quality issues related to the evaluation could help manage external evaluators' performance and course-correct to avoid the waste of resources. Clear signals of contractor weak/poor performance should be timely flagged by ELO, who bears responsibility for evaluation management. From the early stages of Imbizo implementation, the IEP cautioned about challenges with the relevance and design of

¹ The IEP assesses final evaluation reports using a standard quality-assessment framework (QAF), with two members of the IEP independently scoring each report. The assessment includes both numerical and qualitative assessments of the key elements of the evaluation - executive summary, purpose, objectives, logic model or theory of change, methodology, findings, conclusions, and recommendations. The report's final quality is assessed on a four-point scale: Unacceptable, Less Than Acceptable, Good, or Very Good.

the approach, as reflected in prior IEP Annual Reports and meeting notes, and requested that the ELO develop a course-correction mechanism.

A key area for improvement within the Function is the learning component, which has not yet been fully developed to fulfill its essential role of translating contextualized evaluation findings into actionable topics that can contribute to the organization's strengthening. This might be due to different (misaligned) understandings and/or a lack of commonly agreed definition of "learning" within the GF context across secretariat, ELO and IEP that can foster a culture of learning.

Completed Evaluations

Evaluation of Capacity, Quality, and Decision-making in Sub-national Tailoring of Malaria Interventions

The evaluation was conducted independently, and the final report meets quality standards, with recommendations emphasizing the need for strengthened leadership, ownership, and the implementation of tailored strategic plans. The report was rated as 'good'.

In addition, the IEP would elevate the included recommendation to 'apply core principles of the Lusaka Agenda to the core malaria SNT partnership' from 'important' to 'critical' given the level of influence external partners have on malaria programs.

Imbizo

The IEP was vocal in expressing concerns about the quality of Imbizo since early stages of the implementation, but the consultants were less adaptive than anticipated. Therefore the IEP agreed with the CELO decision not to approve the final report.

The IEP considers it is essential to have an independent mechanism to gather feedback from stakeholders, however a discussion on how to shape the project into a more cost-effective learning tool or develop different and more efficient tools is needed.

Evaluation of Community Engagement in the Global Fund Grant Cycle

The evaluation was conducted independently, and the quality of the report was rated as 'good', with areas for improvement mainly concerning the recommendations section.

The IEP notes that the Community Engagement evaluation met quality standards and generated relevant findings, including on political and institutional dynamics affecting community actors' influence within the grant cycle. However, the recommendations could have been more provocative and forward-looking in order to better support

strategic course correction. From the IEP's perspective, greater emphasis on cross-learning and alignment with related evaluations, particularly CRSS, would have strengthened the overall learning value of the exercise and avoided treating closely related thematic areas as stand-alone evaluations.

The absence of a coherent, context-sensitive operational framework which is adapted to different maturity levels of community health systems over time, and the lack of clear definitions of key concepts and useful indicators for monitoring are some of the operational challenges identified by the evaluation. In the face of growing global pressures—ranging from resource constraints to shrinking civic space—the findings underscore the importance of adopting a multi-cycle longer term vision for improvement, strengthening incentive structures and integration across the Global Fund departments, and coordinating more closely with development partners. The evaluation also highlights the need to increase the visibility of community contributions and to demonstrate their value proactively, given the vulnerability of these investments to de-prioritization.

The findings from the evaluation highlighted political dynamics—for example, community-lead organization frustration over perceived limited influence on funding allocations, but without providing priority recommendations to address them.

Evaluation of Community Responses and Systems Strengthening (CRSS)

From the IEP perspective, the CRSS evaluation was conducted independently and provides a useful overview of the Global Fund's support to community responses and systems strengthening. While the conclusions and recommendations generally follow from the findings, the evaluation would have benefited from a more explicit articulation of causal pathways linking contextual factors, implementation mechanisms and observed outcomes. The limited use of explanatory analysis constrains the strategic utility of the report, particularly for informing prioritization and adaptive decision-making. Strengthening the analytical use of theories of change and making causal assumptions more explicit would significantly enhance the contribution of future evaluations in this area to organizational learning.

Things the IEP would like to see change

More effective use of TOCs: Across completed evaluations, the IEP welcomes the more frequent use of theories of change, which reflects progress in evaluation design. Nevertheless, their application remains largely descriptive and insufficiently leveraged during analysis to explain why and under what conditions interventions work. To maximize learning, evaluators should be more effectively managed by ELO to ensure theories of change inform not only evaluation frameworks but also data interpretation, synthesis of findings and formulation of recommendations.

Cross-fertilization across evaluations: Furthermore, while managing evaluations identifying opportunities for cross-fertilization across evaluations at the design and implementation stages would help ELO enhance coherence and strategic relevance.

Strengthening learning from evaluations: From ToR development to implementation management, the potential for cross-learning from evaluations has to be identified, and opportunities seized to produce more robust and relevant learning outcomes that could better inform the recommendations.

Strengthen evaluative thinking that promotes learning and further methodological discussions on evaluating portfolios seems as key areas to focus to increase the effectiveness of the function.

Ongoing Evaluations

At the end of 2025, the following set of evaluations and a rapid assessment were ongoing, with IEP Focal Points actively observing processes to assess the independence of the exercises and will, upon completion of the evaluations, provide an assessment of quality.

End term Evaluation of the Global Fund's Covid 19 Response Mechanism and its Contribution to the Strengthening of Sustainable Health Systems and Pandemic Preparedness

The IEP provided feedback on the draft Terms of Reference (ToR) for this evaluation and approved the ToR with changes on 29 July. The inception report was expected by 23 December 2025.

Evaluation of the integration of HIV, TB and malaria services into national health systems within Global Fund investments

The IEP provided extensive feedback into the draft ToR of this evaluation, and after a second round of review, approved the ToR on 3 December 2025 with procurement launched by ELO on 16 December 2025.

HIV Prevention Evaluation

The IEP Focal Points reviewed and provided feedback on the inception report and have been closely following the progress on this evaluation. A recommendations workshop was held on 9 December 2025. The draft final report has been assessed using the QAF tool by IEP Focal Points.

Evaluation of the Integration of Gender Approaches in HIV, TB and Malaria Programs

The IEP Focal Points reviewed and provided feedback on the inception report and have been closely following progress on this evaluation. A recommendations workshop was held on 16 December 2025. The draft final report has been assessed using the QAF tool by IEP FPs.

Rapid Assessment of the Sustainability of Human Rights Responses supported by the Global Fund

The IEP provided feedback into the ToR for this rapid assessment. The draft report was received on 8 December 2025 and IEP assessment was submitted 24 December 2025.

Developments Within the Evaluation & Learning Function

During 2024, there were discussions on how to streamline the review process of the final reports to ensure that IEP feedback was useful to improve the quality of the evaluation reports, responding to a concern that providing detailed feedback after the CELO approved final reports rendered the IEP feedback of limited value. In response, it was agreed with the CELO to receive the detailed IEP feedback using the QAF tool of the draft final report before the CELO approval in order to have IEP included as part of the feedback to the evaluators. In this way, the final IEP assessment of quality of the final report will include whether the feedback was incorporated in the final version.

In response to the decision to incorporate Rapid Assessments as part of the portfolio of the Evaluation & Learning Function to provide timely evidence to inform decision processes at the GF, the IEP defined an abridged version of the QAF to assess Rapid Assessment reports, to inform the position of the IEP endorsement.

The ELO produced an approach to monitoring the uptake of evaluations and acceptance by the Secretariat, which is welcomed by the IEP, although there is still room for improvement in terms of documenting and better understanding the limited adoption of recommendation, and how those accepted are tracked to specific changes.

The IEP considers a key area for further strengthening within the Evaluation and Learning Function is the learning component. While evaluations continue to generate evidence, there is an underdeveloped shared understanding of how learning from evaluations should be defined, operationalized and used within the Global Fund. From the IEP perspective, learning should go beyond dissemination of findings and focus on the systematic translation of contextualized evidence into actionable insights that inform strategic choices, operational adjustments and organizational adaptation.

Clarifying expectations around learning and strengthening mechanisms for synthesis, prioritization and uptake of evaluative knowledge would significantly enhance the overall effectiveness of the Function

Status of Previous Year Recommendations

Recommendation	Year	Status update
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,	2024	Given the uncertainty surrounding the global health funding landscape in 2025, overall OPEX resource availability remained unclear until year-end, making detailed planning challenging for all Secretariat teams. As outlined in the 2026 Evaluation Workplan, the multi-year evaluation calendar will be reviewed for the remainder of the Strategy Period, at which point the considerations in this recommendation can be applied.
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.	2024	Throughout 2025, there have been a number of governance engagements aimed at discussing evaluation outcomes and related activities with the SC and the Board. These engagements have provided valuable opportunities for dialogue on evaluation findings and their implications. They have also enabled the SC to provide strategic direction to the Secretariat and IEP, which has been critical to ensure that the Independent Evaluation Function continues to deliver on its mandate amid a changing context.
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	2024	This tailoring is ongoing for individual evaluations and will be systematically incorporated into the multi-year evaluation calendar review planned for 2026.

as in the budget for the evaluation function.

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

2023

Imbizo has been discontinued. Lessons learned from the experience of conducting Imbizo have been documented (and shared with IEP and the SC) and will be referred to in the future should a similar mechanism be put in place.

ELO to develop a **formal learning strategy**: ELO to dedicate the required resources to the learning component of the Independent Evaluation 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.

2023

ELO developed a formal approach to drawing learning from evaluations, which was shared and discussed at the 12th meeting of the IEP in September 2025. A mechanism to follow up on evaluation management responses and capture lessons from individual evaluations was put in place at the end of 2025.

ELO to develop **guidance on considering human rights, gender, and intersectionality in Global Fund evaluations**: While progress has been made, the work was not

2023

Guidance on applying a gender lens to evaluations was developed and will be further sharpened in 2026.

completed in 2024, and finalization is expected in 2025.

Recommendations to the Board/Strategy Committee

The IEP recommends strengthening the learning component of the Independent Evaluation Function by agreeing on a clear, shared definition of learning within the Global Fund context. From the IEP perspective, learning from evaluation should be understood as a structured and intentional process through which evaluation evidence is synthesized, contextualized and translated into actionable insights that inform strategic decision-making, operational refinement and institutional adaptation. This requires not only high-quality evaluations, but also dedicated processes, roles and spaces to reflect on findings, identify priorities and support uptake across the organization (this is further described in the IEP document on learning).

From this perspective, the Global Fund should actively champion evaluation and learning—leading by example, engaging with the Independent Evaluation Function, and signaling its value for improving organizational performance. This means emphasizing learning and performance improvement. Achieving this requires top-leadership support that drives demand for and use of evaluation findings to shape strategy, and that promotes an evaluative culture that takes both positive and negative feedback as opportunities for improvement. It also requires a degree of budgetary flexibility within an allocated ELO budget to allow agile responses to emerging evaluation and learning needs.

Annex 1. IEP points of engagement on evaluations

Evaluations and Rapid Assessments ongoing in 2025	1. Scoping		2. Contracting	3. Inception	4. Data collection & Analysis	5. Reporting		6. Response	
	ToR Review	ToR Approval IEP	Observer on TEC	Review and input (Inception Report)	Receive progress updates	Co-Chairs Recommendations workshop	Review of draft / final reports	Endorsement of report;	QA & IEP commentary;
Imbizo: Learning from country stakeholder feedback	x	x	x	x	x	N/A	x	N/A *	N/A
Malaria Sub-national Tailoring	x	x	x	x	x	X	x	x	x
Community Engagement	x	x	x	x	x	X	x	x	x
Community Response Systems Strengthening	x	x	x	x	x	x	x	x	x
HIV Prevention	x	x	x	x	x	x	x	To happen in 2026	To happen in 2026
Gender Integration	x	x	x	x	x	x	x	To happen in 2026	To happen in 2026
Covid-19 Response Mechanism	x	x	x	x	To happen in 2026	To happen in 2026	To happen in 2026	To happen in 2026	To happen in 2026
Human Rights Rapid Assessment	x	**	N/A***	x****	N/A***	N/A***	x	To happen in 2026	To happen in 2026

*Final Report not approved by CELO, so the report did not go to the IEP for endorsement

** Procedures of rapid assessment were still being designed when first rapid assessment commenced. For future rapid assessments, the IEP will be requested to approve the ToR.

***Not part of the procedures for rapid assessments

**** In the case of RA: Review of Assessment Framework (IR not part of RA process)