

# **Tenth Meeting of the Independent Evaluation Panel**

## Summary Notes

11-12 February 2025

Virtual

## Purpose

This document presents the Report of the Tenth Meeting of the Independent Evaluation Panel (IEP), held virtually 11 to 12 February 2025.

**Agenda items.** The meeting comprised four agenda items.

**Decisions.** The report includes a record of the decision point adopted by the IEP (Annex 1).

**Documents.** A document list is attached to this report (Annex 2).

**Participants.** The participant list is attached to this report (Annex 3).

## Action items

- ELO to review evaluator onboarding material and strengthen where required to ensure the mandate of IEP and the respective roles of IEP focal points is clear to evaluators.
- IEP to prepare a note with reflections on the timing of ELO approval of evaluations in relation to the Quality Assessment Focal Point role for future discussion on SOPs.
- ELO to strengthen the 2024 *CELO Learning and Synthesis Report* by incorporating relevant learning from TERG reports that relate to the four themes identified in the report.
- ELO to submit comments on the 2024 IEP Annual Report to IEP Chair and Vice Chair in writing by 14 February 2025 for consideration in finalizing the report.
- IEP and ELO to review and adjust the guidance on applying a gender lens to evaluations in 2026 based on lessons learned from applying the guidance on gender to evaluations, to inform future reviews of the Quality Assurance Framework.

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# Report

## Opening

The Legal and Governance Department confirmed quorum and the Vice Chair opened the meeting by introducing the newly appointed IEP Chair, Juan Pablo Gutierrez. The IEP Chair summarized the meeting agenda and reviewed action points from the previous meeting.

The IEP Chair requested disclosures of perceived, potential and actual conflicts of interest from IEP members. Several disclosures were made, none of which required the IEP Chair to ask IEP members to recuse themselves from discussions.

## Chief Evaluation and Learning Officer Operational Update

Summary of presentation:

CELO presented the ELO priorities for 2025 and reported on the status of action items from the 9th IEP meeting. CELO provided updates on ongoing evaluations and shared the ELO approach to in-country evaluation oversight visits.

Summary of the main discussion points:

- **Imbizo:** CELO emphasized that going forward orientation of key stakeholders for Imbizo is required prior to key Imbizo engagement processes. The IEP Quality Assurance Focal Point supported this view noting orientations respond to the unique role and purpose of Imbizo and will provide required clarity. An IEP member also emphasized the importance of feedback being provided to people that have contributed to Imbizo so that Imbizo is not perceived as a purely extractive process.
- **Quality Assurance Focal Point roles:** Following a situation where an IEP Quality Assurance Focal Point was contacted by evaluators with a request to engage actively in evaluation activities in-country, the IEP and ELO discussed and confirmed the incompatibility of such a request with the IEP mandate. It was noted that this has not happened in other evaluations, and ELO will investigate the incident and make sure in the future evaluation teams clearly understand the role of IEP members.
- **ELO oversight to evaluation work in countries:** IEP members raised questions about ELO's country visit approach including (i) Criteria for selection of country visits; (ii) IEP role in assurance of independence; (iii) Extent to which IEP obtains feedback on country visits by ELO as a data-point for IEP deliberations on independence or other relevant aspects of evaluation; (iv) What specific activities take place in country visits and what heuristics/tools (i.e. checklists) are used in that process. An IEP member questioned whether such visits need to be undertaken in real time or whether retrospective visits could achieve better results. CELO agreed that a retrospective approach could have benefits as another option and provide useful insights but also alerted to future resource constraints for travel in general. CELO emphasized that any travel must be cost effective and non-intrusive in the evaluation process.
- **Timing of IEP Quality Assessment:** IEP members sought clarity on why CELO signs off a final evaluation report before IEP Quality Assessment Focal Points undertake their review. CELO responded that as per the design of the SOPs, it is the Quality Assurance Focal Points' who review the evaluation report prior to CELO approval of the final report. The

quality assessment is then a post-facto independent review on quality. The IEP Chair emphasized that this is an important topic to be addressed again as part of the future SOP review and requested the IEP member who initially raised this issue to start preparing a respective note to reflect his observations.

Action items:

- ELO to review evaluator onboarding material and strengthen where required to ensure the mandate of IEP and the respective roles of IEP focal points is clear to evaluators.
- IEP to prepare a note with reflections on the timing of ELO approval of evaluations in relation to the Quality Assessment Focal Point role for future discussion on SOPs.

## **CELO Learning and Synthesis Report**

Summary of presentation:

CELO presented the *CELO Learning and Synthesis Report* and explained that the Report considers evidence from evaluations published in 2024 and identifies recurring themes across those evaluations. CELO requested the IEP's input on how to strategically use the Report.

Summary of the main discussion points:

- **Learning, influence and follow-up:** IEP members commended the ELO on the first CELO Learning and Synthesis Report. Members expressed their appreciation for the approach to follow-up and monitor the use and influence of evaluation evidence. One IEP member inquired whether the influence approach would consider both operational and strategic influence tracking. ELO confirmed it would. Another IEP member inquired as to whether a specific tool would be used to follow up on recommendations. CELO indicated that no specific tool is used, but the next revision of the report will further explain the ELO follow-up approach.
- **Considering evidence from published Technical Evaluation Reference Group (TERG) evaluations:** IEP members recommended that the CELO Learning and Synthesis Report also incorporates learning documented in reports of TERG-conducted evaluations that relates to the four themes presented in the Report. IEP members also encouraged ELO to consider in the Report where progress has/has not been made and those ongoing tensions raised in evaluations over a longer time period that remain unresolved. In response to the latter, the IEP member representing the Executive Director suggested it is more helpful to consider the offsetting factors and circumstances where less progress has been made in areas that are complex with no easy fix, instead of just raising ongoing tensions and challenges for the Global Fund Partnership. CELO agreed that in future reports, ELO could consider a narrative based on these issues. CELO also agreed to endeavor to include legacy evaluations in the current report before submitting to the SC.
- **Strength of evidence:** An IEP member commented that the reference in the Report on how strength of evidence criteria is applied to evaluation findings could be further drawn upon and applied in the evidence synthesis sections.

Action items:

- ELO to strengthen the *CELO Learning and Synthesis Report* by incorporating relevant learning from TERG reports that relate to the four themes identified in the report.

## IEP Annual Report

Summary of presentation:

The IEP Chair presented the 2024 IEP Annual Report. The presentation included a reflection on the developments within the evaluation function in 2024; an overview of the IEP role in implementing of ongoing evaluations; and IEP transition, composition and way forward, underlining the concern about the reduced number of IEP members to assume quality assurance and quality assessment roles. The importance of tailoring specific methodological approaches to different types of evaluations and the need to consider budgetary implications was flagged. Actions from the 2023 IEP Annual Report and their implementation status were discussed, as well as a new set of recommendations to the Board and the Strategy Committee, including the recommendation for ELO to implement a scenario planning exercise to improve efficiency in the face of limited resources.

Summary of the main discussion points:

- **ELO feedback on the report:** The CELO pointed out that the development process for the 2024 report was different from 2023. The CELO requested that ELO have a much earlier opportunity to review and provide input to the report, as in the previous year. The CELO provided ELO's feedback on the 2024 IEP Annual Report related to language and terminology and requested clarification on some statements in the report and on the recommendations. It was agreed that ELO would provide, in writing, all points raised in the meeting to the IEP Chair and Vice Chair for their consideration to reflect in the final version of the report.
- **Maintaining the report's independence:** IEP members noted that the IEP annual report has to reflect the IEP's opinion and be independent. IEP members agreed that the feedback received from ELO does not change the substance or key messages of the final report and will serve to align language and provide more clarity on recommendations.

Decision:

- The IEP unanimously approved the decision point GF/IEP10/DP01: Approval of the 2024 IEP Annual Report (Annex 1).

Action items:

- ELO to submit comments on the 2024 IEP Annual Report to IEP Chair and Vice Chair in writing by 14 February 2025 for consideration in finalizing the report.

## Applying a Gender Lens to Evaluations

Summary of presentation:

ELO presented guidance on applying a gender lens to evaluations which has been developed in collaboration with the Global Fund Community Rights and Gender (CRG) team. The representative from CRG described how the guidance embeds the concepts of intersectionality and gender-responsive evaluation. ELO described how applying a gender lens is integrated at different points across the evaluation process – aligned to the evaluation standard operating procedures and provided an example from a current evaluation.

Summary of the main discussion points:

- **Strengthening the guidance:** The IEP acknowledged the work developing the guidance and congratulated ELO. The IEP recommended to remain consistent on the language used in the guidance. The IEP also emphasized that when talking about gender in evaluation, it should not just be about sex disaggregation but also issues of equality and access.
- **Implementation in countries:** IEP also suggested that the guidance provide more focus on implementation practicalities, e.g., how to manage if, at the country level, the data is not disaggregated by gender or if gender equality promotion faces cultural and institutional resistance. The CRG representative responded with practical suggestions in relation to cultural sensitivity when dealing with governments that criminalize certain groups and need for careful assessment criteria to understand the gender issues and barriers before any engagement at country level.
- **Using the guidance:** IEP raised a question on how and when this guidance could be applied noting that gender may not be the key program issue or barrier. CELO agreed and highlighted the need to have a customized approach on applying the guidance, being cognizant of the context of the evaluation and to consider that the causes of disadvantage or discrimination do not exist independently but intersect and overlap with gender inequality. The IEP suggested having core gender lens elements on all the evaluations that should be adaptable or extendable in relation with the theme of the evaluation. IEP and ELO agreed that this guidance should be treated as “living guidance” and adjusted and improved with experience.

Action items:

- IEP and ELO to review and adjust the guidance on applying a gender lens to evaluations in 2026 based on lessons learned from applying the guidance on gender to evaluations, to inform future reviews of the Quality Assurance Framework.

## Closing Session

The IEP and ELO reviewed the summary of decisions and action points from the meeting. The next IEP meeting is scheduled for 4-6 June 2025; its format (virtual or in-person) will be determined following a review of agenda items with IEP Leadership, CELO and LGD and communicated soon to IEP members. The IEP Chair expressed gratitude to all for the participation and progress made in the meeting.

# Annex 1: Decisions

Decision Point	Decision Point Text	Voting Summary		
		For	Against	Abstain
GF/IEP10/DP01	The Independent Evaluation Panel approves the substance of the 2024 IEP Annual Report (GF/IEP10/04) and delegates its finalization to the Chair of the IEP based on discussion during the 10 <sup>th</sup> IEP Meeting.	Unanimous		



## Annex 2: Document List

Reference	Document Title
GF/IEP10/01	Agenda
GF/IEP10/02	Chief Evaluation and Learning Officer Operational Update
GF/IEP10/03	Chief Evaluation and Learning Officer Learning and Synthesis Report
GF/IEP10/04	IEP Annual Report
GF/IEP10/05	Applying a Gender Lens to Evaluations
	<b>Supporting Documents</b>
GF/IEP09/08	Report of the 9 <sup>th</sup> Meeting of the IEP

## Annex 3: Participant List

### Independent Evaluation Panel (IEP)

Juan Pablo Gutierrez, Chair  
George Gotsadze, Vice Chair  
Abdallah Bchir  
Evelyn Ansah  
Fred Carden  
Caroline Lynch  
Dede Watchiba  
Josephine Watera  
Massimo Ghidinelli, Strategy Committee  
Evaluation Focal Point, Ex-officio, non-voting  
John Grove, Global Fund Chief Evaluation and  
Learning Officer, Ex-officio, non-voting  
Harley Feldbaum, Global Fund Head of  
Strategy and Policy Hub, Ex-officio, non-voting

### Evaluation & Learning Office (ELO)

Rita Benitez, Specialist, Learning &  
Dissemination  
Yana Daneva, Evaluation and Project Specialist  
/ Consultant  
Jutta Hornig, Team Coordinator  
Rhiannon James, Senior Specialist, Evaluation  
Partnerships  
Roy Mutandwa, Evaluation Specialist, C19RM  
John Puvimanasinghe, Senior Specialist,  
Evaluation & Learning  
Michael Schroll, Senior Specialist, Evaluation &  
Learning  
Marc Theuss, Specialist, Evaluation  
Olga Varetska, Specialist, Evaluation

### Global Fund Secretariat

Stephanie Martone, Specialist, Legal and  
Governance Department  
Etienne Michaud, Chief Counsel, Legal and  
Governance Department  
Emilomo Ogbe, Technical Advisor Gender,  
Community Rights & Gender Department

### External participants

n/a