# Update on the Technical Evaluation Reference Group (TERG) work

For Board Information

**The Global Fund**

# Technical Evaluation Reference Group

The TERG is an independent evaluation advisory group, accountable to the Board through the Strategy Committee for ensuring independent evaluation of the Global Fund business model, investments and impact. Specifically, the TERG provides:
- Independent evaluations;
- Learning functions; and
- Advice functions

The TERG comprises
- 13 voting members serving in their personal capacity; and
- 6 non-voting ex-officio members
  - UNAIDS; Roll Back Malaria; Stop TB Partnership; Gavi; Strategy Committee; and the Secretariat.

Key components
- Prospective Country Evaluations (PCE); Strategic Reviews (SR); and thematic reviews

# Significant independent inputs to policies and actions

| TERG review examples | Policies and actions |
|---|---|
| Strategic Review 2015 | Key input to the new strategy |
| Fragile states | Challenging Operating Environment (COE) policy, the Emergency Fund |
| Financial and programmatic sustainability | Sustainability, transition, and co-financing (STC) policy |
| Allocation methodology | Updated allocation methodology |
| Review process of concept notes | Differentiated and simplified application process, including TRP |
| Artemisinin resistance | Regional Artemisinin-resistance initiative (RAI) grants |

Currently, thematic reviews on data system investment and gender are being finalized, while two additional ones are being defined.

# Contents Overview

Prospective Country Evaluations

Strategic Review 2017

Note: the rest of slides are based on the Strategy Committee presentation.

Country-level, in-depth, continuous evaluations providing a detailed picture of the implementation, effectiveness and impact of Global Fund supported programs in eight countries.

**PCE goals**

> To generate information, data and evidence on the entire Global Fund results chain and provide stakeholders with on-going feedback in order to accelerate progress and maximize impact towards Strategic Objectives of the Global Fund Strategy by:

- Examining the pathways between Global Fund investment and impact at country level;

- Facilitating continuous improvement of program implementation and quality and testing innovative solutions; and

- Learning lessons that can improve the Global Fund model.

*PCE expected results and benefits*

> **Country evaluation and learning platforms will facilitate:**

– Measurement of programme contributions to impact;

– Timely use of better quality data from all sources;

– Identification of risks, issues and challenges;

– Development, follow-through and assessment of potential solutions and testing of innovations;

– Continuous program quality improvement for impact;

– Development of country capacity in M&E and program implementation;

– Strengthened ownership and partnership for the above.

*Beyond selected countries:*

– Lessons learned;

– Refinement of evaluation approaches; and

– Independent assurance of the Strategy and business model effectiveness.

# Prospective Country Evaluations (PCE) (3 of 5)

*At the 31ˢᵗ TERG meeting (Feb. 2017), additional emphasis was given to the following:*

> Establishment of **high-level, in-country advisory groups** (to provide guidance, facilitate data access and maximize the use of PCE recommendations);

> **Strong country ownership and partner coordination**; coordination with the Global Fund Country Teams and other departments;

> Processes and objectives for assessment of **both Global Fund strategy, policies, processes, AND country's programs**, through Theories of Change and evaluation questions, tailored to country context and needs;

> Consistency of approaches where appropriate (e.g. use of internationally accepted measurement methodologies);

> Evidence informed management and decisions at country and global levels;

The Global Fund 37th Board Meeting, 03-04 May 2017, Kigali, Rwanda

# Prospective Country Evaluations (PCE) (4 of 5)

*Next steps at country level*

Introducing PCE and evaluation partners in countries, with support of Country Teams (Cambodia, D.R. Congo, Guatemala, Mozambique, Myanmar, Senegal, Sudan, Uganda)

Identifying a high level advisory group in each PCE country

> With in-country key stakeholders' and Country Team recommendations

Adapting evaluation priorities to country needs:

> Map stakeholders and engagement;
> Dialogue with key stakeholders on evaluation priorities;
> Map data availability and identify data gaps;
> Identify and initiate drafting of evaluation protocols and data sharing policy.

Setting up evaluation platforms

Observing grant application country dialogue, where appropriate

*Timeline and key milestones*
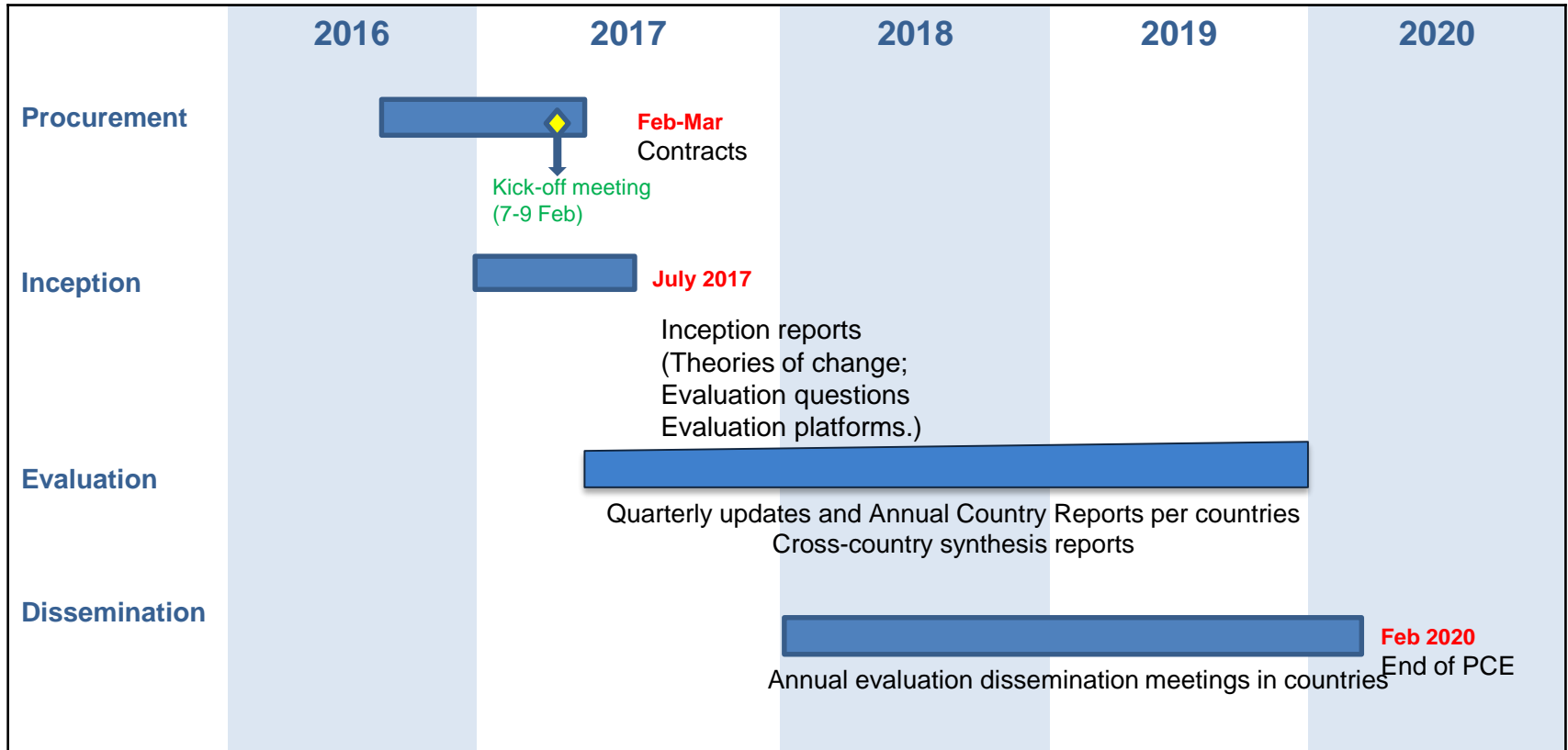
# Strategic Review 2017: Objectives (1 of 4)

**Main SR2017 Objectives**
1. Reviewing progress in delivering 2012-2016 Strategy
2. Assessing the Global Fund readiness for the 2017-2022 Strategy

**Review progress in delivering 2012-2016 Strategy**

**Assessing the Global Fund readiness for the 2017-2022 Strategy**

**Looking Backwards**

**Looking Forward**

**1.1 Review the Global Fund responses to recommendations**

**1.2 Assess what has changed over the last two years**

**2.1 Assess the readiness of the Global Fund to implement the new Strategy**

**2.2 Make recommendations to facilitate Strategy implementation**

**2.3 To identify areas for further examination**

Results in Development

| Cluster | Cluster heading | Sub-Issues |
|---|---|---|
| 1 | Strategy translation and readiness for implementation | • Translation of strategy into prioritised action plans<br>• Staffing differentiation and internal performance management<br>• Differentiated grant procedures and management |
| 2 | Country partnerships and sustainability | • Programmatic sustainability and transition<br>• Absorptive capacity<br>• National ownership<br>• Country partnerships<br>• RSSH, including:<br>- data systems and quality<br>- supply chain<br>- community systems and governance<br>• Human rights and gender |
| 3 | Results | • Focus on Value for Money<br>• Measurement of outcomes and impact<br>• Accountability for results |

**Results in Development**

# SR 2017: Some **early** emerging findings (3 of 4)

- Evidence across all three 'clusters' of a comprehensive response to most TERG recommendations - strongest at Secretariat level – e.g. through:
  - Strategy development process and content
  - Strategy Implementation Plan (SIP) process and roll out
  - A large number (too many?) of 'initiatives' relevant to issues raised
- **Key emergent question (#1)** to address: to what extent stakeholders at all levels have been/will be able to make resourcing decisions and systematically *prioritise* (in context of a broad strategy/flat-lined resources)
- **Key emergent question (#2)** that this review will NOT be able to explore:  Will the Global Fund 'business model' need to adapt to maintain relevance beyond the 2019 horizon (see next slide)

**Results in Development**

# SR 2017: Beyond 2019:
## Issues the Strategy Committee might consider (4 of 4)

- SR2017 findings will likely highlight the fact that while 'staying the course' might be appropriate for the current replenishment period, it may not be the best way forward in the future…

- Is there a need to proactively address the issue of 'future proofing' the Global Fund 'business model' and plan for the next strategy process - i.e. beyond the current replenishment period - **starting now?**

- Possible mechanisms for doing this (e.g. expert 'think tank' or working group).

**Results in Development**