

Evaluation of Integration of Gender Approaches in HIV, Tuberculosis and Malaria Programs

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Terms of Reference (ToR)

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1. Introduction

1. These terms of reference (ToR) describe the independent evaluation of the progress of implementation of the Global Fund ambition related to gender equality as set out in the Global Fund 2023-2028 Strategy. The purpose of the evaluation is to assess to what extent, and how, approaches to advance gender equality have been integrated into HIV, Tuberculosis and Malaria programs supported by Global Fund investments. This evaluation is a formative assessment to identify the progress and achievements made so far and to serve as a forward-looking assessment to provide actionable recommendations for improvement in future Global Fund Grant cycles.
2. The evaluation is part of the Global Fund Board-approved Multi-Year Evaluation Calendar for the 2023-2028 Strategy Period. It will be managed by the Evaluation and Learning Office (ELO) of the Global Fund under the oversight of the Global Fund Independent Evaluation Panel (IEP). This ToR outlines the background, purpose, audience, and use of the evaluation, objective and key evaluation questions, methodological considerations, timeline and deliverables, and the technical requirements the prospective evaluation team should meet.

2. Background

3. The Global Fund is a worldwide partnership to defeat HIV, TB, and Malaria (HTM) and ensure a healthier, safer, more equitable future for all. The Global Fund raises and invests more than US\$5 billion a year to fight the deadliest infectious diseases, challenge the injustice that fuels them, and strengthen health systems and pandemic preparedness in more than 100 of the hardest-hit countries. As reported in the most recent Global Fund Results Report¹, since 2002, the Global Fund partnership has saved 65 million lives and has reduced the combined death rate from the three diseases by 61 percent in the countries in which it invests.
4. The Global Fund partnership has also played a critical role in supporting countries and communities to advance human rights and gender equality by breaking down barriers to health and ensuring access to lifesaving care for those who need it most. Gender inequalities, including harmful gender norms, power imbalances, gendered stigma and discrimination, violence and other gender-related barriers limit access to critical health services and increase vulnerabilities; the Global Fund recognizes that the goal of ending HTM cannot be achieved without maximizing health equity, gender equality and human rights².

¹ <https://www.theglobalfund.org/en/results/>

² https://www.theglobalfund.org/media/5728/core_gender_infonote_en.pdf

5. The Global Fund has a history of addressing gender equality through the programs it supports with efforts and approaches evolving with each Strategy period. In 2008 a standalone gender equality strategy was developed which later evolved into the 2014-2016 Gender Action Plan³. Gender was first embedded as a strategy objective in the 2017-2022 Strategy; in this Strategy period there was a strong focus on adolescent girls and young women (AGYW) in the HIV response with a corresponding Strategic Initiative⁴ as well as support to partnerships such as HER Voice⁵ and VoixEssentiELLES⁶.
6. Despite considerable strides in the fight against HTM, growing inequalities and pervasive human rights, gender-related and other structural barriers continued to exacerbate vulnerability to HTM infection and limit access to services at the end of the previous Strategy. As a result, the 2023-2028 Global Fund Strategy⁷ calls for intensified action to address inequities, human rights and gender-related barriers under the mutually reinforcing strategy objective described as “*Maximizing Health Equity, **Gender Equality** and Human Rights*”. This objective calls for deepening the integration of these dimensions into HTM investments, including through expanding the use of data to identify and respond to inequities, scaling up comprehensive programs to remove human rights and gender-related barriers, and leveraging the Global Fund’s voice to challenge harmful laws, policies and practices.
7. The Technical Brief on Gender Equality for the 2023-2025 allocation period⁸⁹ describes how women, men, adolescent girls and boys and gender-diverse communities have different health needs and face different barriers to accessing and using health services and information. **Gender-responsive approaches** to health recognize and respond to these differences and aim to ensure equitable health outcomes across the life course. They also collect and use sex and gender-disaggregated data, information and research to inform policy and program decisions. In addition, the Strategy commits to taking a **gender-transformative approach** to the three diseases to effectively address the underlying factors that contribute to HIV, TB, and malaria. Gender-transformative programs recognize how harmful gender norms and stereotypes, inequalities in power and control over resources, discriminatory laws, policies and practices impact women’s, girls’ and gender-diverse people’s vulnerability to the three diseases and take concrete actions to counter or change them.

³ https://www.globalfundadvocatesnetwork.org/wp-content/uploads/2014/10/Publication_GenderEqualityStrategy_ActionPlan_en.pdf

⁴ Strategic initiatives are a type of Global Fund catalytic investment that complement country allocations through programs that cannot be funded through country grants alone.

⁵ <https://www.yplusglobal.org/her-voice-fund>

⁶ <https://voixessentielles.org/en/>

⁷ <https://www.theglobalfund.org/en/strategy/>

⁸ https://www.theglobalfund.org/media/5728/core_gender_infonote_en.pdf

⁹ The 2023-2028 Strategy Period corresponds to two allocation periods; the 2023-2025 allocation period also referred to as Grant Cycle 7 (GC7) and the 2026-2028 allocation period also referred to as Grant Cycle 8 (GC8)

8. Examples of gender-responsive and gender-transformative interventions in HIV, TB and Malaria disease programs are described in a respective set of Technical Briefs for the 2023-2025 allocation period^{10, 11, 12, 13}. For HIV, gender inequality has long been recognized as a key driver of HIV infection among adolescent girls and women in countries with generalized HIV epidemics, among trans people and among women and girls who are also members of key populations globally. TB affects women and girls, men and boys, and gender-diverse communities differently. Globally, men are more than twice as likely as women to have active TB, while women generally face greater barriers to TB care. Women are more likely to be under-diagnosed due to different presentations of TB and are more likely to suffer negative consequences from TB stigma, including intimate partner violence, loss of livelihoods and divorce than their male counterparts. Gender-diverse people experience higher levels of stigma, discrimination and resulting social marginalization, poverty, which create additional barriers to TB testing and treatment¹⁴. For malaria, increasing evidence indicates that addressing gender-related inequalities in endemic malaria settings may reduce the burden of disease and hasten elimination efforts¹⁵, and women's agency in household decision-making leads to better malaria outcomes¹⁶.
9. Gender-related inequalities within the health workforce as well as the gender-related knowledge, attitudes and practices of health workers and other service providers also need to be considered and addressed in HIV, TB and malaria programs. Where services are located, how they are paid for, who provides care and how they are supported and compensated all have an impact on the quality and effectiveness of programs and can either perpetuate gender inequalities or help to overcome them¹⁷.
10. Based on the importance of this area for the Global Fund partnership, this evaluation, imbued with principles of participation and utilization, aims to generate learning and evidence on how gender equality approaches are evolving and being advanced in HTM disease programs supported by the Global Fund. The immediate **use** of this evaluation will be to inform improvements and adaptations to Global Fund guidance and grant implementation for the 2026-2028 allocation period to drive the future impact of Global Fund grants. Further utility of this evaluation is to identify and share key lessons concerning good practices of gender-responsive and gender-transformative interventions in HIV, TB and malaria disease programs. Finally, learning from this evaluation will contribute to the evidence base that will inform the development and direction of the post-2028 Global Fund Strategy.
11. The target **audience** of this evaluation includes the Global Fund and Board, Principal and Sub-Recipients of Global Fund investments, Country Coordination Mechanisms

¹⁰ https://www.theglobalfund.org/media/5728/core_gender_infonote_en.pdf.

¹¹ https://www.theglobalfund.org/media/5536/core_malariagenderhumanrights_technicalbrief_en.pdf

¹² https://www.theglobalfund.org/media/12729/core_removing-barriers-to-tb-services_technicalbrief_en.pdf

¹³ https://www.theglobalfund.org/media/12445/core_removing-barriers-to-hiv-services_technicalbrief_en.pdf

¹⁴ https://www.stoptb.org/sites/default/files/tb_gender_investment_package.pdf

¹⁵ https://www.gatesgenderequalitytoolbox.org/wp-content/uploads/BMGF_Malaria-Review_FC.pdf

¹⁶ https://www.malarianomore.org/wp-content/uploads/2021/06/Malaria-and-Gender-Report_FINAL3.pdf

¹⁷ <https://iris.who.int/handle/10665/311322>

(CCMs) including civil society actors and technical partners and donors. The findings will inform strategic, policy and operational decisions, organizational learning and accountability - both internally to the Global Fund and externally with partners on how to improve and advance gender responsive and gender transformative approaches in national disease programs. As a primary user, The Global Fund Secretariat will take forward the utilization of insights, findings and recommendations of the evaluation and document how this will be done in a management response to the evaluation.

3. Context

12. The evaluation of the previous Global Fund Strategy (2017-2022)¹⁸ observed that a strong foundation for an effective Adolescent Girl and Young Women (AGYW) HIV response was established in this period with significant reductions in new HIV infections among AGYW, particularly in East & Southern Africa. However, other than the AGYW HIV response, gender equality-related investments have been limited with uneven prioritization of gender equality in HTM interventions. Global Fund Secretariat and country partner capacity constraints and challenging external social, economic and political factors in countries were reported as key contributing factors.
13. To respond to continued challenges and to prevent inconsistent approaches to gender equality in the HTM response, the Global Fund has adopted a “twin-track”¹⁹ approach to (a) integrate a gender-equality focus across the portfolio, and (b) better meet the scale of need by complementing integration with targeted investments in gender-equality-focused interventions. At the beginning of Grant Cycle 7, a Theory of Change (ToC) for the Global Fund’s “twin-track” approach was articulated (see supplementary information at the end of this section for an excerpt of the ToC) with outcomes defined as:
 - Outcome 1: Global Fund and partners have increased **knowledge, capacity and political will** to address gender inequality within the HTM response
 - Outcome 2: Global Fund **structures and processes** better incentivize prioritization of gender equality within the HTM response
 - Outcome 2: **Strengthened partnerships and coordination** with existing and new partners, at community, national and international levels to advance gender equality objectives
 - Outcome 4: High-quality **catalytic programming** on gender equality supports communities to advance gender equality within the HIV, TB and malaria response

¹⁸ https://www.theglobalfund.org/media/14802/iep_gf-elo-2024-01_report_en.pdf

¹⁹ https://archive.theglobalfund.org/media/12481/archive_bm48-09b-thematic-discussion-gender_report_en.pdf

14. To achieve the outcomes of the Theory of Change (ToC), the Global Fund Secretariat has embedded a focus on gender at distinct points across the Global Fund grant lifecycle. It is expected that gender considerations are integrated into every element of the Global Fund's funding cycle, from the development of funding requests and program implementation to monitoring, evaluation and learning. To facilitate this, new levers²⁰ have been designed or previous levers have been adapted to strengthen the inputs to the ToC. Key levers applied during the funding request stage include the inclusion of interventions to reduce gender barriers within the program essentials²¹, active engagement in the country dialogue of women's and feminist organizations and organizations led by gender-diverse people, along with people living with and affected by the diseases and other key population groups, and, in addition, the Global Fund encourages the submission of a **gender assessment** as an annex to the funding request.
15. The Gender Equality Marker (GEM) is an important new lever introduced at the funding request stage to understand and track how well gender considerations are being mainstreamed across Global Fund investments. It consists of a set of minimum gender equality criteria spanning program design, delivery and evaluation, against which funding requests are assessed²². The GEM assessment is carried out by the Technical Review Panel (TRP)²³ during the funding request review windows. The assessment criteria for GEM can be found in the Global Fund Applicant Handbook²⁴.
16. Two Strategic Initiatives (SI)²⁵ in the 2023-2025 allocation period also have a specific gender focus. This includes the SI on scaling up programs to remove human rights and gender-related barriers which was launched in 2017. The second is on strengthening the engagement of communities and civil society in Global Fund and related national processes. The latter SI includes support for a Gender Equality Fund set up to strengthen the engagement of women, girls and gender-diverse communities to achieve gender equality. The Gender Equality Fund²⁶ The Fund was set up as a joint initiative with the Global Fund together with private sector partners to complement investments in gender equality and human rights.

²⁰ The term "lever" is used to describe an activity or process initiated and used by the Global Fund Secretariat to influence the design and implementation of investments

²¹ Program Essentials are key evidence-based interventions and approaches to addressing the ambitious goals set out in the respective global HIV, TB and malaria strategies.

²² ²² Please consult this page for more information on the Funding Request process: <https://www.theglobalfund.org/en/applying-for-funding/design-and-submit-funding-requests/timing-of-submissions/>

²³ Each request for funding submitted to the Global Fund is evaluated for technical merit and strategic focus by an independent group of experts, called the Technical Review Panel (TRP). The Technical Review Panel consists of experts in HIV, tuberculosis, malaria, human rights and gender, health systems and health financing.

²⁴ https://www.theglobalfund.org/media/4755/fundingmodel_applicanthandbook_guide_en.pdf

²⁵ https://www.theglobalfund.org/media/14811/fundingmodel_2023-2025strategicinitiatives_list_en.pdf

²⁶ Initial investment of up to US\$7.5 million over three years from ViiV Healthcare and GSK, with the aim to welcome more partners and donors in the future. Funding is initially open to organizations, networks, and consortia working in the 7 countries (i.e., the Democratic Republic of the Congo, Eswatini, Lesotho, Mozambique, Nigeria, Uganda, and Zambia), with an ambition to expand should additional funding become available.

17. The Global Fund introduced two new strategic Key Performance Indicators for the 2023-2028 Strategy (i.e., KPI E3a and E3b)²⁷ to measure engagement of women and gender diverse communities, and grant performance relating to gender equality. Specifically, KPI E3b tracks the performance against targets of indicators focused on women, girls and trans and gender diverse communities. Each High Impact and Core portfolio²⁸ is required to have a minimum of one gender-specific indicator per disease component in their Performance Framework. The first results for E3b will be available in March 2025.
18. Most grants in the 2023-2025 allocation periods are now through the first two stages of the grant life-cycle which includes the funding request and grant-making stages. According to the TRP, compared to the 2020-2022 allocation period, funding requests have shown improvement in addressing gender equality, with an overall increase in gender assessments being conducted as part of the Funding Request process and an increase in the quality of requests relating to gender, particularly in high impact portfolios^{29,30}. However, the TRP has also observed instances where gender assessments were either poorly reflected in funding requests, or not used at all. Internal analysis of the GEM results shows that **over half of Global Fund funding is allocated to programs that do not have gender equality fundamentals in place**³¹. There is an indication that programs to maximize gender equality are still often viewed as add-ons to core programs, rather than strategies that are essential for their ultimate success. Internally led surveys conducted to report against KPI E3a, indicate that women, girls, and gender-diverse communities still struggle to influence country-level processes to ensure that their needs are being adequately addressed through country programs³².
19. The above internal analysis and observations come in the context of a rapidly evolving external environment, where risks to human rights and gender equality are worsening driven by persistent human rights and gender-related barriers including stigma, discrimination, and criminalization. Such risks pose serious threats to Global Fund-supported programs and achievement of grant targets which is also emphasized in the 2024 Summary Report of the Breaking Down Barriers SI³³. This evaluation thus comes at a very critical time as the stalling progress on gender equality poses a fundamental threat to the Global Fund Partnership's efforts to end HIV, tuberculosis (TB) and malaria, and to build truly inclusive health and community systems that leave no one behind.

²⁷ https://www.theglobalfund.org/media/12681/strategy_globalfund2023-2028-kpi_handbook_en.pdf

²⁸ Countries and multi countries eligible for Global Fund support are assigned to one of three portfolio categories: High Impact, Core or Focused, based on country allocations and disease burden. See pages 4-6 of the [Operational Policy Manual](#)

²⁹ https://www.theglobalfund.org/media/13448/trp_2023-observations_report_en.pdf

³¹ Based on the Gender Equality Marker (GEM) scoring of funding requests by the Technical Review Panel (TRP)

³² https://archive.theglobalfund.org/media/14273/archive_bm51-02b-2023-2028-strategy-performance_report_en.pdf.

³³ https://www.theglobalfund.org/media/14849/crg_2024-progress-reduce-human-rights-related-barriers-hiv-tb-malaria_summary_en.pdf

4. Purpose and Objectives, Scope and Indicative Evaluation Questions

20. As stated at the start of the TOR, the overarching purpose of this evaluation is to assess to what extent, and how, gender equality approaches, have been integrated into HTM programs supported by Global Fund investments. This evaluation is formative: to identify the progress and achievements made so far in programs and to serve as a forward-looking assessment to provide actionable recommendations for improvement in future Global Fund Grant cycles such as potential replication and scale-up of gender-responsive and transformative interventions.
21. The evaluation will identify the key factors that drive or serve as barriers to mainstreaming gender equality across Global Fund investments to understand the inconsistent progress across the Global Fund portfolio. The evaluation will examine which gender-equality approaches have, or have not, generated or are expected to generate positive, intended or unintended, changes. While impact, in the sense of directly attributable changes from the integration of gender equality programming in HTM programs, is too early to be assessed, the evaluation will examine the extent to which new or planned approaches are likely to lend themselves, or not, to achieving impact in the future. The evaluation aims to examine this from a wide set of perspectives of country stakeholders engaged with the Global Fund at national and community levels. Stakeholders should include, Principal and Sub-Recipients of Global Fund investments, Country Coordination Mechanisms (CCMs), civil society and representatives of women's groups and gender diverse communities.
22. The specific **objectives** of the evaluation are thus:
- i. To assess the extent to which gender equality approaches are being integrated into HIV, TB and malaria disease programs supported by the Global Fund.
 - ii. To identify enabling and hindering (internal and external) factors - and their causes and effects - for integrating gender equality approaches into Global Fund-supported disease programs.
 - iii. To identify key lessons and successes that would allow the Global Fund partnership to reinforce, advance and sustain gender-responsive and transformative interventions in future disease programs.
23. The principles of equity, human rights, gender equality and ethics are essential to the Global Fund evaluation function and will be integrated into the evaluation design, scope, methods and analysis. In particular, the evaluation design itself should ensure that it will adhere to gender transformative values by ensuring participation and

inclusivity at all stages of the evaluation and being intentional in the consideration of power dynamics concerning how, by whom, when and where the evaluation could limit the participation of particular stakeholder perspectives.

24. Whilst this evaluation will be examining what is happening during implementation in the 2023-2025 allocation period (GC7), it is recognized that with each subsequent grant cycle, programs are building on the foundations, progress, and lessons from previous cycles. Therefore, it is expected that, where relevant, the evaluation will consider this evolution to understand underlying factors related to progress and ongoing challenges in the current grant cycle.
25. In line with the objectives, the evaluation will be guided by the evaluation questions listed below. The questions will be fine-tuned, as deemed appropriate, during the inception phase to ensure relevance and utilization of the exercise once the evaluation team is onboard in further consultation with a broad set of stakeholders and in close collaboration with ELO.

Theme	Indicative Evaluation Questions
Funding Request and Grant Design	1) To what degree are Global Fund HIV, TB and Malaria grants demonstrating the integration of gender-responsive and gender-transformative approaches into interventions, including HRH-funded interventions, in their design?
	2) How are commitments and prioritization to targeting gender equality reflected in grant budgets and results frameworks?
	3) To what extent were women's and feminist organizations and organizations led by gender-diverse people effectively engaged in country dialogue to identify gender-related barriers and gender-responsive and transformative interventions in the Global Fund Funding Request? a) What has facilitated or hindered this engagement?
	4) What has contributed to or prevented the development, quality, use and effectiveness of gender assessments in informing national plans and funding requests?
Partnerships and Catalytic Investments	5) To what extent, and how, are key partnerships at the international level demonstrating support for advancing gender equality approaches in HTM programs where the Global Fund invests?

	<p>6) In countries that are part of the following Global Fund Strategic Initiatives, to what extent are the SIs supporting:</p> <ul style="list-style-type: none"> a) Strengthening engagement of those affected by gender inequalities in advocating for their priorities and influencing decisions? (The Community Engagement (SI)) b) Efforts to address gender discrimination, harmful norms and gender-based violence in the HTM response? (The Breaking Down Barriers SI)?
Grant Implementation and Monitoring	7) How do stakeholders understand gender equality and gender transformative programming and how is this being reflected in program implementation decision-making in Global Fund grants?
	<p>8) Are gender responsive and gender transformative approaches in HTM interventions being conducted as planned in grant design?</p> <ul style="list-style-type: none"> a) What is facilitating or hindering the implementation of these interventions? b) How does the national enabling environment, including laws and policies, support or mitigate the delivery of Global Fund grants to advance gender equality approaches?
	9) To what extent, and how, are programs supported by Global Fund investments engaging and proactively working with partners at national and community levels to advance gender equality in relation to achieving greater grant impact?
	10) To what extent is gender-relevant data being advanced and collected by country stakeholders to monitor grant implementation and inform decision-making in programs (including but also going beyond sex-disaggregation)?
	11) What gender-equality approaches and specific gender response or gender transformative approaches in HTM interventions are demonstrating an indication of success, and why?

	12) What good practices, structure, and resources need to be in place to ensure gender equality approaches will drive the sustained impact of HTM programs?
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26. The scope of this evaluation will not be able to cover the whole Global Fund portfolio (the Global Fund invests in over 100 countries). The analysis will include a sample of countries and grants that represent different portfolio differentiation and geographic regions (see the following section on methodology). Importantly the sample will include a positive deviance approach to learn from grants where success is being demonstrated. Multicounty grants will not be included.
27. It is also important to note that during the same period, the Global Fund will be commissioning an independent evaluation on HIV prevention. The purpose of the evaluation is to assess to what extent, and how, the increased Global Fund efforts in HIV prevention have led to GC7 grants that are optimally configured and coherent to enable maximizing HIV prevention outcomes and impact and are being implemented in line with the grant design. As integration of gender-responsive and gender-transformative interventions in HIV programs are often in the area of HIV prevention, it will be important to ensure appropriate coordination between these evaluations during the inception phase and at other distinct points in the evaluation process.

5. Methodological Considerations

28. The evaluation design and methodology will be proposed as part of the technical proposal in response to the Request for Proposal (RfP) and finalized as part of the inception phase of the evaluation once the contract is awarded. It is expected that the justification for the evaluation design and methodology explains the fit for purpose and rationale to answer the evaluation questions and conclude on the evaluation objectives. The technical proposal must also describe the analysis approach and how information and data coming from different methods will be triangulated and will complement each other to ensure robust and rigorous findings and conclusions.
29. The evaluation will be conducted using an inclusive approach applying mixed methods and obtaining data from a range of sources, including secondary data and document analyses, as well as stakeholder consultations for example interviews, focus group discussions, observation and in-depth country analysis. The methodology should adopt a ToC analysis aimed at comprehensively understanding whether the efforts implemented to achieve the outcomes in the ToC are demonstrating the potential to bring about desired changes and to understand the contextual factors that enable or hinder progress against the ToC.

30. The following outlines important methodological considerations for service providers to address as they develop the technical proposal:

- It is expected that the evaluation will apply a gender lens at all stages,³⁴ adopting gender-sensitive, gender-responsive and feminist evaluation methods as appropriate. This requires at a minimum that:
 - i. Data collection methods should be gender-sensitive, attentive to who is conducting interviews, who is participating in the interviews, how questions are drafted/asked, and where and from whom information sources are derived.
 - ii. A mixture of qualitative and quantitative methods with methods proposed designed to capture differentiation in gender roles, attitudes, behaviors and norms.
 - iii. The data-gathering process should be inclusive, participatory and respectful of all stakeholders (rights holders and duty bearers). Women and girls, gender-diverse communities and their organizations should participate in data collection and analysis, where possible.
- The evaluation will need to consider the significant heterogeneity and diversity among countries and grants.

31. The evaluation is also expected to be sensitive to **intersectionality**, which includes gender but also other identity markers and to take into account differences among stakeholders and their different roles and capacities in relation to the planning and implementation of Global Fund-supported programs. Taking an intersectionality approach to answer evaluation questions puts a focus on the types of bias and dominant thinking that may be giving rise to continued inequities, discrimination, and unfair power relations in decision-making.

32. A **document review of secondary sources** is expected as part of the evaluation, drawing on relevant evaluations, assessments and studies.

33. The evaluation will be based on a “**Country Insights**” **approach**, which is expected to provide an analysis of a sample of grants. It is proposed that the grants to be included in the sample are those submitted in Windows 1- 3 of the Funding Request Application Process for the 2022-2025 allocation period; most grants in this period were approved by the Board by the end of 2023 or early 2024 and will have therefore had at least one full year of implementation before the evaluation starts. Approximately 200 grants were submitted in Windows 1-3 for the 2023-2025 allocation. It is also suggested that the selection of grants is based on GEM score diversity and includes:

- Grants with the highest GEM score (GEM=2)
- Grants with lowest GEM scores (GEM=0)

³⁴ Adapted UNICEF Guidance on Gender Integration in Evaluation available here: <https://www.unicef.org/evaluation/documents/unicef-guidance-gender-integration-evaluation>

- Further stratification based on disease component, size of allocation amount and Strategic Initiative (SI) funding.

34. The evaluation is proposed to adopt a combination of a) a desk-based portfolio analysis of approximately 35 grants across the different diseases, with possible virtual engagement with in-country stakeholders and b) in-depth focus in a sub-sample of up to six countries focused on obtaining data and information that cannot be retrieved via remote data collection, especially at community and sub-national levels. The technical proposal should describe the methodological approaches for both.

a) **Portfolio analysis:** Relevant grant documents to be leveraged during the portfolio analysis include:

- Funding Requests to analyze the modules for which countries have requested funding, the rationale for the selection of these modules and any program improvements related to gender; whether and how the program design addresses gender-related barriers to address health inequities in accessing health services addressed by the interventions, and whether it advances gender equality. Several relevant annexes to the Funding Request, as described in the Funding Request Instructions Document³⁵ maybe relevant to analyze, this includes:
 - Performance Frameworks – established to monitor grant performance over time.
 - Grant Budgets - analyze interventions prioritized for funding.
 - Programmatic Gap Table - analyze where Global Fund is filling country gaps.
 - Funding Landscape Table - analyze any gaps in funding related to gender within Global Fund-supported programs.
 - Prioritized Above Allocation Request (PAAR) - analyze the key additional interventions for investment not included in the allocation amount.
 - Implementation arrangement map - analyze the relationships between stakeholders engaged in grant(s) implementation.
 - Essential Data Table - analyze key epidemiological data and context.
 - Innovative Financing Documentation, if relevant to any country, examines any innovative financing mechanisms related to gender.
 - Funding Priorities from Civil Society and Communities Annex to identify and analyze community priorities that may relate to gender.
 - Gender Assessment - analyze the gender inequality context, gender barriers, and key gender-related recommendations for Global Fund-supported programs.
 - Grant Progress Updates will also be made available.

³⁵ For further information, please refer to the Funding Request Instructions document available here: https://www.theglobalfund.org/media/5743/fundingrequest_fullreview_instructions_en.pdf

The Global Fund will make available any additional documents that may be relevant for this evaluation and identified in the inception phase.

- b. **In-depth Country Studies** It is proposed that in-country data collection takes place for a sub-sample of grants, in 4-6 countries, from the larger portfolio analysis list. This will enable diverse stakeholder perspectives to be included in the evaluation, including representatives of women's, feminist organizations and gender-diverse communities and their organizations. A strong rationale, approach and plan for in-country data collection is essential in the technical proposal. Based on preliminary selection, applying selection criteria described above, the following countries are being considered for in-depth study Côte d'Ivoire, Ghana, Guinea, Lesotho, Pakistan and Tanzania. Final countries will be confirmed during the inception phase.

35. The conduct of this evaluation will be coordinated, where relevant, with other ongoing evaluations (e.g. HIV Prevention) during this time period.
36. The selected provider is expected to comply with the following ethical guidelines during all phases of the evaluation^{36 37} :
- a. Integrity – honest communication and actions; independence, impartiality and incorruptibility; professionalism.
 - b. Accountability – transparency about the evaluation purpose and actions; responsiveness to any questions, issues or events that arise; taking responsibility for honoring commitments; fair and accurate reporting to all stakeholders; and fair representation of diverse opinions and voices.
 - c. Respect – access to evaluation purpose and products; meaningful engagement and fair treatment of all stakeholders.
 - d. Beneficence – do no harm; ensure the overall positive contribution of the evaluation; maximize benefits for all at all levels; and ensure risks and benefits of the evaluation and its products are considered.

Evaluators will also be bound by the Terms and Conditions for the Purchase of Good and Services, including the Code of Conduct for Suppliers, as described in the RFP document.

37. The technical proposal is also expected to provide sufficient detail on the following:
- a. The expected limitations of the evaluation methods and any foreseen risks with a description of how these will be addressed.
 - b. The quality control mechanisms that will be applied at different stages of the evaluation process,
 - c. How the evaluators will approach the collection of confidential information and how they intend to operationalize a do-no-harm approach during data collection and analysis considering the potential sensitivity of the topic.

³⁶ UNEG evaluation ethical guidelines are available here: <https://www.unevaluation.org/document/detail/2866>

³⁷ https://www.theglobalfund.org/media/14881/iep_evaluation-learning-principles_guide_en.pdf

- d. The strength of evidence approach that will be used. The proposal is expected to explain how the strength and robustness of evidence will be assessed and documented (i.e., a ranking approach indicating the strength of evidence as major, moderate or limited could be included along with a detailed explanation for each category).

6. Evaluation Process

38. Once the evaluation team is on board, the evaluation will be structured in three main phases defined by accompanying activities as described below:

a. Inception Phase (approx. 3-4 weeks)

Onboarding: This will most likely occur in the week or so following the signature of the contract and will be conducted virtually.

All evaluation team members will be requested to sign a Non-Disclosure Agreement which covers issues related to handling confidential information.

A series of onboarding sessions will be organized by ELO with the evaluation team. The sessions will cover but are not limited to consultations on a) the evaluation process, with its key milestones and deliverables. b) roles and responsibilities of major stakeholders in the evaluation management and oversight; c) guidance and templates for the evaluation deliverables; d) overview of the available data and documents for desk review; e) clarity on technical issues related to the subject matter and the Global Fund modus of operation; f) discussion of the Theory of Change; g) country, grant and stakeholder mapping for data collection.

ELO will establish a TEAMS Space and will give access to the evaluation team members. This space will be used throughout the evaluation to share a) all guidance materials, templates and documents referred to in the onboarding b) Global Fund data and documents identified in the inception phases c) progress updates and deliverables submitted by the supplier.

Inception Report: At the end of the Inception Phase the Inception Report will be submitted for review adhering to ELO guidance on the structure of the report. The Inception Report will contain an executive summary, background & context, evaluation approach, evaluation framework, evaluation workplan and relevant annexes to the report. Once approved by ELO the evaluation team can move to data collection.

b. Data Collection and Analysis Phase (approx. 12-14 weeks)

The Evaluation Team to proceed with the independent collection and analysis of data and information as described in the approved Inception Report.

The Evaluation Team Lead and ELO will hold weekly meetings to review the progress of the evaluation and identify any areas where ELO can facilitate progress if required.

Toward the end of this phase, there will be virtual meeting(s) between the Evaluation Team and key stakeholders in which the evaluation team will present and discuss preliminary findings. The Evaluation team will be requested to submit a slide deck presentation in advance of the meeting(s) to present key analyses that are leading to the main findings and conclusions.

c. Reporting Phase (approx. eight weeks)

Adhering to ELO guidance on report structure and length, a draft Final Evaluation Report will be submitted at the start of this phase.

Based on the draft report, a workshop will be held with the evaluation team and key stakeholders (co-chaired by ELO and IEP) to discuss the recommendations in the draft report. A brief presentation summarizing the conclusions and recommendations will be submitted beforehand. It is expected that at least the Evaluation Team Lead and 1-2 team members will come **in person** (other team members to attend virtually) for this event to be held in the Global Fund Secretariat in Geneva.

Written feedback on the draft report and recommendations will be received from relevant stakeholders (User Group, IEP, ELO, etc.).

A Final Evaluation Report is submitted that addresses the feedback received on the draft report and is reflective of the discussions in the aforementioned meeting/ workshop. Once the final report has been approved by ELO, an Evaluation Brief and a Summative Slide Deck are also to be submitted as part of the final deliverables.

39. The Global Fund Evaluation Function has developed a Quality Assurance Framework.³⁸ to guide the process of review of the final report. Potential bidders may find reviewing this document helpful in considering proposal submissions. The QAF is of particular importance at the report-writing stage of the evaluation process but given the centrality and importance of the final report, all evaluation activities should be framed and informed by the logic and content of the QAF.

40. Upon ELO approval of the final evaluation report, the report will be assessed by the IEP using the QAF and the IEP will prepare a Commentary on the evaluation. The Global Fund Secretariat will prepare its management response. The intention is to publish the Final Evaluation Report alongside the IEP Commentary and Secretariat

³⁸ The Global Fund Evaluation Function Quality Assurance Framework (https://www.theglobalfund.org/media/13794/iep_quality-assessment_framework_en.pdf)

Management Response on the Global Fund website.³⁹ The evaluation brief and slide deck may also be posted here for external audiences.

7. Deliverables and Expected Timelines

41. A tentative time frame for the evaluation is provided below. The entire evaluation process from contract signing to the approval of the very final deliverables is expected to take about 8-9 months (target commencement of the inception phase is anticipated to be at the end of January 2025)
42. The approximate time of expected submission of the evaluation's main deliverables to ELO is outlined below. Exact dates will be confirmed during the inception. Payment will be made against deliverables once approved by ELO

Evaluation Core Deliverables and Approximate Due Dates⁴⁰

Deliverable	Submission Date
High-Level Workplan	10 working days after the contract signature
Final Inception Report	Mid-March 2025
Preliminary Findings Presentation	Early-June 2025
Draft Evaluation Report	Early July 2025
Summary Presentation of recommendations to be used in the Recommendations Workshop	Early July 2025
Final Evaluation Report	Mid-August 2025
Dissemination Products: Evaluation Brief and Summary Slide Deck	End- September 2025

8. Skills and Experience Required from the Evaluation Team

43. Institutions with a strong background in gender and evaluation of development effectiveness and public health are encouraged to submit a proposal. **The evaluation team should be gender balanced, culturally and geographically diverse with**

⁴⁰ The exact date to be set is based on the date of the final contract signing.

experience of working in different countries and contexts. The evaluation team should be composed of a team leader and additional team members. It will be important that the evaluation team is made up of team members with senior-level gender program expertise, strong gender evaluation experience, familiarity with HTM disease programs, and a team lead who has held a lead role in evaluations of similar scope/complexity.

44. The evaluation team will comprise a balance of relevant expertise and knowledge in the areas listed below:

Essential:

- Expertise in conducting similar or related comprehensive multi-sectoral evaluations and/or applied research work to assess gender equality programs and/or gender plans/strategies supported by organizations. Experience in conducting multi-country evaluations across thematic or cross-cutting program areas.
- Demonstrated experience in programming in gender equality and gender mainstreaming in different contexts.
- Sound knowledge of HTM disease programs in different contexts.
- Evaluation skills and proficiency in using participatory, people-centered, and inclusive evaluation methods including gender-sensitive, gender-responsive, and feminist evaluation methods and ethical research practices in relation to these methods.
- Strong quantitative and qualitative analytical skills and use of data analysis approaches and applications, such as, but not limited to, Machine Learning / Natural Language Processing -to manage large standardized data sets and implement portfolio-wide analysis of grant documentation.
- The Evaluation Team Lead must have a minimum of 10 years experience in managing complex and/or multi-county evaluations and experience of evaluations with a gender focus.
- Fluency in English and French

Highly desirable:

- Evaluation team lead and/or team members already based in Africa, Asia, or South America with a work record of gender-related evaluations in countries in these regions.
- Familiarity with the Global Fund and with Global Fund grant design and program implementation at the country level.

- Other language proficiency in the team, in particular Spanish and Portuguese
45. It should be noted that the evaluation team is expected to organize all activities (travel, interviews etc.) in the data collection phase, therefore the evaluation team should include appropriate project management and administrative support to the evaluation process. It is also expected that provisions are made for document editing and proofreading.
46. The technical proposal should describe the team structure and indicate the role and responsibilities of different members including the level of effort allocated to each team member.
47. The technical proposal should indicate how diversity has been considered in the team composition, particularly in respect to gender and geography but also other aspects as relevant to the evaluation topic.

9. Annexes

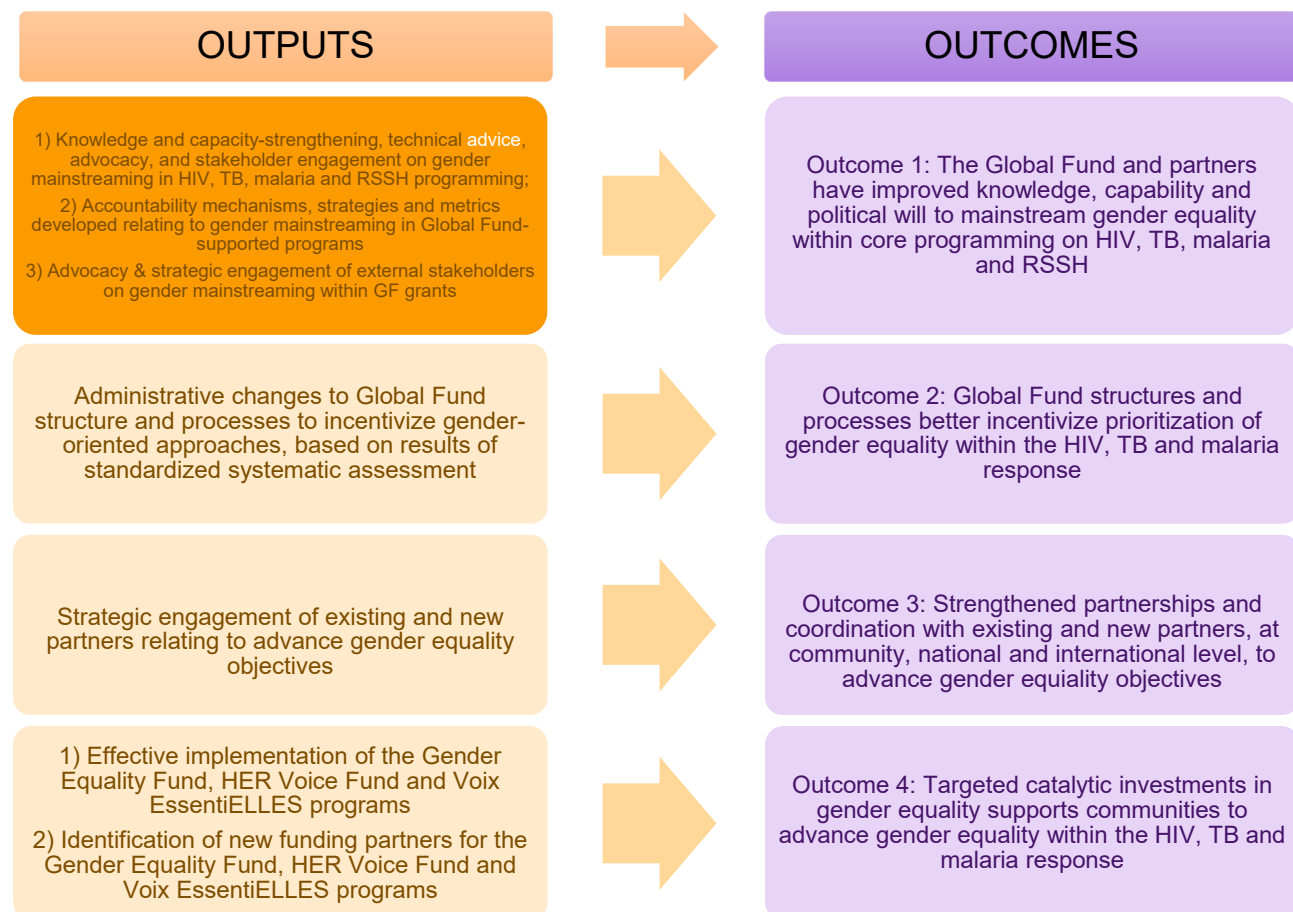
Annex 1: List of Acronyms and Abbreviations

AGYW	Adolescent Girls and Young Women
AI / NLP	Artificial Intelligence / Natural Language Processing
CCM	Country Coordination Mechanism
CRG	Community Rights and Gender Department
CHW	Community Health Workers
ELO	Evaluation and Learning Office
FR	Funding Request
GEM	Gender Equality Marker
GC	Grant Cycle
HRH	Human Resources for Health
HTM	HIV, TB and Malaria
IEP	Independent Evaluation Panel
KEQ	Key Evaluation Question
KPI	Key Performance Indicator
M&E	Monitoring and Evaluation
SI	Strategic Initiative
SO	Global Fund Strategic Objective
PR	Principle Recipient
TA	Technical Assistance
TERG	Technical Evaluation Reference Group
ToC	Theory of Change
ToR	Terms of Reference
TRP	Technical Review Panel
USD	United States Dollar
QAF	Quality Assessment Framework

Annex 2: Supplementary Information

Theory of Change (TOC) Excerpt

Desired Impact: “HIV, TB, malaria and RSSH policies and programs maximize gender equality, and more effectively meet the needs of communities”



Annex 3: List of References

Delivered by women, led by men: a gender and equity analysis of the global health and social workforce.
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https://www.theglobalfund.org/media/4755/fundingmodel_applicanthandbook_guide_en.pdf

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https://www.theglobalfund.org/media/5728/core_gender_infonote_en.pdf

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https://www.theglobalfund.org/media/4309/fundingmodel_modularframework_handbook_en.pdf

Semi-Annual Risk Management Report 50th Board Meeting GF/B50/20 14-16 November 2023, Geneva, Switzerland https://archive.theglobalfund.org/media/13544/archive_bm50-20-risk-management_report_en.pdf

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https://www.theglobalfund.org/media/5536/core_malariagenderhumanrights_technicalbrief_en.pdf

Technical Brief Gender Equality, Allocation Period 2023/2025
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https://www.theglobalfund.org/media/5536/core_malariagenderhumanrights_technicalbrief_en.pdf

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