

# **13<sup>th</sup> Meeting of the Independent Evaluation Panel Summary Notes**

17-18 March 2026

Geneva, Switzerland

## **Purpose**

This document presents the Report of the 13<sup>th</sup> Meeting of the Independent Evaluation Panel (IEP), held virtually from 17 to 18 March 2026.

**Agenda items.** The meeting comprised nine (9) agenda items.

**Decisions.** One decision was taken at this meeting. A list is annexed to this report (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**

- The IEP will revise its presentation on the learning approach and share it with SC Leadership. As an SC member, the IEP Chair can relay the IEP's thinking on learning to the Strategy Committee through discussions on the future of the Evaluation Function.
- The ELO will develop a one-pager on its learnings from the first rapid assessment process.

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# Report

## Opening

The IEP Chair summarized the agenda for the 13<sup>th</sup> meeting of the IEP and welcomed attendees, including the Strategy Committee Chair and the new Head of Strategy and Policy (SPH), an ex-officio member of the IEP.

The IEP Chair requested disclosures of conflict of interest from IEP members; none were raised.

The IEP Chair shared reflections on the recent Strategy Committee (SC) and Board meetings and highlighted the focus on the Grant Cycle 8 (GC8) strategic shifts in the Global Fund's portfolio-wide investment approach and the *Audit Report of the Office of the Investigator General on the Independent Evaluation Function*, referred to as the OIG Audit Report.

The Head of SPH provided strategic updates and explained the shifts that are guiding implementation of GC8, which aim to support sustainable program design and effective transition from Global Fund financing. She reinforced that the resources available to the Global Fund relative to global health institutions indicated substantial responsibility to use money wisely in response to health needs. The Head of SPH flagged the unprecedented number of countries that would need to prepare for transition but noted that all transitions were a minimum of four years away, giving countries and technical partners time to prepare.

In response to an IEP Member query on how the shifts were developed and if any factors beyond epidemiology and financial resources were considered, the Head of SPH shared that key shifts were not only examined vertically but through the lens of technical prioritization in collaboration with partners.

The IEP Chair asked if discussions on transition and efficiency were informed by past evaluations. The Head of SPH responded that only five countries had transitioned in the past 25 years, limiting the learning available. Some IEP members highlighted the work of the Technical Review Panel, Technical Evaluation Reference Group, and Alliance for Health Policy and Systems Research which could have additional insights.

## Update on the OIG Audit of the Evaluation Function

This session included a presentation from the OIG on the Audit of the Independent Evaluation Function and from the SC Chair on guidance on the way forward for the Independent Evaluation Function, including IEP engagement for the remainder of the year.

### Summary of the presentation by the OIG:

The Inspector General and OIG presented the Audit of the Independent Evaluation Function, including the audit objectives and scope; the rationale behind the Audit Report and its timing; and key questions that the Global Fund Board should consider when considering any changes to the Function. The Inspector General highlighted that the Audit found the Independent Evaluation Function ineffective. This rating represents collective design and implementation choices and requires a full rethink of the evaluation function rather than incremental changes.

## Discussion summary:

- **Results and recommendations:** The IEP agreed that the OIG Audit Report flagged legitimate questions regarding the current performance of the Independent Evaluation Function. However, the tools and practices set up by the Evaluation Function– such as the standard operating procedures and quality assessment framework – were noted by the IEP as supporting the quality of independent evaluations. The Inspector General concurred stakeholder feedback on individual evaluation reports did not question their soundness and quality, though report timing and utility of recommendations were issues raised. It was noted that the OIG Audit Report did not make recommendations or generate agreed management actions but rather served as a framework to support decision-making on the future Independent Evaluation Function.
- **Process and criteria:** IEP Members noted the analytical limitations of the audit in looking only at the ELO and IEP rather than looking more broadly at how meaningful knowledge for decision-making is generated and used in organizations. One IEP Member noted that the audit scope went beyond an audit and that the UN Evaluation Group and other organizations' evaluation functions typically undergo peer-to-peer reviews. The Inspector General emphasized that methodology discussions distract from the broad stakeholder feedback that the Independent Evaluation Function is ineffective. However, it was acknowledged that the unprecedented and volatile global funding environment presented challenges in defining a clear path forward. The factors outside of the Evaluation Function control, such as procurement timelines, flagged by one IEP Member, were noted by the OIG as not unique to evaluations and requires mitigation across the organization, including for grants.
- **Distinguishing between evaluations and audits:** One IEP member noted that audits are traditionally compliance-based and questioned whether the audit took a purely compliance-based approach. The Inspector General responded that the OIG focuses on process, models, effectiveness and efficiency through the lens of business definitions of a given audit subject, which was the Board mandate for the Independent Evaluation Function, in this case.
- **Future of learning:** One IEP Member queried how the audit would affect systematic organizational learning and address its constraints, and another IEP Member suggested looking at iterative learning when it comes to rapid, focused decision-making. The OIG agreed that the Independent Evaluation Function would benefit from an agreed definition of learning.

## Summary of the presentation from the Chair of the SC:

The SC Chair provided perspective on how the Strategy Committee would take forward the audit's findings and consider revisions to the Evaluation Function this year. He emphasized evaluations as a core pillar of Global Fund decision-making and learning architecture, playing a core role in strengthening the effectiveness of investments. He underscored the seriousness with which the SC took the audit findings and emphasized the timeline for considering revisions to the Evaluation Function would be ambitious, with a final decision to be presented to the Board by October 2026 and implementation to immediately follow.

The SC Chair shared that in light of the audit findings, the SC agreed to pause the evaluations in the 2026 evaluation workplan which had not yet started or were in early stages. He highlighted that due to the reduced workplan and in anticipation of revisions to the Independent Evaluation Function, the IEP should only undertake the work that is directly related to finalizing the continuing evaluations for 2026 on an as-needed basis and through virtual modalities. The IEP should not plan to produce a 2026 IEP Annual Report or contribute to a 2027 Evaluation Workplan until after a Board decision on the future of the Function. The SC Chair noted that the IEP Chair would remain an ex-officio member of the SC, providing valuable input and perspective. The SC Chair acknowledged that transition is

never easy and thanked the IEP for its flexibility and continued commitment to maintaining the Independent Evaluation Function's credibility.

The CELO flagged the audit results as a humbling experience, prompting serious action and reflection on what and how to do better in the future. The CELO also cited peer organizations experiencing similar changes in response to shrinking resources, a fast-changing landscape, the need to rapidly generate evidence and incorporation of artificial intelligence (AI). In moving forward, the CELO highlighted the support of the Chief of Staff's office, while noting that it would be difficult to balance the evaluation needs of the Secretariat with those of the SC – while ultimately remaining accountable to the beneficiaries of Global Fund investments.

#### **Discussion summary:**

- **Decision-making and stakeholder engagement:** One IEP Member noted that the evaluation topics often try to satisfy everyone, resulting in findings and recommendations that are too broad. Another IEP Member queried whether uptake of recommendations was inhibited by lack of engagement by key stakeholders early enough in the evaluation process. The SC Chair agreed that early engagement across the Secretariat, SC and Board was necessary. The CELO added that moving away from an SC-approved annual calendar of broad topics and toward a more flexible annual learning agenda would likely better support immediate decisions and increase stakeholder engagement.
- **Risk and evaluation findings uptake:** The IEP Vice Chair noted that the Global Fund has gone through multiple iterations of evaluation functions and asked whether this reflected risk-averseness, which could impede utilization of an evaluation. The SC Chair responded that the SC looks at evaluations in terms of what is needed to support decision-making, and relevance and timeliness of evaluation findings are critical to do that, but the SC is only one part of the discussion; the Board and Secretariat have roles as well. The Head of SPH flagged that revisions to the Independent Evaluation Function would follow the approach laid out in the audit on the need for form to follow function.
- **Learning:** The IEP Vice Chair echoed the OIG's call for the organization to define learning and noted that this would be a topic for discussion later in the 13<sup>th</sup> IEP Meeting.

#### **Chief Evaluation and Learning Officer (CELO) Operational Update**

The IEP Chair reminded the IEP that changes to the 2026 evaluation workplan presented by the CELO would affect IEP work for the remainder of 2026.

#### **Presentation summary:**

The CELO presented an update on ELO 2026 objectives, the operational status of on-going evaluations and ELO-related action items from previous IEP meetings. The CELO highlighted the need for the ELO to pivot into acting as evaluation and evidence product brokers in addition to their role as managers of evaluations, with an emphasis on rapid delivery of topical information using existing evidence over primary data collection.

The CELO highlighted the following changes in the 2026 workplan as agreed with the Strategy Committee and in response to the findings of the OIG Audit Report:

- **Continuing evaluations:** HIV Prevention Evaluation; Gender Evaluation; Human Rights Rapid Assessment; COVID-19 Response Mechanism/Pandemic Preparedness and Response Evaluation. Each of these evaluations/rapid assessments are well underway or near final.

- **Paused evaluations:** Integrated Service Delivery; Supply Chain Rapid Assessment; Mid-term Review; AI and TB Diagnostic Innovations Rapid Assessment. These evaluations/rapid assessments had not yet started or were in early stages.

Regarding the action items arising from previous IEP meetings, the CELO noted that all items had been completed aside from two items in progress, namely the IEP-ELO joint review of guidance on applying a gender lens to evaluations and the IEP-ELO joint revisiting of approach to IEP commentaries. The CELO noted that these would be paused given potential revisions to the Function this year.

#### **Discussion summary:**

- **Learning in light of the OIG Audit Report:** The IEP Chair requested the CELO’s feedback on learnings, challenges preventing change and the process of ELO contributing to the future of the Independent Evaluation Function. The CELO responded that the Function would have to move away from business as usual of strictly governed eight- to 12-month evaluations and toward a more proactive, dynamic approach using existing evidence and rapid assessment and synthesis approaches and products. The CELO noted the OIG Audit Report as an opportunity for the evaluation function to demonstrate its own learning capabilities through evolution.
- **Leadership engagement and appetite for evaluations:** The IEP Vice Chair echoed earlier IEP comments on the importance of engaged organizational leadership and asked about the extent to which learning culture has been demanded, supported and demonstrated by leadership. The CELO flagged the difficulty of attracting attention to evaluations, noting the urgent need to cope with unprecedented challenges in the broader context over the last 18 months. In response to the IEP Chair’s question on the organizational appetite for evaluations, the CELO flagged the general willingness to address findings – even negative ones – but that narrower, rapid evaluations with focused recommendations that are timelier are needed moving forward.
- **Budget flexibility:** The IEP suggested that direct and more flexible budget management (within limits of Board allocated annual amounts) might allow the ELO to more responsively address the rapidly shifting environment and emerging issues, ultimately supporting more informed decision-making. The CELO agreed that structuring the budget through “buckets”, bodies of work and related key decisions and their appropriate evidence products rather than strictly ringfenced thematic evaluations would allow the ELO to be more opportunistic.
- **IEP role:** The IEP Vice Chair requested clarification on the IEP’s role in assuring the quality of the Evaluation Function broadly – in addition to overseeing individual evaluations – to which the CELO responded that the SC is best positioned to provide general oversight. It was noted that the IEP Focal Points would continue in their role as previously planned for the C19RM Evaluation despite other changes in the 2026 evaluation calendar.

#### **Update on Ongoing Evaluations**

##### ***COVID-19 Response Mechanism and Pandemic Preparedness and Response (C19RM/PPR) Evaluation***

#### **Presentation summary:**

The ELO presented an update on the ongoing C19RM/PPR Evaluation, including how the evaluation process underway responded to the OIG Audit Report findings, updates from discussions with the Grant Management Division on country insights selection confirmation– considering the Funding Request processes underway – and development of a theory of change for the evaluation. The

importance of field work, including coordination with the planned OIG country audits was noted as important to collect relevant data and avoid duplication.

#### **Discussion summary:**

- **Overall:** The IEP Focal Points expressed their appreciation for the thorough independent evaluator selection process and for addressing comments on the inception report and requested the comment matrix that was sent to the supplier be shared with the IEP. The ELO highlighted that the independent evaluator was required to address 50 to 60 comments on the inception report after an initial review by the ELO team prior to it being shared with the User Group and IEP Focal Points.
- **Decision-making and stakeholder engagement:** The ELO was asked what decisions would be informed by this report and one IEP Member encouraged interim findings already be shared with the User Group for feedback. The CELO reminded the IEP that PPR is part of the Global Fund Strategy, necessitating an evidence base for how its PPR mechanism, the C19RM, performed and how other such mechanisms through global health institutions could be done in the future. The ELO flagged that the findings would be shared through the regular preliminary findings workshop, and that individual pieces might be shared earlier if useful and provided the evidence is of adequate quality, noting that User Group Members have limited time available. One IEP Member queried if the availability of User Group members for evaluation purposes reflected its perceived level of importance, to which the IEP Focal Point responded that findings workshops typically have strong user group engagement.
- **Adjustments due to Audit findings:** The IEP Vice Chair asked if there were any adjustments anticipated to this evaluation in light of the OIG Audit Report. The CELO emphasized the collective review of the draft evaluation report; the application of the quality assurance framework and quality assurance steps earlier in the process; review of analyses, fieldwork observation by ELO managers, as receiving more attention than in the past.
- **Learning across evaluations:** One IEP Member flagged the need for the Evaluation to elaborate more on the quality of analysis and on the country insights operational issues. The ELO and IEP Members agreed on the importance of articulating that the country insights were not simply anecdotal but offered value and learnings for others. Additionally, the ELO was encouraged to ensure that independent evaluators be informed of lessons learned on use of AI and natural language processing, in response to which the ELO highlighted ongoing discussions between suppliers, i.e. the supplier for the C19RM Evaluation and the one that carried out the HIV evaluation.

#### ***Integrated Service Delivery Evaluation***

##### **Presentation summary:**

The ELO presented an update on the Integrated Service Delivery consultancy that had taken place in 2025. Per IEP request, a theory of change was developed as part of the consultancy to depict the causal pathways underpinning the rationale for service integration. The ELO highlighted that while the evaluation would not be moving forward (despite the evaluator selection process taking place in early 2026), this theory of change was used by the Resilient and Sustainable Systems for Health (RSSH) Team for integration workshops at country level.

##### **Discussion summary:**

- **Independent evaluator selection process:** The IEP Focal Point flagged that the selection process was split into two stages, one for expressions of interest and a second invitation-only

stage for full applications. It was flagged that the high number of expressions of interest received (potentially reflecting the changing marketplace in Global Health) were of varied quality and format which required significant effort from the TEC. If ELO expects similar volumes of submissions for the future, the IEP Focal Point suggested several specific steps to improve efficiency of the process and improve the quality of submissions. Namely, the ELO could more specifically define requirements at the expression of interest stage, including specificity of expected evaluation-related expertise and experience and disqualifying factors.

## **Gender Evaluation**

### **Presentation summary:**

The ELO presented progress on the nearly-complete Evaluation of Integration of Gender Approaches in HIV, Tuberculosis and Malaria Programs, highlighting that, though the topic was of critical importance, the evaluation's timing coincided with the reprogramming of GC7 grants and it was noted that primary data collection and country visits were delayed, therefore delaying the finalization of the report.

### **Discussion summary:**

- **Overall:** The IEP Focal Points expressed appreciation for the ELO, other Secretariat teams and the independent evaluators in developing a rigorous and balanced report.
- **Report length:** IEP Members flagged that the current report length was an outstanding issue. The ELO was suggested to provide future suppliers with a strict page limit, which the IEP Chair flagged could be a challenge if the IEP and ELO have many comments to be addressed.
- **Evaluation focus:** The ELO flagged that many of the evaluation findings, conclusions and recommendations were relevant for the partnership as a whole and not actionable by the Secretariat alone. One IEP Member echoed earlier concerns from the IEP and ELO that broad thematic evaluations yield overly general recommendations.
- **Learning across evaluations:** One IEP Member encouraged the ELO to synthesize complementary components of this evaluation and other evaluations as a learning product. Another IEP Member suggested that future independent evaluator onboarding consider how to prepare them for responsiveness in conditions of emergence and uncertainty.

## **Learning Approach**

The IEP Vice Chair opened by reminding the IEP and ELO that this agenda item was discussed at previous IEP meetings and was intended for input rather than recommendation.

### **Presentation summary:**

The IEP presented a document for facilitating evaluation-driven learnings. While learning was not precisely defined in the presented document, need for behavioral change was articulated as arising from a combination of evaluation evidence and the institutional space, the latter of which would need to shift from being reporting-oriented to learning-oriented. The presentation also covered evidence-based mechanics of organizational learning, pillars of evidence-driven change, cross-evaluation signals, strategic steps to embed learning, moving from recommendation tracking to logging behavioral change and how to cultivate true impact through cumulative, evidence-driven adaptation.

### **Discussion summary:**

- **Overall:** The CELO welcomed the IEP’s presentation and noted that these ideas could contribute to the rethink of the learning activities within the Independent Evaluation Function. The CELO flagged that the current institutional context, including limited resources and staff reduction, presented challenges and noted that the Global Fund does not have a dedicated team responsible for learning across all organizational functions. The CELO also noted that “evidence-based decision-making” does not appear as an organizational priority set by the MEC. However, the CELO added that there were still entry points, including the organization’s appetite for technical, evidence-based decisions and possibly a learning plan.
- **Definitions and goals of learning and evidence-generation:** The ELO asked the IEP to clarify whether behavior change alone was the end goal of learning – and who was intended to make these changes – and on the definition of different forms of learning and evidence generation within the organization. IEP Members responded that behavior changes can be positive or negative, suggesting that an evaluation function measure progress on specific processes or potential areas of gaining efficiency, particularly given discussions on organizational efficiency.
- **Institutional learning and political will:** IEP Members asked about the openness of organizational leadership to learning and suggested developing a better understanding of political motivations and their underlying determinants, including through examining cross-evaluation learnings. The IEP Vice Chair noted the general dynamic and adaptive nature of the Global Fund based on learning but noted that willingness to change the business model and/or specific areas – such as sustainability and transition – seemed less amenable to learning.
- **Evidence precedents and curation:** The CELO flagged the issue of evidence curation, including a large volume of reports and lack of central repositories, the confidential nature of some OIG-collected information and conflicting database entries. The IEP Vice Chair suggested that the organization’s available data could preemptively have metadata added for use by evaluations or AI tools.
- **Learning from other institutions:** The CELO asked the IEP to provide recommendations of other organizations that build core data assets and learning culture well. One IEP Member flagged the United Kingdom’s Foreign, Commonwealth & Development Office’s practice of assessing the level of change three months following a recommendation, or of other governments’ parliaments holding their prime minister accountable for change within a specified timeframe.
- **Next steps:** The SC Representative to the IEP suggested that this presentation be part of the SC’s phased rethink of the evaluation function. The IEP Chair and Vice Chair discussed whether this material was sufficiently fit-for-purpose to support the SC as they consider revisions to the Evaluation Function. The Secretariat advised that the IEP’s views on learning be channeled to the SC through the IEP Chair, who is a member of the SC.

**Action items:**

- The IEP will revise its presentation on the learning approach and share it with SC Leadership. As an SC member, the IEP Chair can relay the IEP’s thinking on learning to the Strategy Committee through discussions on the future of the Evaluation Function.

**CELO Learning and Synthesis Report**

**Presentation summary:**

The CELO presented an outline of the Learning and Synthesis Report, including key takeaways from evaluations published between 2024 and 2025 and key themes central to the goals of the Global

Fund Strategy. It was highlighted that the limited number of reports it covered allowed for focus on high-level, thematic signals that emerged among and between reports.

The report would highlight two strategic observations and supporting themes related to the Global Fund Strategy's components on community systems and the status of recommendations and Secretariat actions on accepted and partial recommendations. It would also include a summary and forward-looking introduction by the CELO to set the tone for evolving needs and expectations for evaluation and learning. The CELO flagged next steps that included completion of the full report, internal review and cross-reference of recent Governance documents.

#### **Discussion summary:**

- **Overall:** The IEP Chair flagged the complementarity of the report with the IEP's observations on learning and highlighted the alignment of the report structure with the Global Fund Strategy. IEP Members expressed appreciation for the proposed focus and, echoing earlier comments, one IEP Member asked if repeated or known evaluation findings could be low-hanging fruit for the organization to address, particularly related to power asymmetries. The CELO agreed with the IEP suggestion that the report reflect hidden as well as obvious signals coming out of evaluations.
- **Follow-up on recommendations:** IEP Members queried whether and to what extent recommendations were actioned into measurable behavior changes, and what incremental steps in this process looked like. Specifically, one IEP Member asked about follow-up on the finding that applicants were asked to review a burdensome amount of guidance for Funding Requests, which the CELO agreed should be investigated as part of the report.
- **Decision segmentation and audience altitude:** The IEP Vice Chair highlighted that, even if policies respond to recommendations, the mechanisms that facilitate their implementation may be within the scope of control of the Secretariat rather than the SC, ultimately limiting recommendation effectiveness. The IEP suggested segmenting recommendations by type and audiences to support follow-up. In response to a query on obstacles to responding to evaluation findings, the CELO agreed that, for key recommendations, the Executive Director might be appropriate to engage.
- **Data availability:** One IEP Member recalled evaluation processes revealing issues with internally held data, requiring independent evaluators to seek data through new surveys. The CELO noted an internal data governance group, flagging that the group's scope was limited and had recently reduced capacity.

## **2025 IEP Annual Report**

#### **Presentation summary:**

The IEP Chair noted that the IEP had already reviewed the draft 2025 IEP Annual Report but highlighted an additional paragraph to be added in the recommendations section of the report emphasizing the need for the Global Fund to actively champion evaluation and learning and recommending budgetary flexibility within the allocated ELO budget to allow agile responses to emerging evaluation and learning needs.

#### **Discussion summary:**

- **Member representation:** After questions on process were raised, the IEP Chair asked if both Legal and ex-officio IEP Members were required to review the report before its finalization. It was clarified that as the IEP Annual Report is submitted to the SC and Board as an official governance document, Legal should review and that ex-officio members, although non-voting, are IEP members and should have an opportunity to provide input.

- **Updates to report:** The Head of SPH requested that wording be updated to affirm the Secretariat’s desire for an evaluation function, which receives broad support even when the altitude and relevance of recommendations impede their full implementation. The IEP was also asked to clarify whether the request for budgetary flexibility was meant to be within the existing budget allocation or a request for additional resources, to which the IEP confirmed it was the former.

**Decision point:**

- The IEP approved GF/IEP13/DP01: The Independent Evaluation Panel approves the substance of the 2025 IEP Annual Report (GF/IEP13-Rev 1) and delegates its finalization to the Chair of the IEP based on discussion during the 13<sup>th</sup> IEP Meeting.

**Human Rights Rapid Assessment**

**Presentation summary:**

The CELO presented an update, noting that the rapid assessment format had been a success. The CELO noted the sensitivities given the nature of the report and highlighted that final products would need to be tailored to various audiences.

The CELO shared the assessment questions, sustainability framework and findings, which focused on integration, contextual factors, the GC7 reprioritization, resilience, national ownership and adaptation, and sustainability. The considerations for actions related to building strong political commitment, investment in communities and community-led programming, and expanding feedback mechanisms to foster accountability.

**Discussion summary:**

- **Overall:** The Secretariat expressed their appreciation for the rapid assessment’s depth, specificity and utility, which would contribute to improving provision of support, particularly in countries preparing for transition. The IEP Focal Point agreed that the report contained richness and depth, though the IEP highlighted several areas in which content could be improved. The CELO noted that the IEP Focal Point would receive updates on the final report’s progress and that future rapid assessments could expand on how analytical conclusions were reached.
- **Rapid assessment format:** Given that this was the first rapid assessment, the IEP Chair asked for feedback on the quality of the report given that IEP engagement is differentiated for rapid assessments. IEP Members provided positive feedback, though it was also suggested that future rapid assessments cover fewer questions, which the CELO echoed as an important boundary.
- **Results:** The SC Representative acknowledged that the IEP Focal Point provided comments on an accelerated schedule and, in combination with the Secretariat’s feedback that the rapid assessment directly influenced prioritization, demonstrated fulfillment of the vision for rapid assessments’ potential. Regarding any surprises among results, the CELO shared some contradictory findings in certain countries that had not been anticipated.
- **Political will:** One IEP Member asked about whether building political commitment for human rights was feasibly in scope for the Secretariat. The CELO highlighted that the unique Global Fund partnership of private sector, government, non-governmental and civil society organization, and other stakeholders provided many levers, allowing the organization to influence political will to some degree, but bounded by its mandate; the Secretariat reinforced this, adding the report affirmed the role of the Global Fund as a key donor, in collaboration with implementers.

- **Community-led monitoring:** In response to an IEP comment on community-led monitoring, the Secretariat flagged the importance and complementarity of investing in responsive action to issues monitored, requiring a broader set of programmatic tools.
- **Next steps:** The CELO noted that the Human Rights Rapid Assessment would move forward toward finalization of the report, including soliciting IEP endorsement. The IEP Chair requested the ELO to produce a concise set of learnings from the rapid assessment format.

**Action items:**

- The ELO will develop a one-pager on its learnings from the first rapid assessment process.

**HIV Prevention Evaluation**

**Presentation summary:**

The ELO presented a summary of the HIV Prevention Evaluation Report. The Evaluation’s purpose was 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. The ELO shared that the innovative approach to this evaluation yielded valuable insights during a time of high political sensitivity. It was also flagged that this marked the first extensive use of AI in an evaluation.

The ELO highlighted key next steps, including approval of the final report by the CELO, its endorsement by the IEP, the IEP commentary, the Secretariat Management Response, submission of relevant documents to the SC and the planning for and dissemination of evaluation products.

**Discussion summary:**

- **Overall:** The IEP Focal Point expressed appreciation for the process and for Secretariat engagement on its results and queried the role of theories of change in future evaluations, given that this evaluation was not built around it. The ELO acknowledged this feedback while noting that the purpose of this evaluation was not to test the theory of change.
- **Specificity of recommendations:** Echoing previous discussions in the meeting, the IEP noted that the evaluation yielded generic recommendations and missed the opportunity to challenge business as usual. The Secretariat confirmed that the recommendations were technically sound and that greater specificity would come when nuancing and translating them into region- and country-specific actions. The ELO added that the independent evaluators delivered on their task, yielding findings appropriate for the evaluation’s altitude, but noted the challenge, for example, to clarify feasible pathways for expanding biomedical services, given current financial constraints.
- **Decision-making support:** The IEP Vice Chair asked if this Evaluation would support any specific decisions. The Secretariat noted that the Evaluation would help with targeting investments while preparing for and implementing the GC8 strategic shifts, noting that partners would be asked to support with responding to Evaluation recommendations.
- **Supplier pool:** The IEP Focal Point highlighted that the report’s quality reflected the independent evaluator’s familiarity with Global Fund and asked how this familiarity could be built in other prospective independent evaluators.
- **Ethical guidelines:** The IEP Focal Point flagged the ethical guidelines adhered to by the independent evaluator, which could be better articulated in the final report. The CELO pointed out that ethical conduct is also part of the Global Fund’s evaluation and learning principles to which all suppliers must adhere.

- **Next steps:** The ELO will continue toward finalizing the report and seek IEP endorsement after CELO approval.

## **Use of Artificial Intelligence (AI) in Global Fund Evaluations**

The IEP Vice Chair introduced this topic by sharing that the field is moving fast and the presented material might soon be outdated, but for now reflected independent evaluators' cumulative experience in using AI, which, in synthesis with other experiences could potentially offer an approach for future evaluations.

### **ELO presentation summary:**

The ELO presented the objective of the session, namely, to learn from the use of AI in evaluations, including lessons learned and experiences to date from Imbizo and the evaluations on Malaria Sub-National Tailoring, Integration of Gender Approaches in HIV, Tuberculosis and Malaria Programs, and HIV Prevention. The ELO flagged challenges such as technical limitations, the need to reconfigure approaches, slow document ingestion, inconsistent results and hallucinations, high cost, intensive time and effort required, and the risk of overestimating AI capabilities. Overall, the ELO noted that the results of using AI and natural language processing (NLP) varied by use case and would be considered for future use as a supplementary tool, while not replacing human evaluators.

### **Itad presentation summary:**

Itad shared its experience of AI use for the Global Fund Evaluation of HIV Prevention, which yielded the insight that AI cannot replace evaluators but would change the evaluator role. The Global Fund is at the forefront of using AI for evaluations based on Itad's experience. Itad also provided an overview of the AI and machine learning solutions used in the evaluation, which analyzed over 2,000 documents using the enterprise version of a large language model (LLM) with strong data governance. Itad reported that AI added the most value when tightly scoped and supervised, that chunking and iteration were non-negotiable, and that human judgement remained critical for accuracy and nuance. Overall, Itad recommended:

- Setting expectations of AI capabilities early in the project.
- Designing a structured AI workflow.
- Investing in prompt engineering and templates.
- Applying rigorous quality assurance.
- Planning realistically for time, skills and governance.

### **Summary of discussion with Itad:**

- **Overall:** The ELO emphasized that across all cases, AI did not replace evaluators; rather, it functioned as an additional tool requiring continuous validation, iteration, and expert judgment. One IEP Member asked if the AI tools were equivalent to a junior analyst, to which Itad responded that the LLM used was closer to a mid-level analyst that improved performance at a faster rate than a human, while still requiring a human with evaluation knowledge as oversight.
- **Value for money:** IEP Members asked if AI costs were weighed against its overall value-add. Itad highlighted that the use of AI came at a net cost for their organization in this instance, but the experience would support more accurate costing and adept use of AI tools in the future. Additionally, the IEP Vice Chair asked if this evaluation's LLM could be used for other evaluations requiring the same data sets and if this would bring the costs down for the future.

The IEP also asked a more general question on how the tools built for this evaluation, like AI memory and/or knowledge graphs, could support future evaluations. Itad noted that this would depend on the evaluation context and the source documents used, as LLM-based tools are not static and may require substantial redesign when queries or data sources change.

### Summary of IEP discussion:

- **Overall:** The IEP commended the Global Fund’s embrace of innovative tools, while flagging the resource-intensive experience of using AI tools.
- **Supplier pool:** One IEP Member queried to what extent ELO with its investments is shaping the market of evaluation suppliers by giving an opportunity to build capacity in AI, with the IEP Vice Chair flagging the risk of having created a competitive advantage. The CELO highlighted that AI expertise was held by firms in both the global South and global North providing some specific examples, and that the Global Fund is influential across many markets, such as in supply chains. CELO emphasized that as has been the commitment, ELO would continue to ensure a diversity of partners.
- **Tools:** The IEP asked about whether the AI context framework developed within this evaluation could be used by ELO to carry out future analysis using AI with or without external suppliers. The ELO agreed on the importance of building upon this evaluation, and possibly taking an even more broad approach, structuring knowledge about the organization and the three diseases into a knowledge graph, while noting that this is not presently feasible given resource constraints across the Secretariat. The IEP Vice Chair suggested the evaluation function remain open to the possibility and consider incorporating the TERG’s database of evaluation data as well.
- **Data protection:** An IEP Member asked if independent evaluators could be contractually required to hand in to ELO datasets with AI memory systems, to which the ELO responded that this handover – as well as the removal of Global Fund data on external data systems – can be contractually required. One IEP Member queried what concerns the Secretariat had about AI use for evaluations related to data protection. Legal shared that the Board had expressed support for the use of AI but that the Secretariat was mindful to mitigate potential security risks and impact on individuals related to the insecure handling of private information. Legal highlighted that, overall, there is an opportunity for the organization to mature its data governance practices to lower the risk linked to the use of AI, as such practices are currently in line with information technology best practices but not specifically designed to optimize the safe availability of data for AI tools.

### Closing

IEP Leadership and the Secretariat presented the outstanding action items arising from previous and current IEP meetings for a brief discussion, noting that the Independent Evaluation Function’s current transition period would make it difficult to see all action items through to completion.

The IEP Chair and Vice Chair reflected on the sessions and enriching discussions at this meeting, particularly on learning. It was flagged that the IEP Chair would continue to be part of deliberations on the future of the Independent Evaluation Function as an ex-officio SC Member, through which IEP Members opinions could be shared. The IEP Chair and Vice Chair expressed their appreciation to the IEP and Secretariat for their contributions to this meeting.



## Annex 1: Decisions

Decision Point	Decision Point Text
GF/IEP13/DP01	The Independent Evaluation Panel approves the substance of the 2025 IEP Annual Report (GF/IEP13/03 Rev 1) and delegates its finalization to the Chair of the IEP based on discussion during the 13th IEP Meeting.

## Annex 2: Document List

Reference	Document Title	Document Type
GF/IEP13/01	Agenda	-
GF/IEP13/02	Chief Evaluation and Learning Officer Operational Update	For information
GF/IEP13/03	2025 IEP Annual Report	For decision
GF/IEP13/04	Failing better for impact: A learning discussion paper	For input
GF/IEP13/05	CELO Learning and Synthesis Report	For input
GF/IEP13/06	Use of Artificial Intelligence in Global Fund Evaluations	For input
GF/IEP13/07	Presentation of the Final Report: Evaluation of HIV Prevention	For input
GF/IEP13/08	Rapid Assessment on Human Rights Breaking Down Barriers	For input
GF-OIG26-003	Review of the Independent Evaluation Function	For information

### Supporting Documents

Document Title	Document Type
Action Points Tracker	For information
C19RM Evaluation Final Inception Report	For information
Reflections on the Use of AI in the Evaluation of the integration of gender approaches in HIV, TB and Malaria Programs	For information
Use of AI in Evaluation of HIV Prevention	For information
Documenting the Global Fund's Efforts in Integrated, People-Centered Quality Services	For information

### Additional Background Reading

Reference	Document Title	Document Type
GF/IEP12/09	Report of the 12th Meeting of the Independent Evaluation Panel	For information

## **Annex 3: Participant List**

### **Independent Evaluation Panel (IEP)**

Juan Pablo Gutierrez, IEP Chair  
George Gotsadze, IEP Vice Chair  
Evelyn Ansah  
Abdallah Bchir  
Fred Carden  
Florescia Guertzovich  
Caroline Lynch  
Dede Watchiba  
Josephine Watera  
John Grove, Global Fund Chief Evaluation and Learning Officer, ex-officio member  
Julia Martin, Global Fund Head of Strategy and Policy, ex-officio member  
Massimo Ghidinelli, Strategy Committee representative, ex-officio member

### **Strategy Committee (SC)**

Jim Tulloch, SC Chair

### **Evaluation & Learning Office (ELO)**

Rhiannon James, Senior Specialist, Evaluation Partnerships  
Michael Schroll, Senior Specialist, Evaluation & Learning  
Rita Benitez, Specialist, Learning & Dissemination  
Roy Mutandwa, Evaluation Specialist, C19RM  
David Nash-Mendez, Specialist, Evaluation  
Olga Varetska, Specialist, Evaluation  
Yana Daneva, Consultant

### **Global Fund Secretariat**

Hannah Grant, Senior Strategy and Policy Advisor, Strategy and Policy Hub  
Stephanie Martone, Governance Specialist, Legal and Governance Department  
Etienne Michaud, Chief Counsel, Legal and Governance Department  
Alexandrina Iovita, Senior Technical Advisor, Community, Rights and Gender  
Michelle Remme, Manager Thematic Cluster, Community Rights and Gender  
Alistair Shaw, Technical Advisor, Community Rights and Gender  
Izukanji Sikazwe, Head of HIV, Technical Advice and Partnerships

### **External participants**

Sam McPherson, Partner, Itad  
Farai Matsika, Monitoring and Learning Commercial Manager, Itad  
Julia Bürgi, report writer