



Independent observer  
of the Global Fund

## Global Fund's Strategic Review 2017 identifies gaps in several program areas, including differentiated approaches, absorptive capacity and transitions

A report prepared in late 2017 – but not released until February 2019 – is the end product of a strategic review conducted by the Technical Evaluation Reference Group (TERG) on how well the Global Fund has been able, and will be able, to operationalize its strategic plans.

The Strategic Review 2017 found that although at a global level, the Global Fund has embraced the concept of differentiated approaches across the grant lifecycle (e.g. applications process, grant implementation), it was not clear whether this extends to programs at country level. In addition, the review identified a number of critical issues that need to be addressed, including country absorptive capacity and how best to ensure that programs are sustained after the Global Fund withdraws support.

The strategic review was initially carried out by the consultant firm Itad in association with the Euro Health Group. The consultants were guided by continuous dialogue and feedback from the TERG. The methodology for the review included a document review, key informant interviews and country case studies.

The consultants were engaged in December 2016 and their report was submitted in July 2017. The TERG presented the findings of the Strategic Review 2017 to the Board in November 2017. However, the [final report](#) on the review was not published until February 2019.

Commenting on the delay in publishing the final report, Seth Faison, director of communications for the Global Fund, told Aidspan that “the TERG Review 2017 was completed in 2018, and it took time to conduct consultations on this issue, agree on a way forward, and then coordinate a management

response. We anticipate that future TERG reports will be published in a more timely fashion.”

The final report consists of: an executive summary (two pages); the report submitted by the consultants in July 2017 (67 pages); a discussion section with recommendations, prepared by the TERG (eight pages); and a “management response” from the Global Fund Secretariat prepared in December 2018 (two pages).

In the balance of this article, we present a summary of the final report.

Overall conclusions

In its final report, the TERG presented “overall conclusions” for seven topic areas:

- 1. Implementation of recommendations from previous reviews;
- 2. Whether the Secretariat is well positioned to implement the 2017–2022 Strategy;
- 3. Introduction of differentiated approaches;
- 4. Operationalization of sustainability and transition considerations, including addressing complex issues related to country ownership and absorptive capacity;
- 5. Integration of resilient and sustainable systems for health (RSSH), human rights and gender issues into Global Fund processes;
- 6. Increasing focus on value for money and renewed emphasis on data modelling and measuring outcomes and impact; and
- 7. Alignment between the 2017–2022 Strategy and an evolving global health context.

There is some overlap among the topic areas.

The final report concluded that the vast majority of recommendations from a [previous strategic review in 2015](#) were fully or at least partially addressed. The report also concluded that “the Secretariat has planned and prepared itself well for implementing the 2017–2022 Strategy.”

In addition, the report prepared by the consultants in July 2017 stated that:

“For the first time, the Secretariat has holistically considered the key linkages between its strategy, the identification and prioritization of activities, the allocation of funds, and the measurement of results. This strategic planning process is a major step forward, with the broad set of strategic priorities for 2017–2022 translated into a prioritized and actionable implementation plan for 2017.”

In Tables 1, 2 and 3 below, we present the findings of the Strategic Review 2017 on three specific issues included in the seven topic areas — (1) differentiated approaches; (2) country ownership; and (3) strengthening RSSH. In addition to showing the review findings, the tables provide the relevant recommendations and responses from the Secretariat.

Table 1: Summary of findings and recommendations, and Secretariat response:  
Differentiated approaches

Review findings	The Global Fund has demonstrated a significant commitment to introducing differentiated taken to reorganize the Fund’s core grant and management structures to deal with the imp these changes have been or will be translated into modified behavior and results at count
Recommend- ation	Monitor and, if necessary, course correct the ongoing implementation of differentiation me

Secretariat  
response

There is a need to continue to differentiate across the portfolio in terms of staffing, knowledge, and expertise.

Table 2: Summary of findings and recommendations, and Secretariat response:

Country ownership

Review findings	The Global Fund needs to be clearer about degrees of authority and responsibility between the Fund and countries, and how the Fund's strategy complements national priorities. Although the Fund has made progress, there are still issues and tensions in implementing the principles into practice. The tensions include differences in ownership and responsibility within countries (e.g. national government vs. ruling party vs. civil society ownership).
Recommendation	Undertake a thorough review of issues related to country ownership with a view to developing clear guidance on the Fund's policies and principles in this regard. (Rec. 7)
Secretariat response	The TERG has been assessing country ownership through desk reviews, prospective country reviews, and country visits. Country ownership is strengthened in the Global Fund's programming by ongoing efforts such as the development of the Operational Guidance in many areas, which outlines the Fund's principles with respect to country ownership and the roles of stakeholders involved in Fund grants. There is flexibility in how the principles and guidance are applied to ensure they operate in over 100 countries with highly varied contexts.

Table 3: Summary of findings and recommendations, and Secretariat response:

Strengthening resilient and sustainable systems for health (RSSH)

Review findings	Although the Global Fund has accorded a high priority to RSSH (as well as human rights and gender equality), there are still challenges in how to operationalize these priorities through programming decisions; and there is a need for greater stakeholder engagement by country stakeholders and decision makers around these issues.
Recommendation	Further clarify to countries the priorities and intended focus of investments in RSSH. (Rec. 8)
Secretariat response	The Secretariat agrees that greater clarity is required in some areas, and thanks the Technical Review Group's recommendations, which have resulted in seven key actions to improve the Global Fund's approach to RSSH. These recommendations are from the TERG's ongoing thematic review and the Office of the Inspector General's findings.

Note: The seven key actions identified by the TRP and the TERG fed into a discussion by the Strategy Committee on strengthening RSSH. The TERG's thematic review has just been completed. The Secretariat told Aidspace that a report on the thematic review will be published in due course. The OIG's advisory review is expected to be completed shortly. Reports on OIG advisory reviews are normally not made public.

In addition, the Strategic Review 2017 concluded that although the Global Fund has developed definitions, policies and guidance concerning sustainability and transition, and has begun to operationalize them, there are a number of critical issues that need to be addressed.

Critical issues to address

The critical issues include the following: (a) how best to ensure the sustainability of key programs after the Global Fund has exited the country (particularly those programs that engage civil society and key populations); (b) addressing complex issues related to country absorptive capacity; (c) ensuring country

ownership over the transition process; (d) addressing a lack of clarity on the extent to which principles of country ownership apply; (e) a lack of engagement to discuss issues where country and Global Fund objectives do not meet and align; and (f) the need to better leverage partnerships that support the achievement of tangible results and long-term impact.

The TERG presented 15 recommendations in all, divided into three categories: 'Continue and embed'; 'Monitor and course correct'; and 'Act now' (see Figure).

Figure: Summary of the recommendations in Strategic Review 2017

Source: Strategic Review 2017

Note: The recommendations shown in bold are ones to which the TERG accords a higher priority.

The Technical Evaluation Reference Group's strategic reviews are available in English on the Global Fund website:

- [Strategic Review 2017](#)
- [Strategic Review 2015?](#)

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