Thirty-Third Board Meeting

Update on Strategy Development and Partnership Fora
For Board Information

GF/B33/13 – Revision 1
Geneva, Switzerland
31 March – 1 April 2015

This document is part of an internal deliberative process of the Global Fund and as such cannot be made public until after the Board Meeting.
Content

1. Strategy Development Process and Timeline
2. Emerging Priorities for 2017-21 Global Fund Strategy
3. Partnership Fora
4. Looking Forward

Annex
Content

1. Strategy Development Process and Timeline

2. Emerging Priorities for 2017-21 Global Fund Strategy

3. Update on Partnership Fora

4. Looking Forward

Annex
### Strategy Framework 2012-2016: “Investing for impact” (1/2)

<table>
<thead>
<tr>
<th>Vision</th>
<th>A world free of the burden of HIV/AIDS, tuberculosis and malaria with better health for all</th>
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</thead>
<tbody>
<tr>
<td>Mission</td>
<td>To attract, manage and disburse additional resources to make a sustainable and significant contribution in the fight against AIDS, tuberculosis and malaria in countries in need, and contributing to poverty reduction as part of the MDGs</td>
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</tbody>
</table>
| Guiding principles | • Being a financing instrument  
  • Additionality  
  • Sustainability  
  • Country ownership  
  • Multi-sectoral engagement  
  • Partnership  
  • Integrated, balanced approach  
  • Promoting human right to health  
  • Performance-based funding  
  • Good value for money  
  • Effectiveness and efficiency  
  • Transparency and accountability |
| Goals | 10 million lives saved³ over 2012-2016  
140-180 million new infections prevented over 2012-2016 |

<table>
<thead>
<tr>
<th>Targets² (2016)</th>
<th>Global plan</th>
<th>Global Fund leading targets for 2016</th>
<th>Indicators for other selected services</th>
</tr>
</thead>
</table>
• HIV testing and counseling  
• Prevention services for MARPs  
• Male circumcision |
| **TB** | Global Plan to Stop TB 2011-2015 | 4.6 million DOTS treatments (annual) 21 million DOTS treatments over 2012-2016 | • HIV co-infected TB patients enrolled on ARTs  
• MDR-TB treatments |
| **Malaria** | RBM Global Malaria Action Plan 2008 and May 2011 updated goals and targets | 90 million LLINs distributed (annual) 390 million LLINs distributed over 2012-2016 | • Houses sprayed with IRS  
• Diagnoses with RDTs  
• Courses of ACT administered to confirmed malaria cases |

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³Based on impact of provision of ART, DOTS and LLINs using methodology agreed with partners. ²Targets refer to service levels to be achieved in low- and middle-income countries. ²Note: Goals and targets are based on results from Global Fund-supported programs which may also be funded by other sources; targets are dependent on resource levels.
# Strategy Framework 2012-2016: “Investing for impact” (2/2)

<table>
<thead>
<tr>
<th>Strategic Objectives</th>
<th>1. Invest more strategically</th>
<th>2. Evolve the funding model</th>
<th>3. Actively support grant implementation success</th>
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<tbody>
<tr>
<td>1.1</td>
<td>1. Focus on the highest-impact countries, interventions and populations while keeping the Global Fund global</td>
<td>2.1 Replace the rounds system with a more flexible and effective model</td>
<td>3.1 Actively manage grants based on impact, value for money and risk</td>
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<td>1.2</td>
<td>2. Fund based on quality national strategies and through national systems</td>
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<td>3.2 Enhance the quality and efficiency of grant implementation</td>
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<td>1.3</td>
<td>3. Maximize the impact of Global Fund investments on strengthening health systems</td>
<td>2.2 Facilitate the strategic refocusing of existing investments</td>
<td>3.3 Make partnerships work to improve grant implementation</td>
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<td>1.4</td>
<td>4. Maximize the impact of Global Fund investments on improving the health of mothers and children</td>
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<tr>
<th>Strategic Actions</th>
<th>4. Promote and protect human rights</th>
<th>5. Sustain the gains, mobilize resources</th>
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<td>4.1</td>
<td>4.1 Ensure that the Global Fund does not support programs that infringe human rights</td>
<td>5.1 Increase the sustainability of Global Fund-supported programs</td>
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<td>4.2</td>
<td>4.2 Increase investments in programs that address human rights-related barriers to access</td>
<td>5.2 Attract additional funding from current and new sources</td>
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<td>4.3</td>
<td>4.3 Integrate human rights considerations throughout the grant cycle</td>
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<tr>
<th>Strategic Enablers</th>
<th>Enhance partnerships to deliver results</th>
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<td>Transform to improve Global Fund governance, operations and fiduciary controls</td>
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SIIC guidance and oversight for Strategy development

SIIC to guide and support key work-streams in Strategy development

SIIC to present Strategy for Board input in 2015 and final approval in 2016

SIIC Role

- Approve and oversee the implementation of a Strategy work plan
- Review and provide input into draft materials, support preparation of briefing materials and final reports
- Oversee the implementation of a consultation strategy
- Provide active outreach, briefings and updates to constituency groups
- Oversee and contribute to the development of criteria for participation at specific Regional Partnership Forum events

Board

SIIC

Secretariat

- Policy Hub
- Office of Board Affairs
- Secretariat and other analytical inputs

Consultation

- Focused Consultations
- Broad-based Consultation (Partnership Fora/E-Fora)
Overview timeline for Strategy development

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<th>2015</th>
<th>2016</th>
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- **Analytical work**
- **Consultations**
- **1st SIIC 2015**
- **2nd SIIC 2015**
- **3rd SIIC 2015**
- **1st SIIC 2016**
- **2nd SIIC 2016**

- **Board approval of goals and strategic objectives**
- **Board approval of GF Strategy**
- **Replenishment preparatory meeting (tbc)**
- **Replenishment Meeting (tbc)**
Content

1. Strategy Development Process and Timeline

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Annex
Board Retreat discussion on strategic priorities

The Fall 2014 Board Retreat identified the following (non-exclusive) priorities for further development in the 2017-2021 Strategy:

- Ending the three epidemics
- Sustainable impact and domestic funding
- Key populations and human rights
- Health systems strengthening
- Partnership
- Challenging Operating Environments
- Differentiation

Need to consider the difficult trade-offs that are inherent to the GF’s work and build consensus on our priorities for the 2017-2021 Strategy
Strategic Framework: vision and mission (1/3)

Vision

Current Text: “A world free of the burden of HIV/AIDS, tuberculosis and malaria with better health for all.”

Feedback received to date: Remains a relevant and accurate vision.

Mission

Current Text: “To attract, manage and disburse additional resources to make a sustainable and significant contribution in the fight against AIDS, tuberculosis and malaria in countries in need, and contributing to poverty reduction as part of the MDGs.”

Feedback received to date: Strong, but needs to be rephrased to reflect SDGs and potentially greater specificity on impact, saving lives, and/or ending epidemics.

Question: To what extent should this be revised? Should there be an explicit mention of impact, saving lives, and/or ending epidemics? How should the mission describe the SDGs and our contribution to poverty reduction?

• E.g. major revision: “Investing the world’s money to defeat AIDS, tuberculosis and malaria.” (From GF internal communications)
• E.g. minor revision: “To invest additional resources to make a sustainable and significant contribution in the fight against AIDS, tuberculosis and malaria in countries in need, and contribute to achievement of the SDGs.”
Strategic Framework: guiding principles (2/3)

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<th>Guiding principles</th>
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<td>• Being a financing instrument</td>
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**Current Text:**
- Being a financing instrument
- Additionality
- Partnership
- Sustainability
- Promoting human right to health
- Integrated balanced approach
- Country Ownership
- Transparency and accountability
- Performance-based funding
- Multi-sectoral engagement
- Effectiveness and efficiency
- Good value for money

**Feedback received to date:** Generally relevant but could be consolidated as principles are currently too numerous and generic. Could include focus on impact and evidence-based approaches.

**Question:** Is it useful to revisit and consult on the guiding principles?
Strategic Framework: draft strategic objectives (3/3)

Based on discussions and feedback received to date

“Revision with ambition”

DRAFT Priority Areas/Strategic Objectives

1. Focus on the highest impact countries
   - Focus resources on highest burden countries with the least ability to pay
   - Differentiate investments for impact across diverse country-contexts
   - Increase flexibility and partnerships for greater impact and deeper engagement in the most challenging environments

2. Focus on key populations, rights and gender
   - Invest in CSS and programs to address gender inequalities and remove legal barriers
   - Address health inequities

3. Focus on the highest impact interventions
   - Support the most cost-effective interventions based on evidence and evaluation of what works
   - Maximize the impact of GF resources on health systems and RMNCH
   - Invest in strategic initiatives critical to progress against the three diseases
   - Support the most effective approaches to deliver quality services to key and vulnerable populations

4. Effectively implement the Funding Model to deliver impact
   - Ensure realization of funding model principles: predictable funding, country ownership, inclusive dialogue, funding based on quality national strategies and through national systems where possible,
   - Effectively manage risk for grant management
   - Ensure that the GF does not finance programs that infringe on human rights
   - Evolve and improve the allocation model for impact

5. Sustain the gains, mobilize resources
   - Increase the sustainability of Global Fund-supported programs through an effective co-financing policy and by increasing domestic resource mobilisation
   - Attract additional funding from current and new sources
   - Integrate sustainability throughout the grant cycle and support responsible country transitions
Strategic Framework: summary of SIIC feedback

- Do not be constrained by the structure of the previous strategy, the new strategy should be fit for purpose
- Strategy consultations should be inclusive and reflect multiple inputs
- Update Mission for SDGs and consider other revisions
- Narrow and focus guiding principles. Key words include acceleration, scale-up, sustaining, results, quality, ending epidemics, transparency, human rights, accountability
- Increase focus on epidemiological impact against the three diseases
- Increase focus on leveraging funding and additionality
- Increase focus on women and girls
- Increase focus on supporting resilient health systems and improving data
- Shift focus from high impact countries to high impact locations and people
Content

1. Strategy Development Process and Timeline

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4. Looking Forward

Annex
Content

1. Changes in 2015
2. SIIC oversight of Strategy development and Partnership Forum planning
3. Partnership Forum 2015 Theme and Timeline
4. Objectives and Focus
5. In-person consultations
6. Target participation
7. Other consultation opportunities
Changes in 2015

- Focused around strategy development

  “the scope of the Partnership Forum should be focused on and aligned to the development and implementation of the Global Fund Strategic Plan”

  Governance Plan for Impact, approved at 32nd Board Meeting

- 3 smaller meetings rather than one global meeting

  “In-person meetings should be structured as smaller, more iterative, more focused and more timely meetings, aiming to synthesize strategic input from multiple sources…”

  Evaluation of the 2011 Partnership Forum
SIIC oversight of Strategy and Partnership Forum planning

Role of the SIIC:

- Oversight by full committee
- Key involvement of SIIC Leadership
- Identification of priority strategic areas
- Approval, guidance and input into materials
- Monthly update and discussion calls
- Facilitate broader constituency engagement
- Oversee participant selection (sub-group)
- Promote and advocate Strategy-related activities
Partnership Forum 2015 Theme

Shaping our Future:
Collaborating for a Healthier World

Health Systems Strengthening
Community Systems Strengthening
Impact
Risk Management
Challenging Operating Environments
Partnership
Human Rights
Gender
Transition
Key Populations
Stigmatization
Sustainability
Surveillance
Equity
Density
Differentiation
Prudent allocation
Partnership
Objectives and Focus

Key Objectives

• Contribute to a new strategy (2017-2021) that makes the Global Fund impactful and fit-for-purpose in the post 2015 world

• Ensure an inclusive and participatory consultation process

Focus

• Built around key themes identified for the Strategy Development Process

• Opportunity for the Global Fund to hear many different voices and opinions
In-person consultations

- 3 iterative meetings focused around key issues in the new Strategy development

1st Partnership Forum
May 7-8
Addis Ababa

2nd Partnership Forum
June 24-25
Bangkok

3rd Partnership Forum
Sept 2 -3
Panama (tentative)

Estimated 330 total participants across 3 meetings
Target participation

- Participation methodology approved by the SIIC

- Key elements include:
  - Strong focus on in-country stakeholder and civil society participation
  - Equal participation from each region
  - Increased participation from Global South (80% vs. 75%)
  - Broad range of stakeholders to be invited:
    - In-country stakeholders
    - Global and Regional stakeholders and partners
    - Stakeholders with an existing governance, funding or assurance role

Outreach currently being initiated for Partnership Forum 1 - Addis Ababa
Other Consultation opportunities

E-Forum
- Opportunity to directly input on key strategic questions
- Borderless, open, available in 4 languages (English, French, Russian, Spanish)
- Targeting a broad outreach to receive input from wide range of stakeholders
- Including people who do not participate through the usual channels

Other potential strategy consultations
- Global Fund identifying other opportunities with partners for additional consultation opportunities

Examples:

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<tr>
<th>Year</th>
<th>Month</th>
<th>Event Description</th>
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<td>2015</td>
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<td>Mar</td>
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<td>May</td>
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<td>Global Maternal New Born Health Conf</td>
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<td>Nov</td>
<td>Stop TB with PH Havard</td>
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<td>Dec</td>
<td>Prep Replenishment Meeting</td>
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</table>

The Global Fund 33rd Board Meeting
31 March – 1 April 2015, Geneva Switzerland
Content

1. Strategy Development Process and Timeline

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Annex
# Potential SIIC and Board Meeting agenda items

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<tr>
<td>Partnership Forums and online consultations</td>
<td>Office of Board Affairs with Policy Hub</td>
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<td>Development Continuum Report</td>
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<td>Allocation Model 2017-19 (incl. Lessons learned from NFM implementation)</td>
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<td>Sustainability and co-financing</td>
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<td>Challenging Operating Environments</td>
<td>Policy Hub</td>
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<td>2017-2021 Strategy</td>
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Overview timeline for Strategy development

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<th>Jan ’16</th>
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<td>Board and Committee Meetings</td>
<td>14th SIIC</td>
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<td>Draft report</td>
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<td>Strategic Review TERG</td>
<td>Update to SIIC/Board</td>
<td>Preliminary findings</td>
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<td>Other TERG reviews</td>
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<td>Final report Strategic Review</td>
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<td>SIIC/Board discussion and approval of workplan</td>
<td>SIIC discussion of options for policy revision</td>
<td>Board approval of policy revisions</td>
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<td>Equitable Access Initiative</td>
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<td>Campaign kick-off at SDG Summit (TBD)</td>
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## Timeline for the 2017-2019 needs assessment

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**Review costs/targets/financing data from partner plans and Concept Notes**

**Develop components of the needs assessment (e.g. adjustments to partner estimates, forecasts of domestic/other external financing)**

**Consultations – internal and external**

- First meeting with partners
- Second meeting with partners
- Third meeting with partners
- Finalize estimates, produce report
- Final report
- UN General Assembly
- Preparatory Meeting for Replenishment (TBD)

### Key dependencies:

- **Strategy goals and targets**
- **Allocation**

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The Global Fund 33rd Board Meeting
31 March – 1 April 2015, Geneva Switzerland
# Timeline for the Strategic Review

<table>
<thead>
<tr>
<th>Action</th>
<th>Target date</th>
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<tbody>
<tr>
<td>Request for Proposals</td>
<td>October - November 2014</td>
</tr>
<tr>
<td>Update to the Board</td>
<td>November 2014</td>
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<tr>
<td>Contracting a review team</td>
<td>December 2014</td>
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<tr>
<td>Review of existing information and additional data collection</td>
<td>December 2014 - May 2015</td>
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<tr>
<td>Inception report</td>
<td>January 2015</td>
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<tr>
<td>TERSG meeting</td>
<td>February 2015 (done in January)</td>
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<tr>
<td>Meta-review and synthesis</td>
<td>March 2015</td>
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<tr>
<td>Preliminary findings and initial recommendations</td>
<td>May 2015</td>
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<tr>
<td>TERSG meeting to finalize the report</td>
<td>September 2015</td>
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</tbody>
</table>
| Strategic Review 2015 Report presented to the SIIC for review and recommendation to the Board for approval | Q4 2015
Timeline for other TERG reviews

**Thematic review on HSS**
1. Inception Report: February 2015
2. Table listing Donor/Partner Models with potential country examples: March 2015
4. Final presentation in Geneva to the Global Fund Secretariat and the TER: June 2015
5. Final Synthesis Report: June 2015

**Thematic review on market shaping**
1. Inception report: April 2015
2. Preliminary draft report: June 2015

**Thematic review on sustainability**
1. RFP for main consultant/s: November 2014
2. Identification of country case study consultants: December/January 2014
3. Development of country case study standard template: January 2014
4. Inception report from main consultant: end January 2014
5. Drafts of country case studies: April 2015
7. Final report: June 2015

**Thematic review on effects of allocation methodology**
1. Inception report: April 2015
2. Progress update May 2015