

Management Response of FA5 Onboarding evaluation

Context of the evaluation

This evaluation was commissioned by ITM to C-Lever to evaluate how, and to what extent, the onboarding of new country programmes and partners under the FA5 programme (2022–2026) went. Onboarding is understood in this evaluation as the process of integrating new partners into FA5 programme structures and processes. The evaluation draws on six partner onboarding experiences across four countries: Benin (CERRHUD), Ethiopia (Jimma University), Nepal (NHRC and BPKIHS), and Rwanda (RBC and University of Rwanda/CHUK) combining evidence from case studies, key informant interviews, an online survey, and a stakeholder sense-making workshop. The evaluation was structured around six evaluation questions covering onboarding challenges, the existence and perception of a defined onboarding process, clarity of roles and responsibilities, integration of new partnerships into broader FA5 structures, lessons for future onboarding, and the contribution of onboarding to programme outcomes. While explicitly framed around FA5, the evaluation was designed with a forward-looking purpose: to inform not only the current programme but also the design of FA6, as well as other current and prospective ITM partnerships.

Conclusions

Overall, the evaluation finds that new partnerships under FA5 are highly valued, with many delivering research and capacity-strengthening results that meet or exceed expectations. This success is grounded in long-standing relationships and strong alignment with partners' strategic priorities: pre-existing professional contacts and partners' active involvement in shaping programme objectives were consistently the strongest facilitating factors for onboarding. At the same time, the evaluation shows there is room to make onboarding less dependent on individual effort and more supported by shared processes. Without a common definition or guidance for onboarding, the process currently varies by context and relies heavily on the initiative of committed individuals. This flexibility has clear benefits, but it also means continuity can be affected by staff turnover, and that not all partners have had the same level of support. The evaluation also points to a gap between strong strategic clarity: partners understand programme objectives and scientific goals well, and less consistent clarity on operational matters such as roles, reporting requirements and administrative timelines, with financial and DGD-related reporting most often mentioned as an area for improvement.

Part of this is linked to how scientific, management and administrative functions currently plan and communicate internally at ITM, which can lead to overlapping demands and occasionally asks scientific promoters to take on administrative troubleshooting alongside their research role. The evaluation also sees a further opportunity in better leveraging country partners' role in national coordination and in strengthening cross-country learning across FA5, which today happens mostly informally.

None of this takes away from the fact that most partnerships are seen as successful, thanks in large part to the strong commitment of researchers and promotor. The evaluation's core message is that building more structured, lean and shared onboarding processes, without adding unnecessary bureaucracy, will help make this success more consistent and less dependent on any one person. This recommendation is timely as FA5 transitions into FA6.



RECOMMENDATIONS REGARDING SUPPORTING FA6 IN STRENGTHENING INSTITUTIONAL LEARNING, GOVERNANCE, AND COLLABORATION STRUCTURES

Recommendation 1: Recommendation 1 (to ITM): Develop a “whole-of-ITM approach” prior and integrated to partner onboarding.

1.1 Develop a “whole-of-ITM approach” to strengthen the coordination and joint planning of management, administration and scientific activities. ICO, CROO and promoters/co-promoters are the leading actors to implement this recommendation.

1.2 Consider producing integrated ‘ICO-CROO-science’ planning documents with key actions and timelines. These documents should provide agile, fit for the purpose of partnership steering and orientation, and (as required) tailored to each programme. They should be shared internally at ITM and externally with country partners to promote alignment on expectations and awareness of priorities.

1.3 Highlight the added value and integrated roles of management, administration and research functions towards effective programme delivery, quality and timely outputs, and intended positive impact.

Management Response: Recommendations accepted

The next programme’s outcome-based impact strategy and governance structure, with designated coordination roles and aggregated thematic budgets, provides a natural opportunity to integrate scientific, management and administrative planning from the start.

The financial intelligence infrastructure will migrate from several tools into one and should add much clarity on budget management. Multiple promoters and partners have been consulted during this process, creating a good starting point for training and learning activities on programme (budget) management.

Even though only one partner is fully new to the DGD programme format (INS-Mozambique) closer guidance and support is relevant – including refresher sessions.

Action Plan

#	Actions planned	Deadline	Responsible Office/Unit/Department	Responsible Person/Role	Implementation stage	Actions (to be) taken
1	Develop an onboarding plan for new FA6 partners, starting with a needs check per partner	December 2026	ICO/CROO	Wouter Boesman Katrien Kolf	Not started	Do a needs check on the (new) partner covering scientific, management and administrative needs (financial, m&e)
2	Set up (onboarding) trainings with CROO on financial and administrative requirements	May 2027	ICO/CROO	Wouter Boesman Katrien Kolf	In preparation	Use this as an occasion to also refresh existing partners on financial regulations, M&E and other requirements - Schedule training sessions as part of kick-off for each new partner

						- Organise a periodic refresher session (e.g. annually, or tied to JPM) covering financial rules, M&E and reporting for all partners, not only new ones
Recommendation 2 Build a “know-your-partner” approach to facilitate and reinforce ITM-partner cooperation. 2.1 Develop a “know-your-partner” approach aimed at timely organisational knowledge and dialogue among ITM and new partners, in parallel to the technical design of new programmes. 2.2 To ITM: Conduct ‘smart’ and agile institutional assessments of – and with – new partners to identify and understand (i) hierarchies and decision-making processes, (ii) potential hindering factors on the timely and quality delivery of programme activities, (iii) the need for mitigating measures as to be able to anticipate and resolve those hindering factors in a timely and effective manner. Enhance in-house knowledge and experience (e.g. “country ambassadors”) and address these topics with new partners as part of proposal development. 2.3 To partners: Appoint a dedicated team to interact upfront with ITM on programme administration, management and reporting. These resource persons will help ITM conduct targeted institutional assessments during proposal preparation, will familiarise with ITM management and administration staff, and will be the contact point for dialogue and training on programme management, monitoring and reporting. 2.4 To ITM and partners: Engage early on and on a regular basis in organisational dialogue on administration and management processes. After first contacts established during proposal development, conduct training sessions ahead and as part of kick-off of programme activities. Further training arrangements are addressed in Recommendation 5.3.				Management Response: Recommendations accepted <i>Explanation</i> 2.1. Accepted : This approach is already built into FA6 through the integration of the 5C Self-Assessment Tool, which structurally embeds early organisational knowledge-building and dialogue with partners as part of programme design, rather than as an ad hoc addition. 2.2. Accepted : The 5C Self-Assessment tool gives ITM and partners a structured understanding of each partner's institutional capacity-strengthening priorities, including capabilities relevant to hierarchy, decision-making and delivery risk, ahead of and during programme design. ITM teams are also reviewing the guidance approach to finance/admin and clarification of the contract annexes on financial compliance 2.3. Accepted : This is also built into FA6 and is currently being designed in detail. 2.4. Accepted : This will be addressed together with Recommendation 5.3 on training arrangements, and will be built into the onboarding process.		
Action Plan						

#	Actions planned	Deadline	Responsible Office/Unit/Department	Responsible Person/Role	Implementation stage	Actions (to be) taken
1	Link 5C outcomes to the onboarding plan/needs check	December 2026	ICO	Helena Liekens	Not started	- Define how to combine the institutional capacity strengthening priorities with the onboarding needs for the new or 'newer' partners in FA6
2	Define the requirements for a dedicated partner onboarding team/focal point in FA6 partnership arrangements	December 2026	ICO/CROO	Wouter Boesman Helena Liekens Katrien Kolf	Ongoing	- Detailed design of this requirement ongoing as integral part of the governance set-up where CROO team will be better informed about overall programme evolution.
3	See action plan under Recommendation 5.3 (training arrangements)					
4						
5						

Recommendation 3: Strengthen programmatic learning with improved processes to gather actionable feedback from (current and new) partners and communicate these processes as part of onboarding. 3.1 Promote a culture and processes of targeted feedback gathering on management, administrative and scientific activities. This should come as part of the “whole-of-ITM” and the “know-your partner” approaches, applied throughout regular, autonomous yet integrated collaboration on management, administration and research.	Management Response: Recommendations accepted
	Feedback mechanisms will be built into the recurring Cluster/Outcome/Programme coordination moments already planned under FA6, rather than added as a separate process.

3.2 Develop processes and timelines for feedback processing and response within programme governance and decision-making structures.						
3.3 Integrate and communicate these processes and timelines as part of onboarding and reporting.						
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#	Actions planned	Deadline	Responsible Office/Unit/Department	Responsible Person/Role	Implementation stage	Actions (to be) taken
1	Introduce regular targeted feedback sessions (admin/management) alongside cluster coordination meetings	Yearly	ICO/CROO	Wouter Boesman Helena Liekens	Ongoing	- Set this up as a recurrent agenda item on governance meetings and program level meetings (jpm)
Recommendation 4 (to ITM): Develop proportional, fit-for-purpose, shared definitions and guidelines on onboarding				Management Response: Recommendations partially accepted		
				Explanation Straightforward to implement and directly addresses the evaluation's core finding; will be issued as a companion document to the "whole-of-ITM approach" (Recommendation 1).		
4.1 Develop shared definitions of “onboarding” as part of the “whole-of-ITM” approach						
4.2 Issue onboarding guidelines offering a clear overview of key roles and responsibilities on scientific, management, and administration dimensions, both during the onboarding phase and within the larger programme setup. Such onboarding guidelines should bring added value to the partnership by combining (i)						

shared, standardised understanding, expectations and processes, and (ii) flexibility and responsiveness to different partners’ contexts and circumstances.						
4.4 Organise an in-person kick-off meeting at the start of ITM–partner collaboration, bringing together all key actors (ICO, CROO, researchers, and their counterparts in partner institutions) to align expectations, build a shared understanding of the onboarding process, and establish a strong foundation for effective scientific, managerial, and administrative collaboration.						
Action Plan						
#	Actions planned	Deadline	Responsible Office/Unit/Department	Responsible Person/Role	Implementation stage	Actions (to be) taken
1	Draft short (onboarding) guidelines (roles, timelines, requirements) as part of the larger governance guidelines and responsibilities	December 2026	ICO/CROO	Wouter Boesman Katrien Kolf Helena Liekens	Not started	- Will be approached as an update of the existing guidelines on narrative and financial reporting with specific focus on making the financial annex to the collaboration contract leaner and clearer - Create guidelines and checklist for onboarding of new partners
2	Organise an in-person kick-off meeting at start of each new partnership	Start of FA6	ICO/CROO	Wouter Boesman Katrien Kolf Helena Liekens	Not started	- Plan the visit to the one new partner INS-Mozambique - Design the training agenda
				Management Response: accepted		

Recommendation 5 (to ITM – CROO): Reshape financial/narrative reporting requirements so that they add value to partners/ITM while abiding by DGD rules, and provide (new) partners with targeted training and coaching on those requirements and timelines 5.1 Focus simplification/reshaping efforts not only on accountability and administrative compliance towards (simplified) DGD rules, but also on added value to partners’ own monitoring, management and administration, and on sound programme management, planning and M&E. 5.2 Allow the following questions to inform simplification/reshaping efforts: • Are the reporting requests to partners proportional and fit for purpose to meet DGD requirements? • Do they add value to programme monitoring and management (e.g. actual vs budgeted use of resources, progress indicators, etc.) and to partners’ own monitoring, management and administration needs and requirements? • Where and how could they be scaled back or made less complex and demanding? Note that this effort is about reviewing and optimising the internal control systems to apply a proportionality and effectiveness principle to administrative and reporting requirements. 5.3 Reserve budget provisions for on-site training, both at the start of the programme and on a regular basis, to refresh knowledge and possibly to train new personnel in case of staff turnover. Beside ad-hoc training, engage partner staff in regular dialogue and coaching, and request feedback on challenges and possible improvements (in line with Recommendation 3).	ITM agrees with the need for simplification and training, but evidently compliance with DGD rules, which ITM does not unilaterally control, is the purpose and must be guaranteed. In other words: this can only be delivered within ITM's own margin of manoeuvre. The narrative reporting requirements are clear and manageable. In the new program the responsibility for the data collection, data consolidation and reporting are more clearly delineated, meaning ‘less’ work for the day-to-day implementers, and more structured responsibility to the outcome and cluster coordination. They will be supported by the M&E officer in ITM’s international cooperation office. ITM’s finance and project management teams have started preparing an upgrade of the financial management systems with the aim to provide better insight for budget management. The swifter integration of partner expenditure reporting will be an important element to reach success. For this a review of the financial guidelines is underway with the aim to make them leaner and leave less space for interpretation/confusion - evidently always while keeping with the DGD compliance guidelines.
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1	Map which reporting requirements can be simplified within DGD rules		CROO		Underway	Analysis of the Annex 4/5 to the partnership contract, first by CROO team based on own experience and partners' feed-back during 2026 workshop, second instance by ICO and communications to guarantee 'readability' also for non-finance experts.
2	Provide onboarding financial training + annual refresher <i>(see previous recommendation)</i>		ICO/CROO		Planned	See above : ad-hoc in-person for INS-Mozambique, online including refreshers for the full partnership.

Signature: _____

Name and position: _Prof Dr Özge Tunçalp, Executive Director____

Date: _15 July 2026_____