



Independent
Advisory and
Evaluation
Service



Terms of Reference: Evaluation Reference Group (ERG)

June 2025

Questions on this Terms of Reference should be directed to the Evaluation Function Lead/CGIAR Independent Advisory and Evaluation Service (IAES)
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1. Background: CGIAR and Independent Evaluation

The [CGIAR's Independent Advisory and Evaluation Service \(IAES\)](#) supports and facilitates CGIAR's independent advisory services, comprising the Independent Science for Development Council (ISDC), the Standing Panel on Impact Assessment (SPIA) and an independent [Evaluation Function \(EF\)](#).¹ IAES' EF supports implementation of CGIAR's consolidated [2025–27 Workplan and Budget](#), to meet the system's needs for rigorous high-quality independent evaluations to inform decision-making across CGIAR.

In 2022, the CGIAR-wide Evaluation Framework and revised CGIAR Evaluation Policy² were approved by the [CGIAR System Board \(February 2022\) and System Council](#). The Framework sets the overall approach to process and performance evaluations in CGIAR with overarching principles and standards anchored by the evaluation policy. The Policy recommends the use of a standing Evaluation Reference Group (ERG) for enhanced evaluation quality, rigor, and credibility.

The ERG was piloted by IAES in 2021.³ The continued value of seeking independent expertise *via* an ERG is underscored by the findings of the [2019 CGIAR's MOPAN Assessment Report](#), which questioned the behavioral, operational, and structural independence of the incoming EF. In line with the approved Evaluation Policy, *per* the [IAES ERG Terms of Reference](#) (ToRs), the IAES-ERG was rolled out for the approved triennial 2022–24 Evaluation Workplan, and subsequently for the next triannual cycle (2025–27 [Workplan](#)). These 2025 ToRs are revised accordingly.

2. ERG: Purpose and Objectives

Figure 1. EF objectives under MYEP 2025–2027

IAES EVALUATION FUNCTION
Implementing external evaluative activities (process and performance evaluations)
Issuing evaluation guidance to support the implementation of CGIAR's Evaluation Framework and Policy
Engaging with CGIAR on process and performance evaluations
Knowledge management and translation of evaluative knowledge

The IAES-ERG is an advisory group, comprised of five independent evaluation experts of subject matters related to the CGIAR Portfolio [\[link\]](#). Specifically, the purpose of the ERG is to offer state-of-the-art technical constructive critique regarding independent evaluation to the IAES of CGIAR. The group serves as a sounding board to the IAES Director and the EF Lead about evaluation approaches for strategic deliverables, including knowledge management pathways underpinning evaluation use aligned to the objectives of the EF (Figure 1). ERG remarks constitute a peer review on identified strategic items. The ERG aims to provide an added layer of alignment to evaluation industry standards and to reinforce the influence of IAES to CGIAR. Therefore, IAES expects added value from the ERG through strategic advice on IAES-commissioned evaluative activities, policies and guidelines, to enhance evaluation quality, rigor and credibility.

The ERG is not a decision-making or implementation body. The ERG would interact with the EF Lead and the IAES Director, to provide expert input as IAES implements its 2025–27 [Workplan](#) (Figure 2) and makes it responsive to CGIAR's operational and governance needs. IAES will continue to liaise with the Integrated Partnership Board and System Council through its standing

¹ See Annex A for a background on independent evaluation.

² Links to be provided once posted.

³ The success of the ERG is evinced by the quality of ERG feedback on evaluative work, the ERG's input on strategic evaluation consultations in 2021, and the ERG post-pilot period survey³ (Annex D).

committee for strategic impact monitoring and evaluation (SIMEC), which supports the System Council, the ultimate CGIAR decision-making body. Aligned to the ERG key performance indicators (KPIs), **ERG objectives and responsibilities** include the following:

- Provide IAES EF and IAES Director with strategic and technical advice on identified topics towards enhancing the quality and relevance of evaluative work, aligned with international best practice in the evaluation field.
- Interrogate design, conclusions and recommendations from independent external evaluations commissioned by the System Council and executed through IAES during peer review process.
- Provide input during the planning and implementation processes on evidence-based learning activities, including ideation of IAES communications, and how to best address gaps and priority themes.
- Work with IAES in its effort to crowd-in industry best practice that will enhance the audience-driven and demand-driven nature of IAES-commissioned evaluative activities and evaluations.
- Advise the IAES EF and IAES Director on ways to improve overall EF coherence, approach, work program and evaluation methodologies.

Consistent with the above, **the scope and outputs** of the ERG engagement would include: advice and periodic and solicited commentary on strategic work items produced by the EF under IAES, in line with the [approved 2025–27 Evaluation Workplan](#), including the following:

- Feedback and inputs into:
 - Developed/revised evaluation-related guidelines produced by IAES EF in support of the [2022 CGIAR Evaluation Framework and Evaluation Policy](#).
 - Designated ToRs inception and final evaluative reports or products for specific external evaluative activities and early interrogation of conclusions and recommendations from evaluations and evaluative activities.
- Support to knowledge Management: engage with and from time to time participate in strategic communication materials from the EF, including conferences, and blogs,⁴ among others.
- Advice and engagement with IAES on proposed revisions or adjustments for consideration of the System Council and Integrated Partnership Board on Evaluation Framework and/or Policy.

3. Workplan and Engagements in 2025–27

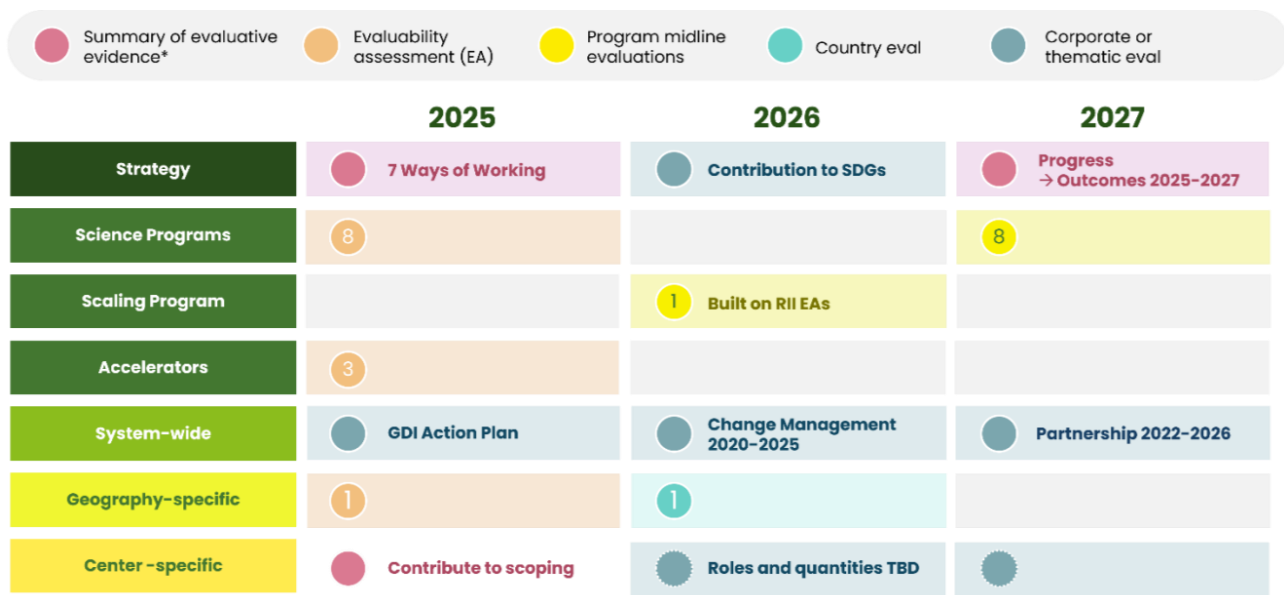
In line with the [EF's 2025–27 Workplan](#),⁵ IAES will seek ERG-input on the engagements and responsibilities outlined below. Individual member project allotment will be agreed upon annually with each ERG member. ERG members are encouraged to indicate their choice of up to three (3) headline outputs per year,⁶ consistent with their interest, availability, and expertise. IAES EF would make the maximum effort to accommodate requests, while ensuring that at least two (2) ERG members review each headline output. The IAES EF team will provide ERG members with all necessary documentation needed to support the above workplan and engagements *via* access to a cloud-based background documentation repository, or will provide access to documentation in another way. The type of engagement and form of commentary on the above items would vary and is subject to confirmation for each engagement.⁷

⁴ [Towards Unified Accountability and Joint Learning: A New Evaluation Framework and Policy for One CGIAR](#) (May 2022).

⁵ [EF's 2022–24 Workplan](#).

⁶ A breakdown of the 2025 headline outputs and milestones are available in Annex B.

⁷ To be discussed and confirmed in consultation with ERG members.

Figure 2. Multi-Year Evaluation Plan (2025–27)

*supporting knowledge management, learning and scoping activities

4. ERG Composition and Nominations

The ERG will comprise five (5) members with proven technical expertise and experience relevant to the evaluation of both research and development programming aligned with CGIAR's Mission: "To deliver science and innovation that advance the transformation of food, land, and water systems in a climate crisis" as specified in the [2030 Research and Innovation Strategy](#)⁸ and the [2025–30 Portfolio](#).

The total level of effort for each ERG member per year should not exceed an average of five (5) days. The following other terms and conditions apply:

- ERG membership will be for an initial two-year term with an option to renew for a third year.⁹
- IAES will pay an honorarium to the ERG members in recognition of their contribution.¹⁰
- IAES will publish the names of ERG members on its [website](#).

If, and when, related engagements are required, such in-person meetings or contributions beyond the expected level of effort and contractual adjustments may be negotiated, as necessary.

A combination of the following characteristics is sought for the ERG:

- A blend of relevant academic backgrounds, for instance evaluation, international development, public administration, rural sociology, and economics.
- Extensive expertise and knowledge in the field of evaluation of research or development programs, or familiarity with the evaluation of research for development.
- Experience with CGIAR evaluations, either as a peer-reviewer or an evaluator.
- Good knowledge of the main international institutions and mechanisms involved in evaluation

⁸ See Annex C for ERG list of reference materials, including the CGIAR 2030 Research and Innovation Strategy.

⁹ Depending on the assessment of the degree to which IAES and ERG member expectations are being met.

¹⁰ Tentative USD 5,000/annum.

and/or agriculture research for development.

- Gender and geographical balance.
- Affiliations with the voluntary organization for professional evaluation (VOPE).
- Good English communication skills.

5. ERG Working Principles and Modalities

The following principles are recommended to guide ERG work and communication:

- Respect for, and curiosity about, different perspectives on evaluation; and agreement to disagree on some issues. Advice from the group will reflect a potential diversity of opinions.
- Recognition that there is no single 'right' set of evaluation and learning values, approaches, or methods.
- A collaborative approach to defining terms, where definitions would be needed/useful.
- A collaborative approach to working with the EF lead and IAES Director.
- Recognition of the CGIAR context, transitions and the evolving role of independent process and performance evaluation in CGIAR.
- A diversity of opinions where applicable can be recognized and recorded upon request of a member. The process of tracking and communicating opinions will follow the process referred to below.

The IAES-ERG will meet remotely, with a schedule and meeting duration that depends on workload. Core engagement with the IAES EF and IAES Director would take the form of quarterly virtual meetings that last a maximum of 1.5 hours, with necessary documentation supplied, with as much advance notice as feasible, depending on the product. The EF Lead and IAES Director may request additional meetings based on business needs driven by the evaluation workplan, to discuss evaluation issues and advice. The IAES EF would schedule ERG meetings at a time convenient to most members. A quorum for attendance shall be a minimum of half of the membership, plus one, which constitutes a simple majority for a quorum. To facilitate the exchange of views among IAES-ERG members, various means of communication will be maintained, including electronic discussion groups, conference calls, or video conferencing.

5.1 Consultative Group

In addition to engagement modalities with IAES outlined herein, in 2025, IAES is piloting **ad hoc consultative groups** for every evaluation and evaluative activity. ERG members involved in a specific evaluation will be invited to participate in CG activities, namely online meetings to comment on ToRs and online workshops for participatory recommendation refinement with the evaluand leads and other consultative group members. This will be in addition to peer review of the ToRs, Inception Report, and Evaluation Report.

5.2 Expectations of ERG Members

- All ERG members are expected to participate and be substantively engaged during meetings and via email communication.
- Only official ERG members may engage and attend meetings; IAES expects no alternates. IAES requests an early advance notice if an ERG member cannot commit to most meetings and calls each year.

- Any ERG engagement with IAES or CGIAR beyond the scope of this ToR must be discussed with the IAES EF on an ad-hoc basis.

5.3 Expectations of CGIAR IAES, Including the Evaluation Function

Expectations of the EF Lead and IAES Director in relation to the work of the ERF are as follows:

- The Lead of Evaluation Function is:
 - the direct point of contact for the ERG.
 - a 'non-advising' member of the group.
 - responsible for both the primary facilitation of calls/meetings and for bringing forward content to be discussed by the ERG.
- The IAES Director will provide overall ERG oversight and contextual grounding on governance.

They will be present at ERG meetings to benefit from the expertise of ERG members.

6. Performance, Contracting and Payment

IAES is hosted by the CGIAR System Organization through an arrangement with the Alliance of Bioversity International and the International Center for Tropical Agriculture, at its offices in Rome, Italy. Contracting is carried out by host entities and under their name on behalf of IAES. Each ERG member must sign and return statements indicating their understanding and compliance with policies of IAES and its host institutions.

IAES will apply an honorarium payment of USD 5,000 per annum from 2025–27. All honorarium payments and conditions will be administered in line with the approved policy for consultants. Conflict of interest, confidentiality, intellectual property provisions and use of AI are covered in these contracts.

The ERG will perform their role at their own place of work.

6.1 Conflict of Interest and Confidentiality

ERG members are expected to declare their interest and to align with the IAES [Conflict of Interest \(COI\) policy](#). An ERG member cannot be considered as a consultant to or a grantee of CGIAR, as this would potentially bias their advice; given the breadth of activities and types of products developed by the EF of IAES, selected interests can be mitigated. Notwithstanding the completion of the IAES declaration of interest, ERG members have an ongoing obligation to inform IAES of any arising interest, real or perceived, that may lead to a real, potential or apparent conflict of interest. Members of the IAES-ERG must update the IAES declaration of interest form whenever required.

Since ERG members may become acquainted with, or have access to, confidential information, they must agree to maintain and to prevent its unauthorized disclosure to, or use by, any third party. "Confidential Information" means any CGIAR proprietary information, technical data, trade secrets or know-how, including, but not limited to, business information, personally identifiable information, bid or tender related documents, proposal process, research, marketing, technical, financial information, product plans, pricing information, products, services, customer lists, markets, software, developments, inventions, processes, formulas, technology, designs, drawings, engineering, and any other information relating to its personnel, affiliates, or agents disclosed to the contractor by CGIAR, either directly or indirectly. ERG members shall continue to be bound by the confidentiality provisions after their term.

Additional level of detail will be covered in the individual contracting documentation.

6.2 Performance and Review

In accordance with developments in best practice, the IAES Director and the EF Lead will evaluate the performance of ERG members regarding the principles, KPIs and purpose, as set out in these ToRs, and *vis-à-vis* the Evaluation Workplan and evolving needs of IAES.

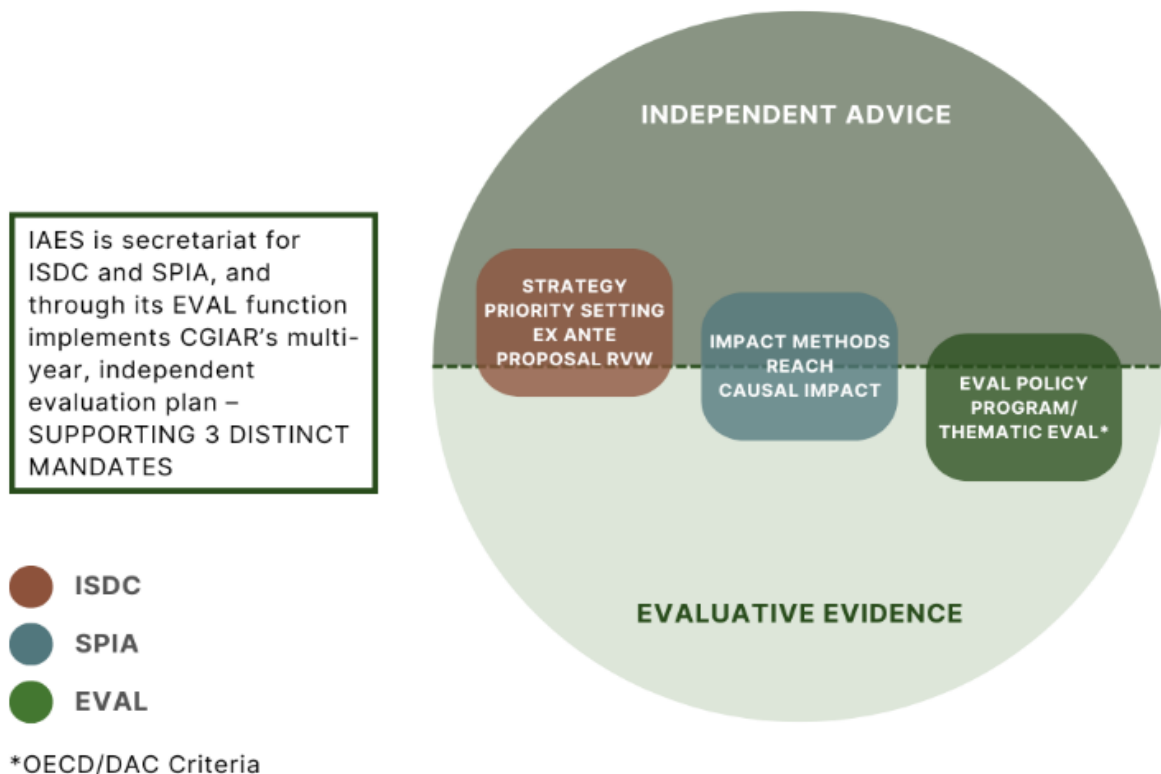
7. Revision of the ERG Terms of Reference

IAES will revise these ToRs as necessary, based on strategic, operational needs and after-action reviews.

Annex A. Background on Independent Evaluation, IAES

Evaluations and impact assessments (or impact evaluations, as known outside CGIAR) have a long tradition in CGIAR for the purpose of accountability and learning. At system level, this has been the responsibility of the Evaluation Function (EF) and the Standing Panel on Impact Assessment (SPIA). CGIAR Independent Advisory and Evaluation Service (IAES)¹¹ supports and facilitates the CGIAR's independent advisory services, comprising the Independent Science for Development Council (ISDC), SPIA and an independent evaluation work stream. IAES performs the independent EF for CGIAR.

Figure 3. IAES functions



Assuming the responsibilities previously held by the Independent Evaluation Arrangement (IEA), the IAES EF's mandate, under the 2018 IAES Terms of Reference (ToRs), pertains to implementation of the CGIAR System's Multi-Year Evaluation Plan (MYEP) to meet CGIAR's need for rigorous, high-quality, independent evaluations to inform decision-making. Evaluation responsibilities include, *inter alia*, delivering evaluations responsive to system needs, including their management and quality assurance, and proposing a multi-year plan for external evaluation to funders; knowledge management with relevant bodies for effective dissemination and use of evaluative information; and proposing evaluation policy to System Council,

¹¹ As of September 2022.

which is the highest-level strategic decision-making body of CGIAR, with voting members composed primarily of CGIAR funders.

The EF Lead is supported in the first instance by Senior Manager and temporary analysts, employed under Evaluation budget (see the [evaluation function of IAES team](#)).

Evaluations and Impact Assessments

Evaluations and impact assessments (or impact evaluations as known outside the CGIAR) have a long tradition in CGIAR for the purpose of accountability and learning. At system level, related responsibilities are driven by different mandates of the EF and the SPIA.

- **Mandate:** The SPIA mandate includes funding and/or directly implementing studies that document credible evidence of **causal** impacts generated by innovations to which CGIAR has contributed. The IAES EF mandate is to commission independent and systematic **process** evaluations that addresses explicit evaluative criteria, typically assessing programs funded through pooled funding or system-level performance on cross-cutting topics for accountability and learning.
- **Scope:** SPIA and the EF do not implement all impact assessments nor commission all evaluations in CGIAR. Centers and research programs implement several of them. SPIA and the EF make available technical advice and quality assurance of this work, when feasible. SPIA advises on methods and metrics to design rigorous impact assessments, and the EF advises on and applies various methods aligned to the CGIAR Evaluation Policy, guided by the OECD/DAC evaluation criteria.
- **Theory of change (ToC):** While the SPIA approach focuses on rigorously testing underlying ToC assumptions to provide evidence for best strategies and scaling models to achieve greater impacts, the EF focuses on the use the ToC to evaluate the accuracy/validity and its actual use towards measuring results of a research program/Initiative.
- **Approach:** The SPIA approach relies on research designs from the start of the innovation process and the use of valid and credible **counterfactuals**. The EF uses theory-based approaches to structuring and undertaking analysis in an evaluation to draw conclusions about whether and how an intervention contributed to observed results, with the use of triangulation, mixed methods and meta-evaluations.

Both functions prioritize **learning agenda** via related Communities of Practice (CoPs) (monitoring evaluation and learning [MEL] and SPIA CoPs) and with internal and external audiences: CGIAR System Council (SC), CGIAR System Board (SB), CGIAR Executive Management Team (EMT), CGIAR System Management Office (SMO), ISDC, CGIAR centers (Entities) and programs, researchers, Impact Assessment Focal Points (IAFP), and academia.

Annex B. IAES/Evaluation Workplan 2025–27

The Independent Advisory and Evaluation Service (IAES) Terms of Reference (ToRs) (2018 with revisions) mandate IAES the responsibility for “supporting implementation of CGIAR’s multi-year, independent evaluation plan in a manner that meets the CGIAR System’s strong need for rigorous high-quality independent evaluations to inform decision-making across the System,” in addition to IAES’s responsibilities pertaining to ISDC and SPIA. The Evaluation Function (EF) under IAES concentrates on the implementation of a Multi-Year Evaluation Plan (MYEP) and associated work. The IAES/EF developed a second¹² MYEP (2025–27) in close consultation with CGIAR stakeholder groups, to deliver and support process and performance evaluation that will bolster implementation of the 2030 CGIAR Strategy.

Objective 1: The bulk of the investment in EF is directed to independent and external evaluations and evaluative activities of CGIAR’s work (what-performance/how-process), taking the form of the MYEP. All IAES process and performance evaluations support learning, accountability, and steering. Evaluative engagements are characterized by pre-defined types (see Figure 3 below).

Objective 2: This objective pertains to high-quality guidelines and method notes to operationalize and support the implementation of the CGIAR Evaluation Framework and Policy. Guidelines are aligned with industry standards and best practices from across the field of professional evaluation, adapted to the research-for-development (R4D) context of CGIAR. CGIAR core business and consultation with stakeholder groups point to needed guidelines and/or method notes to cover the evaluation of: a) climate change-focused programming; b) methods in R4D settings for evaluation of sustainability and efficiency criteria; and c) potential practitioner method notes on the use of AI in evaluations, including ethical use.

Objective 2: In 2026, IAES EF will assess, against the CGIAR governance and management structure, revisions to be proposed to System Council and the Integrated Partnership Board regarding CGIAR evaluation policy.

Objective 3: Engagements within CGIAR underpin the use and utility of evaluations, as well as the support to centers and units conducting self-evaluation. A prime example is co-development and engagement with CGIAR Monitoring-Evaluation-Learning professionals, who have the potential to be an important fulcrum for Monitoring, Evaluation, Learning and Impact Assessment (MELIA) in CGIAR, and related activities under System Organization units related to CGIAR’s MELIA system. The EF collaborated on joint activities with MELIA colleagues around professional conferences of evaluation associations.

Objective 4: Evaluation-targeted and specific communications and knowledge management ensure that CGIAR independent evaluations are accessible, relevant, and timely for internal and external stakeholders. An external-facing core activity is collaborating with the UN Rome-based agency and GEF evaluation offices. For instance, CGIAR remains actively involved with EvalForward and EF staff and attends regional conferences of evaluation associations.

A typologyⁱ useful to understand the CGIAR MYEP makes use of CGIAR evaluation guidelines ([portal](#)), and descriptors and typologies recorded at the Rome-based agency and other evaluation offices. The timing of the external evaluations in the MYEP is optimized for evaluation use (Table 2). Evaluation engagements are arrayed against **predefined objects**, namely: R4D Portfolio components, e.g., Science Programs and Accelerators; system-wide structures, frameworks, strategies, and processes; geography-specific; and, center-specific. Combining types, objects, and timing stated in the previous section produces an overview visual of the MYEP, Figure 3.

¹² MYEP 2022–24, with confirmed annual workplans.

Figure 4. Multi-Year Evaluation Plan (MYEP)

*supporting knowledge management, learning and scoping activities

Table 1. Timing of independent evaluations to address the timing of CGIAR decisions

Item	Decision type (per Table 1)	Timing	Independent evaluative activity (and number)
Science Programs and Accelerators	Accountability	2025 Q2	Science Program + Accelerator Evaluability Assessments x 11
Research and Innovation Portfolio components	Investment	2027 Q4 2027 Q4	Science Program Midline Evaluations x 8 Summary of Evaluative Evidence x 1
2030 Research and Innovation Strategy	Learning/Assurance	2025 Q1, Q3	CGIAR 7 Ways of Working x5 (i) (summary past eval evidence)
System-wide structures, frameworks, strategies, and processes	Accountability/Learning	2025 Q4 2026 Q3 2026 Q4 2027 Q3	GDI Action Plan Progress x1 CGIAR Change Mg't (2018-25) x1 SDG Contribution x1 Partnership and Engagement Framework (2022/2024) x1
Country-specific results, structures, strategies, plans, and processes	Assurance/Learning	Q4 2026	Country Evaluation Proof of Concept (1x reports)
Center-specific results, structures, strategies, plans, and Processes	Assurance/Learning	Q3 2025	Summary of Evaluative Evidence (to contribute to scoping activity)

(i) Two summaries pertaining to partnership-themed ways of working will be delivered in Q4 of 2024.

Deliverable Highlights:

- **Evaluative evidence summaries** on Seven Ways of Working (WoW) and, in 2027, progress towards outcomes (pink dots).¹³

¹³ Notably, on WoWs 3 and 7. [A report](#) was published at the time of finalizing this ToRs.

- New **corporate evaluations** (blue dots) on implementation of GDI Framework and Action Plan (in collaboration with Internal Audit function), Partnership and Engagement Framework (2022, 2024), Change Management, and CGIAR's Contribution to Sustainable Development Goals (SDGs).
- Guided **evaluability assessments** (EAs) (first half of 2025) of all new Portfolio components to build strong MELIA plans envisaged for Science Program mid-line evaluations in 2027 (orange dots).
- **Midline evaluations** (yellow dots) completed by late 2027 which, aligned with request from CGIAR leadership team, will be geared to assist System Council's subsequent investment decisions in the latter half of the Portfolio (2028–30) and provide ongoing learning and insight to directly contribute to the next CGIAR decadal strategy.
- Proof of concept on geography-specific **country evaluations**, to complement CGIAR intentions to put in place country strategies (country to be defined, light blue dot).
- Given demand for **center-specific assurance activities**, which has been flagged by some center and governance stakeholders during consultations, the IAES EF will participate in a broader scoping activity by harvesting evaluative evidence pertinent to center performance.
- A key input into cost-efficient evaluation will continue to be the cleaning of CGIAR monitoring data.

The next table outlines the 2025 Workplan by envisioned Evaluation Reference Group (ERG) engagements, to be confirmed.

Table 2. Potential 2025 workplan engagements for ERG members by milestone outputs

Potential Engagements	Timing	Independent evaluative activity (and number)
Science Programs and Accelerators	2025 Q2	Science Program + Accelerator EAs x 12
2030 Research and Innovation Strategy	2025 Q1, Q3	CGIAR 7 WoW x6 (i) (summary past eval evidence)*
System-wide structures, frameworks, strategies, and processes	2025 Q4	GDI Action Plan Progress x1
Country and center-specific results, structures, strategies, plans, and Processes	Q3 2025	Summary of Evaluative Evidence (to contribute to scoping activity)

Seven Ways for Working (WoWs):

1. Embracing a systems transformation approach, seeking multiple benefits across five SDG-linked Impact Areas.
2. Leveraging ambitious partnerships for change in which CGIAR is strategically positioned.
3. Positioning regions, countries, and landscapes as central dimensions of partnership, worldview, and impact.
4. Generating scientific evidence on multiple transformation pathways.
5. Targeting risk-management and resilience as critical qualities for food, land, and water systems.
6. Harnessing innovative finance to leverage and deliver research through new investment and funding models.
7. Making the digital revolution central to our way of working.

Annex C. Key Reference Materials for ERG Members

1. [CGIAR Evaluation Framework and Revised Evaluation Policy \(2022\)](#)
2. [Evaluation Guidelines](#)
3. [Evaluation Methods and Technical Notes](#)
4. [CGIAR Performance and Results Management Framework](#)
5. [October 2023 CGIAR Results Framework](#)
6. [Draft CGIAR Technical Reporting Arrangement 2025+](#) (by request)



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