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RESEARCH FOR DEVELOPMENT  
EXTERNAL REVIEW

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**COHRED**  
Council on Health Research for Development



**SPN**  
CONSULTING

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# PREFACE

Sarah Norris and Malaquias Lopez Cervantes were commissioned by Irish Aid to do an external review of the global development non-for profit organization COHRED, Council on Health Research for Development, focusing on research and innovation as key to achieving health equity. This report is predominantly of a qualitative nature, with the majority of research having been conducted through a wide range of surveys and interviews with relevant key players in global health and development and an in-depth analysis of relevant data/documents.

The purpose of this external review is not to question the validity of COHRED's mission of strengthening health research as an important component of health equity. The external review instead assesses whether COHRED's global initiatives and programs focused on health research strengthening are relevant, appreciated and effective. It is widely understood that research and innovation are crucial for successful development, an opinion that is shared by the external reviewers.

It is important to give some context by describing the evolution of COHRED since inception. COHRED divides its history into three chapters, COHRED 1.0, from 1993 to 2004, COHRED 2.0 from 2004 to 2010 and COHRED 3.0, the organization today and in the future.

COHRED has evolved from being an advocate of essential national health research (COHRED 1.0) to an organization that in addition to advocacy, provides technical assistance and support to countries and development organizations working towards improving research systems for health (COHRED 2.0). As an advocate of the importance of health research, in particular health research systems as key to development, COHRED faces a number of challenges: Firstly, it is advocating a concept, which is poorly understood by most. Secondly, strengthening health research systems is an area of development that has few valid benchmarks and indicators to measure success. Quantifiable data in this domain is weak and the existing metric systems are not recognized as effective measures of progress. Herein lies the third challenge; the weak metric system coupled with the inherent long-term nature of research, has meant that in general, neither donors nor governments in LMIC have prioritized spending in these areas. COHRED 3.0 plans to continue with a 2-prong strategy with an emphasis on both technical support and advocacy. However, they are shifting their positioning away from a classic nonprofit model of a "doer" to that of an "enabler" with the fundamental belief that development would be best served if LMIC are actively engaged. COHRED 3.0 is also broadening its focus moving away from solely promoting its core competency, National Health Research System (NHRS), to engaging in creating environments that promote research competitiveness in general with improved health and health equity as key outcomes. COHRED's geographic presence has also evolved and grown since inception with its presence heavily resonating on three continents. Of note, is COHRED 2.0's growth in Latin/Central America and Asia. A large number of countries represented show the long-term nature of COHRED's programs (notably those projects inherited from COHRED 1.0 that are still active today). Please refer to map of COHRED 1.0, 2.0 programs in opening section of external review report.

COHRED 1.0 was a phase in which COHRED was entirely donor-funded. COHRED 2.0 saw a diversification of funding to include more project related funding. In COHRED 3.0, as of 2010, further diversification has started, notably in terms of obtaining contracts from countries and institutions, to create "purchaser-provider" relationships which now constitute 25% of funding to date. The external review has considered new diverse funding sources for COHRED, including the possibility of a Social Enterprise, notably COHRED Technical, a concept introduced by COHRED 3.0. COHRED Technical would complement COHRED's social mission by providing technical services, tools and a framework aimed at strengthening research and innovation systems for health in countries against payment. The revenue generated from the initiative would help fund COHRED's social mission.

COHRED 1.0 has also evolved from a Geneva based organization to becoming a Southern Alliance with key Northern Partners (COHRED 2.0) with a significant global presence (please refer to map on page 11).

In brief, this external review will address all issues relating to the organization's work and sustainability as it enters a new chapter, COHRED 3.0

## SUMMARY AND CONCLUSION OF KEY FINDINGS

In summary, our findings are that COHRED is a relevant and key player for advocating health research issues and strengthening health research systems in low and middle income countries and has proven successful in forming relevant partnerships that help drive agendas forward. Those who understand the problems caused by lack of research capacity and the complexities involved in building health research systems consider COHRED as being a leader in this specialized field. It has been suggested "COHRED bridges the gap between strategies/programmes of International players mandated by the international community (i.e. UN bodies including the World Health Organization (WHO) and the true aspirations of the LMIC expressed at the state levels or at community levels," New Partnership for Africa's Development (NEPAD). In addition to this, specific local research institutions hope COHRED will play an important role in representing their interests by raising the visibility of their work and securing commitment to R&D funding from governments who have not prioritized spending in this area or have been slower in reaching set target amounts.

COHRED's work can broadly be split into four main sections: 1) technical support 2) advocacy, learning, communications 3) R&D of tools, methods, approaches and processes in NHRS and increasing our understanding of the link between research and development and 4) web based system support. Many of COHRED's advocacy policies have resulted in increased awareness and mobilized both local and regional recognition for the need to address the issues at hand on a wide range of topics including ethics and pharmaceutical innovation, The core of COHRED's technical support work is aimed at strengthening research capacity through a systems approach. Based on our assessment of COHRED's work in LMIC, there is significant evidence to suggest that COHRED's tools and services are having a positive impact on strengthening research capacity. COHRED's technical expertise in particular is highly appreciated and respected by the stakeholders they work with. A key strength for COHRED has been to leverage its size, allowing it to be nimble and flexible, staying alert to country needs, respond quickly to opportunities presented, and adjust its mission to address the continuously changing environment.

However, amongst certain stakeholders, COHRED is still unknown or considered too small to contribute significantly in this domain. The question of how they operate on the ground is unclear to some and a little skepticism exists regarding its ability, given their size and budget, to address such a large global agenda. There is also some ambiguity whether systems thinking is the right approach to solving many global health problems and if a single framework can solve or strengthen research capacity in such a wide range of differing LMIC around the world.

Many of COHRED's key challenges are associated with its limited resources. A key issue for unlocking large grants from global organizations/donors/foundations will depend on solving the issues surrounding lack of metrics. COHRED is currently aligning itself with projects such as NEPAD's ASTII and staying on the forefront on any major developments in this area. Section IV in the external review addresses how COHRED is and should tackle these challenges moving forward.

## Conclusion of Key Findings:

As a summary, the external reviewers have concluded that COHRED addresses the following:

### COHRED is strengthening health research systems

- 1 Evidence suggests that reform is taking place to radically improve health research systems in specific countries based on the recommendations and conclusions resulting from COHRED's activities.

### COHRED acts as a mechanism for triggering country responses

- 2 COHRED continues to play a crucial role in placing critical topics such as health research priorities and national health research systems on country agendas and triggering country level responses to address the problems of weak capacity and scattered research efforts.

### COHRED, a trusted partner providing expertise aimed at building research capacity

- 3 COHRED's is a trusted partner with the ability to provide technical assistance to countries and regions looking to strengthen research capacity nationally or in specific target areas. It provides LMICs countries with critical expertise that is currently lacking yet necessary for implementing successful health research related activities

COHRED raises the profile and visibility of a stakeholder when it engages in projects which can be crucial for securing funding.

- 4 COHRED, a visible international organization, represents the interests of local organizations that have no means, resources or platform to be heard. Local partner organizations are hoping COHRED will assist in increasing government R&D commitment or channel new funding to support their work.

### COHRED is committed to the fundamental principle of country ownership

- 5 At the core of COHRED's social mission, is the concept of country ownership and enabling recipients to be accountable and responsible for their own programs and future. Now COHRED as a social enterprise must reinforce this principle.

### COHRED, a promoter of principles of knowledge sharing and learning

- 6 Through HR Web, COHRED is already providing access to information and knowledge sharing. Now COHRED must advance by incorporating innovative mechanisms and links to other relevant information related to health research systems.

These aspects of health development that COHRED is addressing directly relate back to Irish Aid's objectives for health as an institution committed to "a strong focus on investment in health care institutions and systems". COHRED applies an approach consistent with Irish Aid's overall health policy and strategy to "work closely with other development partners in strengthening government capacity to direct and manage this health sector reform process". COHRED is working to strengthen government commitment and health research systems which is in keeping with Irish Aid's SWAp approach, which includes governments leading the process and implementation for change.

# ABBREVIATIONS

ACHR	Advisory Committee on Health Research
AFHRF	African Health Research Forum
AHA	Alignment and Harmonization
ART	Anti Retroviral Treatment
AMCOST	African Ministerial Conference on Science and Technology
APHRC	African Population & Health Research Centre
ASIF	African Science and Innovation Fund
ASTII	African Science, Technology and Innovation Indicators Initiative
AU	African Union
Bangkok (2000)	The International Conference on Health Research for Development in Bangkok (2000)
CARK	Central Asian Republic and Kazakhstan
COHRED	Council on Health Research for Development
DANIDA	Danish International Development Agency
DFID	UK Department for International Development
EC	European Commission
EDCTP	European & Developing Countries Clinical Trials Partnership
EETT	External Evaluation Task Team
EU	European Union
GAVI	Global Alliance for Vaccines and Immunization
GFATM	Global Fund to Fight AIDS, Tuberculosis and Malaria
Global Forum	Global Forum for Health Research
GHP	Global Health Partnership
G8	8 Member States from Forum created by France
HIV	Human Immunodeficiency Virus
HPSR	Health Policy and System Research
HQ	Head Quarters
HRC	Health Research Council
HRD	Human Resource Development
HRS	Health Research Systems
HRU	Health Research Unit
HR Web	Health Research Web ( <a href="http://www.healthresearchweb.org">www.healthresearchweb.org</a> )
IA	Irish Aid
IAVI	International Aids Vaccine Initiative
IFC	International Finance Corporation
LMIC	Low- and Middle-Income Countries
MDG	Millennium Development Goals
MoE	Ministry of Education

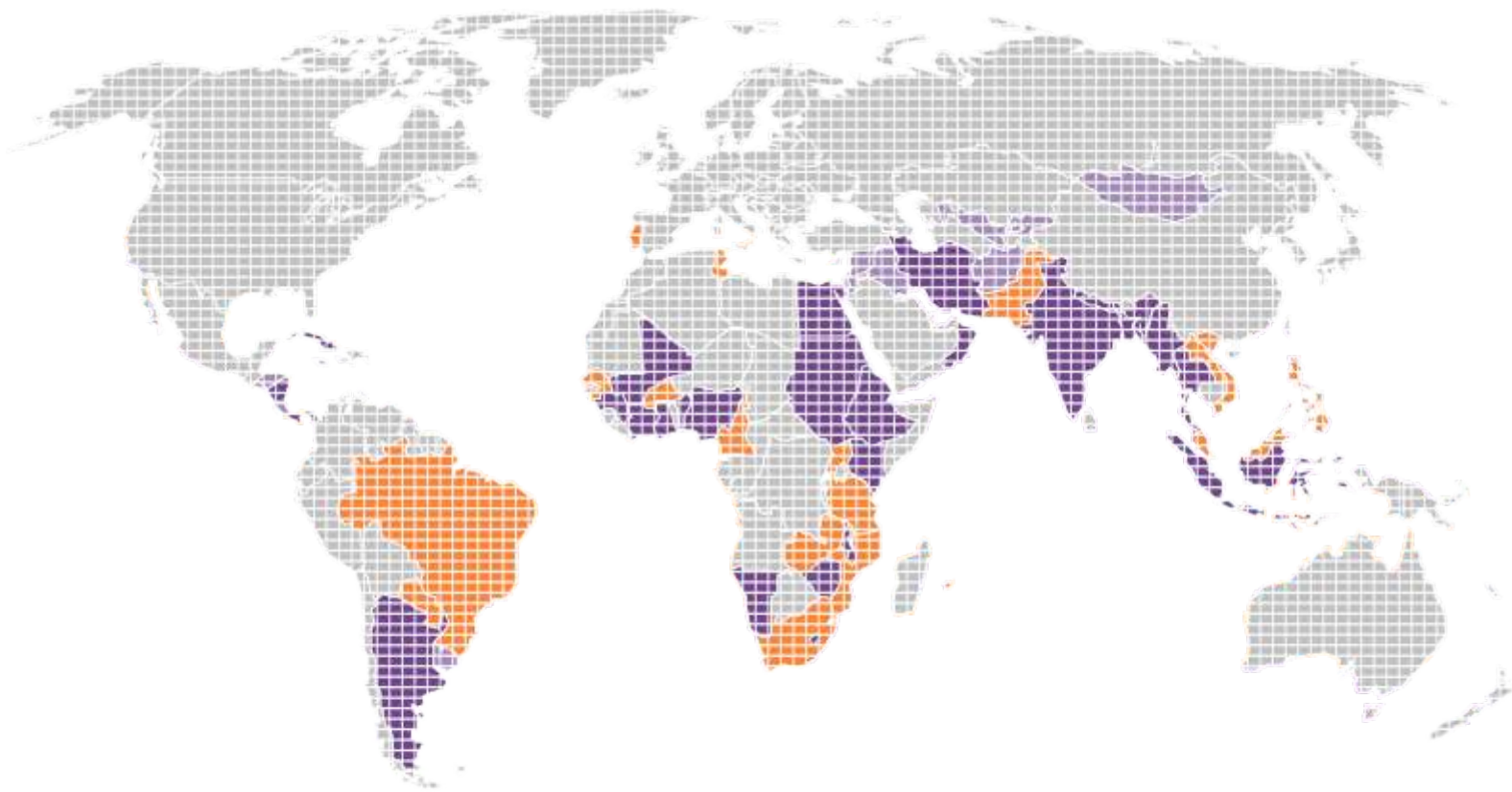
MoF	Ministry of Finance
MoH	Ministry of Health
MoPS	Ministry of Public Service
MoS&T	Ministry of Science & Technology
MoU	Memorandum of understanding
MRC	Medical Research Council
NGO	Non-Governmental Organization
NHRS	National Health Research System
NIH	National Institutes for Health (USA)
NEPAD	New Partnership for Africa's Development
NRS	National Research System
PAHO	Pan American Health Organization
PHC	Primary Health Care
PPP	Public Private Partnership
R&D	Research and Development
RCB	Research Capacity Building
RIMAIS	Red Iberoamericana Ministerial de Aprendizaje e Investigación en Salud
ROI	Return On Investment
RVP	Responsible Vertical Programming
RPC	Research Policy and Cooperation
S&T	Science and Technology
SDC	Swiss Agency for Development and Cooperation
TB	Tuberculosis
TDR	UNICEF, UNDP, World Bank and WHO's Special Programme for Research and Training in Tropical Diseases
TOR	Terms of Reference
UK	United Kingdom
UNDAF	United Nations Development Assistance Framework
UNDP	United Nations Development Programme
UNICEF	United Nations International Children Education Fund
UNFPA	United Nations Population Fund
USD	United States Dollars
WAHO	West African Health Organisation
WHA	World Health assembly
WHO	World Health Organization
WPRO	Western Pacific Regional Office (WHO)

## THE EXTERNAL REVIEW REPORT INCLUDES FIVE SECTIONS:

- SECTION I. Overview: COHRED's presence
- SECTION II. Key trends and how they impact COHRED 3.0
- SECTION III. COHRED at present and options for the future
- SECTION IV. COHRED's sustainability; Funding diversification
- SECTION V. Annex:
  - ◆ Partner Survey Findings

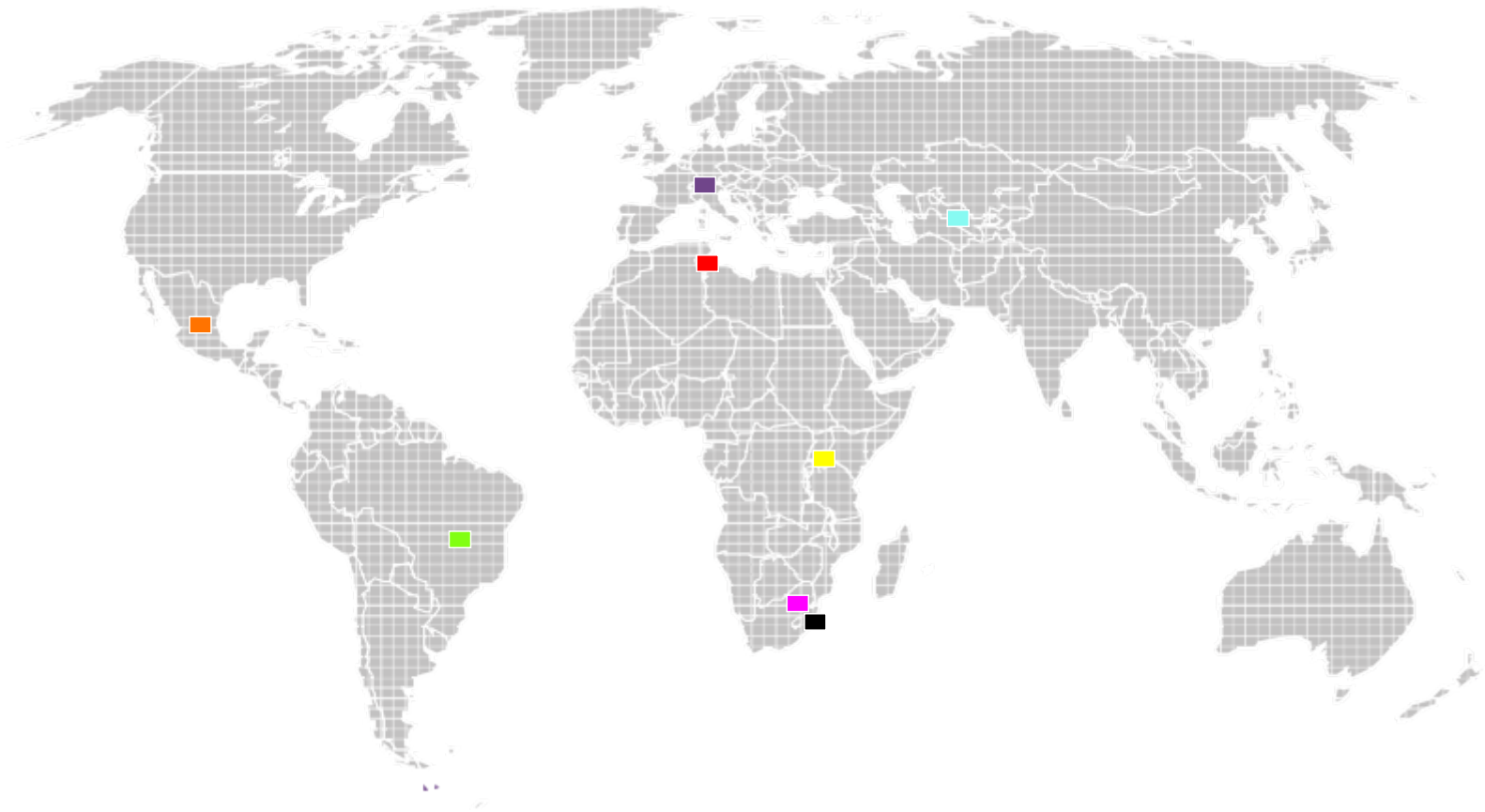


## SECTION I. OVERVIEW: COHRED'S PROJECTS



- ACTIVE PROJECTS FOR COHRED 1.0  
(developed and completed between 1993-2004)
- ACTIVE NEW PROJECTS FOR 2.0  
(developed post 2004)
- ACTIVE PROJECTS FOR COHRED 2.0 INCLUDING THOSE INHERITED FROM COHRED 1.0  
(developed between 1993-2010 and currently still active)
- UNSPECIFIED

## SECTION I. COHRED'S CENTRES AROUND THE WORLD



□ SWITZERLAND - GENEVA  
COHRED's Headquarters

□ MEXICO - MEXICO CITY

□ BRAZIL - BELO HORIZONTE

□ UZBEKISTAN - TASHKENT

□ TUNISIA - SOUSSE

□ UGANDA - KAMPALA

□ SOUTH AFRICA - PRETORIA

□ SOUTH AFRICA - PIETERMARITZBURG

## SECTION II. KEY TRENDS AND HOW THEY MAY IMPACT COHRED 3.0

The global health agenda is extremely complex with a myriad of health initiatives and programs involving a wide range of donors, recipients, civil society organizations, global and regional organizations and local as well as international non-profit organizations. The many sources of funding and sheer number of actors working in this domain and the inability to present a universal vision and process or framework to solve the world's health problems adds to this complexity. The role of WHO and the World Bank as the dominant forces for setting and prioritizing agendas is also changing with the increase in stakeholders. Examples of the shift in balance of power amongst larger stakeholders include the introduction of global health policy on the G8 agenda and the formation of the H8. The general landscape also adds to the complexity at hand, with each country representing its own set of political, socio and economic challenges subject to rapid and continuous change due to the nature of health and poverty.

A systems approach can help clarify the complexity by organizing information and presenting an overview of how the various components fit together. Research is a critical component of the systems approach shedding light on the building blocks of a solid public health system and the foundation of a sustainable and prosperous society.

COHRED's life is an appropriate reflection and example of a rapidly changing dynamic environment – as mentioned earlier. It has shifted its focus as an advocate for Essential National Health Research (ENHR) (COHRED 1.0) to implementing National Health Research Systems (NHRS) (COHRED 2.0.) to now evolving into an organization focusing on increasing the capacity of Low and Middle Income Countries (LMICs) to engage and get access to the world's competitive research environment (COHRED 3.0).

So where does COHRED's vision fit into the current landscape and are these changes due to a lack of focus or a necessary evolution that reflect the dynamic environment in which it operates? The answer is best tackled looking at COHRED and how it prepares for future trends.

There are three main trends that have been identified as being critical in impacting the development of COHRED 3.0. How the organization is and continues to leverage these opportunities are key to its growth and success in achieving health, equity and development through research and innovation.

An article released this month on AllAfrica.com, regarding a recent Commission report highlighting the lack of support in science, sheds light on all three trends and will be referenced in this section:

### 1 Health Research Systems Strengthening

Health Systems Strengthening has been the new buzz-word on the Global Health Agenda, highlighting a focus or shift in attention on "horizontal" programs when previously, much of the funding has been toward vertical disease specific programs. "A growing number of WHO Member States and the world's political and international health leaders recognize the urgent need to make a major, sustained commitment to strengthening health systems" (World Bank). After an initial explosion in global partnerships and alliances to streamline funding, much of which was allocated to vertical disease specific programs, many of these efforts have concluded the need to strengthen underlying health systems. Vertical disease specific programs have highlighted fragile underlying health systems and there is strong evidence to suggest they are contributing to weakening health systems. How to define health systems strengthening and what may be appropriate for all countries is still unresolved and a matter of debate.

COHRED 3.0 Strategy:

Of interest, is whether COHRED, that is ideally positioned to play a critical role in an area of health systems strengthening, i.e. research for health, is actively seizing this opportunity and maximizing its potential. Obviously COHRED already has its existing funding and programming related to NHRS and research capacity strengthening. But the question remains whether it should and could do more?

It is the opinion of the external reviewers that the opportunity presented by an increasing global recognition of Health System Strengthening could present a tipping point for COHRED if leveraged correctly. The evidence suggests that COHRED 3.0 is strategically acting on this opportunity. Its strategy includes raising the organization's profile globally and locally through partnerships and alliances both on the regional (e.g. The New Partnership for Africa's Development (NEPAD)) and local (e.g. European & Developing Countries Clinical Trials Partnerships (EDCTP)) level. There is also an underlying assumption that by partnering with an increasing number of Southern organizations, and gaining valuable and technical knowledge about countries' research systems, COHRED will continue to gain global visibility and relevance. One of the key hurdles COHRED faces is the lack of availability of a generally recognised and feasible metrics to evaluate progress in system development. For COHRED to unlock more significant funding from larger global organizations, donors and foundations that are directing a substantial amount of money to strengthening health systems, it will need to tackle the issue of Return on Investment (ROI) (COHRED 3.0 specific strategy regarding metrics is highlighted in section 3). The role of research in health systems strengthening has not been a funding focus in large part for this reason. As an authority on health research, and an advocate of its role in systems strengthening, COHRED 3.0 is aware that it needs to fill the metrics gap by presenting success stories and strong evidence that will satisfy its skeptics and tip this trend in its favor: As an example "Drugs that have an efficacy of 98% will have an efficacy of 30% in the best functioning African health system today" said a COHRED Board Representative

The health systems strengthening concept is important when one applies it to research for health in Africa specifically. The recent report released by a Commission set up under Blair for donors to support Science and Technology (S&T) in Africa provides a relevant example. The Commission argued overall progress in S&T in Africa despite increase in funding having been "disappointing." The article highlights that the reason for this is that the underlying research systems in place are weak and unable to support these initiatives.

John Mugabe (from the University in South Africa) a former S&T adviser to NEPAD said "that while the commission had made many good concrete recommendations in its first report" it "did not identify specific and strategic ways and means of implementing the recommendations. The commission assumed that strong or capable institutions to implement its recommendations existed in Africa and internationally."

## 2 The Ambiguous Impact of Aid/Empowering the South

Another trend centers on the increasing ambiguity relating to the negative impact of Aid and a desire from a number of Southern countries to be more empowered in the process of solving their own development issues, including health. There is evidence suggesting a growing trend of frustration amongst African governments/officials that are wanting to be more involved in the process for implementing change and shift responsibility for countries' development to those in charge. The arguments supporting this position tend to relate to donors and foreign stakeholders having a poor understanding of country processes and systems.

Governor Sule Lamido of Jigawa state in Nigeria for example said. "The approach has to be changed, programmes and project have to be developed, based on our perspective and needs otherwise, it will be of no impact to us" (Source: allafrika.com October, 2010)

This perspective is also met with some resistance as pushing responsibility and accountability onto local stakeholders requires a need for transparency if funding is provided from the North.

Having an indepth understanding of the slightly unnatural relationship between donor and recipient founded on “funding for a greater good” is central to effective development. Being able to pass on responsibility for a pre-designed program when the incentives for ensuring its success are often weak, is difficult. Accountability for a project is also often further diluted when an “aid agency” is involved.

#### COHRED 3.0 Strategy

COHRED 3.0 has designed its future strategy on the assumption that development will be more effective if countries take control of their own destiny, and that both countries and funders will recognize this with time, and inevitably change their funding patterns to accommodate this. COHRED is therefore moving to grow its services and position itself as an “enabler” of development. It also wants to move away from being considered a solely Geneva-based organization and become a “Southern alliance with key Northern partners” with an accurate understanding of LMIC. It is impossible to know today whether this strategy will be effective over time, but there is significant evidence to suggest that development may be redefined. An increasing number of donors fund governments or “southern” organizations directly, the negative portrayal of the impact of aid by some and the increasing frustration of certain governments to challenge existing patterns by wanting to be more involved in the design and implementation of development projects, suggest that COHRED 3.0's strategy may very well be 'spot on' and that in hindsight, COHRED will be considered a visionary for having been one of the first to identify the change and act upon it.

It is important to analyze how this trend impacts research for health in LMIC by referring back to the article on the commission report which criticized the lack of progress in Science and Technology despite new funding and donor supported initiatives. John Nuage stated, (University of Pretoria in South Africa) “There was a flawed assumption that African countries and their leaders owned or genuinely endorsed the commission's process and would take the recommendation seriously.”

### 3 Lack of adequate metrics to measure progress

The problem surrounding the lack of an adequate metrics system with indicators and benchmarks that measure progress efficiently is a central issue in global health. As mentioned, with any investment, whether in the private or public sector, a quantitative “return on investment” is often key to unlocking funding. There is a craving for relevant data in global health amongst stakeholders. Some argue that “although the West is not comfortable with this notion” “some things just can't be measured” said a representative from a global organization. Others, particularly donors, feel that solving this issue is crucial and important to advancing development and will perhaps continue to be unwilling to fund projects without a sense of ROI. One must distinguish between measures focused on the impact of health research projects specifically and those that are more general in nature such as the development of health research systems. There is no doubt that if COHRED can impact this area either by contributing relevant indicators, benchmarks or quantitative data, “many organizations would sit up and listen” stated a representative from a global organization.

#### COHRED 3.0 Strategy

Given that a generally agreed upon 'systems metrics' is absent, not agreed upon and perhaps immeasurable or too costly to measure, COHRED needs to determine its approach to metrics for COHRED 3.0. Without a doubt, there is pressure to solve this problem. COHRED needs to determine whether it can impact this area given its limited resources. There is no doubt that any significant contribution to this area would lend credibility to the organization and give the perception of added value to its work. One of the areas that may prove relevant is Health Research Web (HRWeb), which could potentially be a source of gathering important and relevant quantitative information. COHRED's response to metrics for the immediate future is also to align themselves with initiatives such as NEPAD's ASTII to gain strength and credibility in this domain.

Again, the article “Existing Initiatives in Science and Technology getting mixed reviews” proves relevant for highlighting the issue of metrics in research for health.

NEPAD argued “Disappointing progress is a rather qualitative position. Remarkable progress has been made in the implementation of the CPA. There has been no benchmark against which progress in science and technology which is measured on the continent. That's why the NEPAD agency established the African science, Technology and innovation Indicators Initiative (ASTII). Lack of benchmarking also meant the commission has failed to notice marginal progress in creating centers of excellence.”

Other trends that were mentioned and are worth noting during the course of the review are:

- 4 **Millennium Development Goals Review:** As we work towards the review of the Millennium Development Goals (MDGs) with regards to health, COHRED should prepare itself for 2015 and the role it could potentially play in reviewing the accomplishment of these goals in partner countries.
- 5 **Privatization of Healthcare worldwide:** Is there a role for COHRED in this domain? The answer is likely to be yes. However, innovative approaches will be required to move away from disease bound definitions of priorities, to focus on healthcare system structural issues as research topics and their impact on affecting multiple outcomes such as health maintenance, and the efficiency and effectiveness of early diagnosis and chronic disease control under different healthcare schemes.

## SECTION III. COHRED AT PRESENT AND OPTIONS FOR THE FUTURE. RESULTS FROM A SEMI-QUALITATIVE ASSESMENT

This section addresses the statement introduced in the preface as to whether COHRED's global initiatives and programs focused on health research strengthening are relevant, appreciated and effective. The external reviewers will relay the four main areas of COHRED's work: 1) technical support 2) advocacy, learning, communications 3) R&D of tools, methods, approaches and processes in NHRS and increasing our understanding of the link between research and development and 4) web based system support back to the six points summarized in the preface which cite specific examples that justify the external reviewers conclusions.

COHRED's goal is for all countries to set and implement their own research priorities which will help drive competent, well informed decision-making for health issues, governance and policy as well as, contribute to socio-economic progress.

For the purpose of the external review, research is separated into two areas: health policy and governance and innovation.

### Research for Improved Health Policy and Governance:

Enhancing the quality, coordination, prioritization of research to improve the decision making that drives health policy and governance of a successful public health system is an essential component of an effective health research system. Ideally, policy makers can use existing research to make decisions rather than decisions triggering research efforts which is a more typical scenario in many countries.

### Innovation for Social and Economic Prosperity

Research, science and technology are central to a country's growth. What we term "innovation" is a driving force for progress. But innovating is only the first step in the process. Research then needs to be adapted and translated into useful products or services that can actually be used. In the 1980's, David Payne, the director of the University of Southampton Optoelectronics Research Centre, designed an amplifier to send signals over long distances down fibre optic cables. "Professor Payne's work is an example of the way fundamental research can have considerable economic and social impact. The ORC has contributed to the foundation of 10 companies in the Southampton area, which together employ 600 people and turnover £200M a year. It took almost two decades for Professor's Payne's advances to bring fast internet connections to homes." Times, November 12th, 2010. Although COHRED's focus is health, this example highlights the impact of innovation in general on social and economic prosperity. Of additional importance, is that the "spill over" benefits of strengthening the health research system are applicable to many areas of innovation.



All four areas of COHRED's work mentioned earlier serve two fundamental purposes:

- 1 To assist countries to identify key stakeholders, that will help generate knowledge (individuals, research, academic institutions etc.)
- 2 To provide guidance on knowledge utilization: how to maximize the research conducted to change behaviour and opinions; launch new products (such as medicines, devices or practices) or improve governance (health policy, ethics, intellectual property etc.)

COHRED's work can broadly speaking be split into two areas:

- 1 Regional Partnerships
- 2 Country Level

The external reviewers believe that the combination of COHRED's regional and country level work is critical to achieving the greatest impact needed to strengthen health research systems.

COHRED has contributed to this field by designing a framework, tools and methods to map a country's health research system by assessing and setting priorities. The effectiveness of its ability to do this, and trigger change or reform and measure that impact on the improvement in health research or health in general, needs to stand the test of time. It is too early to know what, if any, this impact will be. For COHRED, the single biggest budget project in this area, the 'Research for Health Africa' (R4HA) project funded by the Netherlands and executed in partnership with NEPAD, only started in May 2010. However, the external reviewers have concluded that COHRED is moving in the right direction. Evidence relating to this and several other projects suggest that COHRED's current interactions with countries are highly appreciated and valued by a wide range of stakeholders. Working with COHRED has provided partners and countries with a number of valuable marginal benefits listed in our conclusion.

On the other hand, the external reviewers consider COHRED's regional work as a core competency. COHRED's strengths currently lie in developing and motivating regional partnerships to embrace and support specific issues in health research. They are skilled at securing highly credible regional partnerships to engage and implement their initiatives. This work has a two fold impact: firstly, it reinforces COHRED as an advocate, creating crucial awareness of the important issues at stake, and secondly it helps build technical capacity at both the regional and country level as knowledge and awareness trickle down from the partnerships to the partner countries involved.

Yet again, COHRED is cautioned to continue to focus also on the country level since both areas of work are necessary as they reinforce and complement each other. Both are linked and important for achieving large scale change and the highest possible impact.

Due to restrictions on the external reviewers consulting time, the methodology used to gather information was two fold. Firstly, the external reviewers included an e-mail survey for COHRED partners to assess the perceptions and attitudes towards COHRED; and secondly, the external reviewers carried out many in-depth interviews with individuals, groups and partners related to COHRED or the field of global health. Specifically, the information gathered assessed COHRED's responsiveness; its professionalism; the level of technical skills delivered; the usefulness of their methodology, instruments and tools utilized and the perception of the degree of change attained directly owing to COHRED's intervention. It is based on the results of this analysis that the external reviewers determined the following:



## COHRED is strengthening health research systems

100 % of partners interviewed agreed that they would want to work with COHRED in the future. Partners consistently articulated their support for COHRED. When asked, "Were you satisfied with your engagement with COHRED? Why or why not?" partners overwhelmingly praised the organization. "Yes because COHRED leadership has taken the right steps to clarify its vision and check on its viability based on existing demand for its services," one partner stated. Another partner expanded upon this commenting on their solid relationships and communication. "Yes. They were always there to provide assistance. Very reliable, professional with good communication skills." Another partner highlighted how COHRED's mission has helped support the creation of building a sustainable system. "I am very satisfied with COHRED because it gives us support in our health research system and health information system."

### EXAMPLE: TANZANIA

In 2009, COHRED collaborated with the Tanzanian National Institute for Medical Research in the context of Alignment and Harmonization. It conducted an assessment of the Tanzanian Health Research System which examined the country's existing health research system architecture, health research policies, priorities, capacity, and financing mechanisms. This led to a series of conclusions and recommendations aimed at strengthening the Tanzanian health research system. The report is considered to be the only existing document compiling relevant information and providing an overview of the country's health research system. The recommendations issued from the study are guiding reform processes for the improvement of research management systems and governance in the country, as is the case with the Tanzanian Commission for Science and Technology

Tanzania is arguably one of the more advanced African nations in prioritizing health research. The Tanzanian government is moving towards a firm target of a 1% GDP commitment to health research. We can unambiguously state that COHRED is not entirely responsible for the country's recognition and commitment to supporting and spending in health research. However, the external reviewers will argue that COHRED has made an impact and is part of one of many factors that has helped highlight issues at hand and mobilize a response to address it.

COHRED's technical involvement in this study is solid evidence of their technical support and use of R&D tools, methods, approaches and processes in NHRS. The work has catalyzed identifiable change or "reform". The external reviewers caution readers to be realistic in their expectations of what this means. Undoubtedly, this example points to a success story; however, as mentioned earlier, more time is needed to determine whether the reform is successful and will have a positive impact on improving health policy and decision-making in Tanzania and economic and social growth.

## COHRED acts as a mechanism for triggering country response

### EXAMPLE: COSTA RICA

In Costa Rica, COHRED is perceived as the catalyst for the initiative to establish and develop a National Research System and the strengthening of a regional collaboration called Red Iberoamericana Ministerial de Aprendizaje e Investigación en Salud RIMAIS (which stands for Ibero-American Ministerial Network of Research and Learning in Health).

Following the Ministerial Summit in Mexico in 2005, Luis Tacsan, Director of Health Research at the Costa Rican Ministry of Health declared that Health Ministries in Latin America have great interest in identifying health research priorities and developing their own health research system. Tacsan added that without any doubt, COHRED is one of the most important organizations offering support in both these areas. He continued to credit COHRED for assisting in the establishment of a health research policy agenda for the Americas and supporting a series of events, which acted as the catalyst for the official formation of health research policy. He also stressed that COHRED's involvement helped facilitate the creation of the first Latin

America Regional Think Tank, which met in Antigua in 2006, as well as the Latin American Conference on Research and Innovation for Health held in Rio de Janeiro in 2008 and the follow up meeting held in Cuba in 2009. This provides an excellent example for the need in specific areas for an external initiative, such as COHRED, to trigger a country response that can put into motion policy changes. COHRED was perceived as the "glue", providing the necessary "stickiness" amongst Latin American countries to embrace and follow through on an instrumental issue.

COHRED, a trusted partner providing expertise aimed at building research capacity

As mentioned earlier, there is a general finding that COHRED is most skilled at building regional partnerships to drive agendas forward. Its current partnership portfolio include credible organizations such as: WAHO, NEPAD, EDCTP, PAHO, CHRC and RIMAIS.

#### REGIONAL EXAMPLES: RIMAIS, EDCTP and NEPAD

In Central America, RIMAIS is making noteworthy advances in the establishment of agreements to share health research initiatives and human capital with COHRED's support. According to Mario Tristán, Director General of the International Health Central American Institute Foundation (IHCAI), "multilateral collaborations do amplify the efforts aimed at strengthening research capacity and enable several partners to engage in research projects about common priorities with more efficiency." A relevant example is a recent project launched across a number of Latin American countries linking several health problems, in particular renal health, with heat stroke amongst sugar cane workers. Conducting this research as a regional initiative across several countries appears more time and cost efficient than it would have been if conducted solely in a specific country.

In Africa, COHRED is working in collaboration with the European and Developing Countries Clinical Trials Partnership (EDCTP) focused on ethics review capacity and establishing the basis for the participation of African countries to engage in modern clinical research (the project is discussed in more detail later in this section). This initiative is linked to COHRED's even more ambitious project aimed at Strengthening Pharmaceutical Innovation in Africa (in partnership with NEPAD). COHRED's involvement in these types of projects is the most promising strategy for achieving its goal of enabling countries and their institutions to take a leading role in developing a promising and valuable industrial field for the continent. Both these projects incorporate all areas of COHRED's work including technical support, R&D of tools, methods, approaches and processes in NHRS/increasing the understanding of the link between research and development and web based system support (specific to EDCTP project), but the most prominent function in the external reviewers' opinion is that of advocacy, learning, communications. By partnering with credible organizations, COHRED is instrumental in raising awareness of a potentially profitable and important step for development in this region, while highlighting the fundamental building blocks associated with clinical trials and pharmaceutical strengthening which are key to governance of effective health policy.

COHRED raises the profile and visibility of a stakeholder when it engages in projects which can be crucial for securing funding

#### EXAMPLE: THE CARIBBEAN

COHRED'S work in the Caribbean provides a relevant example. Specifically, COHRED has helped consolidate a multinational initiative in defining health research priorities and the development of a health research system. This initiative is the direct responsibility of the Caribbean Health Research Council (CHRC), an organization represented by all the English-speaking countries in the Caribbean region, including Belize. COHRED is providing guidance to CHRC along with the basic tools for conducting priority setting and the development process, which is now reaching its final stages. It is important to recognize that partners engaged in this collaborative process are confident about attaining the necessary economic resources to execute the initiative. COHRED's involvement has been crucial in raising the partnership's visibility, an added benefit which should not be taken for granted in a LMIC where resources are limited.

COHRED is committed to the fundamental principle of country ownership

#### EXAMPLE: RESPONSE OF SEVERAL LMICs

The external evaluators prioritized this issue during interviews with COHRED's partners as it resonates strongly in COHRED's marketing literature. In general, interviewees agreed that COHRED is accessible and responsive to their requests. In Costa Rica, Luis Tacsan clearly stated that "they think of COHRED as their own resources" and "do not hesitate in requesting support whenever they engage in new projects." The objective however, is that COHRED is viewed as a resource to help facilitate the establishment of initiatives and projects but ultimately it disengages handing complete ownership back to country level.

Many countries expressed the importance for "using" COHRED as a key resource in establishing and improving the relationships and communication between Southern institutions for example. The desire to have a means to share knowledge about specific experiences, initiatives and/or project results between Southern countries working with COHRED was a priority for many. As many researchers have a tendency to work in relatively isolated small groups in niche areas there may be significant benefits in providing forums to share expertise and discuss problems in common. This would encourage partnerships and relationships to eventually flourish and for stakeholders to communicate directly without the need of an intermediary such as COHRED. This initiative should not be confused with the annual Colloquium, the conference hosted by COHRED (please see [www.cohred.org](http://www.cohred.org) for more information), which provides a more broader forum for discussion. COHRED would facilitate communication but its primary focus would remain.

In interviews in Mexico specifically, suggestions were made to try to develop an *esprit de corps* among COHRED partners worldwide in order to share local expertise and capacity. The International Clinical Epidemiology Network (INCLEN), provides a relevant example of a research group initiative that developed a strong sense of membership amongst researchers in different countries with a profound impact on capacity building.

COHRED, a promoter of principles of knowledge sharing and learning

#### EXAMPLE: HR WEB

As mentioned, many countries expressed the importance for COHRED to play a facilitator role between southern institutions. The desire to have a platform to share knowledge be it specific experiences, initiatives and/or project results between countries working with COHRED was a priority for many. This would encourage partnerships and relationships to eventually flourish and for stakeholders to communicate directly without the need of a COHRED context.

To this effect, the creation of the HR Web and COHRED's web based system support is central to COHRED's mission to promote knowledge sharing and learning for better governance of research for health. Currently, the HR web's framework is complete but information about specific countries is missing. It has been assessed that there are an increasing number of pockets on the site that are actively being used in specific areas.

The website is aimed to be a research management platform which integrates key components of research systems. The six active projects and programmes on HR Web include NEPAD ASTII, PAHO, EDCTP MARC, INDEPTH, WHO PHI and NGO network.

#### EXAMPLE: EDCTP and HR WEB

The EDCTP (European and Developing Countries Clinical Trial Partnership) is a ten year 300 Million Euro funded programme aimed at promoting clinical trials in Africa. EDCTP is COHRED's core funder for HR Web/Ethics Web. The programme's objective is to build ethics review capacity in the countries in which

trials are being conducted. COHRED produced a report for EDCTP aimed at providing information on how to better target capacity building grants. The external reviewers have assessed that this initiative is very important. There are countless initiatives with large budgets focused on Pharmaceutical or Clinical Trials but few take into account the systems and governance to support them. The semi wiki approach to HR Web suggests that information will stay relevant and up to date. In our interviews with the EDCTP, the importance and appreciation of COHRED's work was reiterated and satisfaction relating to COHRED's implementation methods expressed.

It is the opinion of the external reviewers that COHRED would benefit by developing HR Web into a real Wiki, as a means for stakeholders, partners and board members to build a virtual community online. A Wiki (a web tool used to enhance communication and knowledge management) is a portal allowing members to gain access to different levels/types of information depending on their affiliation. COHRED's HRWEB would provide the "glue" to create a virtual community and a sense of ownership for partners and board members of the organization located in different parts of the world.

## METRICS

As mentioned earlier, strengthening health systems is currently on the forefront of the global health agenda. The production and utilisation of scientific evidence and research is, without question, the best strategy for countries to adopt in order to strengthen their health systems. The ability to carry out high-quality health research in a timely manner, is a crucial input for health systems improvement.

After ten years of promoting ENHR, COHRED gradually realized that health research must not only focus on relevant health problems facing each country, but also that national health research must be viewed as a system which incorporates a wide range of components and stakeholders with specific needs and capabilities. As mentioned, central to an effective health research system is to improve the quality, coordination and prioritization of research to improve the decisionmaking that drives health policy and governance of a successful public health system.

How much COHRED has contributed to strengthening health research systems, and perhaps even health systems strengthening, and more importantly, how much COHRED may contribute in years to come to help countries advance and improve the health of their populations are key considerations.

This introduces the important issue of metrics and how best to assess COHRED's impact. It is important to give an overview of the complexities involved in Health Research Systems Strengthening. The Stanford Business School released a paper on creating high impact non-profits in 2007 after assessing the commonalities of twelve very different organizations that were considered to be high impact. In that paper, Colby, Stone and Cartar state that "Ultimately, all high impact organizations bridge the divide between service and advocacy. They become good at both. And the more they serve and advocate, the more they achieve impact."

Currently, it appears too expensive or difficult to establish benchmarks and indicators to measure COHRED's work. The external reviewers determined, for example, that in spite of COHRED's strong presence over several years in Latin America, it would be difficult to quantify the results of their activities in this region.

British universities recently were given a similar mandate: to prove the benefits of research or lose funding. Over five identified university disciplines, including clinical medicine, it was generally agreed upon that it was possible "to assess the impact of research within a 15 year timescale." (Times, November 12th 2010) But doubts remain among some academics.

Key to this debate is to question what specifically COHRED needs to measure. COHRED's mission is broad and includes the more specific goal of strengthening health research systems as well as the wider objective

of health equity. "The impact of research on society is important, but the impact of specific projects is diffuse and long term. Most major innovations can trace their origins back, literally over decades, to a wide variety of sources." said Lord Rees of Ludlow, President of the Royal Society in the UK Times this month.

The external reviewers believe COHRED's time and focus should be on searching for metrics that point to system strengthening rather than trying to claim credit for benefits of health equity which are more likely to be traced back to a variety of sources. To quantify the strengthening of a system is difficult and the little data available is weak. However, the marginal benefits of health research systems strengthening are crucial and measurable over time. COHRED needs to shift funders' traditional thinking of ROI to recognize and acknowledge marginal benefits and measuring what matters most.

The external reviewers have identified key areas that COHRED needs to develop to accomplish these goals.

#### Areas of metrics to be explored:

- ◆ Policy changes as a direct result of health research strengthening
- ◆ Increased awareness of health research strengthening
- ◆ Media coverage related to health research strengthening
- ◆ Change in behaviour or attitude as a direct result of health research strengthening
- ◆ Improved communication and knowledge sharing between key stakeholders
- ◆ Improved efficiency of policy decision-making
- ◆ Improved research quality and coordination
- ◆ Increased funding commitments in health research
- ◆ Increase in research published
- ◆ Increase in partnerships between research stakeholders

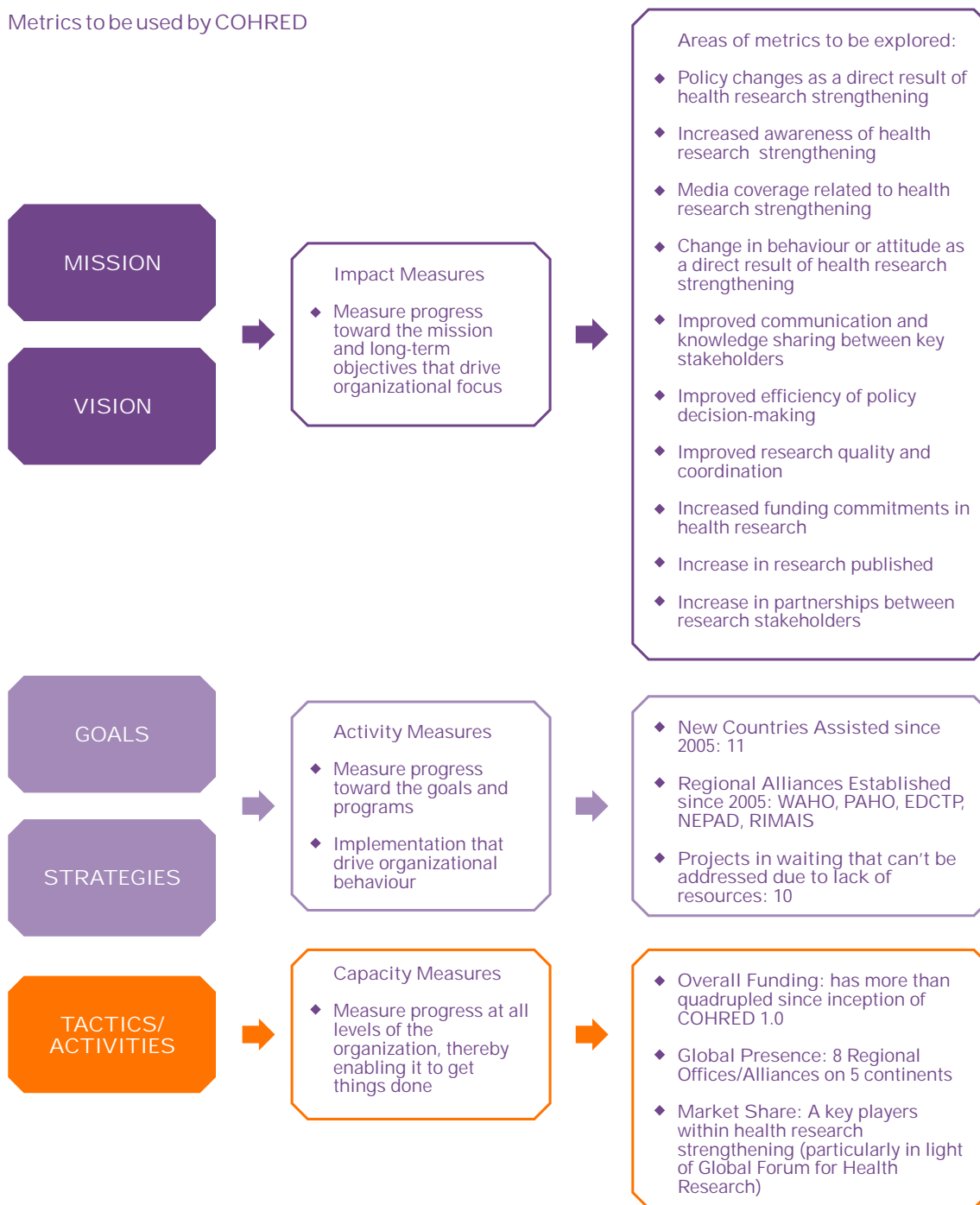
The one source of quantifiable data easily available to COHRED is HR Web. HR Web could act as a strong complement of COHRED Technical and be incorporated into the NHRS program. Furthermore, it should also be used as a data-gathering source for information.

#### HR Web also provides a source of measurable information:

- ◆ Number of unique visitors
- ◆ Number of documents uploaded/downloaded
- ◆ Changes in attitude for knowledge sharing and learning can be assumed and measured over time through increased usage

When assessing COHRED, metrics should not be limited to the work it does, but should include an assessment of its capabilities and achievements as an organization. The external reviewers have also included a chart from a McKinsey Quarterly by John Sawhill and David Williamson on measuring "what matters in nonprofits". The paper states every nonprofit organization should measure its progress in fulfilling its mission, its success in mobilizing its resources and its staff's effectiveness on the job. "The Family of Measures" assesses three types of measures: Impact/Activity and Capacity. The external reviewers have applied this to COHRED (please refer to chart on the following page).

Metrics to be used by COHRED



Source for metrics framework: John Sawhill and David Williamson McKinsey Quarterly, 2001

Finally we must stress that there is a growing support for COHRED to become a Social Enterprise indicated by the findings of the surveys and personal interviews. To this aim, a social enterprise was defined as a social mission driven organization, which applies market-based strategies to achieve a social purpose. A vast majority of those approached agreed that COHRED would be a good social business. One African partner organization stated, "Yes, COHRED is a relevant organization and can support African countries to develop their social sectors." More than half said that they believed that their country would pay for COHRED services if requested. Although partners did articulate potential hurdles including the need for bolder marketing initiatives to clearly define their product and market, the mere fact that partners in this field have expressed demand for COHRED's services and a willingness to pay for them is also a measure of progress.

## SECTION IV. COHRED SUSTAINABILITY: FUNDING DIVERSIFICATION

### SUMMARY OF KEY FINDINGS

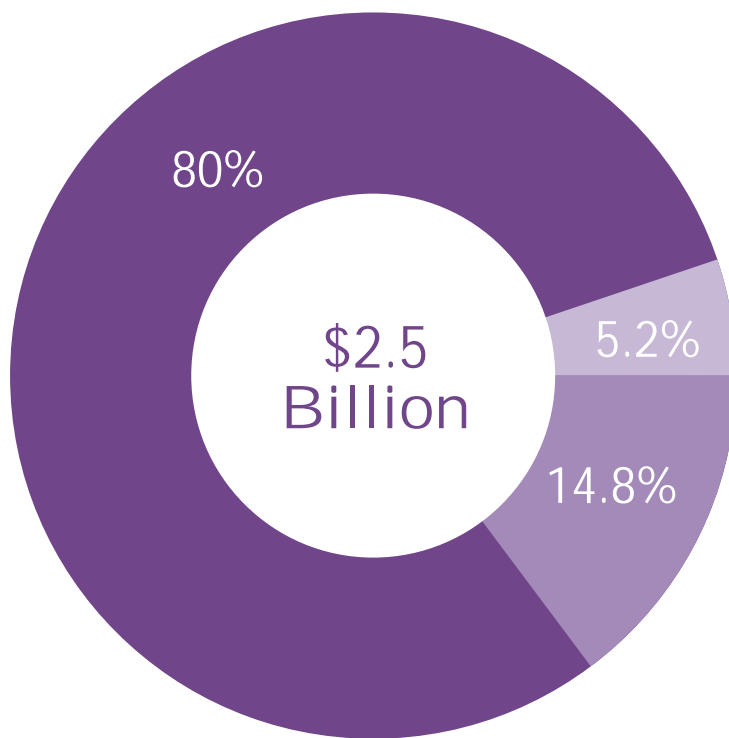
- 1 COHRED is in an unpredictable funding situation, which needs to be addressed immediately.
- 2 COHRED 3.0 (COHRED today and looking to the future) has a healthy and innovative communications and fundraising strategy that is in line with current development trends.
- 3 COHRED is well respected and supported amongst a wide range of funding sources, some of which have criteria that make it difficult to fund COHRED, suggesting a need for an innovative fundraising strategy.
- 4 COHRED has the potential to be a successful Social Enterprise (a concept introduced to us by COHRED), which will enable it to diversify funding. This concept, COHRED Technical, is appropriately aligned with COHRED's strategic positioning of "enabling" and the recent growth of COHRED's "project" business.
- 5 COHRED should build on the success of the recent Colloquium and introduce COHRED CONFERENCES in future strategy.
- 6 COHRED would benefit from reallocating resources and hiring a fundraising director to leverage missed opportunities.

### SUMMARY OF COHRED'S FUNDRAISING CHALLENGES:

- 1 A large percentage of funding for health research is skewed towards vertical and disease specific programmes.
- 2 There is some perception of donor fatigue for health research largely due to lack of metrics and long term nature of research.
- 3 Lack of resources prevent COHRED from targeting wide range of sectors (including private sector, foundations and high-net worth individuals).
- 4 Research for health is a poorly understood concept and difficult to measure.

A CHALLENGE FOR COHRED FINANCING: THE SKEWED NATURE OF HEALTH RESEARCH FUNDING TOWARDS VERTICAL PROGRAMMES

BREAKDOWN OF FUNDING FOR DISEASES (2007)



- Malaria, TB, HIV/AIDS
- Other
- Leprosy, Buruli Ulcer, Trachoma, Rheumatic Fever, Typhoid & Paratyphoid

\* Source for information included in graph: Global Forum for Health Research Report November 2009 referencing data released by The George Institute for International Health, Australia that assessed funding for 30 neglected diseases, over 150 organizations from 43 countries, including pharmaceutical companies.



A) Non for profit organizations (NGO) market to five sectors:

CORPORATIONS

FOUNDATIONS AND HIGH NET WORTH INDIVIDUALS

GOVERNMENTAL DONORS

PURCHASERS (IN THE FORM OF A SOCIAL ENTERPRISE)

GENERAL PUBLIC

Currently, COHRED has primarily prioritized Governmental donors and recipients. The consulting team has identified funding potential and opportunity in other areas. COHRED's limited resources have prevented it from casting a wider net in its fundraising strategy, which has most likely resulted in lost opportunities amongst Corporations and Foundations/High Net Worth Individuals. The external reviewers recommend that COHRED 3.0 reallocate resources and hire a fundraising professional.

#### CORPORATIONS:

COHRED should begin by focusing its efforts on three select business areas/corporate sponsors: the pharmaceutical industry, technology industry and African based businesses. For the purpose of this evaluation, we have looked at one potential business area, the pharmaceutical industry. The external reviewers have assumed that COHRED is willing to accept funds from the Pharmaceutical Industry (given existing funding from Pfizer) and that this does not present a conflict of interest with their social mission.

#### The pharmaceutical industry:

COHRED needs to gain insight into the priorities and objectives of Pharmaceutical companies and establish its presence among small and large pharmaceutical companies that may have an interest in introducing or expanding their social responsibility program. It should be noted that COHRED has already successfully received a grant from Pfizer to support the HR Web Ethics pages (please refer to <http://www.healthresearchweb.org/common/hrweb.php?lg=en&title=ethics> for more information).

There are a number of factors that support a PPP with a Pharmaceutical company.

## What are the benefits for the Pharmaceutical Companies?

- 1 Public/Partnership Benefits: All products being equal, research suggests that consumers prefer purchasing from good corporate citizens.
- 2 Public Relations: Pharmaceutical Companies' images suffered following their lack of willingness to waive patent protection and lower prices for those most in need, culminating with 41 pharmaceutical companies suing South Africa in 2001 over generic drugs. Since, many major pharmaceutical companies have increased their social responsibility programs and are now supporting international initiatives by donating drugs or subsidizing drugs provision (often receiving tax benefits in return), there is evidence amongst specific companies that the change in attitude is continuing to grow. In February 2009, GlaxoSmithKline's Andrew Witty radically shifted the firm's attitude by claiming a commitment to slashing prices, giving profits to be spent on hospital and clinics and sharing knowledge about potential drugs.

- 3 Many LMIC also represent new markets. As Pharmaceutical companies search for new opportunities, some are shifting some attention to R&D spending on neglected diseases and new customers. The pharmaceutical industry may be very interested in getting a better sense of the lay out of academic & research institutions and health systems in general.
- 4 Similarly, there is much talk about the privatization of health care worldwide. Any inside knowledge into a complex system will prove beneficial.
- 5 There is a natural fit between a company with a large focus on R&D and COHRED. COHRED needs to define that fit and approach Pharmaceutical Companies accordingly. COHRED's position on Pharma Innovation could be funded through such a defined fit.
- 6 There have been several proposals for open-source pharmaceutical development including not-for profit "virtual pharma" such as the Drugs for Neglected Disease Initiative and the Institute for One World Health. Given COHRED's progressive position of knowledge sharing, there may be opportunity to partner with a Pharmaceutical company and marry concepts between HR Web and Pharmaceutical Innovation in Africa.

Although the large pharmaceutical companies such as Pfizer and Merck, with large social responsibility programs seem like an obvious fit, "COHRED should also look at smaller pharmaceutical companies that may have an interest in health research systems" said one Northern Donor.

#### Other business development areas to be explored include:

TECHNOLOGY- HR Web is a highly appropriate match for a technology company looking to be a good corporate citizen. Many of the low-middle income countries are potential markets that are likely to grow. "In today's world...top-down hierarchical power is not sustainable. Oh, it can stay in place for years but eventually it is not sustainable", said Hillary Clinton (the chief US diplomat). Clinton continued, "There are just too many ways where people are going to get too much information, and technology is going to blow the doors down on governments...One of my hopes is that we can move toward e-government in Africa so you can get more quickly whatever documents you need to start that business, or to register that car, and you don't have to go through a lot of hands to do it."

Lastly, COHRED needs to explore cause related marketing partnerships with African companies, particularly those in the area of health care, research or technology. There is a growing sense of business being key to empowerment and in turn positively impacting development issues; "Fix the poverty via business, which has rocketed—not aid, which Kagame (Rwandan President) insists in temporary—and you remove the reason for prejudice." Source: Time.com

#### FOUNDATIONS/HIGH-NET WORTH INDIVIDUALS/PRIVATE NON-PROFITS

There are several foundations based primarily in North America and Europe that support research efforts in LMIC. COHRED needs to take advantage of its 501 (c) 3 (tax exempt public charity) status in the US and approach these foundations for grants.

There are also several high net worth individuals/private non-profits focused on boosting global health, health research capacity or technical and scientific research. In many cases, foundations have inflexible funding policies due to set criteria. COHRED needs to continue to present the importance of systems thinking and research for health in order to change their funding focus. Relying on partnerships and supporters to help open those doors will be critical. As an example, "...Bill Gates dismissed the internet as a passing fad early in 1994. A statement he would later come to regret..." (source: SQL Server Security by Chip Andrews, David Litchfield, Bill Grindlay). Recognizing his mistake, he subsequently changed Microsoft's focus and strategy accordingly.

There are some foundations with a clear focus on strengthening research capacity. The Wellcome Trust's Director, Sir Mark Walport, noted that "The African continent faces some of the world's most serious health problems stemming from disease and poverty. If we are to tackle these problems, we need health research on the continent to develop in a vibrant research environment geared towards national priorities."

"APHRC's innovative programme to strengthen research capacity in African universities has received a grant of £3.2 million under the Africa Institutions Initiative by the Wellcome Trust UK based philanthropic organization. This programme is dubbed the Consortium for Advanced Research Training in Africa (CARTA) is the brain child of APHRC and the University of the Witwatersrand." (Source: www.aphrc.org).

COHRED needs to be innovative in securing funding by playing both sides of the fence, the non-profit organization seeking funding from a foundation and the consulting partner bidding on a potential contract. Using the example above, COHRED can either access funding by approaching the Wellcome Trust directly or by approaching APHRC with a bid for a consulting contract to implement the project resulting from the financing.

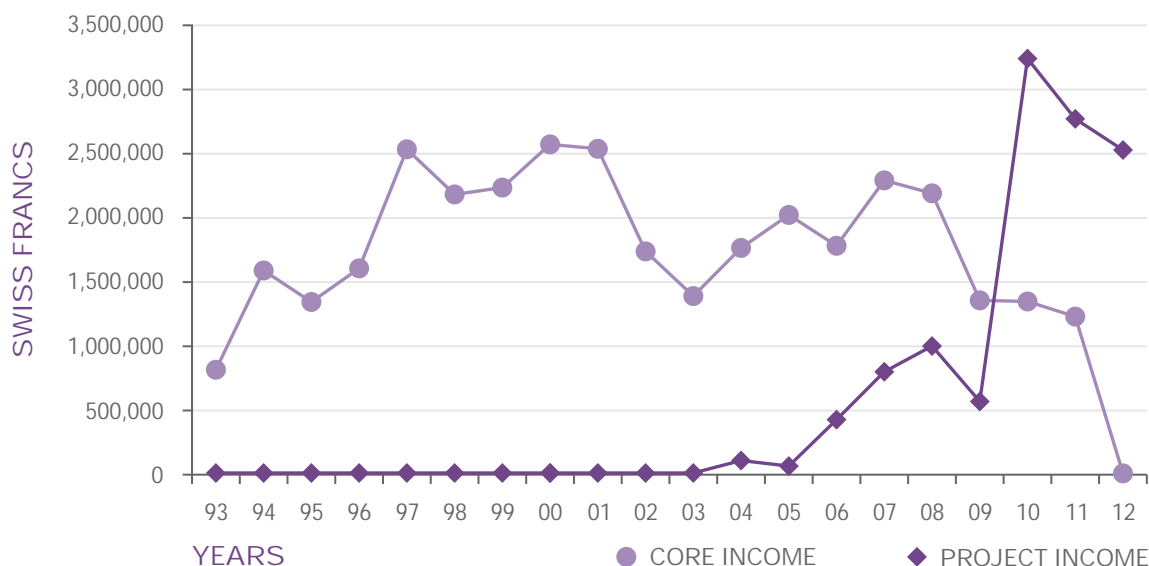
### GOVERNMENTAL DONORS

Although there is a perception of "Donor Fatigue", there are number of ways COHRED could tackle this problem. Firstly, COHRED needs to determine how best they can impact the area of metrics given their resources and design an ROI that would satisfy donors. Another area to explore is for COHRED to package their proposals with marketing appeal to donors much in the way they have packaged their Pharma Innovation Initiative with NEPAD for SDC.

### PURCHASERS (LOW MIDDLE INCOME COUNTRIES AND SOUTHERN PARTNERS)

COHRED has successfully managed to grow its project funding as a key source of revenue (please refer to graph below)

### HISTORY OF COHRED INCOME SINCE 1993 CORE VS PROJECT INCOME\*



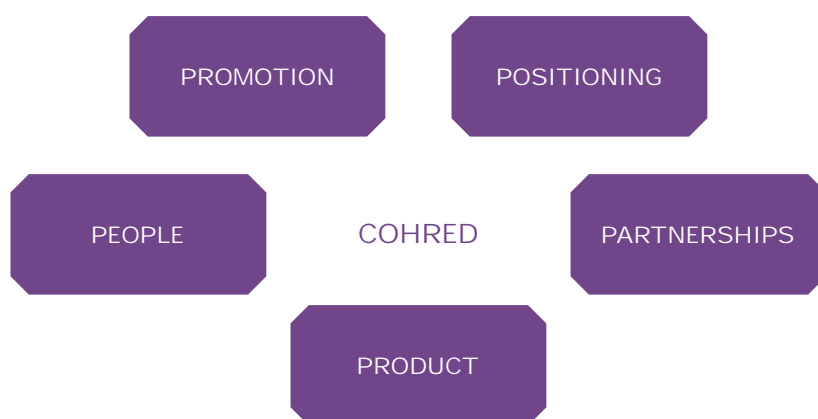
\*This graph displays confirmed income only

The evidence gathered through surveys and interviews suggests that COHRED will successfully grow this source of revenue due to popular demand currently focused primarily on their core competency of NHRS strengthening and HR Web.

## GENERAL PUBLIC

COHRED's current limited resources, suggest that its time would be better spent focusing on foundations, high net worth individuals and corporations rather than the general public. A marketing/branding campaign to raise money from the general public would require a significant investment and place its operating budget in distress. Research for health is also a dry and poorly understood concept and therefore less appealing to the average charitable person compared to many other, more "relatable" causes. COHRED should however stay as visible as possible, and anticipate individual donations by making small adjustments such as increasing the visibility of its SUPPORT/DONATION function on its website.

## THE MARKETING MIX – COHRED



In order to establish a comprehensive and effective fundraising strategy, it is important to examine the organizations' marketing building blocks (the external reviewers have adapted a 5 P framework for this analysis choosing to assess the P's most relevant to this evaluation).

### PRODUCT

COHRED is both an advocate for and implementer of systems aimed at strengthening the health and innovation capacity to improve health, equity and development. It has the difficult task of breaking new ground, raising awareness of specific issues while strengthening the systems and frameworks for implementing change. "When we first learnt about COHRED, we were not clear about what they are advocating; what exactly they are doing" commented one Northern Donor. Another Board Member stated that, "Research for health is still a fuzzy concept."

There has been some feedback that suggests COHRED's website is confusing and does not give a clear picture of the organizations work. Given the number of partnerships, projects and countries COHRED is involved in, the organization needs to be cognizant of appearing strategic, organized and focused.

COHRED needs to improve its communication: define its product and present it in a comprehensive manner. For the purpose of the external review, the consulting team has suggested a format to organize and categorize information.

#### COHRED Technical For Improving Health Research

- ◆ A HIGHLY SPECIALIZED CONSULTING SERVICE providing technical support and advice using unique framework (NHRS) and tools for strengthening health research
- ◆ HRWEB

COHRED Advocacy And Policy – creating partnerships with like-minded organizations, bodies and countries to develop initiatives that raise awareness of health research issues and pave the path for change initiatives include:

- ◆ PHARMA INNOVATION
- ◆ AHA (Alignment and Harmonization)

#### Knowledge Sharing

- ◆ HRWEB
- ◆ SEMINARS
- ◆ TRAINING
- ◆ RESEARCH PUBLICATIONS
- ◆ COLLOQUIUM

#### POSITIONING: COHRED'S OVERALL BROAD POSITIONING

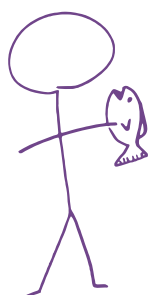
COHRED supports countries to use health research to:

- ◆ Improve health and reduce health inequities
- ◆ Improve health sector performance and accountability
- ◆ Encourage donor alignment and harmonization
- ◆ Link health research with science, technology and innovation
- ◆ Generate economic and social prosperity

Although the broad positioning accurately describes COHRED's objectives, it is also quite long. The organization would benefit from having a tag line that reflects its work. There is some feedback that the current tag line " Making Health Research Work for Everyone" is too broad.

## COHRED'S RECENT POSITIONING: AN ENABLER OF DEVELOPMENT

"The real challenge facing development policy, said IJsselmuiden, lay in moving on to a third stage: providing communities — and not just individuals — with the knowledge, resources and infrastructure required to fish in a sustainable away." David Dickson Director, SciDev.Net



CHARITY



VERTICAL PROGRAMMES



DEVELOPMENT

This is highly attractive positioning for both donors and LMIC governments but it needs to be fleshed with more substantive information and address the issue of "how." In particular, COHRED needs to highlight its technical know how and expertise, which are highly appreciated in the field. Due to a lack of valued metrics, COHRED should also focus on its many success stories. Its work in Tanzania for instance provides a relevant example: An initial assessment in collaboration with the Tanzanian National Institute for Medical Research led to a set of recommendations and conclusions that are now guiding a major reform process for the improvement of health research.

To assess COHRED's fundraising positioning we need to first determine its target audience looking closely at all the defined sectors mentioned at the beginning:

- ◆ Corporations (Technology/Pharmaceutical/Health Care/African based businesses)
- ◆ General Public
- ◆ Foundations and high net worth individuals with an interest in Science and Technology
- ◆ Governmental Donors
- ◆ COHRED consulting clients: research institutions/academic institutions/governments/donors/foundations etc.

COHRED will need to define a specific fit for each of its target audiences much in the way a sales and marketing team operates in the private sector.

Other potential stories that tie into current trends:

- ◆ How COHRED can assist in systems strengthening
- ◆ What role does COHRED play in responsible vertical programming
- ◆ The role of R&D for pharmaceutical companies and/or developed countries

Much of the information already exists in COHRED's documentation and simply needs to be converted into a more "sellable" format.

### PROMOTION

COHRED's promotional strategy currently includes:

- ◆ Promoting the organization amongst local, regional and global players in global health through lobbying, attendance at key meetings, word of mouth
- ◆ Developing significant Partnerships/Alliances – NEPAD/PAHO/WAHO
- ◆ Raising awareness of the organization through an Annual Event, the COLLOQUIUM

Given its limited resources and funds, COHRED has done an excellent task in promoting its organization. It has grown from its inception 17 years ago, to an organization that has a recognized presence on the global health scene with a respected speciality in health research as is reflected in partnerships with large regional players which continue to give credibility and weight to the organization. However, as COHRED is small and not always clearly understood by players outside of health research, it needs to increase its marketing and promotion budget to continue to increase its visibility.

COHRED's promotional budget should be spent primarily on continuing to raise its profile and credibility as a key player in health research by becoming a resource, provider of information and facilitator/forum for discussion by facilitating key conferences (eg the COLLOQUIUM) and smaller discussions/debates with critical group of select players that may influence topics such as ethics or intellectual property.

The external reviewers think there is a potential future for COHRED Conferences. Health research systems is still a very specialized field which is rapidly gaining importance as increasing funds are spent on global health with limited impact. There are few times and places for stakeholders in this niche area to come together to define issues and set agendas for future goals. As a visionary in this field, and one of the first organizations to commit itself to health research, COHRED should take a lead role in facilitating discussion. The opportunity to take a lead role is available at the moment but may not be in the future if the market becomes more crowded.

Another idea that could be explored by COHRED is to launch the first journal dedicated to Health Research Systems (a suggestion made at the Colloquium). It would help shed more light on the issues at hand while strengthening COHRED's position as an authority in this field.

### PEOPLE- Support Structure helping organization

#### COHRED's BOARD OF DIRECTORS

COHRED's board is made up of individuals with a strong background in science/research or global health. COHRED and its Board should consider providing a greater support structure to COHRED as it enters a phase of growth.

The external reviewers would like to point out the structure of a media savvy nonprofit organization called Women for Women as an example that relies on the network, expertise and guidance of a wide range of committees to help grow the organization.



\*Source of information: [www.womenforwomen.org](http://www.womenforwomen.org)

Other ideas included Board members playing a key role in committing to a series of COHRED introductory events in diverse markets to help raise awareness of its social mission and introduce the organization to a new network of contacts.

### PARTNERSHIPS

#### REGIONAL ORGANIZATIONS:

COHRED has been successful in becoming a credible and valued partner of large regional organizations such as NEPAD, PAHO and WAHO. This is an area COHRED needs to continue to grow and strengthen. Partnerships will be key to providing COHRED, a relatively small organization with a niche expertise, with the credibility needed to have a greater impact on global health. More specifically, partnerships will be critical to getting commitments from governments to allocate spending on research in general and partnering with COHRED for implementation.

"COHRED could assist countries to develop strategies and spend global funds....it needs at the same time to develop credibility in country by working with regional partners such as the African Union, NEPAD ..." (representative from EDCTP)

Examples of existing partnerships – NEPAD, PAHO, WAHO



As mentioned earlier, COHRED can unlock funding by packaging initiatives with partnerships that lend weight and credibility to the cause and can potentially be a more attractive funding opportunity for donors. COHRED's recent partnership with NEPAD for Pharmaceutical Innovation to be funded by SDC provides a relevant example.

#### DONORS:

COHRED needs to readjust its approach and consider specific Donors as partners instead of funding sources. There are a number of Donors who strongly believe in COHRED's mission and goals but whose hands are tied to fund its activities. Many donors typically earmark a certain percentage of funds for LMIC governments to spend autonomously. The Donors however stay abreast of the process and policies implemented, are present at annual sector policy reviews and can influence government spending. COHRED needs to continue to lobby its activities to supportive Donors who will assist it becoming involved in country processes and open doors to governments and health ministries.

#### PUBLIC PRIVATE PARTNERSHIPS (PPP)

COHRED needs to identify partners in the business world, which will increase its funding opportunities and strengthen credibility. Three core areas identified earlier – Pharmaceutical Companies, Technology Companies and African Businesses are an obvious fit.

#### COHRED TECHNICAL, A SOCIAL ENTERPRISE (a concept initiated by COHRED)

The External Reviewers explored the possibility of COHRED developing a revenue generating technical support, in which proceeds would benefit COHRED's social goals.

#### OVERVIEW OF THE BUSINESS

COHRED TECHNICAL would consist of a highly specialized team of consultants, health research experts, trained in COHRED's unique tools, instruments and framework providing a range of technical advice and services aimed at strengthening research capacity and competitiveness primarily in Low/Middle Income Countries.

The services would include support to countries and institutions for:

- ◆ Strategic Planning; Mapping out the research landscape in country; Identifying key stakeholders and specific functions and how they interact
- ◆ Assessing and setting priorities using NHRS
- ◆ Data collection and analysis
- ◆ Financial guidance and support for spending priorities
- ◆ Training and conducting seminars
- ◆ Technical assistance and support
- ◆ Network guidance to further goals
- ◆ Knowledge sharing and open communication

#### Unique Selling Points

- ◆ **A** COHRED is a visionary in this field as one of the first organizations to have identified and committed itself to solving the problems created by weak health
- ◆ **B** COHRED has developed a unique and respected framework for measuring research capacity in country
- ◆ **C** HR Web, COHRED's knowledge sharing portal

#### POTENTIAL CLIENTS:

COHRED Technical would capitalize on the three key trends listed in Section 1: Health Systems Strengthening, Country Empowerment and Metrics and seek out clients addressing/related to these issues: Governments (ministries of health and ministries of science and technology, Donors, Regional Organizations, Global Organizations, Academic Institutions, Research Institutions, Non profit Organizations, Specific Corporations (eg Pharmaceutical, Technology Companies), Large consulting firms with health specialties or specialized health consulting firms.

Another potential list of clients could include Northern Governments requesting expertise on health systems strengthening.



Current Demand for COHRED is growing:  
The organisation currently has ten outstanding country requests for projects which it is unable to respond to due to lack of resources. Funding sources are most likely to come from countries directly using their own or donor funds.



## SWOT ANALYSIS FOR COHRED TECHNICAL

- ◆ Visionary – one of the first organizations defining the movement of health research strengthening
- ◆ Independent (this was particularly important to local African organizations working in health research) with understanding of LMIC
- ◆ Small, flexible, nimble
- ◆ Strong partnerships with regional organizations NEPAD / PAHO / WAHO
- ◆ Technical specialist in systems thinking (little understood)
- ◆ Unique tools – HR Web, NHRS
- ◆ Valid success stories
- ◆ Good reputation - respected and appreciated by a wide range of stakeholders

### STRENGTHS

### OPPORTUNITIES

- ◆ Current trends:
  - Health systems strengthening
  - Country empowerment
  - Solve metrics debate
- ◆ Currently few competitors in this field creating opportunity to play a leading and dominant role

- ◆ Limited resources
- ◆ Limited marketing and promotional budget
- ◆ COHRED's longevity (particularly in light of Global Forum for health research) in question - organizations have expressed fear of partnering with an organization if future is uncertain
- ◆ Communications and marketing challenge poor understanding of complexities involved in COHRED's four main areas of work and how the organization operates on the ground
- ◆ COHRED's goal of strengthening health research systems poorly understood
- ◆ Weak metrics

### WEAKNESSES

### THREATS

- ◆ COHRED's current financial situation unpredictable
- ◆ No credible ROI for funders
- ◆ LMIC governments have limited resources to fund COHRED
- ◆ Low barrier to entry: there are other consulting firms with significant resources that can hire scientists with technical knowledge and expertise on health research
- ◆ The need for specialized staff: small pool of potential health research scientists coupled with non profit salaries makes hiring and retaining quality staff a challenge

## MARKETING POSITIONING FOR CONSIDERATION WHEN LAUNCHING COHRED TECHNICAL

1 COHRED Technical is a Social Enterprise that embraces country ownership. As a prerequisite for successful implementation, it requires an investment from beneficiaries to implement its work. It also requires substantial input from countries regarding existing systems and processes in place in order to tailor its framework, tools and instrument to each recipient country.

2 COHRED Technical is a southern independent organization – a consulting arm that understands the range of differing needs and issues facing LMIC countries and is governed primarily by individuals from the South. COHRED, the NGO will remain based in Geneva for funding and advocacy purposes. The rest of the organization is a southern alliance with key Northern partners.

COHRED is well underway of achieving this southern alliance with key northern partners: it has permanent staff in Mexico (where COHRED's Head of Projects and Programmes is located), Brazil (the hub for HRWeb), Tunisia (developing NHRS in the Arab and North African world), South Africa (Ethics Mapping in Africa, COHRED's own R&D, Research for Health Africa staff) and soon Uzbekistan after the return of its staff member from the USA.

3 COHRED Technical is a believer in the benefits of partnership and knowledge sharing. It seeks out like-minded partners, whether in the North or South, who recognize the need for health research capacity as the foundation for health equity.

The external reviewers believe that if COHRED positions itself correctly by partnering with appropriate and respected regional/global organizations and donors, it has a possibility to market itself to governments as a provider of consulting services aimed at strengthening research and innovation aimed at improving health. COHRED could also position itself as an expert on smaller, more specific issues such as Intellectual Property, Ethics, and Pharmaceutical Capacity etc. Almost unanimously, individuals interviewed from both North and South suggested COHRED should focus on building relationships with global and regional bodies, donors and local organization with existing ties to the government, to get more involved in the processes in country. It should then actively market its services to governments, focusing first on low hanging fruit (governments with predisposition to this work) to gain credibility and experience.

As already mentioned, COHRED needs to determine whether it can influence or determine new indicators/metrics to measure success/progress and if not, it needs to develop "stories" that will satisfy its clients. The HRWeb platform could play an active role in this domain. As the platform grows, COHRED needs to continue to leverage the indicators it has identified online such as number of users; increases in published papers, number of active downloads as measurement for progress. HRW needs to continue to partner and link with like minded organizations such as NEPAD'S ASTII, WHO to increase knowledge sharing and traffic to the site. If solving the metrics issue proves difficult, COHRED could highlight examples of "return on investment of R&D in private sector such as pharmaceutical industry and northern countries" or apply investment to context of future and what may happen if this is not addressed.

COHRED should continue to pursue its current activities while developing a business plan for COHRED Technical. In order for a revenue generating business to be successful, there needs to be an investment of time and resources to ensure a productive result. The external reviewers suggest COHRED should begin by developing a business plan, introducing COHRED technical into its marketing material including on its website, nominate staff to be senior consultants, and begin to market its product. COHRED's current (pro bono) should be used as a test pilot to gain credibility and gather relevant information critical to setting up its consultancy moving forward. If there is enough demand, COHRED technical could pursue funding opportunities for its social enterprise and expand; bearing in mind that this would undoubtedly require additional time and management investment and additional resources.

### SUGGESTED FINANCIAL MODEL OF NOTE

Donor/Country Collaboration – Co-financing model. "Countries will be more inclined to spend money in this field if donors match the investment" said a representative from a global organization. "We think the co-financing model is a charming model" suggested one Northern donor.

### KEY OBSERVATION

There is an assumption that the lowest income countries will be unable to pay for COHRED Technical. How does this impact COHRED's mission of improving health and reducing health inequities for all. What criteria will COHRED use to select which stakeholders receive pro bono services and those who pay for them?

## Health Research Web (HR Web)

The external reviewers assessed the importance and added value and potential of HR Web. The general concept has received a lot of support and was considered valuable and useful. In its current state, HR Web, through its semi-wiki open source approach has been used as a portal for knowledge sharing and mapping specific issues such as ethics. HR Web has also received grants through PAHO, the European & Developing Clinical Trials Partnerships (EDCTP), NEPAD, the INDEPTH network and Pfizer to develop specific areas, and it is a key component of all COHRED's internal projects, like the Research for Health Africa (R4HA) project.

The platform's framework is ready for use, but information is not. Many country profiles are still missing key information. There is evidence to suggest that in areas in which the Website has been developed, it is starting to be used as a useful tool.

### SWOT ANALYSIS FOR HR Web

<ul style="list-style-type: none"> <li>◆ Few Competitors: HR WEB of a few web initiatives focused on research for health</li> <li>◆ HR Web reinforces COHRED mission and social goals</li> <li>◆ HR Web integrates with all COHRED's programme activities</li> <li>◆ Semi-wiki approach keeps data relevant and up to date</li> <li>◆ Cost effective method of knowledge sharing</li> <li>◆ Pockets of site growing and actively being used eg Ethics Mapping and Latin American</li> </ul> <p style="text-align: center;"><b>STRENGTHS</b></p>	<ul style="list-style-type: none"> <li>◆ Information on HR WEB incomplete</li> <li>◆ Limited marketing budget to promote HR WEB</li> <li>◆ Limited staff and resources to develop more areas of HR WEB such as Wiki suggestion made earlier</li> <li>◆ Transfer on knowledge and information in several different languages</li> </ul> <p style="text-align: center;"><b>WEAKNESSES</b></p>
<p style="text-align: center;"><b>OPPORTUNITIES</b></p> <ul style="list-style-type: none"> <li>◆ Websites provide data: HRWeb could potentially be an indicator for new metrics in this area</li> <li>◆ New potential funding sources such as technology sponsors and new partners</li> <li>◆ Strong cost effective platform for promoting knowledge sharing across borders amongst Southern institutions</li> </ul>	<p style="text-align: center;"><b>THREATS</b></p> <ul style="list-style-type: none"> <li>◆ Competition such as WHO website</li> <li>◆ Websites have a window of opportunity: if HR Web does not deliver, users may not become adherents</li> <li>◆ Lack of Connectivity Inability to provide training to all users could limit usage</li> <li>◆ Responsibility on COHRED to motivate users in order for information to stay up to date and platform to be effective</li> <li>◆ Responsibility on COHRED to convince users to share information (some ambiguity exists regarding benefits)</li> </ul>

COHRED should continue to seek funding to develop the site and provide training on the ground for people to use it. HR web could act as a strong complement of COHRED Technical and be incorporated into the NHRS program. It should also be used as a data-gathering source of information. Funding should come from a variety of stakeholders that would benefit from HR Web (much in the way COHRED has grown HR Web to date eg PAHO) and technology/pharmaceutical sponsors. HR Web should also learn lessons from comparable more established websites such as open source drug discovery that have received significant private sponsors to date.

#### OBSERVATION OF NOTE:

A Wiki (a web tool used to power community website to enhance communication and knowledge management) component on COHRED'S website could offer COHRED a way for partners and board members to build a virtual community online. A Wiki will be a portal that will give members access to different levels of information depending on their affiliation. Instead of allowing the general public access all reports, data and rubrics, it will tier the site into three segments: general public, partners and board members. Partners and board members will have a specified login that give them exclusive data, reports and updates about the organization. The Wiki will also have discussion boards where partners can ask questions and other partners along with COHRED staff can answer. COHRED will have the ability to make subgroups within this portal for specified regions, thus creating a global COHRED community as well as regional communities. As mentioned, because partners and board members are spread out across the globe, it will offer a virtual community and create a sense of ownership for partners and board members to the organization.

### Partner Survey Results

Survey results supported the findings that were found throughout interviews conducted within the field and on the phone. Survey respondents were enthusiastic about COHRED and the work they had done with the organization, but offered constructive feedback as to where COHRED can fit within a competitive international marketplace in the future. Questions centered on marketing, transforming into a social enterprise (COHRED technical) as well as defining and clarifying its mission and vision within a multinational sphere. Three main findings became transparent when analyzing survey data.

#### 1 Overwhelming Support Exists for COHRED

100 % of partners agreed that they would want to work with COHRED in the future. These were not only echoed within the close-ended questions, but also within the open-ended responses. Partners consistently articulated their support for COHRED.

When asked, "Were you satisfied with your engagement with COHRED? Why or why not?" Partners overwhelmingly praised the organization. "Yes because COHRED leadership has taken the right steps (including this evaluation) to clarify its vision and check on its viability based on existing demand for its services," one partner stated. Another partner expanded upon this commenting on their solid relationships and communication. "Yes. They were always there to provide assistance. Very reliable, professional with good communication skills." Another partner highlighted how COHRED's mission has helped support the creation of building a sustainable system. "I am very satisfied with COHRED because it give us support in our health research system and health information system."

#### 2 Growing Support for COHRED to be a Social Enterprise

The surveys also focused on uncovering what the general climate looks like in regards to supporting the creation of a social enterprise. Within the survey, a social enterprise was defined as a social mission driven organization, which applies market-based strategies to achieve a social purpose. 75% of respondents agreed that COHRED would be a good social business. One African partner organization stated, "Yes, COHRED is a relevant organization and can support African countries to develop their social sectors." 55% said that their country would pay for these services. Although strong support existed for a COHRED Technical, partners did articulate potential hurdles that COHRED must address in order for their social enterprise to be successful. Partners cited potential roadblocks as: strengthening technical support, and marketing initiatives to clearly define their product and market.

#### 3 Unclear about Range of Services COHRED Offers

Because COHRED's reach is so great, it is difficult for the organization to streamline its image throughout the world. One area that the survey tried to understand is if partners and board members understood the range of services COHRED offers. Data demonstrated that haziness exists around what type of support COHRED can offer and does not offer.

Furthermore, this was highlighted when partners responded to the question "Please list organizations that do similar work to COHRED." Of all the respondents, only twice was an organization repeated between different respondents. Various organizations were mentioned: Global Forum for Health Research, Canadian Coalition for Global Health Research, International Development Research Centre, Futures Group (USAID), Caribbean Health Research Council, PAHO, Ishreca, GFHR and WHO. These findings show that COHRED right now is casting a big net and providing a lot of different services and support. Therefore, it is necessary for COHRED to really brand a concise and consistent image in all these locations.

# ACKNOWLEDGEMENTS

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Electronic surveys were sent out to past and present Regional Partners of COHRED within the following countries:

Bangladesh, Brazil, Bolivia, Burkina Faso, Canada, Chile, Costa Rica, Democratic Republic of the Congo, Egypt, El Salvador, Guinea Bissau, Guatemala, Mexico, Nicaragua, Paraguay, Senegal, Switzerland, Tanzania, Trinidad & Tobago, Uruguay, Uzbekistan, United States

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## DISCLAIMER

This external review has limitations due to time constraints available to complete the project which prevented the external reviewers to run a more formal survey, reaching out to a larger sample of respondents covering continents and countries in which COHRED has worked since inception as well as LMIC 's where it does not currently operate. The primary methodology used for gathering information was the usage of questionnaires, interviews and obtaining relevant documentation. If time had allowed, the external review would have further benefitted from an even broader sample of interviewees. However, the external reviewers are confident that the contents of this document will meet the expectations of Irish Aid and will help provide guidance to COHRED for future decisions. While every effort has been made to ensure that the information contained in this paper is accurate neither SPN Consulting or MLC Consulting will be liable for any damages whatsoever relating to the information herein and the use made there of.