

## Annex 1

### Triple I Reporting Guidelines and Framework for projects / financial transactions

The following is a series of standardized, reporting categories for Triple I for Global Health (GH). Triple I partners are expected to use these guidelines, which build on existing impact measurement and management best practices<sup>1</sup>.

The data collected will be used to calculate the total investment mobilized by partners, and identify good practices. The Secretariat may conduct research using anonymized data with a view to further promoting impact investments in the sector. Information on individual cases will not be made public without consent of the partner.

*Working definition of impact investing:* Impact investing is the process of intentionally and measurably allocating capital to address societal and environmental issues. Impact investing can seek to produce market-level returns. However, some investors may accept lower returns in favor of higher, specific impacts.<sup>2</sup>

#### ◆ What to Report

Partner organizations will report:

- (1) Projects / financial transactions in developing countries (countries in the OECD-DAC list of ODA recipients), which are intended to create measurable positive impacts in global health that could be reported, reviewed with sound evidence:
  - Projects / financial transactions which intend to address global health issues such as achieving UHC and / or strengthening PPR for future pandemics, or create positive impacts in global health, especially in the target areas in sec. III 3, of the Triple I Operational Guidelines
  - Projects / financial transactions focused on products / services which mainly target increasing access to and affordability of health services and products, and are better suited to reduce inequalities globally,
- (2) Other efforts such as capacity building related to mobilization of finance whose outcomes / impacts could be reported, reviewed with sound evidence

---

<sup>1</sup> The Impact Management Platform, the Operating Principles for Impact Management, and the Impact-Weighted Accounts Initiative

<sup>2</sup> For more information on impact investing please see the [Global Impact Investing Network](#).

## ◆ When to Report

The partner organizations will report newly committed / active projects / financial transactions in the first quarter of the year<sup>3</sup>. They are also encouraged to communicate performance of relevant projects / financial transactions and relevant efforts which have been reported earlier.

## ◆ Reporting Framework

The proposed framework contains three different types of disclosure metrics: quantitative metrics, qualitative metrics (chosen from a drop-down menu), checkbox and open-ended disclosures, which ask the reporting organization to provide a thorough explanation of how the organization is addressing the disclosure topic. For each disclosure topic, the metric type is included in [brackets]. Questions marked with (Required) indicate a Required field.

### **1. General Information on Organization**

- Name – Organization name [Describe] (Required)
- Type – Organization Type [Check box – See Appendix1] (Required)
- Country – Organization country of domicile [Describe] (Required)
- Year of Foundation [Quantitative]
- Is there anything to report as an investment/project in LMICs which has impacts on global health? [Choose Yes / No. If yes, proceed to question “2. Investment / Project Type”. If no, the questionnaire is completed.]

### **2. Investment / Project Type**

- Investment/Project Name (Required)
- Are there any Triple I partners involved in your project / investment (e.g., co-investor, investee, capacity building partner, advisory partner, co-financier, guarantor, etc.)? [Checkbox (Yes / No / Unknown) (Required). If “Yes”, describe the name of and relation to the Triple I partners (Required)]
- Investment / Project Type – Describe the type of investment [Qualitative, Drop-

---

<sup>3</sup> It is also encouraged to report active projects in the Partner’s first reporting.

down – See Appendix 2] (Required)

- Investment Amount / Project Budget [Quantitative. Drop-down (currency)]
- The proportion of the investment / project going towards LMICs [Checkbox (100% / Less than 100% and approximate percentage is known / Less than 100% but approximate percentage is unknown / Unknown)] If “Less than 100% and approximate percentage is known”, write approximate percentage.]
- Year of commencement for the Investment / Project [Quantitative] (Required)
- Is this project still ongoing as of 2024? [Checkbox (Yes / No)] (Required)
- Year of closing for the Investment / Project

### **3. Project Category**

- Global Health Topic – What Global Health topic / sub-topic does this project focus on addressing? (Maximum three responses)
  - (1) Most Relevant Global Health topic / sub-topic [Qualitative, Check box– See Appendix 3. If “Other” please specify.] (Required)
  - (2) Other Related Global Health topic / sub-topic [Qualitative, Check box– See Appendix 3. If “Other” please specify.]
  - (3) Other Related Global Health topic / sub-topic [Qualitative, Check box– See Appendix 3. If “Other” please specify.]
- SDGs Addressed – Which SDGs does this project focus on addressing? [Qualitative, checkbox, multiple choices allowed] (Required)

### **4. Project Description**

- Overview of the project including which global health issues the project aims to address [Describe] (Required)

### **5. Target Population**

- Target regions<sup>4</sup> [Check box– See Appendix4, multiple choices allowed] and target LMICs [Check box – See Appendix5, multiple choices allowed] (Required)
- Target group [Qualitative (High, Upper-Middle, Middle, Low/ Poor & Vulnerable, Unknown) checkbox, multiple choices allowed] (Required)

---

<sup>4</sup> The regions are classified based on the WHO region list.

## 6. Impacts

Detailed Impacts / Outcome / Output KPIs (Please report a maximum of three material KPIs being used to track progress for this project / investment\*) \*Please see Appendix 6 for a list of example output, outcome, and impact indicators.)

- KPI 1

- (1) KPI category [Check box (Output KPI / Outcome KPI / Impact KPI, Not Sure) ]
- (2) Detailed explanation of KPI [Describe]
- (3) Do you have a quantitative target for this KPI? [Quantitative, Checkbox (Yes, Not Applicable), if Yes, please provide the quantitative target]
- (4) Has this Impact / Outcome / Output been achieved? (only for the projects which have been started earlier) [Checkbox (Yes / Partially / Not yet)]
- (5) If “Yes” or “Partially”, please provide any data on current Impact / Outcome / Output performance [Quantitative]

- KPI 2

- (1) KPI category [Check box (Output KPI / Outcome KPI / Impact KPI, Not Sure) ]
- (2) Detailed explanation of KPI [Describe]
- (3) Do you have a quantitative target for this KPI? [Quantitative, Checkbox (Yes, Not Applicable), if Yes, please provide the quantitative target]
- (4) Has this Impact / Outcome / Output been achieved? (only for the projects which have been started earlier) [Checkbox (Yes / Partially / Not yet)]
- (5) If “Yes” or “Partially”, please provide any data on current Impact / Outcome / Output performance [Quantitative]

- KPI 3

- (1) KPI category [Check box (Output KPI / Outcome KPI / Impact KPI, Not Sure) ]
- (2) Detailed explanation of KPI [Describe]
- (3) Do you have a quantitative target for this KPI? [Quantitative, Checkbox (Yes, Not Applicable), if Yes, please provide the quantitative target]
- (4) Has this Impact / Outcome / Output been achieved? (only for the projects which have been started earlier) [Checkbox (Yes / Partially / Not yet)]
- (5) If “Yes” or “Partially”, please provide any data on current Impact / Outcome / Output performance [Quantitative]

- Additional Information

Please provide additional information, such as links to published documents, relevant information on impact integration into key investment processes (e.g., impact monitoring / evaluation, data collection, risk management and identification, KPI

Feb. 2025

target setting, KPI reporting, etc.), and additionality of impacts (What is the likelihood the target outcomes and impacts would have occurred without the intervention of this project?).

## **Appendix 1 – List of Organization type**

- Investment Managers
- Family offices
- Banks
- Insurance companies
- Development Finance Institutions
- Multilateral Development Banks / Public Development Banks
- Corporates
- Foundations / Endowments
- Donor Organizations
- NPO / NGO
- International Organization
- Pension funds
- Other (Please specify)

## **Appendix 2 – List of Investment/Project Types**

### **1. Investment**

- Direct Debt
- Direct Equity
- Guarantees
- On-lending (direct and indirect)
- Funds
- Thematic Bonds
- Other Financing Solutions

### **2. Projects**

- Infrastructure Development
- Logistics / Distribution Network Development
- Product Development

### **3. Other efforts**

- Capacity building
- Others

### **Appendix 3 – List of Global Health Topics and Sub-Topics**

The List will be created based on the World Health Organization’s list of [health topics](#)

### **Appendix 4 – List of Area**

- African Region
- Eastern Mediterranean Region
- European Region
- Region of the Americas
- South-East Asia Region
- Western Pacific Region
- Global (including LMICs)

### **Appendix 5 – List of LMICs<sup>5</sup>**

Please click [here](#) to see the list of OECD-DAC list of ODA Recipients.

### **Appendix 6 – Examples of Global Health Output / Outcome / Impact Metrics**

Below is a list of example Global Health metrics organizations may wish to consider when seeking to identify and measure their impacts. This section provides examples of the outputs, outcomes, and impacts for Global Health topics. The list is non-exhaustive and you may use other indicators / metrics. Organizations are encouraged to identify the metrics that are best suited for their specific projects / financial transactions.<sup>6</sup>

---

<sup>6</sup> It is expected that this non-exhaustive list of metrics develop over time, both through the experience of participant investors, enterprises and others, and though the development of metrics globally and in specific jurisdictions.

<sup>6</sup> It is expected that this non-exhaustive list of metrics develop over time, both through the experience of participant investors, enterprises and others, and though the development of metrics globally and in specific jurisdictions.

## 1. **Communicable Diseases**

- Output Metrics:
  - Number of tests conducted
  - Number of vaccines administered
  - Number of treated cases
- Outcome Metrics:
  - Reduction in the incidence rate of the disease
  - Increased vaccination coverage
  - Decreased mortality rate
- Impact Metrics:
  - Years of life saved due to disease control efforts.
  - Economic impact of disease control on the community

## 2. **Maternal and Child Health**

- Output Metrics:
  - Number of prenatal care visits
  - Number of skilled birth attendances
  - Number of children vaccinated
- Outcome Metrics:
  - Maternal and infant mortality rate
  - Child development milestones achieved
  - Percentage of children with appropriate growth
- Impact Metrics:
  - Disability-adjusted life years (DALYs) averted for mothers and children.
  - Productivity gains due to improved maternal and child health

## 3. **Non-communicable Diseases (NCDs)**

- Output Metrics:
  - Number of screenings conducted
  - Number of patients receiving treatment
  - Number of educational sessions on prevention
- Outcome Metrics:
  - Reduction in disease progression
  - Improvement in patient quality of life
  - Changes in health behaviors (e.g., smoking cessation)
  - Reduction in disease-specific mortality rates (e.g., cardiovascular)



diseases per 100,000 population).

- Improvement in patient-reported quality of life scores.
- Impact Metrics:
  - Decrease in disability-adjusted life years (DALYs)
  - Economic savings due to reduced healthcare costs

#### **4. Access to Healthcare**

- Output Metrics:
  - Number of healthcare facilities established or upgraded
  - Percentage of population covered by health insurance
  - Number of healthcare professionals trained
- Outcome Metrics:
  - Increase in healthcare utilization rates
  - Reduction in out-of-pocket healthcare expenses
  - Improved health outcomes for covered population
- Impact Metrics:
  - Equity in healthcare access across different socioeconomic groups
  - Reduced incidence of catastrophic / impoverishing healthcare expenses
  - Increase in life expectancy and overall health indicators

#### **5. Nutrition and Food Security**

- Output Metrics:
  - Number of food distribution programs
  - Percentage of malnourished individuals receiving support
  - Number of nutrition education sessions conducted
- Outcome Metrics:
  - Change in nutritional status of target population
  - Improvement in dietary diversity
  - Reduction in stunting and wasting rates
- Impact Metrics:
  - Improved cognitive development in children
  - Enhanced workforce productivity and economic growth

#### **6. Water, Sanitation, and Hygiene (WASH)**

- Output Metrics:
  - Number of water sources built or improved
  - Percentage of population with access to improved sanitation facilities

- Number of hygiene promotion campaigns
- Outcome Metrics:
  - Reduction in waterborne diseases
  - Increase in sanitation practices
  - Improvement in hygiene-related behaviors
- Impact Metrics:
  - Decreased mortality and morbidity from water-related illnesses
  - Increased school attendance and productivity due to improved WASH

## **7. Reproductive Health and Family Planning**

- Output Metrics:
  - Number of family planning consultations
  - Contraceptive prevalence rate
  - Number of reproductive health education sessions
- Outcome Metrics:
  - Reduction in unintended pregnancies
  - Increase in contraceptive use
  - Improvement in maternal health indicators
- Impact Metrics:
  - Increased educational opportunities for women and girls
  - Reduced maternal mortality and infant mortality rates

## **8. Mental Health and Well-being**

- Output Metrics:
  - Number of mental health counseling sessions
  - Percentage of population screened for mental health disorders
  - Number of mental health awareness campaigns
- Outcome Metrics:
  - Improvement in mental health symptoms and well-being
  - Reduction in mental health stigma
  - Increase in help-seeking behaviors
- Impact Metrics:
  - Improvement in overall population mental health
  - Enhanced workforce productivity and social functioning

## **9. Environmental Health**

- Output Metrics:
  - Air quality index measurements

- Number of pollution control initiatives
- Workplace safety assessments conducted
- Outcome Metrics:
  - Reduction in air pollution levels
  - Decrease in occupational injuries and illnesses
  - Improvement in climate change mitigation measures
- Impact Metrics:
  - Decreased mortality and morbidity from environmental hazards
  - Economic benefits from reduced healthcare costs and increased productivity

## **10. Global Health Governance and Policy**

- Output Metrics:
  - Number of health policy frameworks developed or updated
  - Number of international health agreements signed
  - Participation in global health forums
- Outcome Metrics:
  - Implementation of evidence-based health policies
  - Strengthened international collaborations
  - Policy coherence across sectors for health
- Impact Metrics:
  - Improved health system performance and resilience
  - Reduction in cross-border health threats

## **11. Healthcare Innovation and Technology**

- Output Metrics:
  - Number of telemedicine consultations
  - Adoption rate of health-related mobile applications
  - Number of AI-based diagnostic tools implemented
- Outcome Metrics:
  - Improvement in healthcare accessibility, especially in remote areas
  - Patient satisfaction with telehealth services
  - Timely and accurate diagnosis using AI technology
- Impact Metrics:
  - Reduction in healthcare costs through efficient service delivery
  - Improved health outcomes due to early detection and intervention

## **12. Health Promotion and Disease Prevention**

- Output Metrics:

- Number of health education sessions conducted
- Participation rate in disease prevention programs
- Number of community health events organized
- Outcome Metrics:
  - Changes in health-related knowledge and behaviors
  - Increase in vaccination rates
  - Reduction in the incidence of preventable diseases
- Impact Metrics:
  - Decreased burden of preventable diseases on healthcare systems
  - Increase in healthy life expectancy

### **13. Substance Abuse and Addiction**

- Output Metrics:
  - Number of substance abuse treatment programs established
  - Number of individuals enrolled in addiction recovery programs
  - Number of awareness campaigns on substance abuse prevention
- Outcome Metrics:
  - Reduction in substance abuse rates
  - Percentage of successful recovery cases
  - Increase in knowledge about the risks of substance abuse
- Impact Metrics:
  - Improvement in social and economic functioning of individuals in recovery
  - Decrease in societal costs related to substance abuse

### **14. Aging and Elderly Care**

- Output Metrics:
  - Number of elderly care facilities established or upgraded
  - Number of geriatric healthcare professionals trained
  - Number of social support programs for the elderly
- Outcome Metrics:
  - Improvement in elderly health and well-being
  - Reduction in elderly abuse and neglect cases
  - Increase in the availability of elder-friendly services
- Impact Metrics:
  - Enhanced quality of life for the elderly population
  - Reduced healthcare utilization for preventable geriatric conditions

### **15. Neglected Tropical Diseases (NTDs)**

- Output Metrics:
  - Number of NTD screening and treatment campaigns
  - Percentage of at-risk population receiving preventive interventions
  - Number of research projects on NTDs
- Outcome Metrics:
  - Reduction in the prevalence of NTDs
  - Increase in early diagnosis and treatment
  - Improved understanding of NTD epidemiology
- Impact Metrics:
  - Enhanced well-being and productivity of affected populations
  - Reduced disability and disfigurement from NTDs

## **16. Sexual and Reproductive Health**

- Output Metrics:
  - Number of sexual health clinics established or upgraded
  - Contraceptive availability and uptake rates
  - Number of individuals receiving comprehensive sexual education
- Outcome Metrics:
  - Reduction in sexually transmitted infections (STIs)
  - Increase in contraceptive use and family planning
  - Empowerment of individuals in making informed reproductive choices
- Impact Metrics:
  - Improvement in maternal and child health outcomes
  - Advancement in gender equality and reproductive rights

## **17. Healthcare in Humanitarian Settings**

- Output Metrics:
  - Number of healthcare facilities established in humanitarian settings
  - Percentage of population receiving essential healthcare services
  - Number of humanitarian aid workers trained in healthcare delivery
- Outcome Metrics:
  - Reduction in mortality and morbidity rates in humanitarian contexts
  - Improvement in healthcare access for displaced populations
  - Enhanced capacity for emergency response and preparedness
- Impact Metrics:

- Improvement in the overall health and well-being of affected populations
- Strengthened healthcare systems in fragile contexts

#### **18. Health Information Systems and Data**

- Output Metrics:
  - Number of health facilities with electronic health record systems
  - Data completeness and accuracy rates
  - Number of disease surveillance reports submitted
- Outcome Metrics:
  - Timeliness and accessibility of health information for decision-making
  - Improvement in data quality and data-driven interventions
  - Enhanced public health response to outbreaks and emergencies
- Impact Metrics:
  - Reduction in disease burden through evidence-based interventions
  - Strengthened health systems through data-informed policies

#### **19. One Health**

- Output Metrics:
  - Number of interdisciplinary research projects on zoonotic diseases
  - Number of joint animal and human health programs
  - Number of environmental conservation initiatives for health protection
- Outcome Metrics:
  - Increase in awareness of One Health principles among professionals
  - Reduction in zoonotic disease transmission and outbreaks
  - Improved collaboration between human and animal health sectors
- Impact Metrics:
  - Enhanced global health security and pandemic preparedness
  - Preservation of biodiversity and ecosystem health

#### **20. Health Education and Health Literacy**

- Output Metrics:
  - Number of health literacy workshops conducted
  - Percentage of population with improved health literacy
  - Number of health education materials distributed
- Outcome Metrics:

Feb. 2025

- Increase in health knowledge and health-seeking behaviors
- Improvement in patient-provider communication
- Enhanced understanding of health risks and preventive measures
- Impact Metrics:
  - Reduction in preventable diseases and healthcare utilization
  - Empowerment of individuals to make informed health decisions