

Partner

Professional profile

Sam McPherson is an Itad Partner with over 20 years of experience in international development, specialising in research, planning, monitoring and evaluation. Prior to joining Itad, he was Associate Director: Field Programmes at the HIV/ AIDS Alliance. In this position, Sam was a member of the Alliance's Senior Management Team and was responsible for heading up the Planning Analysis and Learning Unit which, amongst other things, led on the Alliance's work on research, evaluation, aid effectiveness/VfM analysis and strategic planning across 42 countries.

Sam has project managed, directed and provided quality assurance to a large number of complex and high-profile evaluations while at Itad and before. He has hands on experience in rolling out planning, monitoring and reporting systems in two different international NGOs, as well as setting up and managing large project teams. Recent evaluations he has been/currently is involved with the Dubai Cares School and Nutrition portfolio Evaluation (Project Director), the evaluation of Gavi's support to Civil Society Organisations (Project Director), monitoring, evaluation, research and learning (MERL) support to the Bill and Melinda Gates Foundation's health systems design portfolio in India (Team Leader), the Global Fund's 2017 Strategic Review (Team Lead), and the DFID-funded Evaluation of DFID-CHAI Market-Shaping for Access to Safe, Effective and Affordable Health Commodities (Project Director). Sam was previously Team Director for an assignment assessing Value for Money in DFID's Health Portfolio across three states (Odisha, Bihar and Madhya Pradesh) in India. He has also represented civil society organisations at the UN Monitoring Evaluation and Reference Group (MERG). His broad experience in evaluation is complemented with strong research skills, proven by a long track record of published reports and academic papers.

Nationality British

Languages English (native), French

Country experience Bolivia, Burkina Faso, Cambodia, Ecuador, India, Kenya, Nepal, Senegal, South Africa, Tanzania, Ukraine, Vietnam, Zambia, Zimbabwe

Education

2010	International Masters in Practicing Management (Distinction) Lancaster University Management School, UK/McGill University's Desautels Faculty of Management, Canada/INSEAD, France
1995	Master of Philosophy in Development Studies (ESRC funded) Institute of Development Studies, University of Sussex, UK
1993	M.A. (First Class Honours) Geography University of Edinburgh, UK

Employment

2012 - Present	Partner (2018), Director of Partnerships (2014-2018), Associate Director (2012-2014) Itad Ltd, UK
2002 - 2011	Associate Director: Programs (2005-2011), Head of Research and Evaluation Unit (2002-2005) International HIV/AIDS Alliance, UK
1995 - 1997	In-house Consultant European Commission, Evaluation Unit of DGVIII (Development)
1994 - 1994	Research Co-ordinator International Centre for Living Aquatic Resource Management (ICLARM)

Project experience

2019 - present	Evaluation of Girls' Education Portfolio Role: Project Director & Quality Assurance Client: Dubai Cares Location: Global Itad has been commissioned to evaluate the current Girls' Education portfolio, which will assess the effectiveness of the programs in the Girls Education Portfolio, as well as how effective Dubai Cares has been in managing the portfolio and in mainstreaming gender thinking across thematic areas and portfolios, and how Dubai Cares has had a global impact, both through directly funded evidence generation activities, but also through its participation in global fora such as the GPE. The evaluation will begin with an inception phase, which will synthesize preliminary findings on the portfolio. This will be accompanied in tandem with the co-creation of a cross-cutting Theory of Change of Dubai Cares' Girls Education portfolio. This will allow Itad to work with Dubai Cares to frame what has been done so far as well as what the vision for the portfolio is. This forms the basis of the next, evaluative phase. Here we will use the Theory of Change and preliminary findings to look in depth at the impact of the portfolio, and the processes and mechanisms that mediate and facilitate this impact. This investigation will be divided into three evaluative streams, looking at portfolio
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processes at different levels: program design and effectiveness; portfolio management; and evidence and global advocacy. Our final task will be to turn these findings into meaningful strategy inputs for Dubai Cares. Our formative phase brings together the findings from the portfolio evaluation, as well as our findings from the evaluation of the School Health and Nutrition portfolio. Working with Dubai Cares we will then co-create recommendations, as well as creating a foundation-level Theory of Action for maximizing impact in Girls' Education and gender transformative programming across portfolios. Sam is Project Direct and is accountable for the successful delivery of the evaluation, as well as assuring the robustness of the methodologies used and the quality of all outputs/deliverables.

2019 - present

Evaluation of School Health and Nutrition Portfolio

Role: Project Director & Quality Assurance | Client: Dubai Cares | Location: Global

Itad has been commissioned to evaluate the current portfolio, producing key recommendations and lessons that will inform future strategy. The evaluation assesses the impact of programming on education and learning by understanding the most effective program modalities, whether standalone or integrated, and discovering which modes of operation, either programs or partnerships, lead to most efficient outcomes and why. Two lenses of enquiry provide an overarching approach to the evaluation; program design and implementation focuses on how program modalities are used for health and learning outcomes, and identifies conditions for successful integration and scaling; partnerships and processes assess the effectiveness of collaboration at a national level, and identifies the processes in successful relationships. Three evaluation approaches have been used to provide formative insights and learning: (i) a utilisation-focused approach engages key staff, providing timely and actionable findings for evidence-based decision making; (ii) a theory-based approach investigates different program modalities, and tests underlying organisational mechanism and intended outcomes; (iii) a mixed methods approach, combining quantitative and qualitative data and analysis, underpins the theory-based and utilisation-focused approaches. Sam is Project Direct and is accountable for the successful delivery of the evaluation, as well as assuring the robustness of the methodologies used and the quality of all outputs/deliverables.

2018 - present

Evaluation of Gavi's Support to Civil Society Organisations

Role: Project Director & Quality Assurance | Client: GAVI | Location: Global

Itad has been commissioned by Gavi to undertake an evaluation of the Alliance's support to CSOs. The primary purpose of this assignment is formative: the evaluation will inform decisions on how Gavi will approach the way it engages CSO in contributing to its mission in the future. The evaluation also has a clear summative purpose: there is an evidence gap about how CSO support mechanisms have contributed to the achievement of Gavi's mission to date and this evaluation will help address this lacuna. Finally, and perhaps more ambitiously, the evaluation will contribute to the broader evidence base relating to unpacking the role that CSOs can play as they interface with other multilateral organisations engaged in key global developmental initiatives. Sam is Project Direct and is accountable for the successful delivery of the evaluation, as well as assuring the robustness of the methodologies used and the quality of all outputs/deliverables.

2018 - present

Concurrent evaluation of the Bill and Melinda Gates Foundation's Health Systems Design portfolio of technical support and technical assistance investments in India

Role: Team Leader/Principal Investigator | Client: Bill and Melinda Gates Foundation | Location: India

Itad are providing comprehensive monitoring, evaluation, research and learning (MERL) for the Bill and Melinda Gates Foundation in India, as part of their health systems design (HSD) strategy and portfolio of work. An HSD approach aims to lead to a health systems transformation, which is much needed in India which has poor access to quality services, low levels of investment and a rising burden of disease from non-communicable diseases. The MERL has been designed to support the development and roll-out of the strategy, with an innovative design that will be theory-driven, generate evidence and capture learning to adjust the strategy, course correct and lead to better impact. Sam is Team Leader/Principal Investigator for this contract, responsible for planning, overseeing and inputting into all of the deliverables to ensure that these are delivered to a high quality.

2018 - present

Transformational Change Learning Partnership Phase 2: Evaluation of Transformational Change In Climate Investment Funds

Role: Team Leader | Client: World Bank | Location: Global

Itad has been commissioned by the World Bank's Climate Investment Fund (CIF) to conduct an evaluation to better understand and assess transformational change in the CIF context. The evaluation is examining the Transformational Change Learning Partnership undertaken by CIF's Evaluation and Learning Initiative.

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It is hoped this will boost the transformative impact of CIF investments, as well as those of other funds, by establishing a more systematic and robust understanding of transformational change and how it occurs. As Team Leader, Sam is responsible for overall technical delivery of the evaluation, including development of the final design and methodology and managing the inputs of the core team.

2017 - 2018

Thematic review of Global Fund in-country programmatic assurance

Role: Quality Assurance | Client: Global Fund | Location: Global

Assurance using various mechanisms and providers is a key component of the Global Fund process to improve and operationalise its risk management framework. In this context the GF identified a need to analyse whether and how assurance providers and mechanisms can be effective and to identify potential ways of strengthening in-country assurance for programmatic risks. The overriding objective of this review was to generate a set of bold and implementable recommendations to help the Global Fund to better assure that the programs it supports are delivering public health gains. Sam is responsible for assuring the robustness of the methodologies used and the quality of all outputs/deliverables.

2017 - Present

Global Fund Prospective Country Evaluations

Role: Quality Assurance | Client: Global Fund | Location: Multi-country

Itad is part of the Euro Health Group-led consortium delivering the Global Fund PCEs. To successfully undertake the PCE, a range of quantitative and qualitative evaluation approaches are required. These are being developed by the Partnership during the Inception Phase and will take into consideration the TOC developed for SR2015 by the same Partnership and the TOC being developed for the TERG based on the 2017-2022 strategy Strategic Objectives and related operational objectives. Sam is responsible for assuring the robustness of the methodologies used and the quality of all outputs/deliverables.

2016 - Present

Fleming Fund Independent Evaluation Supplier

Role: Quality Assurance | Client: Department of Health | Location: Global

The Department of Health has launched the Fleming Fund, a £265 million one health programme, to support low and middle income countries (LMICs) in tackling antimicrobial resistance (AMR). Itad has been contracted to deliver an independent evaluation of the Fleming Fund country and regional level projects. Our work combines both a formative aspect to provide recommendations to guide the portfolio of country and regional grants, and a summative aspect to assess how far the outputs of the portfolio of country and regional grants have contributed, or will contribute, to the outcomes and impact of the overarching Fleming Fund. Sam is responsible for assuring the robustness of the methodologies used and the quality of all outputs/deliverables.

2016 - 2017

Conducting the Global Fund's Strategic Review 2017

Role: Team Leader | Client: Global Fund | Location: Multi-country

The Global Fund has commissioned Itad and Euro Health Group to conduct the Strategic Review 2017 (SR2017). The SR2017 is a follow on to the Strategic Review 2015 (SR2015) and has two overarching objectives: one is to assess progress specifically made during the final two years of the Global Fund Strategy 2012-2016, and the other is to analyse how lessons learned are contributing to the readiness of the Global Fund in implementing its 2017-2022 Strategy. On this project Sam was Team Leader.

2015 - 2017

Monitoring Evaluation and Learning (MEL) from the International Climate Fund / HMG's Climate Change Compass

Role: Project Oversight | Client: DFID | Location: Multi-country

In partnership with IMC, Itad has begun establishing a monitoring, evaluation and learning platform for the ICF, a major cross UK government mechanism to help the world's poorest adapt to climate change and promote cleaner, greener growth. As a member of Itad's Senior Management Team, Sam provided support to the Compass team and mentored the Project Director and Manager. He was a key point of contact for the client, and played a pivotal role in partner relationship management and overseeing operational and logistical difficulties if they arose.

2014 - 2016

Evaluation of DFID-CHAI Market-Shaping for Access to Safe, Effective and Affordable Health Commodities

Role: Project Director | Client: DFID | Location: Multi-country

Delivery of: (i) a baseline data report, (ii) an 'interim findings' report to help inform programme activities and priorities for the remainder of the CHAI grant period, (iii) an end of grant evaluation report which covers the programme areas evaluated/reviewed; (iv) an end of grant document that addresses the

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lessons learned during the evaluation and a learning note for dissemination across the market dynamics. Sam was overall project director for the assignment.

2014 - 2016

Conducting the Global Fund's 2015 Strategic Review

Role: Project Director | Client: Global Fund | Location: Global

Conducting the mid-term review of the Implementation of the Global Fund's 2012–2016 Strategy and to assess impact made against HIV/AIDS, tuberculosis and Malaria over the past ten to fourteen years. Sam was overall project director for the assignment

2013 - 2014

Evaluation of 2 UK Frameworks: Results for Malaria in the developing world and: Improving Reproductive, Maternal and Newborn health in the developing world

Role: Evaluability manager and VFM lead | Client: DFID | Location: Multi-country

In 2010, DFID published two Frameworks for Results (FfRs - 'Breaking the Cycle: Saving Lives and Protecting the Future' and 'Choices for Women: Planned Pregnancies, Safe Births and Healthy Newborns'. The key objective of this evaluation is to verify the results achieved by DFID and to evaluate the utility of these frameworks as a guiding modality. Lead on the production of the Evaluability assessment for this assignment. Sam led on the Value for Money component of the work.

2013 - 2017

Myanmar, UNOPS, Evaluation Services of the 3MDG Fund

Role: Project Deputy Director/ Quality Assurance | Client: Euro Health Group | Location: Myanmar

Project Evaluation Services of the 3 Millennium Development Goal (3MDG) Fund in Myanmar. The 3MDG Fund is the next phase of funding of the Three Diseases Fund (3DF) which was established by a consortia of seven donors after the withdrawal of the Global Fund to Fight AIDS, Tuberculosis and Malaria from Myanmar in 2005. Sam is supporting the consortia in defining evaluation approaches and providing overall QA to the project

2013 - 2014

Access and Beneficiary Feedback Pilots Programme: Research and Impact Evaluation

Role: Team Lead | Client: DFID | Location: Multi-country

An evaluation of 12 DFID pilots which combines the use of quasi-experimental methods, theory based approaches and process evaluation to understand if and how beneficiary feedback mechanisms and transparency results in improved programme quality and better development outcomes. Overall team lead

2013 - 2015

Assessing Value for Money in Health Portfolio across States in India

Role: Team Director | Client: DFID | Location: India

Conducting a formative VFM assessment of DFID's support Financial Assistance (FA) and Technical Assistance (TA) to three states (Odisha, Bihar and Madhya Pradesh). Overall project director for the assignment

2013 - 2014

Formative Evaluation of Monitoring Results for Equity System (MoRES) Approach

Role: Deputy Team Lead | Client: UNICEF | Location: Multi-country

MoRES is a conceptual framework for effective planning, programming, implementation, monitoring and managing for results to achieve desired outcomes for the most disadvantaged children. The objective of the evaluation is to support continuing efforts across UNICEF to articulate, develop and mainstream the MoRES approach by learning from experience. The evaluation is therefore forward-looking, focusing on operational learning and practical adaptation rather than on issues of accountability and outcomes. Deputy team lead managing a number of in country studies and leading the drafting of key components of the report

2012 - 2014

NICE International, M&E of the Health Partnerships Scheme

Role: Project Director | Client: NICE International | Location: UK, China, India

Project description: Monitoring and Evaluation of NICE International (National Institute of Clinical Excellence) Activities in the Context of the Health Partnerships Scheme. Working in Kerala, India and Beijing, China. Sam was Project Director on the team which provided expertise in country health systems, statistical analysis, health issues in developing and middle income countries, and monitoring and evaluation and quality assurance. Specific methodologies used include, document reviews, interviews with key informants, theory of change, (re)construction of portfolio intervention logic, development of an analytical and theoretical logical framework.

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2010 - 2013

Independent Multi-Disciplinary Review of the National Response to HIV/Aids for the Financial Years 2010-2013

Role: Project Director | Client: National Aids Commission, Malawi, World Bank | Location: Malawi

Itad has been contracted to undertake a series of annual reviews of NAC. For each annual review, Itad is required to mobilise a 5-person multi-disciplinary team consisting of both international and Malawian experts. The chief objective of the reviews is to provide NAC and its partners with an independent assessment of performance in implementing the integrated annual work plan against the National HIV Monitoring & Evaluation Framework and budget. Overall project director for the assignment

2012 - 2013

Nigeria, Global Fund, Impact Evaluation of GF Grant in Nigeria

Role: Project Director | Client: National Agency for the Control of Aids | Location: Nigeria

Nigeria is currently implementing the Single stream Global Fund grant, for which National Agency for the Control of Aids (NACA) is a Principal Recipient, along with four other organisations. NACA, in collaboration with the four other Principal Recipients, required an evaluation to document the impact of the Global Fund HIV programmes in Nigeria by reviewing existing performance, outcome and impact indicators.

2012 - 2013

Assessing the Value for Money of Vaccine Product Development Partnerships for the International AIDS Vaccine Initiative (IAVI)

Role: Project Director | Client: International AIDS Vaccine Initiative | Location: USA

This project has been commissioned by the IAVI secretariat and is focused on helping IAVI articulate its value for money proposition while at the same time help define areas where it can increase its VFM offer. Overall project director for the assignment

2012 - 2013

Five Year Evaluation of UNITAID

Role: Project Manager and Operational Lead | Client: UNITAID | Location: Global

Project description: The purpose of the assignment is two-fold; to assess UNITAID's overall performance against its goals and principles, and identify how UNITAID can strategically leverage its strengths to increase its impact on markets and catalyse improved public health outcomes.

Activities: Implementing an innovative methodology, based on an underpinning Theory of Change (ToC) analysis. A mixed methods approach is then being deployed, centred around the ex-post construction of detailed ToC for UNITAID operations across the three work streams. Contribution analysis is also being used to establish the extent to which both market and health impacts generated can be linked to UNITAID intervention.

Selected publications

- Sam McPherson and Julian Barr (2012). Evaluating results, maximising value for money, and being transparent. The Evaluator, Summer 2012.
- Meeting the challenges of proving impact in Andhra Pradesh, India (2010) Journal of Development Effectiveness, December 2010, Vol 2, No 4, 468-485, Fiona Samuels and Sam McPherson.