

EVM TRAINING MODULES

Module 10: Planning for an EVM assessment

Agenda

1. Engage stakeholders
1. Set-up, plan & cost the assessment
1. Activate the plan
1. Design & hold the training
1. During the assessment
1. After the assessment



A network of collaborators contributes to making an assessment happen. Global teams and country teams work hand in hand to ensure change and improvement can happen.

IN-COUNTRY TEAM



EVM LEADER



EVM MANAGERS



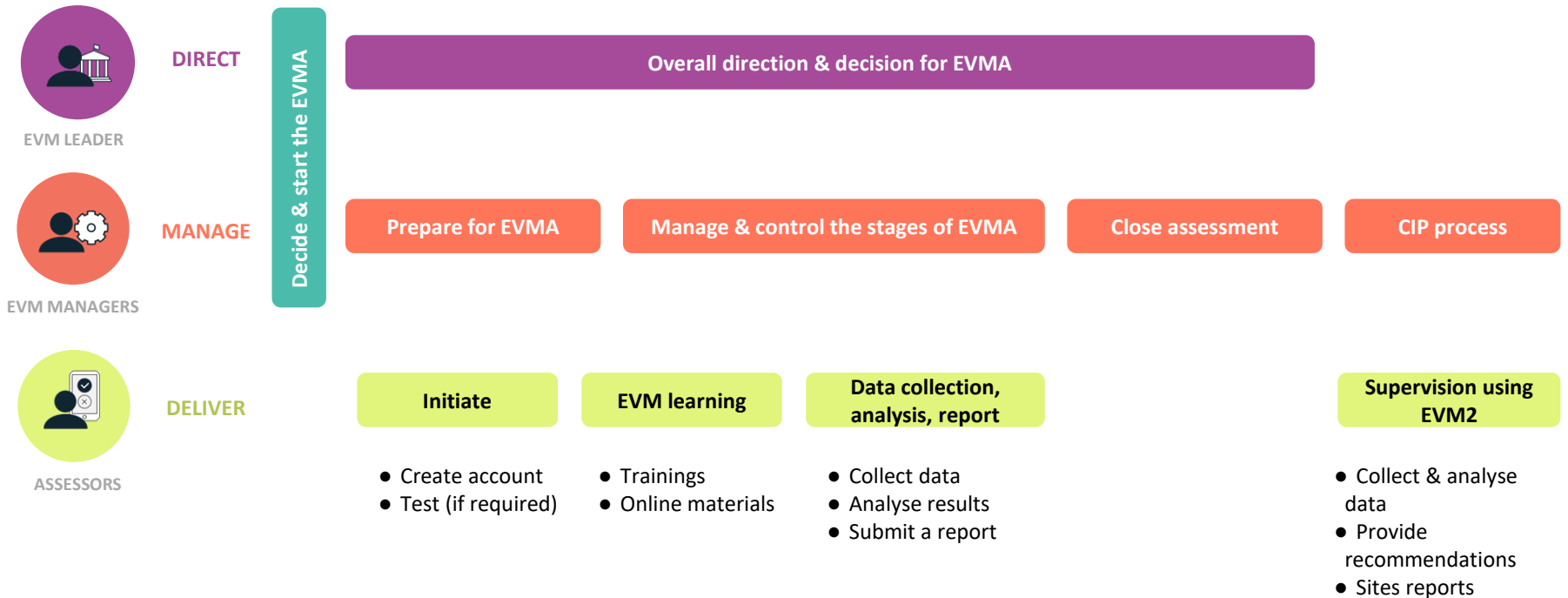
ASSESSORS



GLOBAL TEAM

EVM GLOBAL / REGIONAL
COORDINATION

In-country roles & responsibilities



Managing & Directing

The EVM country manager (s) is responsible for the day-to-day management of the EVM2 rollout in the country. The country manager's responsibility is to ensure that the overall process is well planned, executed and completed, and the expected quality are met:

- defining the scope and sites,
- estimating the workload and duration
- planning the training and data collection
- assessing the risks - such accessibility to sites.

They will engage the global team, if necessary, through the EVMA partner Lead in the country (UNICEF or WHO).



Delivering (Executing)

The assessors are responsible for executing the tasks related to the EVM rollout

- participating in the training,
- collecting the data,
- analyzing the data,
- elaborating the improvement plan.

A team manager will be designated to coordinate the work.



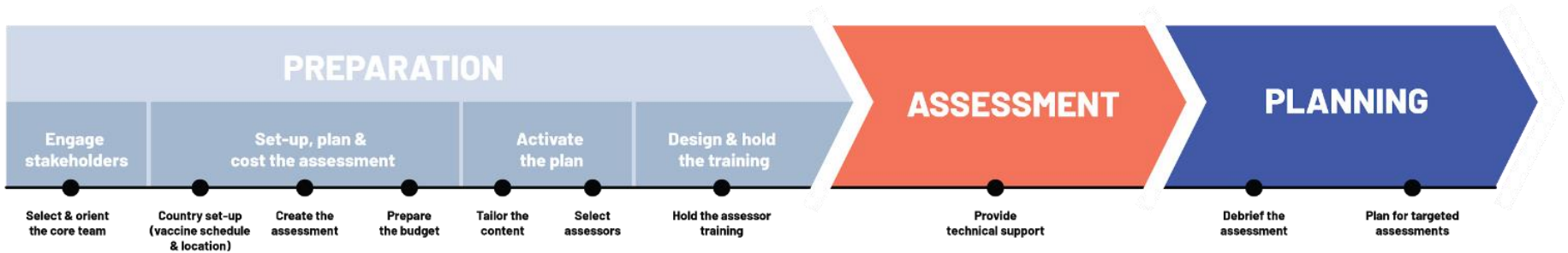
Prepare logistics thoroughly

Using EVM2 as a tool to ignite transformational change requires careful planning with global and local partners. The following steps serve as a checklist to use when preparing for a national EVM assessment.



Timeline

This timeline is a recommendation. It may need to be adapted based on the country's needs and the objective that the programme wants to achieve.



For a clear step-by-step of the full process, refer to the EVM Manager guide.

Country ownership

While a Full, National EVM assessment remains the global benchmark for evaluating a country's supply chain performance, countries are free to deliver other types of assessment to suit their needs.

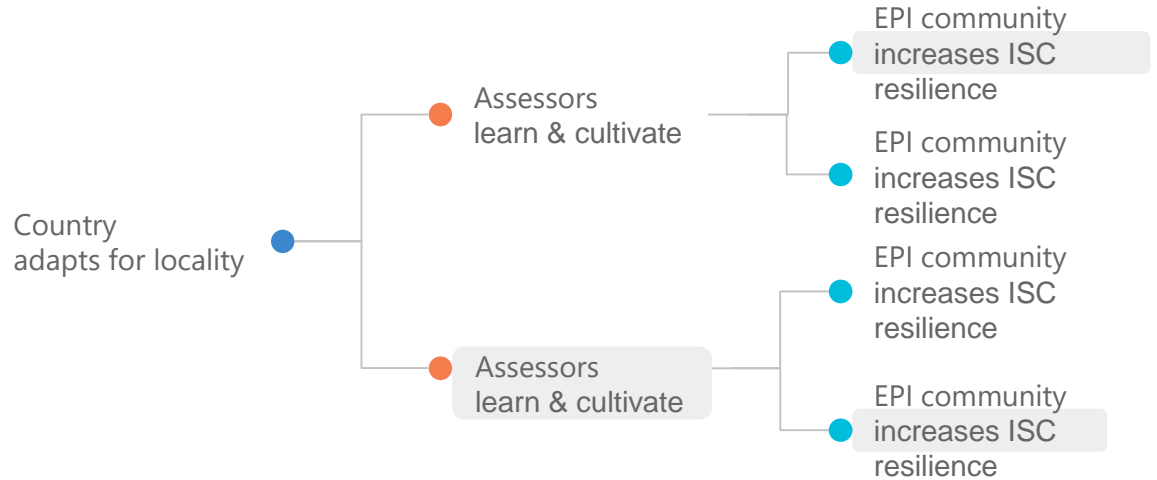
By training EPI staff on the EVM assessment framework and tool, subsequent assessments can be customised to meet a country's specific needs.



A chain reaction

It is important to make EVM accessible to the country teams, the assessors as well as facility managers and other members of the EPI community.

Reaching beyond the assessment, the tool is useful to train anyone in the EPI community.





EVM Manager video goes here
[prepare, collect, analyze]





1

Engage
stakeholders

Nominate the EVM Managers and set-up an EVM country Management team

The first step is building the right team. Once the EVM Manager has been nominated, set-up the team that will manage EVM in the country (partners in country, UNICEF, WHO and others).

This team will work together and coordinate throughout the process to make the EVMA happen.



Align on country roles and goals

Align on the objectives and make sure all stakeholders are clear on the desired outcomes, and possible issues that will be encountered along the way.

Agree on staff availability and roles during the process.



Provide orientation to the EVM country Management team.

- Three day classroom course for MoH staff
- Scenario-based training methodology with group exercises
- Covers assessment of individual facilities, updated criteria, and making recommendations
- Include a practical field assessment exercise: small teams are sent to the field to experience the assessment process





2

Set-up, plan &
cost the
assessment

Create or update the vaccine schedule

Before an EVM assessment, the EVM Manager should:

- Add every vaccine used in the country's immunization schedule
- Specify which of the vaccines in the country's immunization schedule should be used as tracer products during the assessment
- Update ISC parameters (optional)

The screenshot displays the 'Effective Vaccine Management' web application. The interface includes a top navigation bar with 'Home', 'Setup', 'Accounts', 'Assessment', and 'Dashboard'. A secondary bar contains 'Global Dashboard', 'Framework', and 'Administration'. The main content area is titled 'Vaccines' and features a search bar and two buttons: 'Add PCS' and 'Add generic'. Below this is a table listing 12 vaccine entries. The table columns are: Vaccine, Manufacturer, Commercial name, Formulation, Presentation, Doses per primary container, and Active. The 12th entry is highlighted in red.

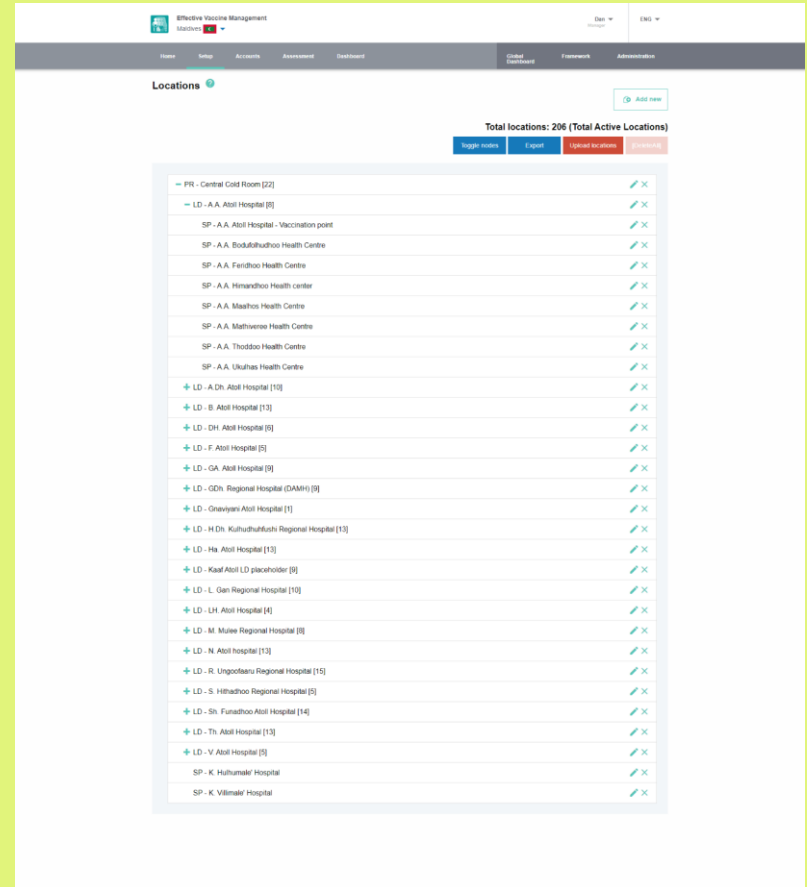
Vaccine	Manufacturer	Commercial name	Formulation	Presentation	Doses per primary container	Active	
1	BCG	Serum Institute of India Pvt. Ltd.	BCG Vaccine	Lyophilized active component to be reconstituted with excipient diluent before use	Vial	20	Yes
2	IGPV	PT Bio Fama (Persero)	Bivalent Diphtheria Poliovaccine Type 183 (DOPV 183)	Liquid: ready to use	Vial	10	Yes
3	DT	PT Bio Fama (Persero)	Adsorbed DT Vaccine	Liquid: ready to use	Vial	10	Yes
4	DTap-HepB-Hib	PT Bio Fama (Persero)	Pentabio	Liquid: ready to use	Vial	5	Yes
5	HepB	PT Bio Fama (Persero)	Hepatitis B Vaccine Recombinant	Liquid: ready to use	Uniject	1	Yes
6	MR	Serum Institute of India Pvt. Ltd.	Measles and Rubella Vaccine, Live, Attenuated	Lyophilized active component to be reconstituted with excipient diluent before use	Vial	10	Yes
7	Ta	PT Bio Fama (Persero)	none	Liquid: ready to use	Vial	10	Yes
8	IPV	Sanofi Pasteur SA	BIOVAX POLIO	Liquid: ready to use	Vial	10	Yes
9	JE	Chengdu Institute of Biological Products Co., Ltd	Japanese Encephalitis Vaccine Live (SA14-142)	Lyophilized active component to be reconstituted with excipient diluent before use	Two vial set (active + excipient)	5	Yes
10	HPV	Merck Vaccines	Gardasil	Liquid: ready to use	Vial	1	Yes
11	PCV-13	Pfizer	Prevenar 13	Liquid: ready to use	Vial	1	Yes
12	IPV	Shantha Biotechnics Private Limited (A Sanofi Company)	ShanPV	Liquid: ready to use	Vial	5	Yes

Complete the codification and location for the sites

Before the assessment, the EVM Manager should also:

- Add the Administrative Units
- Add the locations

This is a significant step. Once this step has been completed, you will be able to finalize the sampling and select the locations that will be assessed.



Create the assessment

Once the set-up has been completed, the EVM Manager can create the assessment and a copy of the setup data will be included within the assessment.

To create an assessment first:

- Select the **type**
- Set the **range**
- Select the **sample type**
- Put in the **name, date and description**

The screenshot shows a 'Create assessment' form with the following fields and values:

- Type***: Full (highlighted with a red box)
- Range***: National (highlighted with a yellow box)
- [SampleType]**: Single (highlighted with a cyan box)
- Name***: Maldives 2020/5 (highlighted with a blue box)
- Planned date***: 12/05/2020 (highlighted with a blue box)
- Description***: (highlighted with a blue box)
- Required fields***: (highlighted with a blue box)

Four colored arrows originate from the text on the left and point to these specific fields: a red arrow points to 'Type', a yellow arrow points to 'Range', a cyan arrow points to '[SampleType]', and a blue arrow points to the 'Name', 'Planned date', 'Description', and 'Required fields' section.

Create the assessment

Then:

- Fill out the scope
- Select the **sites**

The screenshot shows the 'Edit' page for an assessment. The top navigation bar includes 'Home', 'Setup', 'Accounts', 'Assessment', and 'Dashboard'. On the right, there are links for 'Global Dashboard', 'Framework', and 'Administration'. A left-hand sidebar contains a menu with 'Assessment details', 'Scope', 'Select locations' (highlighted in green), and 'Review'. The main content area is titled 'Edit' and contains the following configuration options:

- Precision***: Radio buttons for 5%, 10% (selected), and 15%.
- Confidence***: Radio buttons for 80% (selected), 85%, and 90%.
- Number of SPs to be assessed for each LP***: Radio buttons for 1 (selected) and 2.
- Locations to exclude:** A section with a header 'ALL N S' and a list of locations, each with a right-pointing arrow:
 - National Strategic Cold Store
 - North Central Zone
 - North East Zone
 - North West Zone
 - South East Zone
 - South South Zone
 - South West Zone

At the bottom of the configuration area, there are three buttons: 'Generate sample' (disabled), 'Export' (active), and a confirmation message: '✓ Sample successfully created and accepted'. In the bottom right corner, there are three buttons: 'Cancel', 'Previous' (active), and 'Next'.

Create the assessment

And finally:

- **Review and confirm** the information
- **Create** the assessment

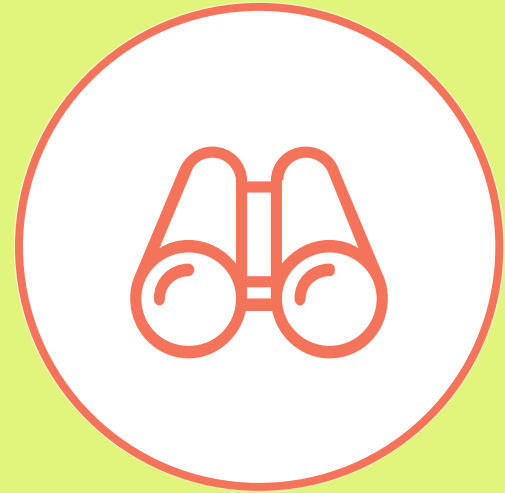
The screenshot shows a web application interface for editing an assessment. The top navigation bar includes 'Home', 'Setup', 'Accounts', 'Assessment', and 'Dashboard'. The 'Assessment' section is active, with sub-sections for 'Global Dashboard', 'Framework', and 'Administration'. The main content area is titled 'Edit' and contains several sections:

- Assessment details:** A sidebar menu with 'Assessment details', 'Scope', 'Select locations', and a highlighted 'Review' button.
- Global information:** Fields for Version (v1.12), Type (Full), Range (National), Name (Nigeria 2020/6), Description (test to delete), and Planned date (6/1/2020).
- Locations to be assessed:** Fields for Precision (10%), Confidence (80%), and a list of locations to exclude.
- Requirements to be assessed:** A list of criteria and categories, each with a checked checkbox.
- Criteria:** A list of 21 criteria, all checked, including E1-E9, M1-M4, R1-R4, and S1-S2.
- Categories:** A list of 7 categories, all checked, including C1-C6 and O-P.
- Buttons:** 'Cancel', 'Previous', and 'Create assessment' buttons at the bottom.

Prepare and schedule the assessment

Now that the site selection is completed, you know the number of locations that need to be assessed and can accordingly budget for that and for the right number of assessors.

When choosing dates for a National assessment, schedule around holidays and 'busy' periods that are demanding of assessor's time.



Prepare and form agreements on budget

When thinking about budgeting, you have to consider all the steps of the process: preparation, training of a cohort of potential assessors, a EVM2 national assessment, a EVM2 data cleaning and approval, CIP development workshops, and the targeted assessments that will follow.

Review the budget at key milestones of the process to make sure that things are on track and that you are within budget.

Key items that should be included in the budget

Translation

Per diem of assessors

Consultant fees

Travel and accommodation

Transportation (& fuel)

Facility rent

Materials



3

Activate the plan

Translate and tailor the questionnaire*

Language issues must be carefully considered. Having questions in the official country language, tailored to local terminology and infrastructure, helps to collect more accurate information.

**This is only applicable in countries that are not English or French speaking.*

(1) Email the EVM secretariat to get the source files for translation.

(2) Translate and tailor questionnaire and in-app guidance into local language.

(3) Validate the translation by completing one or targeted assessments in the new language. Ensure that any errors or missing translations are listed and corrected.

Select and recruit assessors

Review key traits for assessors and find out who is experienced, and who demonstrates potential to learn.

Review the roster of assessors, including their positions and experience with EVM to familiarize yourself with their background, knowledge, and expertise.



Activate networks

Invite all attendees to TechNet and identify the most active social networks amongst the participants.

Familiarize yourself with the TechNet platform.

Take the necessary steps needed to start sharing and communicating content.



JOIN TECHNET

<https://www.technet-21.org/en/login>

Create an account

Join the EVM2 group



VIEW EVM2 TOPICS PAGE



JOIN THE DISCUSSIONS

Understand how to post

Initiate discussions



ACTIVATE THE GROUP

Plan events and regular activations
in the group



4

Design & hold the
training

Choose a location

When choosing a location for the assessors' training, consider which facilities can have their routine disrupted for the week, and also provide relevant practice.

Based on the objectives of the workshop and the number of participants, ensure the space is convenient and will inspire effective learning. Make all the necessary arrangement to ensure all the tools and materials will be available.



Form a facilitation team

Through local institutions, experts and partners, find facilitators that already understand iSC and can be trained on the EVM2 tool.

Based on the traits and qualifications, recruit a lead facilitator, translator, EVM specialist, and identify or speak with the country manager

Assign each person in the team specific a specific role and responsibilities.



Tailor the curriculum

- Plan 4 days of classroom training in addition to 1-2 days of field visits to representative sites.
- Task the facilitators with tailoring session curriculum (interactive activities and live demos) using existing resources from the EVM2 website.
- Review the training agenda and tailor both the training and materials as needed for your context.

DAY 1
A Shared Vision for EVM



DAY 2
A Tool To Realize the Vision



DAY 3
Collaborative Data Gathering



DAY 4
Field Testing



DAY 5
Understanding Results



NEXT STEPS
Practicing Field Testing



Send invitations

Develop and share a concept note to create anticipation including: purpose, objective and timeline of the initiative, date, location, travel details, contact details for the training.

Create and regularly update the attendance list to check-in with assessors.



Pre-send materials to trainees

Share relevant introductory materials and videos to familiarize participants with EVM. Use E-learning platforms to share documents to get all the participants, no matter their background, up to speed.





5

During the
assessment

Be present or available for any potential needs

- Experts and ICT teams should always be monitoring the team's communication platforms to offer support to assessors during their first assessment.
- Have a technical EVM expert available to resolve any inquiries during the assessment.



Virtual mentorship and community building

- Support assessors as champions, including them in the development of cIP and targeted assessments
- Invite assessors to be active on TechNet with questions and experiences
- Feed the need for collaborative networking within and across the talent pool at large
- Give chances for advancement in the wider network





6

After the
assessment

After the assessment

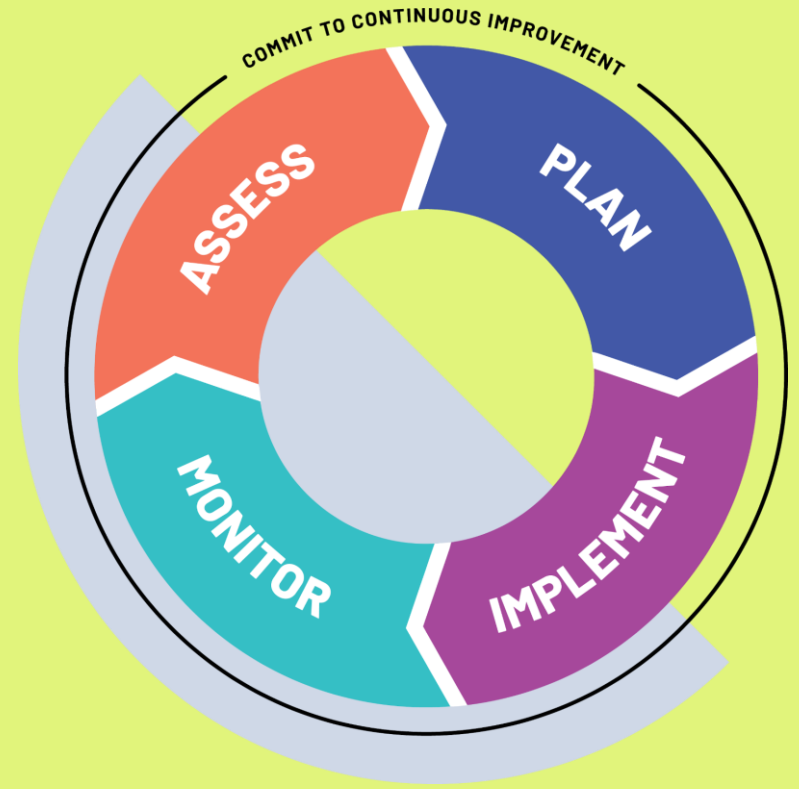
Debrief the EVM2 assessment

Once the assessment is completed and uploaded, have a team meeting to discuss what went well and what could've gone better.



Next steps

Now that you have the assessment results you can analyse what they mean and start developing a plan to improve. A good way to keep track of the plan and its implementation is through targeted assessments.





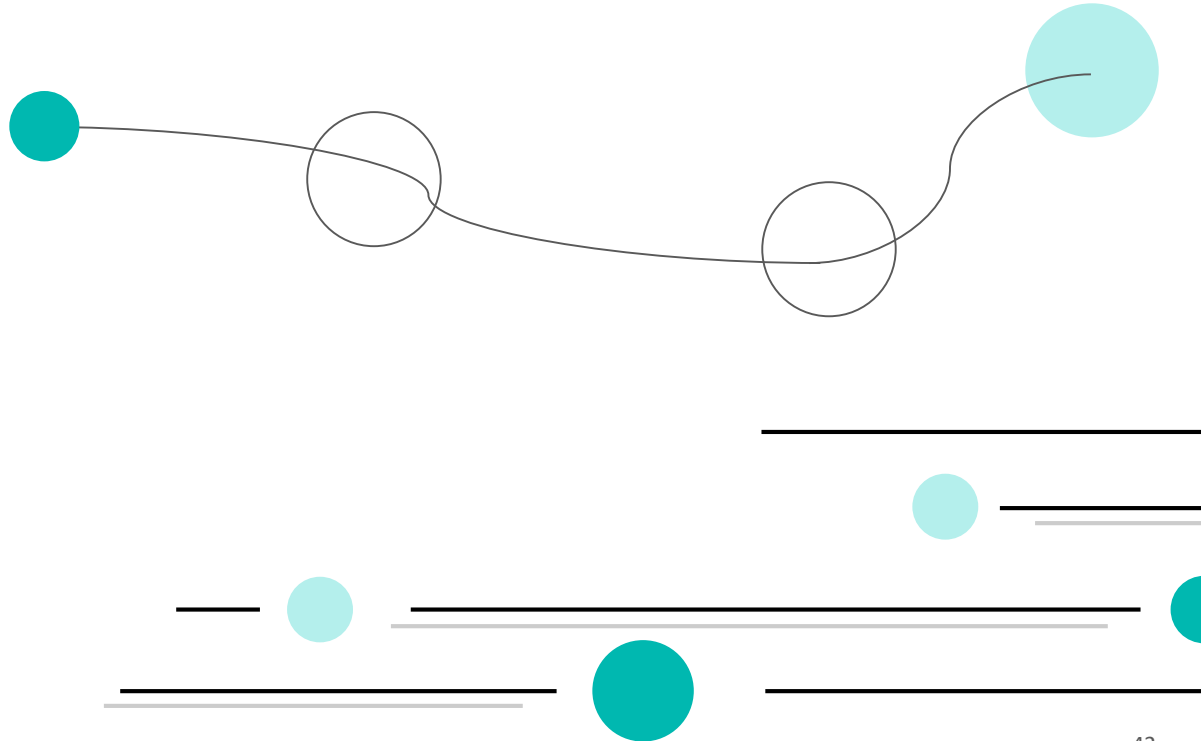
Quick exercise



Timeline sprint

Get a piece of paper, colorful markers, and draw an ideal sequence of steps for an EVM2 rollout.

Once everyone is done, trade drawings with another colleague, and ask him/her to complete what's missing.





**Congratulations on
completing module 10!**

DICTIONARY OF TERMS

AD Auto-disable (syringe)

BCG bacille Calmette-Guérin (tuberculosis vaccine)

°C degrees centigrade

CC Cold Chain

cIP continuous improvement plan

cMYP comprehensive multi-year strategic plans

DTP Diphtheria, Tetanus and Pertussis vaccine

EEFO Earliest-Expiry-First-Out

EPI Expanded Programme on Immunisation

EVM effective vaccine management, a critical MoH-EPI planning process to assess and prioritize improvements in the immunization supply chain

EVM 2.0 the new version of the effective vaccine management assessment tool, available via the “EVM Assessor” app

EVM:next the holistic programme for continuous improvement of national immunisation supply chains

FIC Fully Immunized Child

GAVI Global Alliance for Vaccines and Immunisation

HepB Hepatitis B vaccine

Hib *Haemophilus influenzae b*

ICT information and communication technologies

ILR Ice-lined refrigerator

iSC immunization supply chain

JE Japanese encephalitis vaccine

LD Lowest delivery level store

LMIS logistics management information systems

M&E measurement and evaluation

MoH Ministry of Health

OPV Oral Polio Vaccine

PR Primary store

RI routine immunization

SCE Supply chain essentials

SN Sub-national store

SOP Standard Operating Procedure

SP Service point (health facility)

TA technical assistance

Transition Implementation of EVM 2.0

UNICEF United Nations Children’s Fund

VAR Vaccine Arrival Report

VVM Vaccine Vial Monitor

WHO World Health Organization