2

#### Annex 2.A Desk Review Lead ToRs

Background

In preparation for an EPI field review, technical assistance is sought by the EPI to undertake a desk-based review of the available literature and data relevant to the performance of the EPI over the last five years.

Main tasks and responsibilities

Review findings and recommendations of previous plans, evaluations and studies over the last five years. Produce a table of key recommendations and status of implementation; determine topics to consider as priorities in the EPI Review. Key desk review resources include (see *Annex 1* for detailed resources and tips):

multi-year plan for immunization;

previous EPI review, surveillance reviews, post-introduction evaluations; coverage data and surveys and data quality assessments;

vaccine management assessments;

joint appraisals, KAP studies and other evaluations; financial or economic assessments if available.

Map of the country’s partners, which will be used as a basis for partner interviews.

Assist with preparations for training:

gather key reference documents for reviewers/Topic Leads including technical guidelines and tools (immunization manual/policies, VPD surveillance, AEFI, vaccine management guidelines, etc.);

prepare a desk review presentation on the findings by topic for the Review training.

Draft the Review protocol and develop and tailor EPI Review tools.

Skills and expertise required

Sound knowledge and experience with national immunization programming. Very good writing and data analysis skills.

Expected outcomes of work

A report on EPI performance and implications for the upcoming EPI Review’s methods and tools. Format the report so that it can be used as background to the EPI Review report.

A protocol and field tools for the EPI Review.

#### Annex 2.B Review Manager ToRs

Background

The Review Manager is the in-country immunization leader (usually the EPI Manager and WHO or UNICEF Immunization Officer) responsible for initiating, coordinating and overseeing all stages of the Review. The Review Manager initiates the Review concept development and oversees all stages of the Review.

Main tasks and responsibilities

Initiate and gain approval of EPI Review concept, secure participants and funds. Oversight of all stages of Review – especially the concept, training and debriefing.

Facilitate access of the EPI Review team to senior-level ministry officials and stakeholders for the planning and debriefing.

Coordinate integration of EPI Review findings into national planning.

Skills and expertise required

Leadership and managerial skills.

In-depth knowledge and experience with the country programme.

Expected outcomes of work

Resources (both human and financial) mobilized for the Review. Field teams mobilized and field reviews completed.

Debriefing meetings conducted with inputs obtained from major stakeholders.

#### Annex 2.C Review Coordinators ToRs

**(External & National)**

Background

With oversight by the Review Managers, the Review Coordinators are responsible for preparing, implementing and reporting the Review findings. If an EPI staff person is not available to be a national coordinator, a national consultant may be engaged instead.

It is important to cover all the responsibilities below, keeping in mind that consultants should be hired full-time and should be responsible for successful completion of activities. An EPI counterpart has a critical role in facilitating and guiding each aspect of the Review, particularly to ensure national ownership of the Review and its results.

Main tasks and responsibilities

Responsible for overall Review: planning; logistics; implementation and reporting. Finalize methods and data-collection tools.

Establishes Topic Leads in advance and forms teams and assigns Team Leads.

Organizes team training: participants; agenda; presentations, and background documents.

Oversees the data management and analyses.

Oversees debriefing process, including field team, Topic Leads and final debriefing. Responsible for report drafting and finalization.

Skills and expertise required

Expertise in immunization programming and health systems development. Capacity to lead and gain consensus.

Strong oral and written communication skills.

Specific outcomes

Site selection and communication to offices as required (national and field level). Final tools (questionnaires, checklists, data entry platform).

Dissemination of ToRs for teams, Team Leads and Topic Leads.

Field team packages (background information, tools and templates). Training agenda, background presentations.

Field debriefing: national teams; field teams; Topic Leads and development of presentation of findings.

MoH/ICC debriefing agenda and presentation. Final EPI Review report.

#### Annex 2.D Topic Lead ToRs

Background

The Topic Lead is the designated Review participant (usually an external participant) responsible for leading analysis of a specific topic area. This includes facilitating analysis and synthesis of findings related to the designated topic area.

Main tasks and responsibilities

In general, provide leadership on a topic of the Review. Review background documents.

Attend Topic Lead briefing session that takes place one day before training starts. Review tools to ensure that queries in the topic area are clear and adequate.

During the debriefing session, synthesize and summarize findings and recommendations across the national and field teams for the designated topic.

Lead a break-out session on the topic; present the above-mentioned synthesis; facilitate refining of conclusions and recommendations; present topic-specific findings to plenary.

Provide a written topic summary that can be used for the final Review report.

Skills and expertise required

High-level expertise in the designated topic. Capacity to supervise and coordinate analysis.

Ability to facilitate identification of main topics and recommendations. Ability to contribute to the writing of the EPI Review report.

Specific outcomes

Preliminary presentation on the designated topic area, including: (1) key background information from desk review; (2) synthesis of findings and recommendation from national and field teams; (3) relevant statistics or analyses that may be available from compiled review team data.

Revised presentation after input from break-out group.

Written report on designated topic area that can be used for the final EPI Review report.

#### Annex 2.E Field Team Lead ToRs

Background

An internal or external Review participant who will lead the field assessment in an assigned geographical area, synthesize findings, conclusions and recommendations, and report back at field and national levels.

Main tasks and responsibilities

Responsible for leading fieldwork in a designated geographical area.

Ensures that selection of sites for visits (health facilities) follows the established approach.

Ensures that the roles of each team member are clear and well implemented (e.g. translation, data input, review records, data verification).

Responsible for data collection, entry and reporting. Conducts subnational debriefings.

Oversees or gives presentations at field debriefing meetings. Writes summary of field findings, if required.

Skills and expertise required

Good knowledge of immunization systems. Capacity to lead field teams.

Ability to draft a summary report and recommendations.

Expected outcomes of work

Subnational field assessment analysis and report completed.

Presentation of subnational report at national debriefing (main findings and recommendations).

#### Annex 2.F Field Team Member ToRs

Background

EPI Reviews are generally conducted by assembling field teams who can assess the immunization system at each subnational level – usually the regional, district and health facility levels. Each team is usually lead by an independent, external expert, and is accompanied by a national counterpart who is familiar with the immunization programme and country context. Additional members for each team may be needed, depending on the need for translation or special topics that have been integrated, such as data verification and live data entry into handheld tablets.

Tasks and responsibilities

Participates in EPI Review training and provides input to design of Review, if applicable.

Successfully conducts designated duties such as translation, data entry and data verification.

Supports Team Lead to conduct field studies, especially with regard to understanding country context.

Contributes to thematic analysis and documentation of the overall national report.

Skills and expertise required

Skills in data collection and analysis.

Capacity to synthesize findings from field studies into a field report.

General knowledge of immunization and immunization programme management.

Expected outcomes

Provide input on debriefing presentations.

Any other outcome related to designated role, such as complete and cleaned data set or compiled hard copies of questionnaires.