2

#### Annex 6.A

**Concept note template**

Reminder of instructions for writing this concept note. Plan to keep this report to a maximum of 3–5 pages. Focus on the rationale and objectives for the review. The methods will be detailed in the protocol and mainly serve, at this stage, to get a general overview and to estimate the budget.

* 1. **Background** *(1–2 pages maximum*)
     1. Overview of the EPI (schedule, strategies, performance trend).
     2. EPI human resources, including an organogram at national level.
     3. Rationale and main issues giving rise to the review.
     4. Stakeholders and partners in the EPI (to be engaged early via this concept note).
  2. Objectives
  3. **Methods** *(1 page maximum)*
     1. Overview of the data-collection methods (interviews, observations, questionnaires);
     2. Sites to visit (national interviews and field sites);
     3. Participants (EPI focal points, consultants, national and field team members);
     4. Dates of the review.
     5. Timeline of each phase of the review:
        1. desk review.
        2. planning and preparation.
        3. field review.
        4. synthesis and recommendations.
        5. translating into planning and action.
        6. analysis and report writing.
  4. Estimated budget
  5. **Expected outcomes of the EPI Review**

(how review findings will be used)

#### Annex 6.B

**Desk review report template**

Refer to *Annex 1* for more detail on how to complete data collection and synthesis for the desk review report. The purpose of this report is to summarize key findings –

especially for priority areas. It should be formatted so that it can serve multiple purposes,

e.g. for use in training, highlight priorities that are addressed in the tools and methods. This report can be approximately 8–10 pages plus Annexes.

1. Introduction and background
   1. Purpose of desk review.
   2. Methods, sources of information (data sources and interviews), timeline.
2. **Immunization programme information** *(*[*see Annex 1A*](#_bookmark42)*)*
   1. Immunization coverage trends.
   2. VPDs incidence and trends.
   3. Surveillance standards.
   4. Immunization equity.
   5. Trends in immunization financing.
   6. Immunization governance, planning, assessments.
   7. Immunization targets.
3. **Summary of previous EPI or immunization reviews** *(*[*see Annex 1B*](#_bookmark43)*)*
4. **Summary of priority areas of focus by topic areas** *(*[*see Annex 1C*](#_bookmark44)*)*
   1. Programme management.
   2. Human resources.
   3. Budgeting and financing.
   4. Vaccine supply, quality and logistics.
   5. Service delivery strategy.
   6. Surveillance and reporting.
   7. Demand side strategy.
5. **External determinants assessment** (see [*Annex 1D*](#_bookmark46))
   1. General political, social, economic context, development strategy.
6. Highlight external environment issues impacting immunization performance.
7. Overview of health system function, structure, strategy, aspects that impact performance.
8. **Conclusions and recommendations for amending or guiding EPI objectives, methods, data**
9. **Annexes**
   1. Annex 1. References, resources, persons conducting the desk review, persons interviewed.
   2. Annex 2. Protocol for the EPI Review.
   3. Annex 3. Tailored tools (questionnaires) for the EPI Review.

#### Annex 6.C Protocol template

The purpose of the protocol is to document the technical details of the Review so that all involved have the same understanding of the methods used in the Review. The description of the methods can also be used in the final EPI Review report. This protocol should be approximately 5–8 pages plus annexes.

1. Background

2–3 sentences on the general description of the Review (including purpose, dates).

1. Objectives

Refer to the objectives in the concept note and highlight any changes or additional priorities identified.

1. Participants, stakeholders

Provide a list of participants and roles including Review managers, leads, national focal point for the review, national technical focal points, topic leads needed

and team membership (how many per team and their roles). Provide ToRs for major roles (i.e. update [*Annex 2*](#_bookmark48)). Include partners and stakeholder to invite to the debriefing.

1. Approaches to link to strategic planning

Describe approaches used to coordinate this Review and EPI strategic planning, (e.g. joint activities or key persons involved in both activities).

1. Data-collection methods
   1. Describe the approaches to data collection.
      1. National level – data to be reviewed, stakeholders/partners to interview.
      2. Field teams – health office interviews/observations, health facilities, immunization session observations, caregiver interviews, case verification, etc.
   2. Site selection.
      1. Pre-selected sites. Describe criteria for selection and provide a table of selected sites.
      2. Site selection by field teams. Describe criteria and special considerations guiding teams in site selection.
2. Teams. Describe the number and composition/roles of national and field teams.
3. Training. Describe the main training topics, approaches (review questionnaires, mock interviews, etc.).
4. **Data management and analysis**
   1. Describe instructions to teams for data recording, reporting.
   2. Indicate if key variables in the questionnaires were identified for analysis – priorities for teams to collect.
5. **Synthesis of findings and recommendations**
   1. Describe the methods for synthesizing findings.
   2. Describe the process for developing recommendations.
   3. Describe how these recommendations will be shared, used and tracked.

#### Annex 6.D

**Topic report template**

The purpose is to bring together the observations and recommendations from the national level and across ALL field teams for each topic. This report should be written by the Topic Lead and is a key contribution to the final Review report. It is recommended to try and keep the text of this document within 2–3 pages, although it may be longer if data tables and images are included.

1. Topic name

2–3 sentences on the general description of the Review (including purpose, dates).

1. **Background** *(only one paragraph if possible)*
2. National level

*(this information comes from desk review and national lead presentation)*

* 1. Strengths.
  2. Weaknesses.

1. Field level

*(this information is from field team presentations and analysis of core data across ALL teams)*

* 1. Strengths.
  2. Weaknesses.

1. Observations and data collected

*(to back up strengths and weaknesses listed above)*

* 1. Summary of core variables.
  2. Summary of key observations and trends from the national and field teams.
  3. Pictures or examples that illustrate points.
  4. Best practices noted.

1. Conclusions

*(reflecting national and field findings)*

* 1. Top recommendations (1-2 maximum).
  2. Other recommendations.

#### Annex 6.E

**Final EPI Review report template**

**National EPI Review report outline (30–50 pages).** The following is a sample outline of a national EPI Review report. The outline of the national report may vary according

to the objectives of the review and if a “special topic” was identified for analysis.

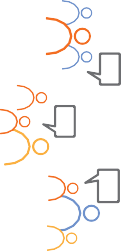
In general, the categories should be limited in number in order to (a) facilitate ready analysis, and (b) focus on the main factors affecting EPI programming in context. Focus on findings that back recommendations and priority actions.

1. Background/desk review
   1. Demography and geography and other relevant external issues.
   2. Health system.
   3. immunization programme in the last five years.
2. Objectives and methods
   1. Objectives of the Review.
   2. Data collection and analysis methods.
3. Immunization system components

*(strengths, weaknesses, conclusions, recommendations)*

* 1. Programme management.
  2. Human resources management.
  3. Costing and financing.
  4. Vaccine supply, quality and logistics.
  5. Service delivery.
  6. Surveillance and reporting.
  7. Demand generation and communication.

1. Conclusion and summary recommendations
   1. Summary of overall findings.
   2. Recommendations for policy or planning actions.
   3. Acknowledgments.
2. Annexes
   1. Subnational reports.
   2. Data-collection instrume



**Annex 6.F**

**Team debrief presentation**

Each field team should prepare a presentation along the lines of this template (see *Box 15*). Download template here.