EFFECTIVE VACCINE MANAGEMENT 2.0 BETA TEST MENA

WORKSHOP REPORT
APRIL 9 -12, 2018

Credits for all photos in this report go to
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EXECUTIVE SUMMARY

BACKGROUND

In 2016, WHO and UNICEF re-launched the EVM initiative as a comprehensive EVM framework — a four-step strategy for *continuous* immunization supply chain (ISC) quality management, optimization and innovation.

The new EVM assessment tool is being designed to support the full national *as well as* targeted self-assessments by the programme to evaluate progressive impact of its investments on ISC improvements. The tool's placement on a mobile app facilitates engagement of subnational EPI workforce in driving continuous ISC systems performance monitoring, diagnostics and problem resolution by national programmes.

The beta test in MENA is a key stage in the development of an improved EVM assessment process and tool, through an approach that encourages participants to collaborate and co-create. This document focuses on feedback and learnings from participants, not on information pushed to participants.

The approach may help other regions to customize this onboarding template when validating and rolling out EVM 2.0.

CONTENTS

> ❝ A QUESTION IS A TOOL TO ASSESS WHETHER A REQUIREMENT HAS BEEN MET. EVM REQUIREMENTS SET THE STANDARD FOR IMMUNISATION SUPPLY CHAINS.
>
> - DANIEL BRIGDEN

Our objectives entering into the EVM 2.0 beta test in MENA were to **(1)** Orient regional country teams on the EVM initiative — continuous improvement process informed by EVM assessments; **(2)** Orient regional country teams on the process of conducting EVM assessments using the EVMA 2.0 tool; **(3)** Inform usability of EVMA 2.0 design through inputs from country teams' participation in the EVM 2.0 beta test; **(4)** Inform training design targeting EVMA 2.0 users, to ensure effective implementation of the tool in the regional context; and **(5)** Design an actionable plan for EVMA 2.0 rollout in MENA countries, including defined roles and deliverables for the MENA regional partner (Emphnet).

OVERVIEW OF THE BETA TEST

Based on the EVMA 2.0 review and feedback from the MENA workshop participants, the Core Technical Team have developed a plan to substantively revise the EVM requirements and questionnaire before the second beta test in ROSA (Bhutan) in June 2018.

APRIL 7-8 & 13, 2018
The Core Technical Team (CTT), along with with Blue Infinity, pulled extra shifts to resolve conceptual and technical issues. This commitment set the course for both the MENA test as well as the upcoming development and validation schedule.

05
GURUS

APRIL 9-12, 2018
Over the four days a series of group activities, open discussions, and field visits were conducted and feedback was collected.

04
DAYS

04 REGIONAL COUNTRIES
Participants included global, regional and country representatives from UNICEF, WHO, MoH from Iraq, Jordan and Libya, Blue Infinity, and Emphnet.

32
TESTERS

03 FIELD VISITS
The 14 workshop sessions, including 3 field visits, will serve as a template for the next beta test(s), and will inform the design of in-country training of EVM assessors.
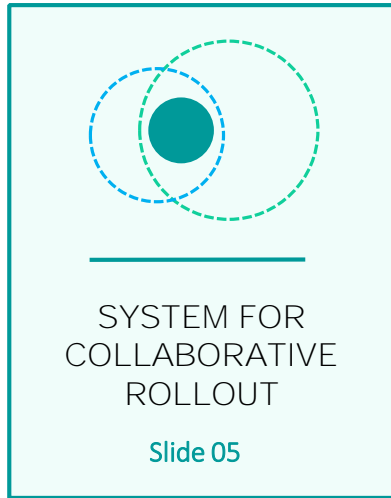
14
SESSIONS

05 CATEGORIES
The feedback was grouped into five categories: general, question design, app functionality, interview process, and training.

215
INPUTS

EVMA 2.0 BETA TEST MENA

INTEGRATED PROCESSES

Nothing can be meaningfully fine-tuned unless there is consistency of vision. The visual diagrams in this section strengthen a common understanding of the core processes and systems at the foundation of the EVM initiative.
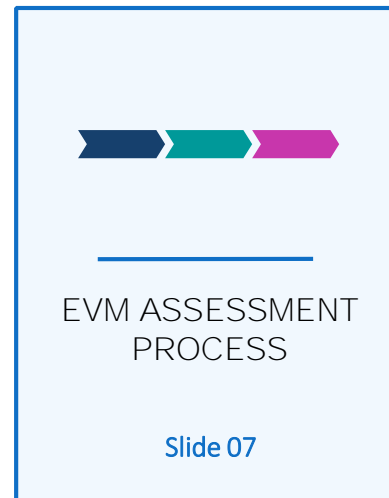
COLLABORATE

SYSTEM FOR COLLABORATIVE ROLLOUT

Slide 05

DESIGN

EVM 2.0 DESIGN PROCESS

Slide 06

ASSESS

EVM ASSESSMENT PROCESS

Slide 07

IMPROVE

CONTINUOUS IMPROVEMENT

Slide 08

THE SYSTEM FOR COLLABORATIVE ROLLOUT

The rollout is region-focused and built on principles of collaboration — **the nexus is on the regional level.**

COUNTRY LEADERSHIP
Country Manager + Sponsor +
Trained Assessors

ASSESSMENT DESIGN
Global Partners +
Regional Experts

REGIONAL VALIDATION, ADAPTATION + SUPPORT
Institutional Platform

NATIONAL

RIGHTS HOLDERS
Children + Caregivers

GLOBAL

WHO-UNICEF GUIDANCE

ICT DESIGN
Architecture + Support

SUB-NATIONAL TALENT POOL AS STAKEHOLDERS
ISC + ICT Capabilities
Communities + Coalition for Change

EVMA 2.0 BETA TEST MENA

DESIGN PROCESS

Participants enthusiastically embraced their role as **co-designers of the tool** – which allows us to collect a lot of high quality, useful feedback on the questionnaire, the performance and usability of the data collection app, the assessment process using the tool, and the training requirements to support the implementation of the tool in countries.
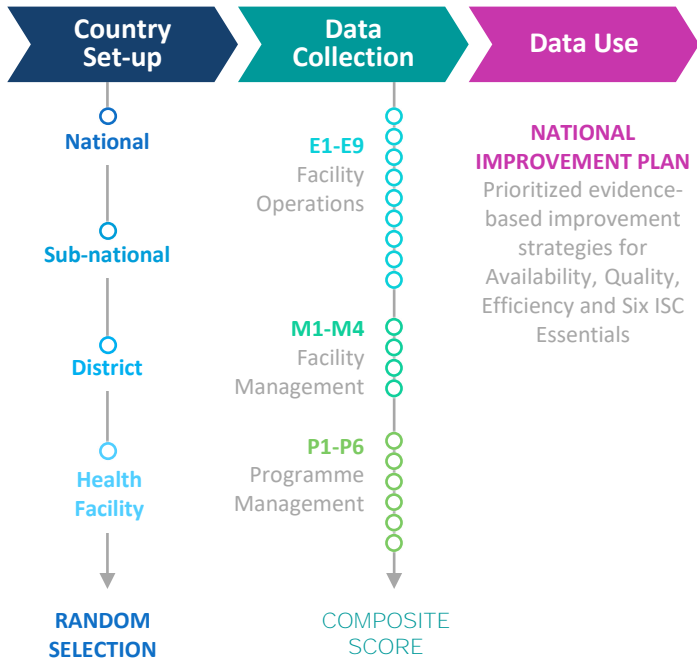

COUNTRY RELEASE

BETA 3

BETA 2

BETA 1

MENA	Iraq	ROSA	Iraq
7-12 April 2018	14-24 May 2018	2-11 June 2018	8-19 July 2018
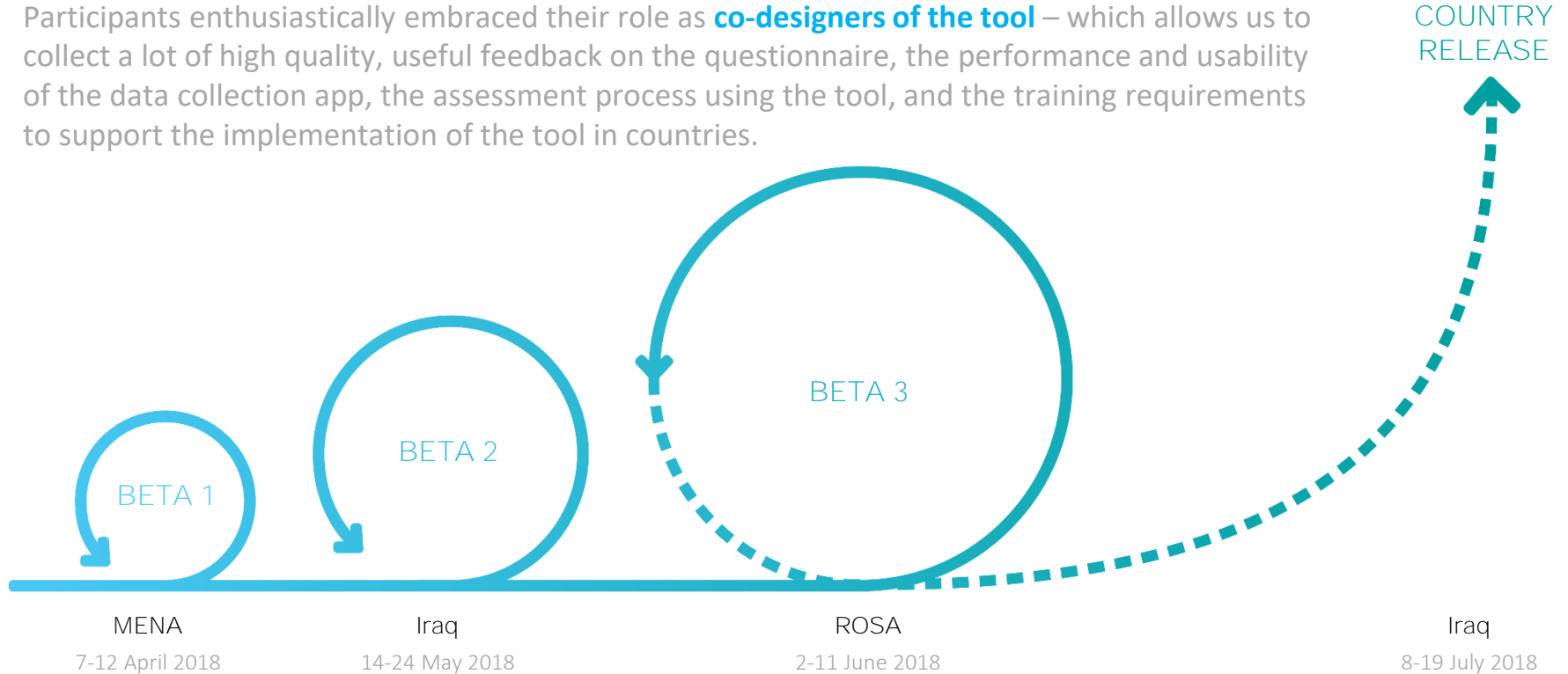
EVM ASSESSMENT PROCESS

EVERY 5 YEARS

NATIONAL ASSESSMENT
Full Questionnaire

Country Set-up	Data Collection	Data Use

National

Sub-national

District

Health Facility

E1-E9
Facility Operations

M1-M4
Facility Management

P1-P6
Programme Management

NATIONAL IMPROVEMENT PLAN
Prioritized evidence-based improvement strategies for Availability, Quality, Efficiency and Six ISC Essentials

RANDOM SELECTION

COMPOSITE SCORE

AS REQUIRED

TARGETED ASSESSMENTS
Assess Priority Areas (Geography, Level, Criteria) as-needed

Country Set-up	Data Collection	Data Use

E.g., District

E2

E6

E9

M4

P3

REFINED IMPROVEMENT PLAN
Verify which interventions worked

TARGETED SELECTION (illustrative)
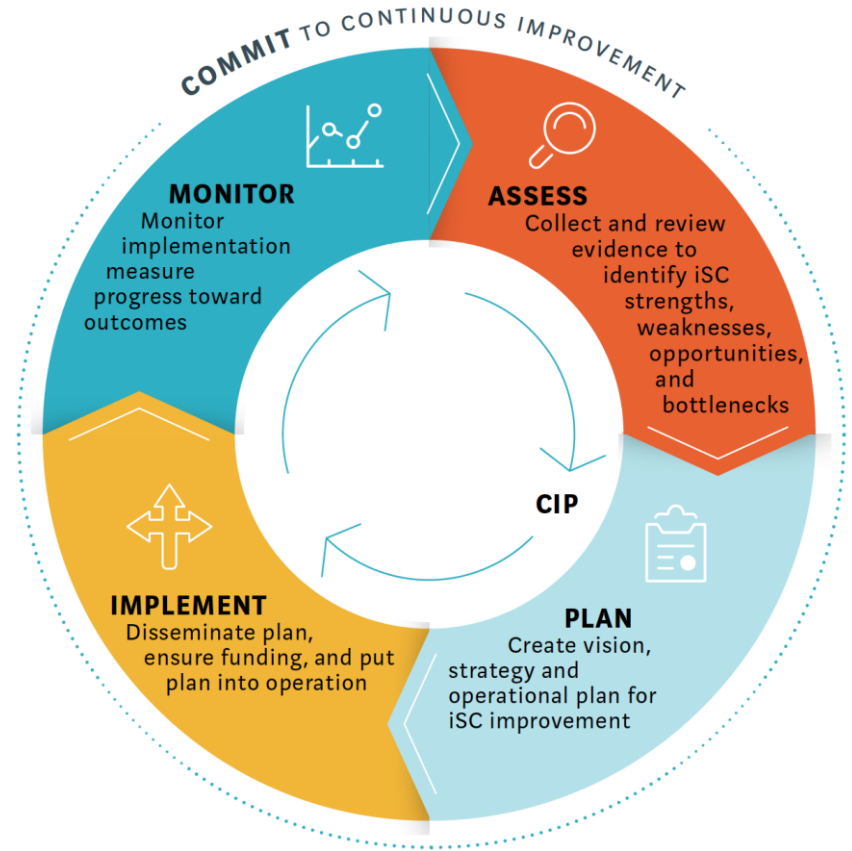
TARGETED CRITERIA (illustrative)
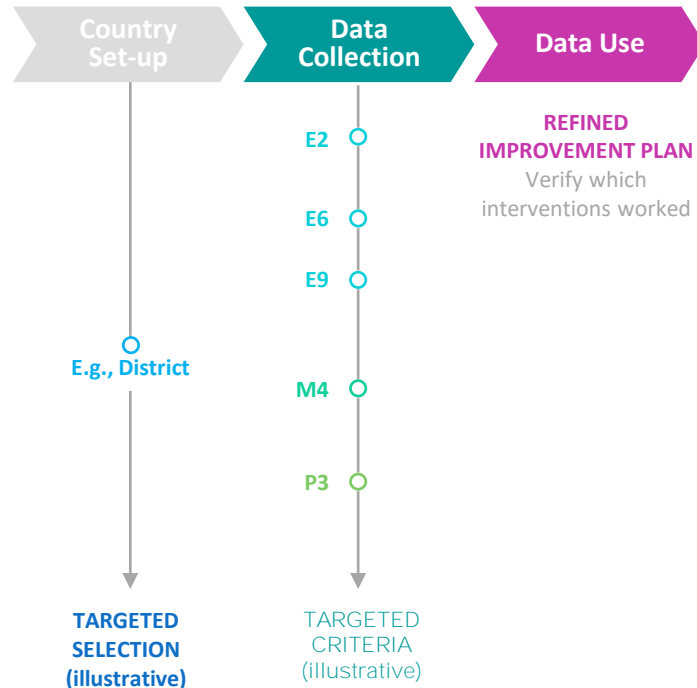
ITERATIVE ASSESSMENTS FOR CONTINUOUS IMPROVEMENT CULTURE

A national EVM assessment is more than a linear project that ends after the data is collected once every 5 years. Being a part of the national continuous improvement cycle, the assessment is a unique **opportunity to mobilize a country-based coalition** of key national and sub-national stakeholders to sustain and improve the delivery of vaccines to the child.

Undertaking a national assessment relies on a host of diverse skills and **country-based capabilities** – incl. the know-how in ISC standards, programme and talent management, and collaboration – enabled by the information and communication technology (ICT). These are the very same country-based capabilities required 'at scale' to continuously plan, undertake, and translate the recurring targeted self-assessments into improved ISC systems performance.

Coincidentally, assessments present unique action learning opportunities that, with support of ICT, can now benefit a critical mass of sub-national EPI workforce engaged continuously throughout the 5-year national EVM cycle. The process builds their ISC, ICT and leadership capabilities to resolve programme performance issues as they arise, while offering them a meaningful stake in the EPI programme performance. Technical assistance 'platforms' should be established to address these needs holistically.

EVMA 2.0 BETA TEST MENA

COMMIT TO CONTINUOUS IMPROVEMENT

MONITOR
Monitor implementation measure progress toward outcomes

ASSESS
Collect and review evidence to identify iSC strengths, weaknesses, opportunities, and bottlenecks

CIP

IMPLEMENT
Disseminate plan, ensure funding, and put plan into operation

PLAN
Create vision, strategy and operational plan for iSC improvement

RESULTS OF THE MENA WORKSHOP & FIELD VISITS

AMMAN, JORDAN APRIL 9 -12

4-DAY JOURNEY: AN INTEGRATED APPROACH

The four days were designed to improve the EVM assessment process from the ingredients (questions) and execution (digital application) to the roll out plan — drawing on the MENA regional expertise in partnership with regional stakeholders.

Day 1: Key Concepts & Processes
Introduction to the purpose, system and roles that make up an EVM assessment.

Day 2: Details & Application
Walk through how to download, open and use the application with tests done by small teams.

Day 4: In-Context Testing
Visit to the field facilities to test the application and training.

Day 3: In-Context Testing
Visit to the field facilities to test the application and training.

OUTCOMES FROM MENA WORKSHOP

A HUMAN-CENTERED APPROACH

Even when digital tools are technically feasible, they are not guaranteed to be desirable to user or responsive to programme challenges. This is why, as part of the orientation, we introduced methods for understanding how human perceptions, actions, and distractions figure into the challenge. A well-functioning digital solution fails if it only works in theory and does not anticipate issues faced by end-users, their community, and the existing systems that surround them.

Human-centred methodologies focus on observing, interacting with, and designing for the people that we seek to serve in addition to looking at technical constraints and specifications. The outputs in this section combine feedback from workshop participants and will continue to evolve with future betas.

OUTPUTS

Personas
Remind us of who we are creating the EVM program with and for.

SLIDE
12

Personas are fictional characters that are used to understand the needs, values, aspirations, abilities, limitations and character traits of different users, along with the challenges they face and their desires for potential solutions. They will help your team consider designs and plans from a point of view that is not their own. A persona is developed from a range of different sources, pulling together common characteristics of similar people into an "archetype" through which a group can be understood.

Design Principles
Focus and guide the development of the assessment and the training of assessors.

SLIDE
20

Design principles specify strategic requirements that the final manifestation (of the digital tool, assessment and training) must support.

WHO WE ENCOUNTER: PERSONAS

MINISTRY OF HEALTH

1

SPONSOR
Reviews assessment outcome (dashboard)

2

COUNTRY EVM MANAGER
Oversees country rollout

3

EVM ASSESSOR
Administers questionnaire

4

FACILITY MANAGER
Answers questionnaire (warehouse)

5

HEALTH WORKER
Answers questionnaire (health facility)

TECHNICAL ASSISTANCE

6

REGIONAL PARTNER
Trains and manages community network of assessors

7

TECHNICAL ICT SUPPORT
On call to fix hardware and software in real-time

EVMA 2.0 BETA TEST MENA

SPONSOR

1

WHO I AM

National EPI Manager

Deal with emergency situations and conflict in the regions.

THINGS I'M TRYING TO DO

Advocate with Partners

- Communicate with stakeholders for support and gain their commitment.
- Secure funding for the programme

MOTIVATIONS: PERSONAL

Showcase a Successful Programme

Motivated by responsibility to make the improvement plan to see improvements in availability, potency, and efficiency.

MOTIVATIONS: PROFESSIONAL

Optimize Supply Chain

Motivated to benchmark the current supply chain with the standard EVM practice.

EVM RESPONSIBILITIES

Accountability for Improvement

- Create a working group
- Prepare data (input to EVMA 2.0 tool)
- Follow-up and monitor EVM plan
- Inform stakeholders and working groups of results

PERSONA: COUNTRY EVM MANAGER

COUNTRY EVM MANAGER

WHO I AM

EPI Cold Chain Manager

Vaccine management officer needs to make sure management understand their involvement, financial constraints, commitment of HR and the value of services. Managing EVM assessment is a project for me.

THINGS I'M TRYING TO DO

Ensure Availability of Vaccine Supplies

Day-to-day taking many meeting to act as a trainer, supervisor, and monitor

MOTIVATIONS: PERSONAL

Prove Achievement

Personal rewards center on the ability to show what has been done, and the sustainability of encouragement.

MOTIVATIONS: PROFESSIONAL

Secure Funding

With the validity of the verification, the EVM assessment supports global involvement and funding.

EVM RESPONSIBILITIES

Manager of the EVM Practice

- Explain the national context
- Data provider to ensure the success of EVM assessment
- Implementation of the cIP
- Advocate for a better vaccine management practice

PERSONA: EVM ASSESSOR

EVM ASSESSOR

3

WHO I AM

Store Manager

Every assessor is a leader. In my day-to-day role I could be a **store manager**, a **pharmacist**, or a **technician**.

THINGS I'M TRYING TO DO

Get a Better Job

- Become part of the roster
- Work at a Public Health University (after training)
- Work at a medical college (after training)
- Get opportunities to travel

MOTIVATIONS: PERSONAL

Incentives

Being part of the EVM assessment and improvement planning means recognition. Struggling to make ends meet, the assessor is looking forward to a week of EVM training to travel to a new place, network, update their knowledge and skills, and hopefully attain a promotion upon their return.

MOTIVATIONS: PROFESSIONAL

Improve My Skills

The assessor is motivated by a healthy competition with the colleagues who work in the assessed facilities.

EVM RESPONSIBILITIES

Observe, Coach and Record

- Collect accurate information with honesty (not from a personal perspective)
- Build capacity of facility manager
- Give supportive supervision and mentorship to the team they are assessing
- Participate in the improvement planning process

4

FACILITY MANAGER

WHO I AM

Facility Manager

Married with children, 16 years of experience in public sector, with a background as a supply chain technician; has taken training courses to continue learning.

THINGS I'M TRYING TO DO

Be an EVM Expert

- Master data analysis
- Serve as NITAG member
- Implement National Immunisation days
- Perform supervision and training of facility staff

MOTIVATIONS: PERSONAL

Incentives

From a letter of appreciation to the opportunity to improve individual skills – the EVM assessment offers opportunities for recognition and personal growth.

MOTIVATIONS: PROFESSIONAL

Show Competency to Managers

It's important to be able to showcase how our daily work contributes to uninterrupted availability of high quality vaccines.

EVM RESPONSIBILITIES

Be Transparent

- Cooperate with the EVM team
- Give truthful answers
- Continue keeping facility running during the assessment
- Also wants to protect the facility team from receiving a bad review

HEALTH WORKER

5

WHO I AM

Nurse in Health Facility

My day-to-day role is to take care of patients.

THINGS I'M TRYING TO DO

Be Detail-Oriented

- Follow protocol for patient care
- Meticulously record data for caretakers
- Meticulously record data for records

MOTIVATIONS: PERSONAL

Higher Paying Job Caring for Children

Motivated by the desire to prevent children from suffering preventable disease, the nurse is the closest person to the rights holder, and hopes to find further financial incentive in the medical field.

MOTIVATIONS: PROFESSIONAL

Be Respected

Bing competent, good at their job, and having this know to both mothers and colleagues.

EVM RESPONSIBILITIES

Give Children Effective Vaccines

- Administer vaccinations
- Track the quality and efficacy of vaccinations

6

REGIONAL PARTNER

WHO I AM

Development Partner

Has a TA mandate from the region to deliver the EVM training and support the rollout.

THINGS I'M TRYING TO DO

Institutional Support

- Develop and deliver effective training
- Customize the EVM programme needs to regional EPI learning platform
- Deliver ongoing technical assistance

MOTIVATIONS: PERSONAL

Improved Health Outcomes

Epidemiologists motivated by the mission that health is a right for everyone, and improvements in the immunization supply chain are part of this.

MOTIVATIONS: PROFESSIONAL

Build a Network of Experts

Motivated by the goal to strengthen public health systems and build working relationships within the region. Their approach is to build capacity through training and networks.

EVM RESPONSIBILITIES

Penetrate Local Areas

- Train local assessors on the tool so that they can administer not only a on-off national assessment, but build toward an assessment that is more periodic and self-administered sub-nationally, incl. by health centres and warehouse facilities.
- Create localized learning materials tailored to the way people learn
- Deliver effective technical support
- Build and foster networks of a critical mass of supply chain and EPI professionals

7

TECHNICAL ICT SUPPORT
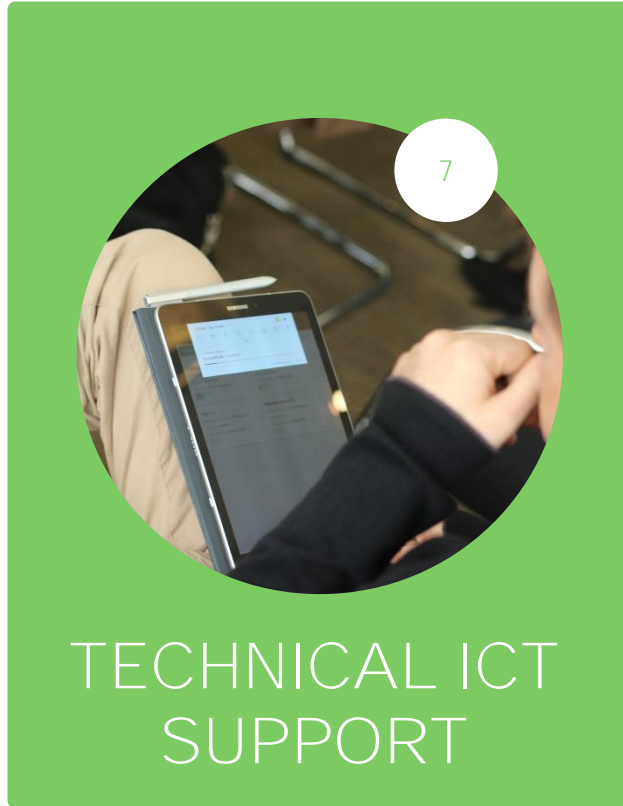
WHO I AM
ICT / Health
Technically minded ICT professional who understands programmatic digital health challenges and appreciates the day-to-day barriers they face.

THINGS I'M TRYING TO DO
Create a Universal Tool
Technical support so that the EVM 2.0 app works for both national and self assessment as technology continues to update and evolve.

MOTIVATIONS: PERSONAL
Improved Health Outcomes
Create a universal tool that is welcomed by users and useful to sponsors.

MOTIVATIONS: PROFESSIONAL
Build Capacity
Make sure the design and architecture fulfills the needs of the user.

EVM RESPONSIBILITIES
Intuitive Technology That Works
- Develop and deliver technical training to introduce the tool
- Deliver technical support continuously once the tool is rolled out
- Any external support given to the country program. Regional, local or global, with any combination of expertise, be it EPI or ICT.
- When countries develop their plans, partnerships need to transcend EPI programmes (epidemiological mind set) and bring in a new added dimension of ICT/ ISC (logistic science and ICT competencies).

DESIGN PRINCIPLES: PUTTING FEEDBACK INTO ACTION

Keeping the personas that will be making or breaking the future of EVM in countries in mind, the rest of the job of the workshop was validating the design requirements of each of the 3 things that must be designed.

INPUT
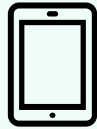
USER
INTERFACE

Using the Digital App
Slide 21

ASK

TOOL &
ASSESSMENT

Integrating New Requirements
Slide 23

KNOW

TRAINING
ASSESSORS

Designing each training
Slide 36

INPUT: DESIGN PRINCIPLES FOR THE USER INTERFACE

CREATE HIERARCHY

① In the guidance, all type appears at the same size and the same level of importance. It needs to be skimmable during an assessment.

LEGIBLE TYPE SIZE

② Questions, guidance, and answers on buttons are difficult to read. Some users wrote questions out so they could read them during the assessment.
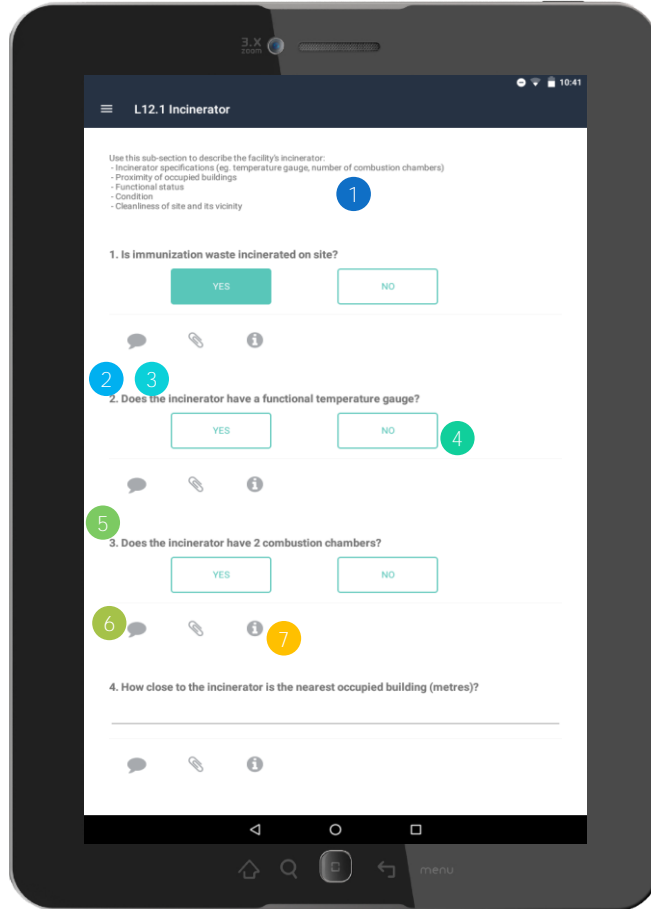
COLOR CODE

③ Indicate what needs to be observed vs what needs to be answered by interviewee vs what needs to be physically verified

SHOW CONNECTIONS

④ Indicate when an answer affects other parts of the survey. Will this reveal more questions? Make other disappear?

NAVIGATE THROUGH THE PROCESS

⑤ Indicate where the assessor is going (physically) and what materials they should ask for

INCREASE AREA OF HOT SPOTS

⑥ Make it more forgiving for large fingers and easier to click on the right area (text, not just check lists)

'JUST ENOUGH' GUIDANCE

⑦ On-screen guidance could range from 'lite' definitions to expanded guidance (incl. pictures or videos). The more the guidance contains, the heavier the tool to use. What must be provided on-screen vs. best delivered separately through a separate training platform?

EVMA 2.0 BETA TEST MENA

> "
>
> NOT EVERYTHING IMPORTANT CAN BE ASSESSED. NOT EVERYTHING THAT CAN BE ASSESSED IS IMPORTANT.
>
> - SOULEYMANE KONE

The EVMA 2.0 tool is being received with genuine enthusiasm from the regional participants (12 delegates from Iraq, Libya and Jordan, as well as regional technical experts – incl. Mojtaba, Zainab, Dr. Ali). We have collected a long list of benefits that the country delegates articulated having experienced the tool, even in its current 'unfinished' form. While this is very encouraging, we have also collected feedback on what needs to improve. The following pages present design principles that summarize requirements to use as a filter going forward.

ASK: DESIGN PRINCIPLES FOR THE TOOL & ASSESSMENT

START WITH THE PREPARATORY WORK

DO NOT ONLY FISH FOR THE BAD THINGS

ASK WHAT CAN BE PROVEN DEFINITEFLY

ASK IN THE RIGHT METRICS

LESS CAN BE MORE

SHOW OUR PRIORITIES

KEEP THE INQUIRY IN BALANCE

PROVIDE GUIDANCE FOR BOTH ASSESSOR AND ASSESSEE

SEPARATE THE PERSONAL FROM THE INSTITUTIONAL

BE ABLE TO DIVIDE OR CONDUCT ALONE

DESIGN PRINCIPLES BASED ON LESSONS LEARNED

START WITH THE PREPARATORY WORK

Preparatory work is essential to familiarize ourselves with the assessment logic, questions and a common understanding of the information/documents we need. The assessment needs to start with this scene-setting information to prompt assessors and prepare facility managers.

TECHNOLOGY ISSUE

USER EXPERIENCE ISSUE

TRAINING TO UNDERSTAND REQUIREMENTS

QUESTION DESIGN / DATA QUALITY

Note: These bars demonstrate the four dimensions that were tested, and therefore the source of each design principles.

EVMA 2.0 BETA TEST MENA

DESIGN PRINCIPLES BASED ON LESSONS LEARNED

ASK WHAT CAN BE PROVEN DEFINITIVELY

Be clear on what can be observed vs what requires active inquiry (observation vs answer). If a question must be re-stated in a roundabout way to be understood, include in guidance.

TECHNOLOGY ISSUE

USER EXPERIENCE ISSUE

TRAINING TO UNDERSTAND REQUIREMENTS

QUESTION DESIGN / DATA QUALITY

DESIGN PRINCIPLES BASED ON LESSONS LEARNED

LESS CAN BE MORE

Fewer inquiries that receive genuine consideration and honest answers are more valuable than many questions that generate poor quality data. Is the question critical to assessing an EVM requirement? Can it be answered easily in the course of an assessment visit - and produce 'good data'? Consider how much time each section takes – and how would assessors behave in practice. The current rule of thumb '3 facilities = 2 days' should not be exceeded.

TECHNOLOGY ISSUE

USER EXPERIENCE ISSUE

TRAINING TO UNDERSTAND REQUIREMENTS

QUESTION DESIGN / DATA QUALITY

DESIGN PRINCIPLES BASED ON LESSONS LEARNED

KEEP THE INQUIRY
IN BALANCE

Prioritize inquiry into what matters most, keep a light touch for what doesn't. Where discussions generate useful qualitative inputs for subsequent improvement planning, make it easy for assessors to collect these systematically.

TECHNOLOGY ISSUE

USER EXPERIENCE ISSUE

TRAINING TO UNDERSTAND REQUIREMENTS

QUESTION DESIGN / DATA QUALITY

DESIGN PRINCIPLES BASED ON LESSONS LEARNED

SEPARATE THE PERSONAL FROM THE INSTITUTIONAL

Make sure we are changing the system, not reprimanding the individual.

TECHNOLOGY ISSUE

USER EXPERIENCE ISSUE

TRAINING TO UNDERSTAND REQUIREMENTS

QUESTION DESIGN / DATA QUALITY

DESIGN PRINCIPLES BASED ON LESSONS LEARNED

DO NOT ONLY FISH FOR BAD THINGS

Remember to look at good things – what they are doing well that others can learn from, and how to recognize that during an interview. Include the option for additional context to bring into improvement plans.

TECHNOLOGY ISSUE

USER EXPERIENCE ISSUE

TRAINING TO UNDERSTAND REQUIREMENTS

QUESTION DESIGN / DATA QUALITY

DESIGN PRINCIPLES BASED ON LESSONS LEARNED

ASK IN THE RIGHT METRICS

Is it an observable question or a question that needs to be asked? If asked, what should the answer come in – for example, do we need a yes/no answer or a 'how long' answer?

TECHNOLOGY ISSUE

USER EXPERIENCE ISSUE

TRAINING TO UNDERSTAND REQUIREMENTS

QUESTION DESIGN / DATA QUALITY

DESIGN PRINCIPLES BASED ON LESSONS LEARNED

SHOW OUR PRIORITIES

Each question signals to the facility something that is important for them to know or monitor. It is our way to start the conversation, otherwise things go unsaid.

TECHNOLOGY ISSUE

USER EXPERIENCE ISSUE

TRAINING TO UNDERSTAND REQUIREMENTS

QUESTION DESIGN / DATA QUALITY

DESIGN PRINCIPLES BASED ON LESSONS LEARNED

PROVIDE GUIDANCE FOR BOTH ASSESSOR AND ASSESSEE

Confusion is hard for staff working in the facilities that are being assessed – they want to give the right answer. Is it also hard for the assessor – they don't know what to record. Provide answer options for comparison.

TECHNOLOGY ISSUE

USER EXPERIENCE ISSUE

TRAINING TO UNDERSTAND REQUIREMENTS

QUESTION DESIGN / DATA QUALITY

DESIGN PRINCIPLES BASED ON LESSONS LEARNED

BE ABLE TO DIVIDE, OR CONDUCT ALONE

The assessment must lend itself to be conducted by one person, or by many. If there are many, how should their expertise/skills be divided?

TECHNOLOGY ISSUE

USER EXPERIENCE ISSUE

TRAINING TO UNDERSTAND REQUIREMENTS

QUESTION DESIGN / DATA QUALITY

" I START THE MEETING WITH A 20 MINUTE TOUR, AND AFTER THAT I CAN ANSWER **MOST OF THE QUESTIONS. I'VE OBSERVED A LOT THAT I DON'T NEED TO** ASK ABOUT
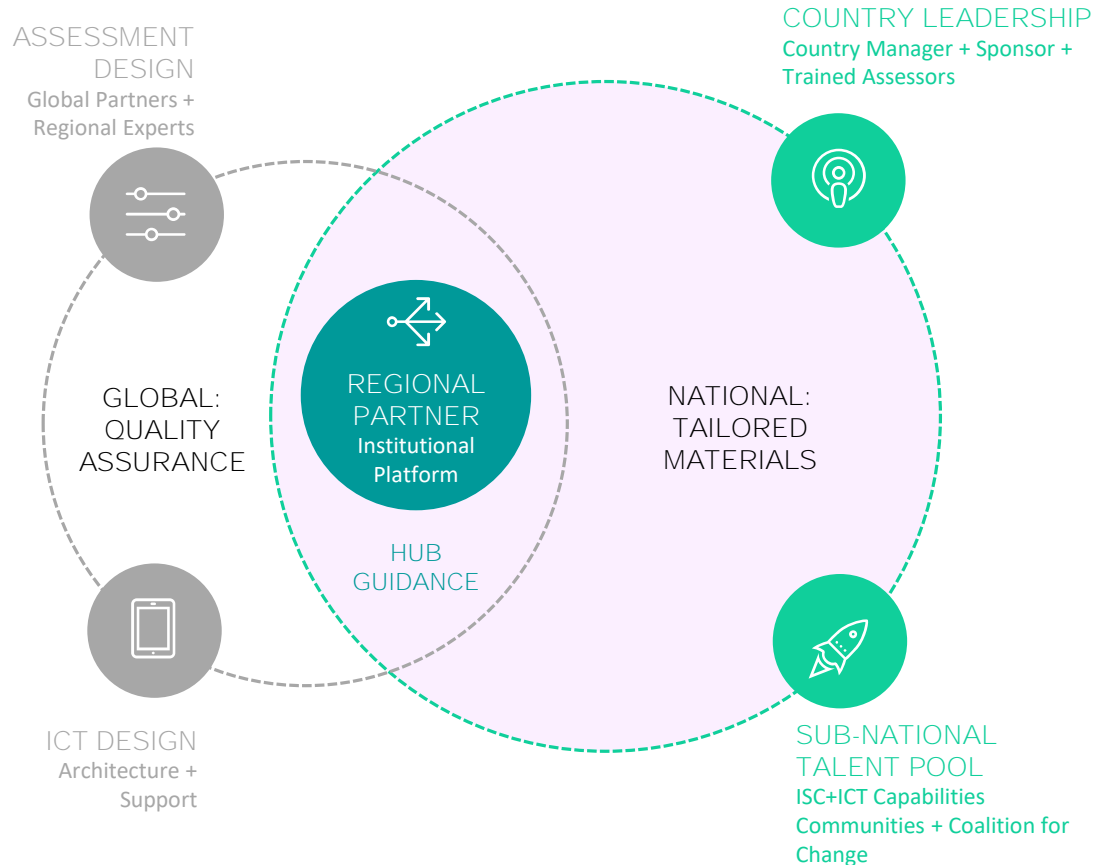
- ZAINAB BERRI

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GLOBAL QUALITY, REGIONAL LEARNING

Passing on ownership starts by building capacity locally. The purpose of going to the region to do the beta testing in the regional context is to tap into existing ecosystems.

While there are 'generic' technical ingredients developed globally (e.g. EVM requirements, SOPs), images, text, training visuals delivery methods must be true to local customs.

Keeping the regional partner as the hub ensures materials are created for, and responsible to, the nations involved.

EVMA 2.0 BETA TEST MENA

ASSESSMENT DESIGN
Global Partners + Regional Experts

COUNTRY LEADERSHIP
Country Manager + Sponsor + Trained Assessors

GLOBAL: QUALITY ASSURANCE

REGIONAL PARTNER
Institutional Platform

NATIONAL: TAILORED MATERIALS

HUB GUIDANCE

ICT DESIGN
Architecture + Support

SUB-NATIONAL TALENT POOL
ISC+ICT Capabilities Communities + Coalition for Change

KNOW: DESIGN PRINCIPLES FOR THE TRAINING OF ASSESSORS

IDENTIFY THE RIGHT PEOPLE

REMEMBER YOUR USERS

PRE-SEND OVERVIEW MATERIALS

LOCALIZE

START WITH WHY, NOT HOW

CONDUCT A TRIAL RUN

KEEP IT INTERACTIVE

REVIEW THE DETAILS & PURPOSE

BUILD UNDERSTANDING AND COOPERATION OF BOTH SIDES

INCLUDE A PERSONAL DEBRIEF

IDENTIFY THE RIGHT PEOPLE

- Local ownership and champions that see it through
- Sponsors interested in more than assessment – committed to improvement
- Staff who want to continuing learning, building and practicing new skills

DESIGN PRINCIPLES BASED ON LESSONS LEARNED

PRE-SEND OVERVIEW MATERIALS

Give orientation materials that lead-in to an initial session to apply the pre-work. The training is something that many look forward to, but is also something new that many want to feel they are prepared and comfortable on Day 1.

DESIGN PRINCIPLES BASED ON LESSONS LEARNED

START WITH WHY, NOT HOW

Translate the purpose of EVM, and the training session, into hearts and minds of people on the ground. Begin sessions with the shared ambition: why each of us want to be here, and the vision of what we will accomplish together. Introduce a solid understanding of the requirements that stand behind categories, criteria and questions.

DESIGN PRINCIPLES BASED ON LESSONS LEARNED

KEEP IT INTERACTIVE

Finding, curating and retaining talent is best through continuous engagement. Games and real life application of knowledge to locate and fix problems is the proven approach to talent growth and retention — as it builds critical thinking in a collaborative way.

Teach peer-to-peer and practice along the way, beginning with the technical components. In the field it will be hard to reach out to experts, and teams must ask each other. Review the research ethics for open and honest answers — not just making them give answers, but approaching the person as a peer, not as a superior, in order to encourage them to have an open and honest conversation.

DESIGN PRINCIPLES BASED ON LESSONS LEARNED

BUILD UNDERSTANDING AND COOPERATION OF BOTH SIDES

In many situations, the dynamic is between a trained assessor and an assesse somewhat familiar with the process, who may be juggling many responsibilities on that day.

- Collaborate with facilities: make sure they have the time, see the shared benefits, and can take ownership over the technology
- Make introductions: practice introducing
- Share context: tell each person how information is used at a national and global level

CONFIRMATION FROM WORKING SESSION

REMEMBER YOUR USERS

Having an understanding of how the process benefits each person that will be part of the process helps build empathy, understanding, and motivation between teams and partners.

- Sponsor (manager's boss)
- Country Manager (overseeing Country rollout)
- Assessor (administering questionnaire)
- Facility Manager / Nurse (answering questionnaire)
- Regional Partner / Technical ICT Support (support network and run training)
- Workforce at large (future self-assessors; today's facility manager)
- In-country civil society at large (communities, patient rights groups, private sector)

LOCALIZE

From the placement of the training to the design of the training session and materials, the delivery should be localized.

People learn differently depending on socio-cultural and other parameters. Training delivery should be designed with the 'personas' in mind.

The English language is understood by many but not everyone is comfortable to speak and write it. Match the training language to the language that assessors will be using and recording data in. Translation requires a professional translator and subject matter expert.

DESIGN PRINCIPLES BASED ON LESSONS LEARNED

CONDUCT A TRIAL RUN

Coaching through first delivery is necessary. Review how to introduce yourself, how to look on the app for help, and where you are supposed to be at different moments. Practice coaching and collaboration; assessors need to build the capacity to advise facility managers in a respectful manner.

DESIGN PRINCIPLES BASED ON LESSONS LEARNED

REVIEW THE DETAILS

UNDERSTAND THE PURPOSE BEHIND EACH QUESTION

Every assessor must be able to defend what is being asked. They need to know: What requirement are these questions trying to assess? What standard are we trying to fulfill (this leads to being able to advise them)? Is there a minimum and maximum standard? How are we weighing these details into scoring? Everyone needs to know how the scoring is processed and how questions fit in.

DESIGN PRINCIPLES BASED ON LESSONS LEARNED

INCLUDE THE PERSONAL IN THE DEBREIF

- Who did you meet with?
- What is their role, and what are their day-to-day activities?
- Are there questions or areas that they were resistant to answering? Why might this be?
- What are they doing well that we can learn from?
- What did the facility manager understand about the information being collected and how it will be used? What questions do they ask? Do you feel equipped with the answers to these questions?

NEXT STEPS

" WE ARE NOW IN IT! I'M ABLE TO LEARN AND ADVOCATE FOR EVM BECAUSE I PARTICIPATED IN ITS DESIGN

Dr. Bedereddin Bashir Annajar
Director-General, NCDC, Libya

As we move forward, we are confirming requirement sets for institutions and global partners to support the rollout of EVMA 2.0 in MENA and other regions — including local ICT support and capacity development models. A comprehensive EVM 2.0 rollout roadmap will be published in the next phase.
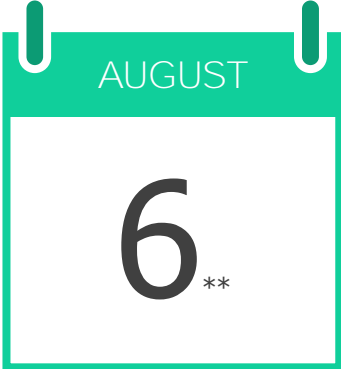
AFTER THE MENA BETA: UPCOMING OPPORTUNITIES* FOR REGIONAL ENGAGEMENT

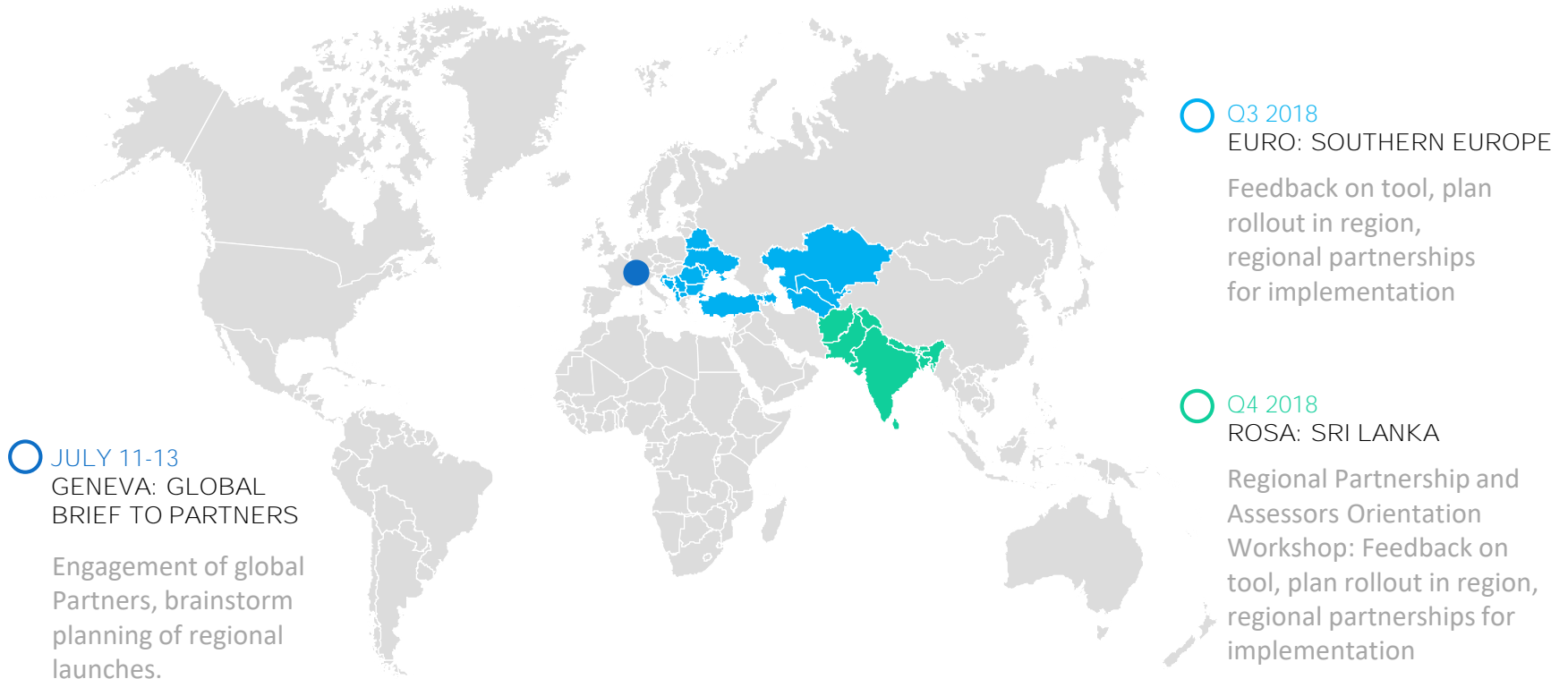| JUNE	JULY	AUGUST	SEPTEMBER
4	8**	6**	TBD

BHUTAN

ROSA EVM 2.0 Beta Test

IRAQ

Full national

MALDIVES

Full national

UKRAINE

Full national

*Not all planned activities are listed
**Dates are tentative

EVMA 2.0 CONSULTATIONS AND VALIDATION

Q3 2018
EURO: SOUTHERN EUROPE

Feedback on tool, plan rollout in region, regional partnerships for implementation

JULY 11-13
GENEVA: GLOBAL BRIEF TO PARTNERS

Engagement of global Partners, brainstorm planning of regional launches.

Q4 2018
ROSA: SRI LANKA

Regional Partnership and Assessors Orientation Workshop: Feedback on tool, plan rollout in region, regional partnerships for implementation

EVM 2.0

WORKING TOWARD LAUNCH

ASSESSMENT DESIGN
Global Partners + Regional Experts

ICT DESIGN
Architecture + Support

COUNTRY LEADERSHIP
Country Manager + Sponsor +
Trained Assessors

SUB-NATIONAL
TALENT POOL AS
STAKEHOLDERS
ISC+ICT Capabilities
Communities + Coalition
for Change

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