



# Enhancing Management of EPI Programs through strategic use of data in Nigeria

Leadership, Management and Coordination Support for the Expanded Program on Immunization



**Course Title: Effective work planning**

July, 2024



**Gavi**  
The Vaccine Alliance



# Course content

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**Introduction**



**Developing work plan**



**Preparing a comprehensive budget**



**Financial resource mobilization**



**Monitoring workplan implementation**

# Why do you think work planning is important?



Work planning helps to...



**Prioritize work** – focus on the important aspect of the works

**Mobilize and manage resources** – secure resources required and maximize utilization of available resources



**Manage team members' contribution to overall goal** – develop a shared understanding of a team's goal and objectives

**Coordinate project** – Presents a framework for improved coordination & control of activities



**Define outputs and impact** of activities before commencement

**Evaluate project** – set the tone for tracking progress project implementation using set milestones

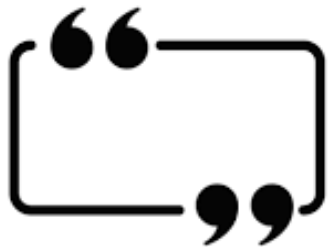


Are there any other things work planning helps you to do?





*“Planning is bringing the future into the present so that you can do something about it now” – William A. Ward*



*“Plan your work and work your plan” – Napoleon Hill*





*Have a bias towards action – let's see something happen now. You can break that big plan into small steps and take the first step right away” – Indira Gandhi*



*“By failing to prepare, you are preparing to fail” – Benjamin Franklin*



# Course content

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**Introduction**



**Developing work plan**



**Preparing a comprehensive budget**



**Financial resource mobilization**



**Monitoring workplan implementation**



# A good project workplan has seven components

**Title** – Name of the workplan or project

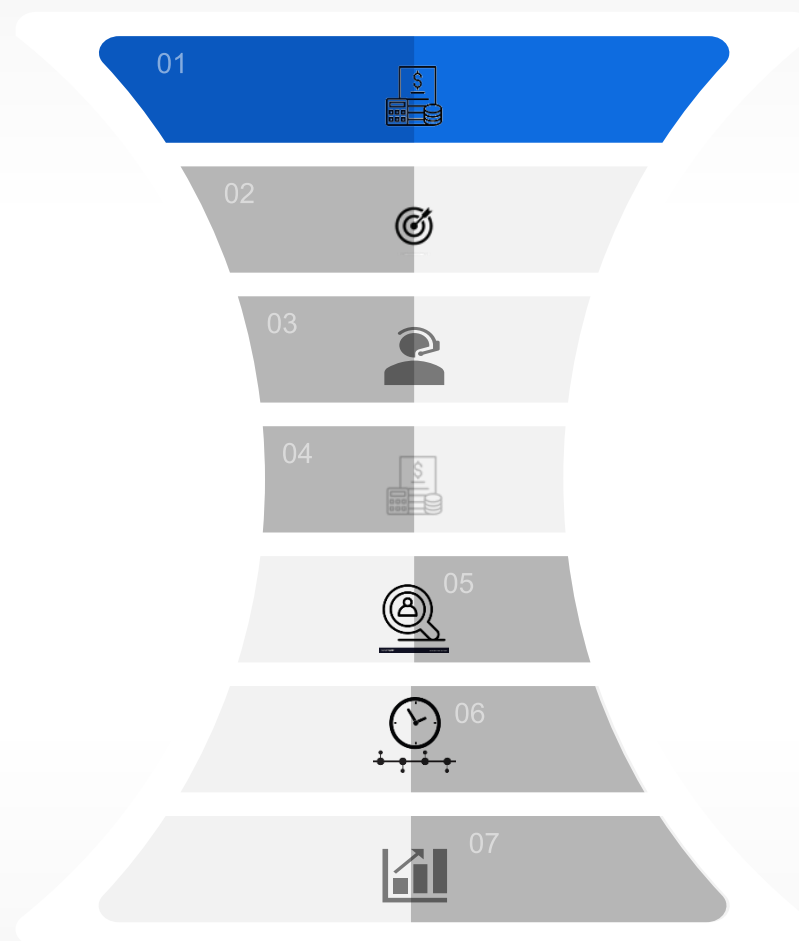
**Goal** – Overall objective of the project or work plan

## Key strategies:

- **Objective:-** specific results to achieve project goals
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## Monitoring indicators

- **Output:-** Product of each step outlined
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**Timelines** – Designated period to conduct and complete the activity

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# Sample workplan template with all components highlighted


## Workplan for EPI campaign microplanning Training

**Goal:** Train Ward Supervisors in Katsina on the conduct of EPI campaign microplanning in January 2025

S/N	Strategy		Monitoring indicators		Timeline	Responsible	Budget (NGN)
	Objective	Activity/Task	Output	Key performance Indicators			
1.1	Ensure Ward Supervisors attend EPI campaign microplanning training on January 25, 2025	Send out invitations to Ward Supervisors	Report of successful invitations	Proportion of participants that confirmed receiving invitation	January 14, 2025	SIO	8,000,000
1.2		Disburse transportation allowance to all participants	Fund disbursement report	Proportion of participants that received transportation allowance	January 20, 2025	DFA	5,000,000
2.1	Ensure qualified facilitators provide adequate EPI campaign microplanning training on January 25, 2025	Identify and inform qualified personnel to facilitate the training	List of training facilitators	Proportion of needed trained facilitators identified	January 06, 2025	Director, PHC	4,080,000
2.2		Train selected facilitators on EPI campaign microplanning facilitators' guide and provide logistics	Training report	Proportion of planned training conducted	January 20, 2025	Director, PHC	6,000,000

# Sample template for AOP template used within the EPI

Primary Data		Costing Sheet		NATIONAL STRATEGIC HEALTH DEVELOPMENT PLAN II (NSHDP II) ANNUAL IMPLEMENTATION PLANNING (AOP) TOOL																						
Priority Areas or Sub domain				Level of Implementation	Status of Implementation	Stakeholder/ Key Responsible Entity	Timeframe				Implementation Milestones	NSHDP II (SwAP)-AOP Budget and Financing			Funding Gap											
Goals		ERGP Strategy					Qtr 1	Qtr 2	Qtr 3	Qtr 4		Cost of AOP (N)	Government Fund (N)	Dev. Partner Fund (N)												
Strategic Objectives		Annual Output Target																								
Interventions		Operational Plan Activities																								
Broad Activities																										
<b>Strategic Pillar One: Enabled environment for attainment of sector outcomes</b>																										
<b>1. Leadership and Governance</b>																										
<b>1. Provide effective leadership and an enabling policy environment that ensures adequate oversight and accountability for the delivery of quality health care for sustainable development of the national health system</b>																										
1.1		Provide clear policy, plans, legislative and regulatory framework for the health sector		Revitalize Primary Health Care System by operationalizing 10,000 Primary Health; target health SDGs									N	1,380,000	N	700,000	N	-	N	680,000						
1.1.1		Promote review and development of polices and laws as necessary												N	1,380,000	N	700,000	N	-	N	680,000					
1.1.1.a		Conduct annual reviews of National, Federal, and States Strategic Health Development Plans		1.1.1.a-i		Organise 3day Stakeholders AOP meeting for 30 persons		State level	New-Project/Activity				✓	✓	✓				N	630,000	N	450,000	N	180,000		
				1.1.1.a-ii		Print 500 copies of 2019 AOP		State level	On-going Project/Activity											N	750,000	N	250,000	N	500,000	
				1.1.1.a-iii																	N	-	N	-	N	-
				1.1.1.a-iv																	N	-	N	-	N	-
1.1.1.b		Train and strengthen human resource capacities at National, State and LGA levels on gender and equity-responsive policy development, planning and implementation of health plans		1.1.1.b-i														N	-	N	-	N	-			
				1.1.1.b-ii															N	-	N	-	N	-		
				1.1.1.b-iii																N	-	N	-	N	-	
				1.1.1.b-iv																N	-	N	-	N	-	
1.1.1.c		Develop/review and support states to domesticate relevant health legislation, policies, and guidelines.		1.1.1.c-i														N	-	N	-	N	-			
				1.1.1.c-ii															N	-	N	-	N	-		
				1.1.1.c-iii																N	-	N	-	N	-	
				1.1.1.c-iv																N	-	N	-	N	-	
1.1.1.d		Conduct stakeholders sensitization and dissemination meeting on the developed/ revised health policies, guidelines, acts and laws		1.1.1.d-i														N	-	N	-	N	-			
				1.1.1.d-ii															N	-	N	-	N	-		
				1.1.1.d-iii																N	-	N	-	N	-	
				1.1.1.d-iv																N	-	N	-	N	-	
1.1.2		Scale-up strategic and operational planning at all levels															N	-	N	-	N	-				
1.1.2.a		Develop evidence based, costed and prioritized operational health plans from the SHDP II for		1.1.2.a-i														N	-	N	-	N	-			
				1.1.2.a-ii															N	-	N	-	N	-		



**Now, I know all the components of a good workplan**

**Let's walkthrough the process developing a good workplan that captures all these components**

# Introduction to class exercise: EPI microplanning for Katsina state

We will use this class example to demonstrate each component of a workplan

## Case scenario:

- Katsina is set to train ward supervisors across all wards on conduct of EPI microplanning
- As an EPI staff, you have been assigned to coordinate the process in Katsina
- Develop a workplan for Katsina to coordinate a 5-day training of ward supervisors on EPI microplanning in January 2025
- You have been provided with necessary templates to guide the workplan development



# A good project workplan has seven components

**Title** – Name of the workplan or project

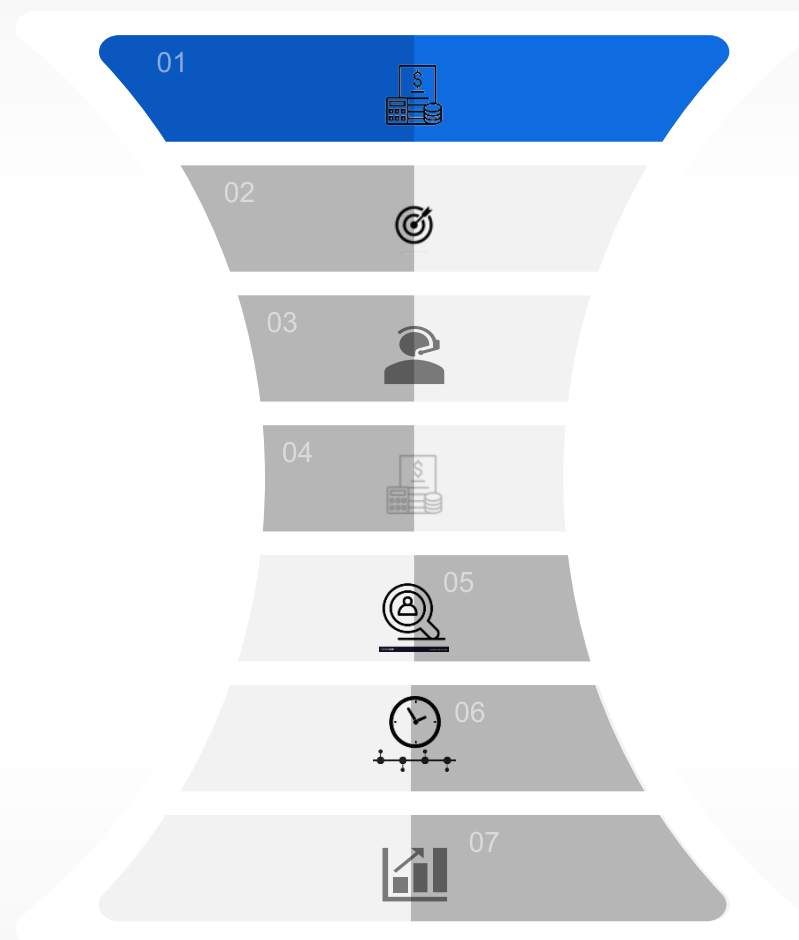
**Goal** – Overall objective of the project or work plan

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- **Activity/Task:-** steps defined to achieve set objectives

## Monitoring indicators

- **Output:-** Product of each step outlined
- **Key performance indicator:-** Criteria for measuring completion of activities



**Timelines** – Designated period to conduct and complete the activity

**Assigned responsible** – list of persons to conduct project activities and task

**Budget** – Total cost of resources required to complete workplan activities

# A workplan goal defines the destination, the purpose of all actions, plans or tactics

- A goal is an observable or measurable end result that has one or more objectives to be achieved within a fixed timeframe
- A goal contains the target, the scope and the timeframe for achievement
- Every workplan is targeted at achieving only one goal



# The goal of every workplan needs to be SMART and written clearly on the workplan template

A project goal can be clearly written as follows:

Trigger question

*What do I want to achieve?*



Examples

Reduce measles prevalence among under 5 children in Bagudo by 30% before the end of Q3, 2025

Train 10 Yenagoa M&E officers on analysis of Penta3 data on the DHIS 2 platform by December, 2025

Equip one health facility in each of the eight LGAs in Bayelsa to effectively diagnose and treat malaria by December 2025

Employ 36 consultants to supervise the conduct of EPI distribution campaign across 18 states in April 2025

**A workplan goal should be SMART as discussed in the problem-solving training module**

# Class exercise: EPI microplanning for Katsina state

## Instruction:

- Consider the case scenario from the class exercise and determine the goal of the workplan
- Write out the goal of the workplan
- Ensure the workplan goal considers all attributes of goals described



# What is the goal of our class example?



Train ward supervisors in all Katsina LGAs on the conduct of effective EPI campaign microplanning for 5 days in January 2025

# A good project workplan has seven components

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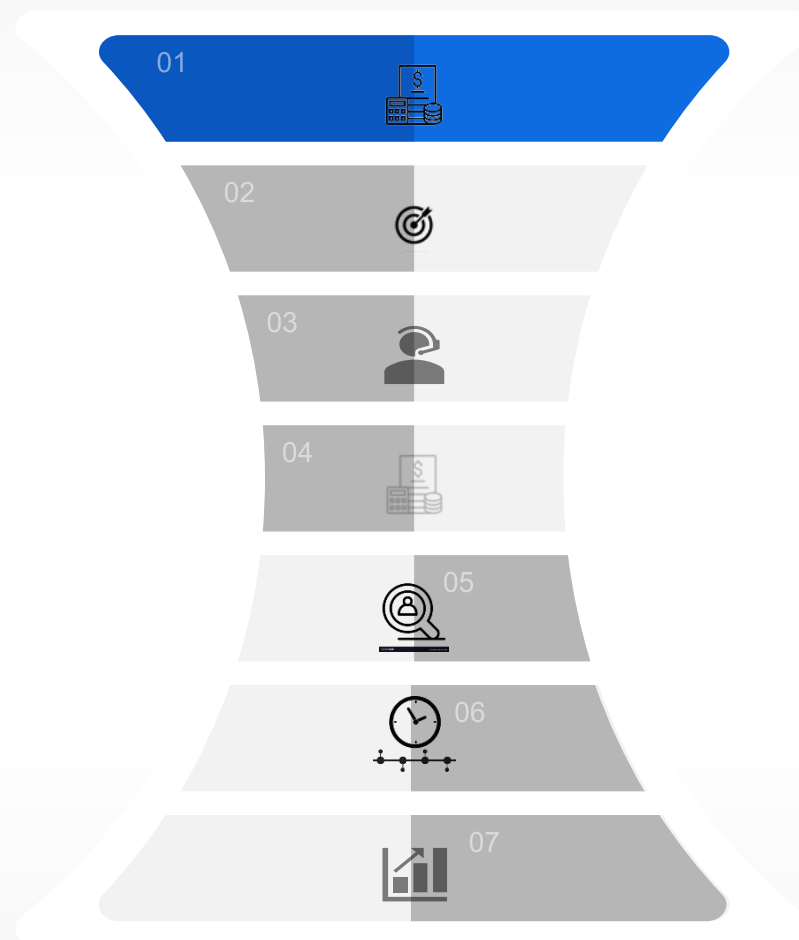
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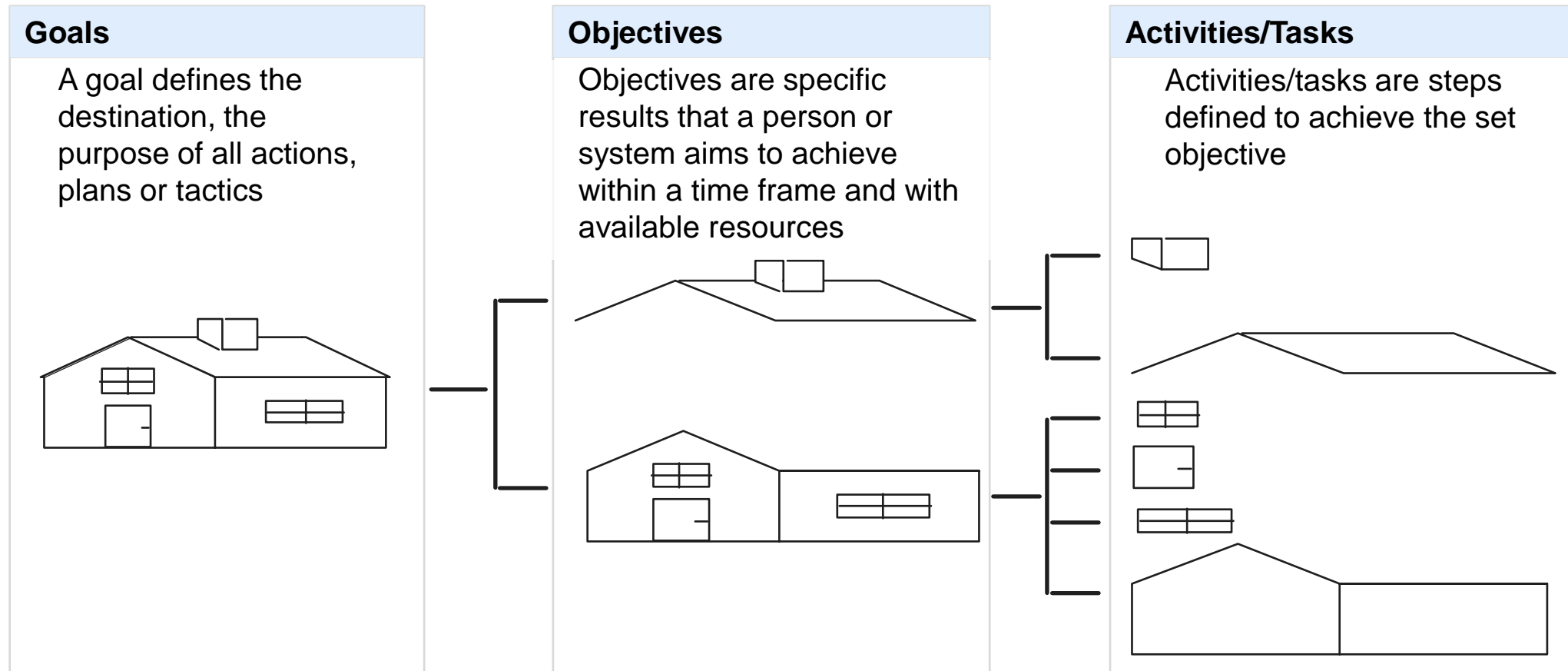


**Timelines** – Designated period to conduct and complete the activity

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**Budget** – Total cost of resources required to complete workplan activities

# Workplan objectives and activities must be clearly defined to achieve project goals



**Activities build up to achieve objectives while objectives put together achieve the goal**

# An issue tree framework is used to objectively define the components of every goal

An issue tree is a graphical breakdown of a project goal that dissects it into its different components. Issue trees are useful for disaggregating **large, complicated goals** into **objectives** and **activities/tasks**

## Why use logic or issue trees?

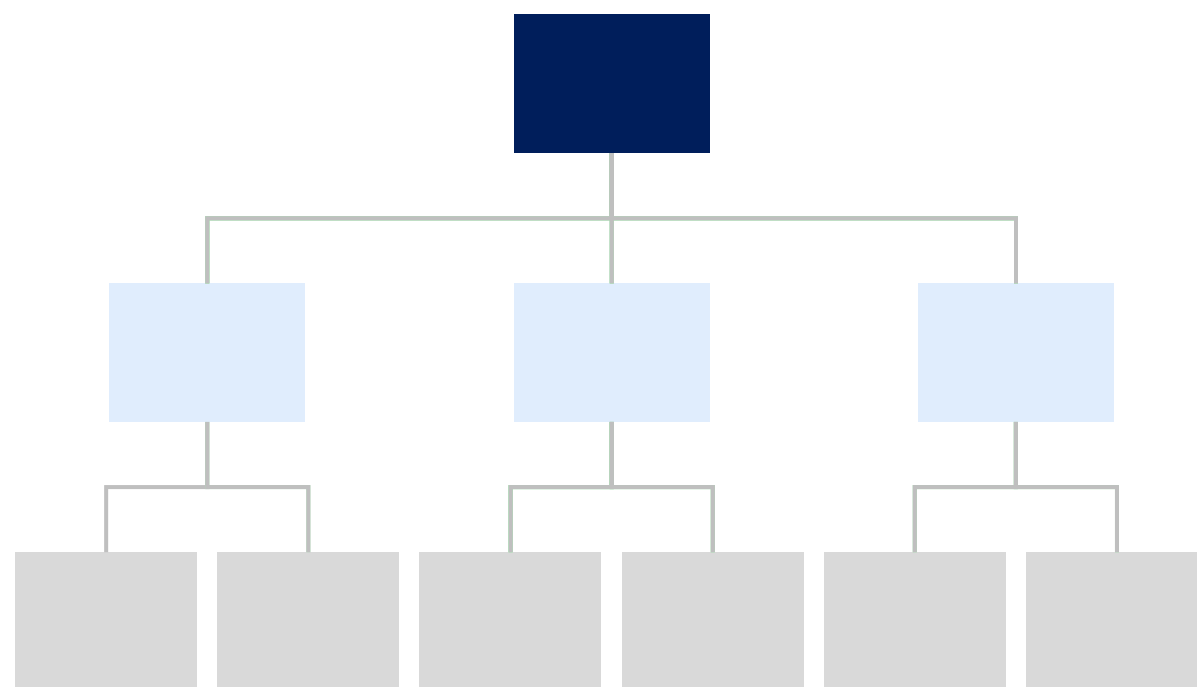
To break a goal into component parts and set priorities

To build a common understanding within the team of the goal, objectives and activities/tasks

To ensure that the parts will achieve the goal and all objectives, and activities/tasks are MECE<sup>1</sup>

To help focus the use of organizing frameworks and theories

## Sample issue tree

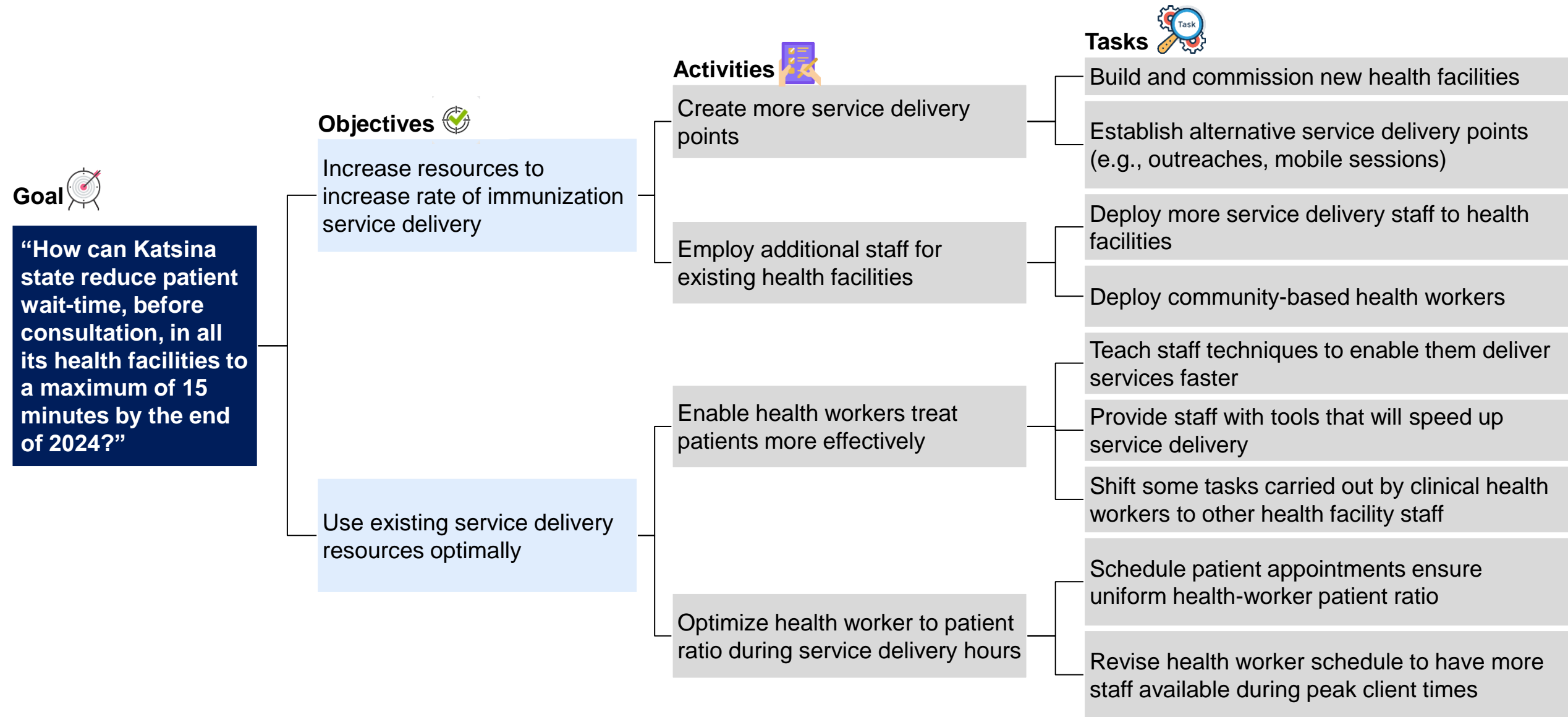


**We had learnt the concept of issue trees in the problem-solving training module**

<sup>1</sup>: Mutually Exclusive and Collective Exhaustive

# Example of goals, objectives and activities/tasks defined using the issue tree approach

SAMPLE



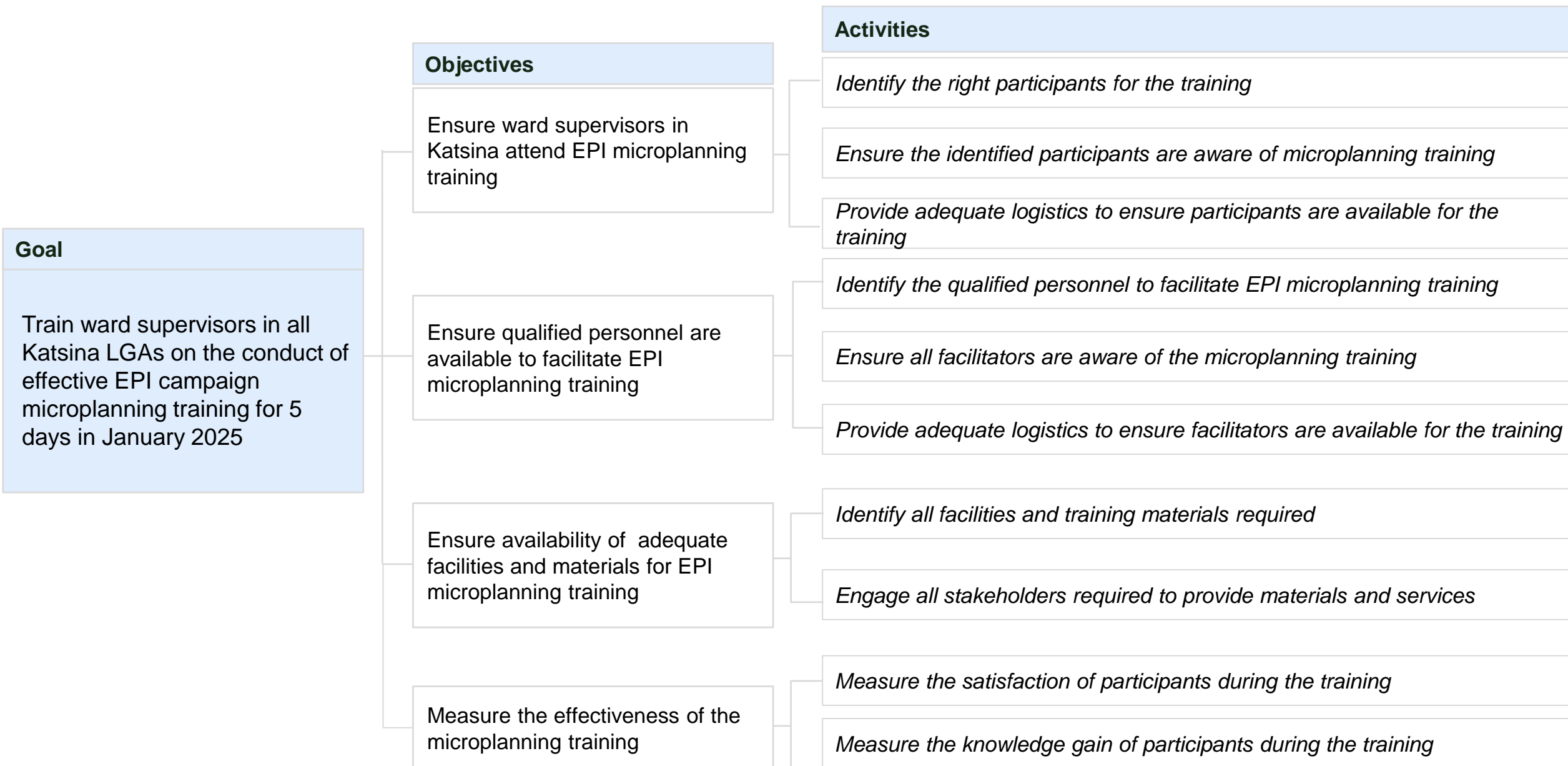
# Class exercise: EPI microplanning for Katsina state

## Instruction:

- Consider the class case scenario and determine the objectives and activities of the workplan
- Write out the objectives and activities using the issue tree template provided



# What are the objectives and activities for the class scenario?



# A good project workplan has seven components

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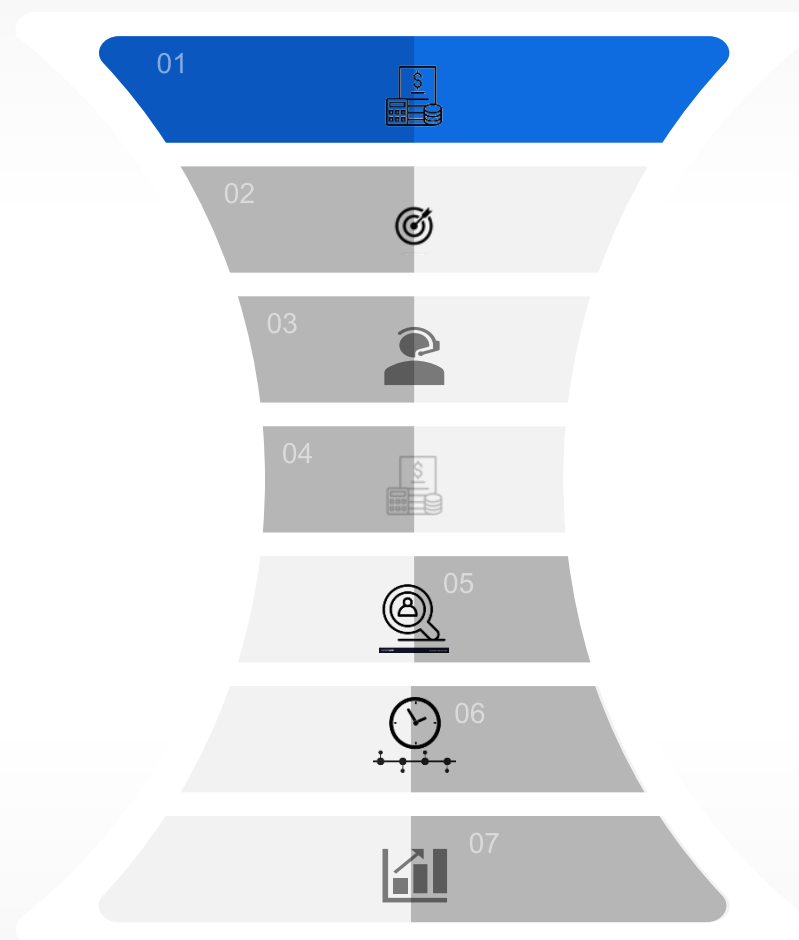
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# The defined outputs and KPIs help to determine the success of the project

Two commonly used monitoring tools on a project workplan include:

## Output



- **Outputs** are tangible services, results, or products of workplan activities or processes
- Examples of project outputs include:
  - Training report
  - Supportive supervision checklist

## Key performance indicator



- **Key performance indicators (KPIs)** are measurable values that signify if/how well set results are achieved
- Examples of KPIs include:
  - Proportion of planned training conducted
  - Proportion of planned supportive supervision conducted

# Class exercise: EPI microplanning for Katsina state

## Instruction

- Consider the class case scenario and outline the outputs and KPIs for each of the workplan activities
- Write out the workplan objectives, activities, outputs and KPIs



# Class exercise: Outline outputs and key performance indicators for the workplan activities

NOT EXHAUSIVE

**Title:** EPIs microplanning training workplan

Goal: Train ward supervisors in Katsina on the conduct of effective EPI campaign microplanning for 5 days in January 2025

S/N	Strategy		Monitoring Indicators	
	Objective	Activity/Task	Output	Key performance Indicator
1.1	Ensure ward supervisors from all wards attend EPI campaign microplanning training on January 25, 2025	Send out invitations to all ward supervisors on time	Report of successful invitations	Proportion of meetings held with invitation sent out at least 24hrs before meeting
1.2		Disburse transportation allowance to all participants	Fund disbursement report	Proportion of participants that received transportation allowance
2.1	Ensure qualified facilitators provide adequate EPI microplanning training on January 25, 2025	Identify qualified personnel to facilitate training	List of training facilitators	Proportion of needed trained facilitators identified
2.2		Train selected facilitators on EPI micro plan facilitators guide and provide logistics	Training report	Proportion of planned training conducted

# A good project workplan has seven components

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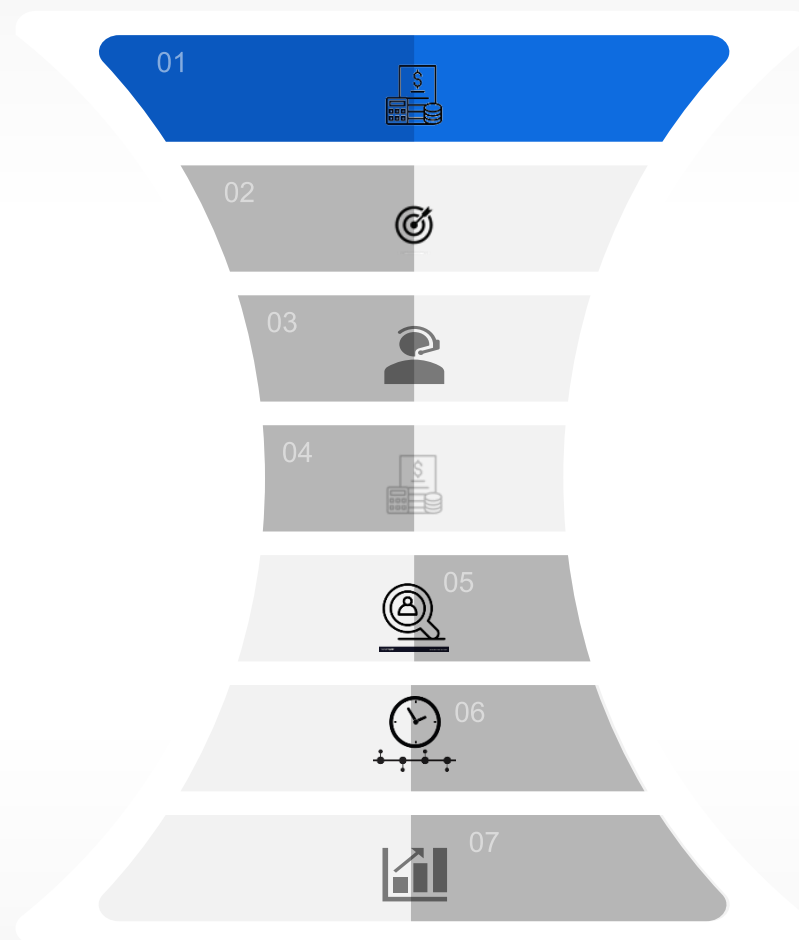
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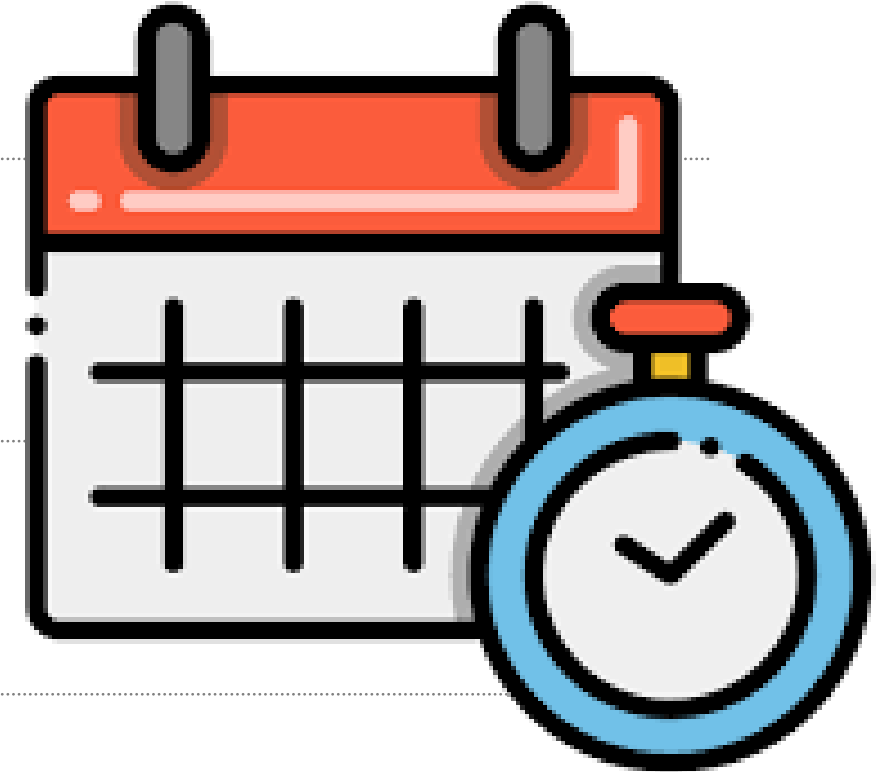
**Timelines** – Designated period to conduct and complete the activity

**Assigned responsible** – list of persons to conduct project activities and task

**Budget** – Total cost of resources required to complete workplan activities

# Timelines are dates or periods in which workplan activities need to be completed

- Timeline details expected duration of each project task
- Project timelines must be specific, realistic and consider availability of resources and human effort required to complete activity
- Project timelines are commonly documented on workplan templates or Gantt charts
- Project timelines can be revised in the course of a project



# Class exercise: EPI microplanning for Katsina state

## Instruction:

- Estimate the timelines for completion of activities outlined in the workplan for our class case scenario
- Include the timelines on the workplan template provided



## Class exercise: Estimate the timelines for completion of the outlined workplan activities

EPI microplanning training workplan					
<b>Goal:</b> Train ward supervisors in all Katsina LGAs on the conduct of effective EPI campaign microplanning for 5 days in January 2025					
S/N	Strategy		Monitoring indicators		Timeline
	Objective	Activity/Task	Output	Key performance Indicator	
1.1	Ensure ward supervisors attend EPI microplanning training on January 25, 2025	Send out invitations to all ward supervisors on time	Report of successful invitations	Proportion of meetings held with invitation sent out at least 24hrs before meeting	January 14, 2025
1.2		Disburse transportation allowance to all participants	Fund disbursement report	Proportion of participant that received transportation allowance	January 20, 2025
2.1	Ensure qualified facilitators provide adequate EPI microplanning training on January 25, 2025	Identify qualified personnel to facilitate training	List of training facilitators	Proportion of trained facilitators identified	January 06, 2025
2.2		Train selected facilitators on EPI micro plan facilitators guide, and provide logistics	Training report	Proportion of planned training conducted	January 20, 2025

# A good project workplan has seven components

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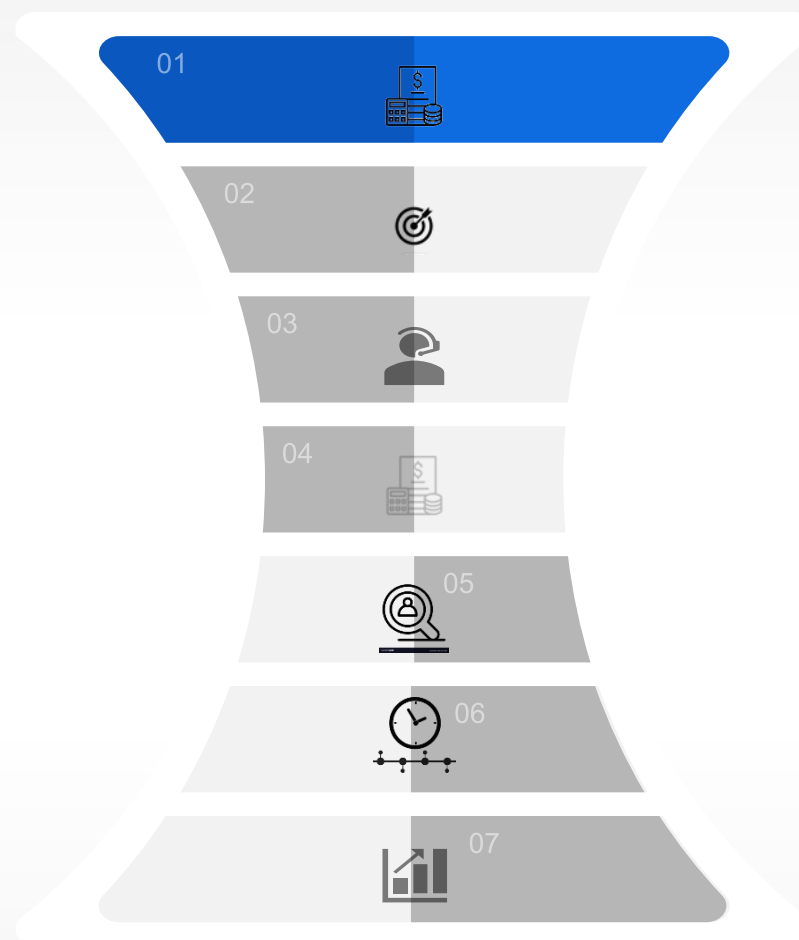
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# Every workplan activity must be assigned to individuals who will implement or oversee implementation

➤➤ **Assigned responsible** are personnel concerned with the implementation workplan activity

➤➤ In assigning tasks to individuals or teams, capacity and availability of individuals or team members must be considered

➤➤ Sometimes, it may be important to assign individuals that are **accountable**, to be **consulted** and **informed** in addition to being the **responsible** individuals for that activity

➤➤ Persons **responsible** for activity implementation must be detailed on the workplan document



# People required for workplan implementation can be categorized into four, based on the roles they have to play



## Responsible

- Person who performs an activity or does the work
- Every task needs at least one responsible party or person



## Accountable

- These persons delegate work and review tasks or deliverables for completion
- Only one person needs to be accountable for every task



## Consulted

- Person that needs feedback and contributes to the activity
- Consulted parties provide input based on impact of deliverable on future of the project work or organization



## Informed

- Person that needs to know of the decision or activity
- These team members need to be kept in the loop on project progress rather than roped into details of every deliverable

- **At the minimum, the responsible individuals should be included on every workplan**
- **The responsible person ensures the work is done**
- **In cases where a team is assigned a task/activity, a lead should still be identified**

# Class exercise: EPI microplanning for Katsina state

## Instruction:

- Consider the outlined workplan activities and assign suitable responsible personnel (indicate person's name and designation)
- Include the persons responsible on the workplan template provided



# Class exercise – Assign persons best suited to conduct workplan activities

## EPI microplanning training workplan

**Goal:** Train ward supervisors in all Katsina LGAs on the conduct of effective EPI campaign microplanning for 5 days in January 2025

S/N	Objective	Activity/Task	Output	Key performance Indicator	Timeline	Responsible
1.1	Ensure ward supervisors from all wards attend EPI microplanning training on January 25, 2025	Send out invitations to all ward supervisors on time	Report of successful invitations	Proportion of meetings held with invitation sent out at least 24hrs before meeting	January 14, 2025	SIO
1.2		Disburse transportation allowance to all participants	Fund disbursement report	Proportion of participants that received transportation allowance	January 20, 2025	DFA
2.1	Ensure qualified facilitators provide adequate EPI microplanning training on January 25, 2025	Identify qualified personnel to facilitate training	List of training facilitators	Proportion of trained facilitators identified	January 06, 2025	Director PHC/ PM SERICC
2.2		Train selected facilitators on EPI micro plan guide and provide logistics	Training report	Proportion of planned training conducted	January 20, 2025	Director PHC/ PM SERICC

**It is better to indicate individuals in the workplan column than groups**

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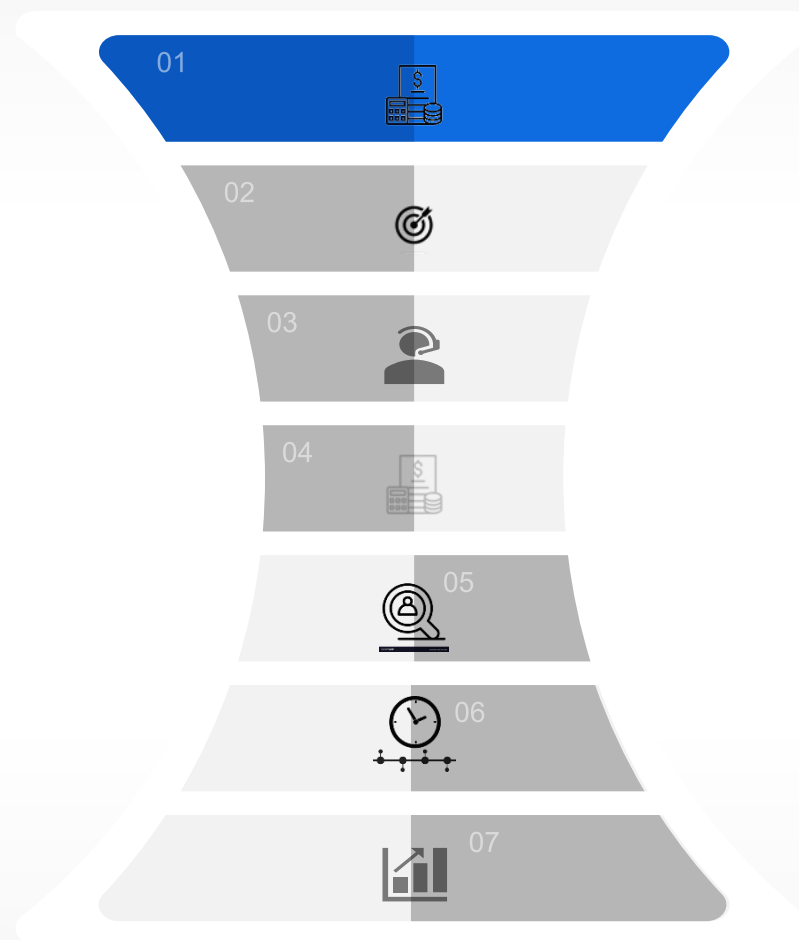
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**Introduction**



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**Preparing a comprehensive budget**

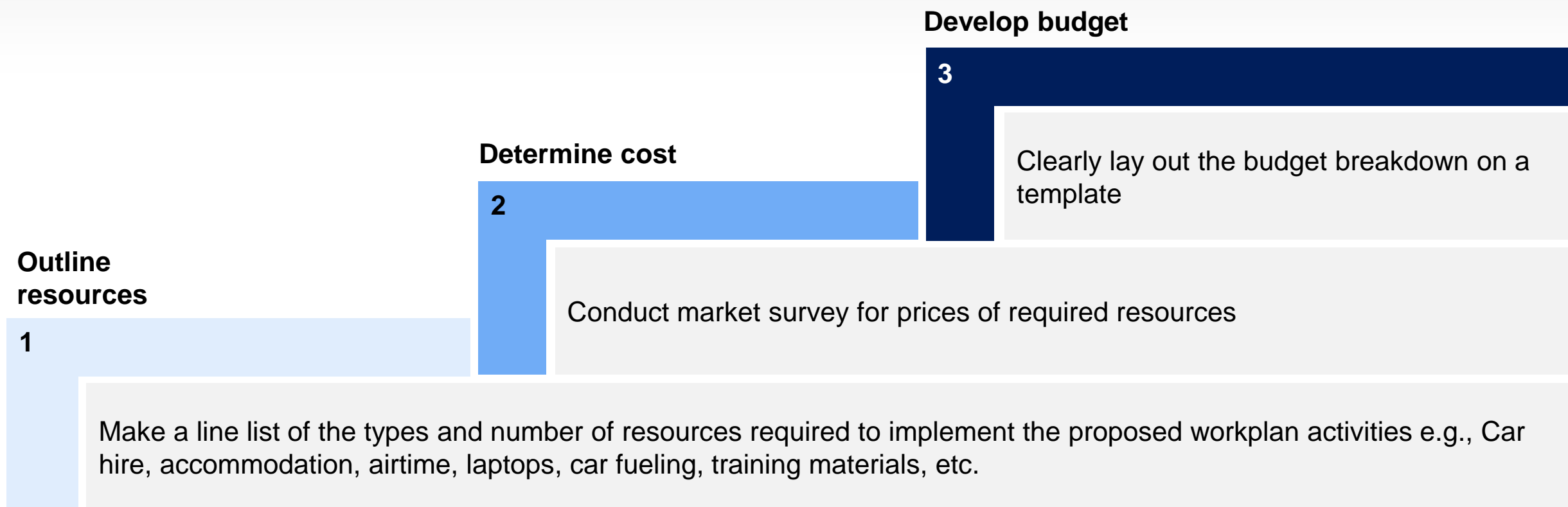


**Financial resource mobilization**



**Monitoring workplan implementation**

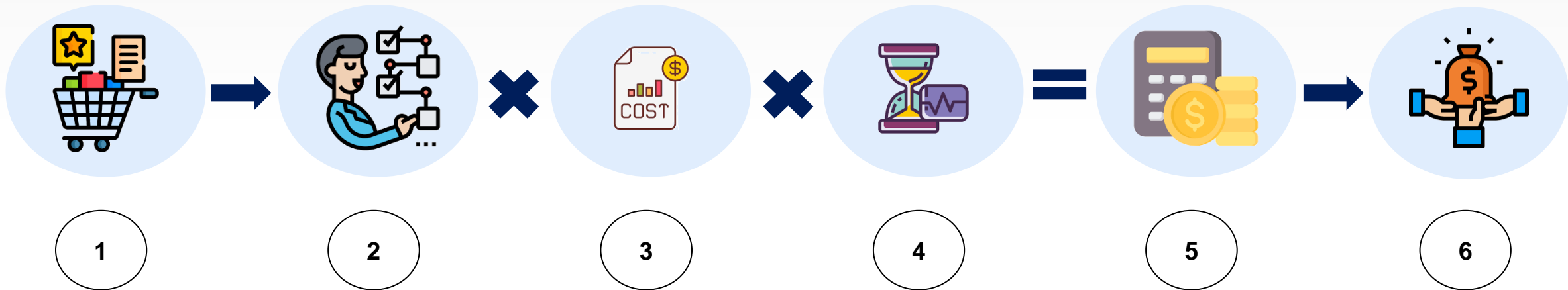
# Workplan budget development involves three major steps



**Prioritization of workplan activities may be required in cases where workplan budget surpasses funds available for a project**

# A workplan budget has 6 components

Activity/Task



Item	Units required	Unit cost	Frequency	Total cost	Funding source
What tool or resource is required to perform task?	How many units of the item is required to complete each task?	What is the cost of procurement of a unit of the item?	How many times will the task be conducted in a year?	What is the total cost for completing the task?	Who gives the fund for the activity?

# Class exercise: EPI microplanning training in Katsina

## Instruction

- Having determined workplan activities of a 5-day EPI microplanning training in Katsina, develop a training budget for the training on Microsoft Excel
- You have been provided with a budget template to develop the training budget



# Class exercise – Develop EPI microplanning training budget

Microplanning training in January 2025							
Objective	Activity/Task	Budget Details				Cost(NGN)	Funding source
		Item	Unit Cost (NGN)	# required	Freq.		
Ensure ward supervisors from all wards attend EPI microplanning training on January 25, 2025	Send out invitations to all ward supervisors	Invitation	6000	1000	1	6,000,000	Government
	Disburse transportation allowance to all participants	transportation allowance	5000	1000	2	10,000,000	GAVI HSS
	<b>Sub-Total</b>					<b>16,000,000</b>	
Ensure facilitators attend EPI microplanning training on January 25, 2025	Send out invitations to all identified facilitators	SMS	40	12	1	480	UNICEF
	Provide adequate transportation allowance for facilitators	transportation allowance	50000	12	1	600,000	WHO
	<b>Sub-Total</b>					<b>600,480</b>	
	<b>Total</b>					<b>16,600,480</b>	

# Sample workplan template with all components highlighted

EPI microplanning training workplan							
<b>Goal:</b> Train ward supervisors in all Katsina LGAs on the conduct of effective EPI campaign microplanning for 5 days in January 2025							
S/N	Objective	Activity/Task	Output	Key performance Indicator	Timeline	Responsible	Budget (NGN)
1.1	Ensure ward supervisors from all wards attend EPI microplanning training on January 25, 2025	Send out invitations to ward supervisors on time	Report of successful invitations	Proportion of participants that confirmed receiving invitation	January 14, 2025	SIO	6,000
1.2		Disburse transportation allowance to all participants	Fund disbursement report	Proportion of participant that received adequate transportation allowance	January 20, 2025	DFA	5,000,000
2.1	Ensure qualified facilitators provide adequate EPI microplanning training on January 25, 2025	Identify and inform qualified personnel to facilitate training	List of training facilitators	Proportion of needed trained facilitators identified	January 06, 2025	Director PHC/ PM SERICC	480
2.2		Train selected facilitators on EPI micro plan facilitators' guide and provide logistics	Training report	Proportion of planned training conducted	January 25, 2025	Director PHC/ PM SERICC	60,000

# Course content

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**Financial resource mobilization**



**Monitoring workplan implementation**

# Financial resource mobilization refers to all activities involved in securing new and additional resources for organization

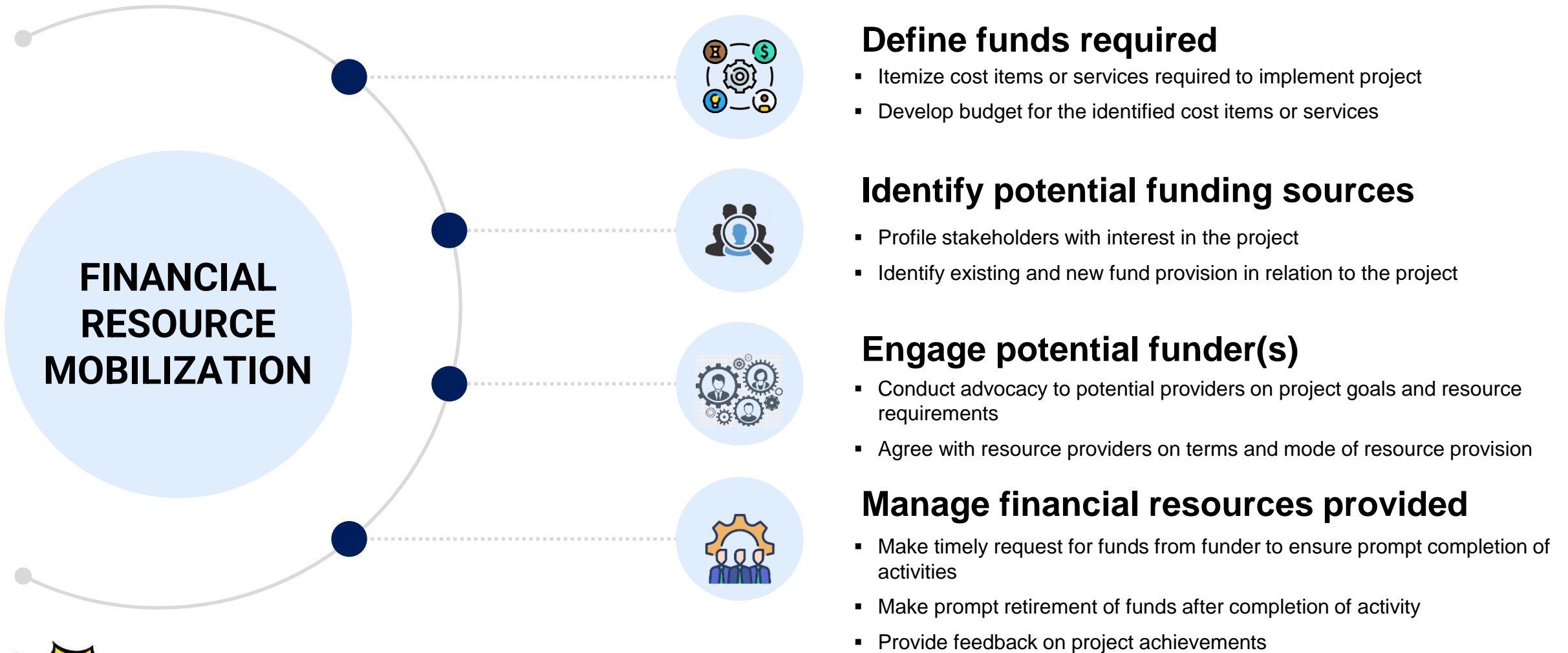
***Financial resource mobilization** is the process of getting funds from funding sources to implement an organization's pre-determined goals*

## *Why is Financial resource mobilization important?*

Financial resource mobilization ...

- Ensures availability of funds to implement planned activities
- Ensures the continuation of organization's service provision to clients
- Supports organizational sustainability
- Allows for improvement and scale up of products and services
- Allows for diversification and expansion of resources

# Steps to mobilize financial resources required to implement your workplan



- **Project workplan and budget feed into advocacy tools to secure funds for projects**



# Course content

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**Preparing a comprehensive budget**





**Financial resource mobilization**



**Monitoring workplan implementation**

# Workplan monitoring involves tracking and reporting progress of project or workplan implementation

Workplan monitoring has two main components, namely:

Components	1 Implementation tracking 	2 Budget performance analysis 
Steps	<ul style="list-style-type: none"> <li>▪ Highlight all expected workplan outputs and milestones</li> <li>▪ Measure the success of each output/ activity against set milestones using the set KPIs</li> <li>▪ Compute project completion rate and challenges</li> <li>▪ Develop recommendations to address identified challenges with project completion</li> </ul>	<ul style="list-style-type: none"> <li>▪ Outline budget for each activity in the work plan</li> <li>▪ Obtain fund expenditures for each of the outlined workplan activities</li> <li>▪ Compare proportion of requests that were approved</li> <li>▪ Analyze time spent between fund request and approval</li> <li>▪ Compare budget to expenditure for each project activity</li> <li>▪ Compare proportion of budgeted funds that was available, released and spent</li> <li>▪ Determine budget variance and burn rate for project budget</li> <li>▪ Outline reasons for variances and recommendations to improve budget performance and project implementation</li> </ul>



- **Most organizations track workplan implementation quarterly and annually. However, in small working units, workplan activities can be tracked weekly and monthly**
- **Workplan tracking helps to determine status of implementation for necessary reprioritization of activities and financial resources**

# Class example: EPI microplanning training workplan tracker

## EPI microplanning training workplan

**Goal:** Train ward supervisors in all Katsina LGAs on the conduct of effective EPI campaign microplanning for 5 days in January 2025

S/N	Objective	Activity/Task	Output	Key performance Indicator	Timeline	Status	% Completion
1.1	Ensure ward supervisors from all wards attend EPI microplanning training on January 15, 2025	Send out invitations to providers on time	Report of successful invitations	Proportion of meetings held with invitation sent out at least 24hrs before meeting	January 14, 2025	Done	100
1.2		Disburse transportation allowance to participants	Fund disbursement report	Proportion of participant that received transportation allowance	January 20, 2025	Done	100
2.1	Ensure qualified facilitators provide adequate EPI microplanning training on January 15, 2025	Identify qualified personnel to facilitate training	List of training facilitators	Proportion of trained facilitators identified	January 06, 2025	Ongoing	68
2.2		Train selected facilitators on EPI micro plan facilitators' guide and provide logistics	Training report	Proportion of planned training conducted	January 20, 2025	Done	100

# Class example: EPI campaign microplanning training budget performance

## EPI microplanning training workplan

**Goal:** Train ward supervisors in all wards in all Katsina LGAs on the conduct of effective EPI campaign microplanning for 5 days in January 2025

S/N	Objective	Activity/Task	Output	Performance Indicator	Budget (NGN)	Amount spent	% utilization
1.1	Ensure ward supervisors from all wards attend EPI microplanning training on January 15, 2025	Send out invitations to all providers on time	Report of successful invitations	Proportion of meetings held with invitation sent out at least 24hrs before meeting	6,000	6,000	100%
1.2		Disburse transportation allowance to participants	Fund disbursement report	Proportion of participant that received transportation allowance	5,000,000	5,200,000	104%
2.1	Ensure qualified facilitators provide adequate EPI microplanning training on January 15, 2025	Identify qualified personnel to facilitate training	List of training facilitators	Proportion of trained facilitators identified	-	-	-
2.2		Train selected facilitators on EPI micro plan facilitators' guide and provide logistics	Training report	Proportion of planned training conducted	60,000	34,000	57%

# Progress and results of workplan implementation can be evaluated during review meetings and project supervision

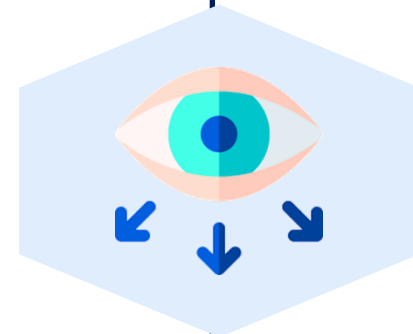
## Review meetings

- Review of workplan output and milestone accomplishment with stakeholders using set performance indicators.
  - Annual and quarterly review meetings
  - Workplan check-in meetings



## Supervision

- Field visits to assess outputs, results and impacts of workplan implementation
  - Field assessment and surveys
  - Interviews and inspections



# Let's recap key takeaways from this lesson....

1

For every project, it is important to develop a workplan to set program expectations and manage implementation of activities

2

Every project workplan must have seven basic components, namely: title, goal, key strategies, monitoring indicators, timelines, assigned responsible and budget

3

It is important to clearly outline workplan objectives and activities required to achieve workplan goal

4

Every project must have a detailed budget to manage financial resource allocation, mobilization and utilization

5

Financial resource mobilization ensures availability of funds to implement workplan activities

6

Periodic evaluation of workplan implementation and budget performance will help individuals or teams prioritize activities and financial resources



**QUESTIONS?**

*Thank  
you*

