Section 3

Use this section of the workbook together with the corresponding Action in the Guide, *Action 3: Choose activities appropriate for your organisation*.

Tool 3.1: Situation analysis

Tool 3.2: Organisational analysis

Tool 3.3: Activity prioritisation matrix

Tool 3.1:
Situation analysis

Use this tool to develop a snapshot of the current situation in the area(s) where you are working. It will help you understand the bigger picture in which your activities function, and analyse the TB and HIV challenges this area faces. You can copy the tool if you would like to do this analysis for more than one area. There are blank spaces in case you want to add other information that is important to you.

Basic information

Geographic area	
Total population	
Male (Hint: break all of these subcategories into total number and percentage of total population)	
Female	
Adults 45 years and above	
Adults 15–44 years	
Children < 15 years	

TB/HIV profile

Indicator	For the area	For the country	Comparison
Number of people with TB notified in most recent reporting year			
Case notification rate			
Percentage of total notified people who were new			
Percentage of total notified people who were retreatment			
Treatment success rate for new TB			
Treatment success rate for retreatment TB			
Percentage of people lost to follow-up (default) as a treatment outcome			
Percentage of people with TB who died as a treatment outcome			
Percentage of people with TB with a known HIV status			

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Tool 3.1: Situation analysis

Indicator	For the area	For the country	Comparison
Percentage of people with TB who were HIV positive			
Percentage of people with TB/HIV on CPT			
Percentage of people with TB/HIV on ART			
Number of people diagnosed with HIV			
Percentage of people with HIV who were screened for TB			
Percentage of people with HIV on IPT			
Number of MDR-TB cases notified			
Number of people with MDR-TB started on treatment			

Are there any specific groups in the area who are most affected by TB/HIV or who lack access to services? (for example, migrants, children, prisoners, certain ethnic groups, slum dwellers)

1.

2.

3.

Major barriers identified through the Cough-to-Cure analysis (three to five)

1.
2.
3.
4.
5.

Tool 3.1:
Situation analysis

Organisations working in TB/HIV in this area (including NTP or NACP units)

Organisation	Activities	Client population and location	Timeframe for work	Funding source

With the information above, can you identify specific barriers or population groups that are not being addressed by the existing or planned activities of others? These will be areas to consider for action by your organisation.

1.
2.
3.
4.
5.

Tool 3.2: Organisational analysis

Use this tool to help you understand the capacity of your organisation to work in TB/HIV, and where there may be gaps or challenges in staffing, expertise, financing or other areas that you need to fill in order to be successful.

Organisational snapshot

Overview	
Name of your organisation	
Year of establishment	
Name of executive director	
Years in the position	
Headquarters address	
Location of any field offices	
Policies	
Does your organisation have a strategy that includes TB/HIV integration?	☐ Yes ☐ No
Staffing	
Number of full-time paid staff	
Number of part-time paid staff	
Number of volunteers at headquarters	
Number of volunteers in the field or community	
Number of technical staff or volunteers	
Number of administrative or maintenance staff or volunteers	
Financing and management	
Annual budget for the past three years	Year:_____ Amount:_____ Year:_____ Amount:_____ Year:_____ Amount:_____
Major sources of funding and approximate percentage of budget	Source:_____%: _____ Source:_____%: _____ Source:_____%: _____ Source:_____%: _____ Source:_____%: _____
Size of largest grant you have managed	
Through what year does your organisation have funding available?	
Do you have a financial accounting system in place that has received an external audit?	☐ Yes ☐ No

What is the name and position of the person responsible for donor reporting?	
Partnerships	
List your main partners at national and local levels in this column (add rows as needed)	Describe the nature of your partnership in this column (What do you do together?)

Organisational activities

Check the boxes in the tables below for the activities that your organisation is already implementing.

HIV activities
Advocacy, outreach and education
☐ HIV policy advocacy
☐ HIV resource mobilisation advocacy
☐ HIV prevention education
☐ HIV education for the general public
☐ Stigma reduction
☐ World AIDS Day events
☐ Production and distribution of educational materials
☐ Other _____
Prevention and diagnosis
☐ Condom distribution
☐ PMTCT
☐ Male circumcision
☐ Referral for HIV counselling and testing
☐ HIV counselling and testing
☐ Other _____
Clinic-based treatment
☐ ART
☐ CPT
☐ IPT
☐ Laboratory services
☐ Other _____

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Community-based treatment
- ☐ ART
- ☐ CPT
- ☐ IPT
- ☐ Other _____

Treatment support
- ☐ Home visits
- ☐ Nutritional support
- ☐ Transportation
- ☐ Financial support/microloans
- ☐ Peer support groups
- ☐ Other_____

Training
- ☐ Training for health care providers from the national health system
- ☐ Training for private health care providers
- ☐ Training for community volunteers
- ☐ Other _____

☐ Other (describe)

TB activities

Advocacy, outreach and education
- ☐ TB policy advocacy
- ☐ TB resource mobilisation advocacy
- ☐ TB education for the general public
- ☐ Stigma reduction
- ☐ World TB Day events
- ☐ Production and distribution of educational materials
- ☐ Other _____

Case-finding and diagnostic services
- ☐ Community-based screening for TB symptoms
- ☐ Referral for TB testing at a health facility
- ☐ Community-based sputum collection
- ☐ Sputum smear microscopy
- ☐ Other diagnostic testing (such as culture, MGIT, Xpert)
- ☐ TB contact tracing

Clinic-based treatment
- ☐ DOT
- ☐ Laboratory services
- ☐ Other _____

Community-based treatment
- ☐ DOT
- ☐ Instruction on infection control in the community (such as cough etiquette)
- ☐ Other _____

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Treatment support
- ☐ Home visits
- ☐ Nutritional support
- ☐ Transportation
- ☐ Financial support/microloans
- ☐ Peer support groups
- ☐ Tracing of people with TB who are lost to follow-up
- ☐ Other_____

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Training
- ☐ Training for health care providers from the national health system
- ☐ Training for private health care providers
- ☐ Training for community volunteers
- ☐ Other _____

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- ☐ Other (describe)

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Population groups

Check the groups that your organisation currently works with, and estimate the number of people in *each of* those groups:

Group	Number of people served
☐ Women	
☐ Children	
☐ People living with HIV	
☐ People who use drugs	
☐ Migrants	
☐ Displaced persons/refugees	
☐ Slum dwellers	
☐ Homeless people	
☐ Prisoners	
☐ Miners	
☐ Diabetics	
☐ Other _____	

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Tool 3.3:
Activity prioritisation matrix

Below is a simple matrix that can help you decide which activities are most appropriate for your organisation if you have to choose from a large number of options. List your potential activities in the first column. Then put a tick in each box for which you can reply "yes" to the statement heading each column. At the end, add up the number of ticks for that activity and enter it in the last column. The activities with the highest numbers are the most appropriate activities for your organisation. Of course, there will always be times when you want or need to do something that may be more challenging. Remember to consider carefully the potential costs and risks before you decide to take on those activities.

Activity number	Addresses a gap that no other group is filling	We have existing technical expertise to implement	We have existing staff or volunteers to implement	We have existing funding to implement	We have time available to implement	This activity complements other work we are doing now	This activity will benefit >50% of our existing client population	This activity will produce measurable improvements in TB/HIV outcomes	Total number of ticks