



Independent observer  
of the Global Fund

## New guidance on selecting methods and tools for HIV economic studies

### Background

Genesis Analytics is leading an innovative project on “Understanding HIV Costing and Sustainability” (UCAS) funded by the Bill & Melinda Gates Foundation (BMGF). UCAS includes a number of learning activities that aim to improve countries’ ability to accurately cost their HIV programs, using national data systems, and to interpret existing cost data, thereby enabling more effective planning, budgeting and ongoing decision-making for continuous improvement.

A recent landscaping of existing HIV costing/financing methodologies and tools, specifically for HIV interventions and primary health care services, revealed that there are more than 50 different ones which can be used to generate information about either HIV financing, costs or expenditure. Unfortunately many are no longer in use or are not publicly available. It becomes apparent that there is a need to assist program managers, practitioners and budget officials by guiding the selection of appropriate methods and/or tools which are most likely to yield the required information for planning and decision making.

A deep understanding of information needs and how this information will be used to inform planning and decisions is essential and determines the selection of the appropriate approach, methodology and costing

tool. In response Genesis Analytics developed a guidance document to guide users through a series of logical steps to establish and define their information needs, select appropriate economic studies, methodologies and tools to generate the required information.

## Purpose of the guide

The overarching purpose of the guidance is to contribute to the efficient allocation of scarce resources to achieve health outcomes through better financial planning and decision making. A better understanding of financial information needs and how to obtain that information by selecting the most suitable methodology and tools will contribute to the above objectives.

For these reasons, Genesis Analytics with supported from BMGF and in close collaboration with the U.S. Global AIDS Coordinator and Health Diplomacy (S/GAC) and USAID created a simple, user-friendly guide to assists policy makers, planners and program managers to:

- Clarify planning and decision-making information needs, related to resource mapping, expenditure tracking and costing, based on a generic planning cycle.
- Select the most suitable approach, methodology and tools to address identified information needs.
- Define next steps to resource and implement the study.
- Inform Country Operational Plans (COP) and Global Fund guidance, and other processes.

## Target audience for the guide

The target audiences for the guide are program managers, planners or policymakers involved in financial planning and resource management for HIV and primary health care service delivery, Ministries of Health, government officials, potential investors, grant makers, philanthropies, foundations, implementers and other affected decision-makers. The guide aims to broaden knowledge about HIV economic studies and related methodologies and tools, simplify access to technical knowledge around costing models and tools, support a community of interest in models and costing tools, and ignite ideas for economic evaluation projects and provide easy links to the different tools.

## A simple four step process

The guidance uses a four-step process to guide users in the identification of their information needs through to selecting the most appropriate costing method and tool and are listed below:

- The first step positions the planning and research activity within the planning cycle.
- The second step comprises choosing the research question and type of economic study.
- The third step requires a consideration and confirmation of the study approach.
- The fourth step facilitates a review of the suggested tools based on a summary of what each tool can or cannot do and then select the best-fit tool given information needs.



A link allows users to navigate to a more detailed description of each tool and related reference material.

### Example of its use in Nigeria

The South-South Learning Network, an initiative of the UNAIDS Prevention Coalition, strengthens HIV prevention programs through shared learning and networking. As part of this initiative, stakeholders involved in managing and implementing HIV prevention programs aimed mainly at key and vulnerable populations conducted a self-assessment which highlighted the need for ‘costing of the key population programmes’. Using the guidance, Genesis Analytics facilitated a process to enable a participative process to support stakeholders to select the appropriate costing methods and tools. The process helped stakeholders to:

- Contextualise their costing needs on the planning cycle;
- Clearly define their decision-making objective and use case;
- Improve understanding of different costing methods and tools, and selection of a fit-for-purpose method, given their objectives; and
- Clearly spell out next steps required to manage and implement the costing study.

One of the most beneficial elements of following the structured guidance is that the final decision of how to proceed had strong buy-in from stakeholders and was based on a common understanding of the costing work to be done.

Downloading the tool is easy

The Guidance on selecting methods and tools for HIV economic studies can be downloaded by navigating

to the Genesis Analytics website using [this link](#). Please note the guide was designed to be read electronically and in PDF format. Certain PDF readers in web browsers do not allow for full navigation functionality. Any feedback is welcome and can be submitted to [elises@genesis-analytics.com](mailto:elises@genesis-analytics.com).

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