

**Building Actors and Leaders for Advancing Community  
Excellence in Development:  
The BALANCED Project**

**Semi-Annual Results Report #8  
For Period January 1, 2012 – June 30, 2012**

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**Coastal Resources Center at the University of Rhode Island  
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## Acronyms

ADDO	Accredited Drug Dispensary Outlets
APE	Adult Peer Educator
BALANCED	Building Actors and Leaders for Advancing Community Excellence in Development
BCC	Behavior Change Communication
BMCT	Bwindi Mgahinga Conservation Trust
BMS	Behavioral Monitoring Survey
CBD	Community-based Distributors
CBFP	Community-based Family Planning
CEWEFIA	Central and Western Fishmongers Improvement Association
CI	Conservation International
CIP	Conservation International Philippines
COMACO	Community Markets for Conservation
CRC	Coastal Resources Center
CRM	Coastal Resources Management
CTPH	Conservation Through Public Health
DBC	Designing for Behavior Change
DCB	Dual Capacity Building
DIP	Detailed Implementation Plan
DOH	Department of Health
EAC	East Africa Consultant
ECHNTS	Esiamia Community Health Nurses Training School
ECO	Ecological Christian Organization
ECP	Emergency Contraceptive Pills
ECSP	Environmental Security and Change Project
EWNRA	Ethiopian Wetlands and Natural Resources Association
FHI	Family Health International
FON	Friends of the Nation
FP	Family Planning
FPTWG	Family Planning Technical Working Group
FZS	Frankfurt Zoological Society
GH	Global Health
HEW	Health Extension Worker
HKN	Healthkeepers Network
HOPE-LVB	Health of People and Environment in the Lake Victoria Basin
ICFG	Integrated Coastal and Fisheries Governance (project)
ICM	Integrated Coastal Management
ICMPHE	Integrated Community Managed PHE
IEC	Information, Education and Communication
IR	Intermediate Result

IPOPCORM	Integrated Population and Coastal Resources Management
IUD	Intrauterine Device
JGI	Jane Goodall Institute
K4Health	Knowledge for Health
KM	Knowledge Management
LGU	Local Government Unit
M4RH	Mobile 4 Reproductive Health
MEAT	MPA Management Effectiveness Assessment
MGNP	Mgahinga Gorilla National Park
MOH	Ministry of Health
MOU/A	Memorandum of Understanding/Agreement
MPA	Marine Protected Area
MSH	Management for Sciences in Health
MSI	Marie Stopes International
NFPWG	National Family Planning Working Group
NGO	Non-Governmental Organization
NRM	Natural Resources Management
OEECC	Office of Energy, Environment and Climate Change
OH	Office of Health
OPRH	Office of Population and Reproductive Health
OSIENALA	Friends of Lake Victoria
PE	Peer Educator
PEPFAR	President's Emergency Plan for AIDS Relief
PFPI	PATH Foundation Philippines Inc.
PHE	Population-Health-Environment
PIR	Project Implementation Review
PNG	Papua New Guinea
PRB	Population Reference Bureau
PTAL	PHE Technical Assistance Lead
RH	Reproductive Health
RHU	Rural Health Units
SACCOS	Savings and Credit Cooperation
SANAPA	Saadani National Park
TA	Technical Assistance
TCMP	Tanzania Coastal Management Partnership
TFDA	Tanzania Food and Drug Authority
TKCP	Tree Kangaroo Conservation Program
TNC	The Nature Conservancy
TNC CTC	The Nature Conservancy Coral Triangle Center
TOT	Training of Trainers
UNDP	United Nations Development Programme

UNFPA	United Nations Population Fund
URI	University of Rhode Island
USAID	United States Agency for International Development
USG	United States Government
UZIkwASA	Tanzanian Health Organization
VEDCO	Volunteer Efforts for Development Concerns
VHT	Village Health Teams
VIP	Verde Island Passage
VMAC	Village Multisectoral AIDs Committee
WCS	Wildlife Conservation Society
WHO	World Health Organization
WPZ	Woodland Park Zoo
WWC	Woodrow Wilson Center
WWF	World Wildlife Fund
YPE	Youth Peer Educator



## I. Introduction

On September 17, 2008, the United States Agency for International Development Bureau for Global Health (USAID/GH) awarded the new Population, Health and Environment (PHE) technical leadership Cooperative Agreement *Building Actors and Leaders for Advancing Community Excellence in Development* (BALANCED) to the Coastal Resources Center (CRC) at the University of Rhode Island (URI) and its highly qualified team of international partners, PATH Foundation Philippines, Inc. (PFPI) and Conservation International (CI). The five-year BALANCED Project has a ceiling of almost \$7.5 million in core funding from the USAID/GH Office of Population and Reproductive Health (OPRH), which includes potential Mission Buy-ins from all accounts.

The Project's objective is to **advance and support wider use of effective PHE approaches worldwide**. To accomplish this, BALANCED has three Intermediate Results (IRs).

IR1 – Capacity built for integrated PHE implementation

IR2 – PHE knowledge and tools developed, organized, synthesized and shared

IR3 – Results-oriented PHE field activities implemented in areas of high biodiversity

## II. Project Results

In Year 4 BALANCED continued to advance its vision of “Building cadres of competent PHE champions and practitioners from Africa and Asia to: (a) promote the comparative advantage of approaches that simultaneously support family planning (FP) and conservation; (b) work collaboratively with other groups globally to apply PHE knowledge and State of the Art (SOTA) practices in remote biodiversity-rich areas; and (c) document and share evidence of added-value and better practices of PHE using 21st century knowledge management and learning tools.”

Toward that end, we began handing over capacity building activities to core institutions and champions in Tanzania, Ethiopia and Zambia who have received BALANCED support over the past three years, so that they can serve as resources to their organization and to others interested in implementing PHE in their region/country. For organizations newer to PHE approaches, such as our seed grant recipients in Uganda and Papua New Guinea (PNG), we continued to mentor these champions on how to plan, implement and monitor effective PHE approaches. We also provided assistance to a several organizations that have shown tremendous interest and progress integrating health and family planning (FP) into their conservation and livelihood activities in two non-BALANCED – Ghana and Mozambique. Capacity building efforts were intricately linked to our field activities and were geared toward building ownership of the PHE approach while simultaneously enabling champion individuals and organizations to take over the role of capacity-building within their organization and country.

As a way to maintain capacity within the PHE community and among PHE practitioners, we finalized two additional legacy training manuals on PHE Community-based and Peer Education Systems as well as two job aids for CBDs and PEs and shared these and existing training curricula, job aids, manuals, and videos with over 1,500 members of the PHE Community. We

produced a newsletter targeted to policy makers and decision-makers participating in the Rio + 20 and other international conferences and leveraged resources so that BALANCED team members and our PHE champions could present at five international conferences and meetings. Blog posts and videos were also produced to showcase PHE champions from the Philippines and Tanzania.

In the field, we focused on building the demand for FP as well as transitioned support for PHE activities to the local district government. In Ethiopia, the conclusion of our first seed grant provided the seed grant recipient with valuable lessons learned and led them to identify new funds to continue and expand the PHE approach in a very remote area of the country. USAID/Philippines offered additional add-on funds to expand FP activities in our scale-up sites until August 2013, while also providing an opportunity to review our community-based approaches to improve effectiveness of the intervention. PHE activities in Uganda did not begin in earnest until the beginning of Year 4, therefore we invested substantial technical support to our newest seed grant recipients and to the HOPE-LVB project. Also getting off to a late start is our seed grant recipient in Papua New Guinea, however, with technical and financial assistance from the Project and tremendous support from the local government, they are now beginning to implement this integrated approach in some of the most remote regions of the world.

The summary below describes how the BALANCED Project team has progressed in achieving its vision and implementing its strategic approach for advancing and supporting wider use of effective PHE approaches worldwide, while acknowledging the limited financial and human resources to implement this vision. This semi-annual report covers activities that took place from January 1 to June 30, 2012. Each section on the individual IRs describes: activities implemented during this reporting period; performance monitoring data; and priorities for the next six months. Although reported by IR, the activities have strong synergies, are closely linked to each other, and contribute collectively to the Project's overarching vision and goal. The final sections include management opportunities and challenges, the comprehensive PMP table and annexes.

## **IR1 Capacity built for integrated PHE implementation**

The BALANCED Project's overall capacity building goal is to enable PHE practitioners to plan, implement and monitor effective PHE activities and become resources to their organization, region and/or country. During this reporting period, we began turning capacity building over to many of our PHE practitioners, while continuing to build the capacity of organizations new to the PHE approach.

### **Accomplishments**

We continued to implement our *continuum-style* capacity building strategy, focussing now mainly on the *post-learning period*, which is traditionally neglected and most responsible for poor post-training results and service delivery outcomes. This will help to ensure that partner organizations and PHE champions' capacity has been built to enable them to not only continue to implement their PHE activities, but also to be a resource to other organizations in their country/region on effective PHE implementation. Toward that end, we provided continued post-training support to BALANCED champions through hands on-mentoring and regular virtual and

in-person technical assistance, especially in Tanzania, Ethiopia, and Ghana. This support is designed to ensure that ownership of the PHE process is transferred to our partner organizations. Because of the continuous post-training support over the last couple of years, champion organizations in Zambia, Ethiopia, Ghana, Tanzania and the Philippines are already taking over many of the training activities on their own, which is a key component of our hand-over strategy.

Toward this end, we also supported the participation of two PHE champions in CRC-CI's June 2012 course: "*Building Coastal Community Resilience: Population, Health and Environment Dimensions*" to expand their skills on PHE and enable them to serve as training resources during a similar course in East Africa and once the Project ends.

### **1.1 Build capacity of NGOs in the Philippines on PHE Program Design**

Activity completed. See BALANCED semi-annual report #7.

### **1.2 Build capacity of NGOs in Africa on PHE Program Design**

Activity completed. See BALANCED semi-annual report #7.

### **1.3 Build capacity of PHE Ethiopia to conduct training activities**

In our Year 4 workplan, we agreed to provide modest financial support and technical assistance to the PHE Ethiopia Consortium to conduct a refresher training workshop on PHE with its member organizations. PHE Ethiopia and several of its member organizations have benefited from BALANCED capacity building events and technical assistance for the past three years. The objective of the Year 4 BALANCED support was to provide some assistance, but encourage the network to seek additional funding for its training activities and to employ some of its member organizations implementing successful PHE activities as co-facilitators so that the network can plan and implement capacity-building events on its own. During the last reporting period, BALANCED staff provided input on PHE Ethiopia's training plan, workshop logistics and other preparatory arrangements prior to the refresher training workshop.

In this reporting period, BALANCED provided \$4,000 towards the cost of the PHE refresher training and continued to offer virtual support to PHE Ethiopia on workshop planning. In February, Dr. Ricky Hernandez, BALANCED East Africa Consultant (EAC), traveled to Addis Ababa and provided technical support during the workshop, assisting the facilitators in the background, and providing input into the workshop sessions as needed. The three-day PHE Implementers Knowledge Sharing and Learning Workshop was held from February 1-3, 2012. The objectives of the training were to enable PHE Ethiopia's members to:

- Strengthen their PHE programs through mutual learning and action planning,
- Share experiences with PHE design, implementation, monitoring, evaluation and sharing results in Ethiopia,
- Establish a conceptual framework and shared indicators for PHE in Ethiopia, and
- Lay the foundation for tracking the impacts of PHE in Ethiopia

Forty five representatives from nongovernmental organizations (NGOs) implementing, or wanting to implement, PHE activities participated in the workshop. During the workshop, participants agreed on a shared vision for PHE in Ethiopia and developed a PHE conceptual framework for PHE in Ethiopia. They also conducted an organizational analysis of their successes and weaknesses; prepared action plans for strengthening each participant’s PHE program; and generated a list of common indicators that key PHE implementers can use to “Tell the Story of PHE in Ethiopia.”

#### Results from Activity 1.3:

- One BALANCED trainee training others on PHE (1.2)<sup>1</sup>

#### **1.4 Provide on-going support to BALANCED trainees and PHE practitioners**

A key element of our capacity building strategy is providing post-training repetition, learning and mentoring and regular support to help build sustainable capacity, and promote a sense of ownership of PHE within targeted organizations. Post-training support is provided by BALANCED staff members, and, in particular, our EAC who visits East Africa twice yearly to provide support to NGOs implementing PHE in that region.

During this reporting period, we supported seven organizations, one Peace Corps Volunteer and two PHE Fellows from four countries (Tanzania, Ethiopia, Ghana, and Mozambique). The technical support provided includes:

- **Tanzania Coastal Management Partnership (TCMP)** – Dr. Hernandez provided virtual and in-country support to TCMP’s PHE coordinator, Juma Dyegula, who is leading the BALANCED Project activities in the Tanzania Project. The technical assistance provided includes:
  - a) Worked with TCMP staff to prepare for the BALANCED PHE activities in Tanzania to be documented in a video by the Woodrow Wilson Center (WWC). Together with TCMP, the EAC helped prepare the background context and identify activities and PHE practitioners that Sean Peoples of the Wilson Center and film maker Michael Miller could then film.
  - b) With the TCMP PHE Coordinator, the EAC helped monitor the BALANCED activities in the TCMP project sites and discussed with stakeholder and partners the progress of PHE activities in the field. Some of the highlights of the monitoring visits were:
    - Dr. Ole and Tabitha Owenya, PHE leaders in Pangani District, included in the Pangani District Health budget a request to conduct refresher training for the peer educators (PEs) and community-based distributors (CBDs) originally trained by the Project. The request is subject to approval by the local government. In the

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<sup>1</sup> Given that BALANCED did not conduct the workshop, we are not counting the number of people trained in our PMP. One staff person from PHE Ethiopia —i.e., not an organization implementing PHE— facilitated the workshop.

meantime, they will advocate for its inclusion in the Pangani Comprehensive Plan. Both also committed to continue supervising the CBDs and PEs.

- Frida Urio, District Integrated Coastal Management (ICM) Facilitator and a PHE champion, committed to inviting health staff to participate in ICM activities, conduct joint activities and/or deliver integrated messages during ICM activities in Pangani.
  - With the PHE coordinator and Dr Ole, conducted monitoring visits with 42 adult peer educators (APEs) in Sakura and 18 PE/CBDs in Sange.
- c) Represented the BALANCED Project during the FHI 360 partners meeting. In July 2010, FHI 360 launched the mobile for reproductive health (M4RH) initiative—a mobile SMS RH hotline—and the BALANCED-trained PHE Providers and CBDs are helping to promote the program. During the meeting, FHI 360 shared preliminary survey results that show more young people are calling the hotline, but that 60% of those callers who are sexually active are not using any contraceptive method. There are ten million mobile phone users and most are younger than 30 years old. FHI 360 sends SMS messages for each method.
- d) Assisted TCMP to refine its PHE communication plan, information, education, and communication (IEC) messages and materials, specifically:
- Recommended unifying the messages of the various activities (fuel-efficient stoves, savings and credit cooperatives/SACCOs and modern FP methods) to have the same PHE tag line, including the 60-second radio spot on PHE, which will be aired during UZIKWASA's Pwani environment program
  - Suggested having promotions for call-ins/SMS messages for which prizes and T-shirts (T-shirts will have the same PHE tag line) will be awarded
  - Provided input on the translation of the PHE PE checklist including the suggestion to add TCMP's IEC messages to it, and APEs used the checklist as a job aid.
  - Made inputs on the PHE integrated messages included in the BALANCED CBD/PE Reference Guide prior to translating the document into the local language so that it could be used by the CBDs and PEs in Pangani.
- e) Provided input on PHE during TCMP Strategic Objective Team meeting, visited TCMP's CRM activities in Zanzibar and provided inputs to the TCMP workplan.
- **The Integrated Coastal and Fisheries Governance Project (ICFG) or the *Hen Mpoano (Our Coast) Initiative in Ghana*** – Since 2009, BALANCED has been providing technical support to integrate health and family planning into the USAID/Ghana-supported Integrated Coastal Fisheries Governance Project (referred to locally as *Hen Mpoano*) activities in Ellembelle and Shama districts. *Hen Mpoano* is implemented by CRC in partnership with Friends of the Nation (FON) to address declining fish stocks and food security in Ghana's Western Region. In Year 3, BALANCED conducted a youth peer education (YPE) workshop with FON and *Hen Mpoano* partners. Since the YPE workshop, Leslie Lucas—a Peace Corps Volunteer sponsored by *Hen Mpoano* to lead the PHE activities in Ellembelle—has been training second year nursing students from the Esiamia Community Health Nursing Training

School (ECHNTS) using the YPE curriculum. During this reporting period, substantial progress has been made incorporating YPE into the nursing school as well as bringing community-based distribution of FP methods to Shama District. Dr. Joan Castro, BALANCED PHE Technical Assistance Lead (PTAL), traveled to Ghana in May 2012 to:

- a) Provide support and assistance to the Peace Corps Volunteer in Ellembelle and FON by reviewing and providing input on their work plans, brainstorming solutions to issues encountered in the field, and planning for additional YPE and CBD training in Ellembelle and Shama.
- b) Conduct a train-the-trainer workshop (TOT) on CBD/PE systems with a total of 11 Central and Western Fishmongers Improvement Association (CEWEFIA) PEs and volunteers and other *Hen Mpoano* partners in Shama District. The Ghana PHE team helped facilitate the training in order to build their capacity to train CBDs/PEs in their respective project areas. Representatives from Healthkeepers Network (HKN) also helped facilitate the social marketing module of the training.
- c) Assist CEWEFIA to establish a functional CBDs system with its trained CBDs and PEs as outlets of FP commodities and to secure FP supplies from HKN. As a result, CEWEFIA has counseled 125 people on PHE and distributed and referred 26 new FP acceptors to the Ghana Health service.
- d) Assist Leslie Lucas to plan and conduct a PHE advocacy meeting with 25 ECHNTS officials and representatives from the local government to galvanize their support for a PHE youth program at the school in lieu of the initial plan to incorporate a PHE course into the ECHNTS curriculum.

With just a little bit of technical assistance, Ms. Lucas has not only helped train approximately 300 second-year nursing students on PHE and youth peer education, she has also enabled 48 of the trainees—many of whom are nursing students—to train others on PHE. She also set up a ground-breaking PHE Student Association. The committed group of 44 students has selected a President and established an attendance policy. Every Saturday, the students break into four groups and visit four communities at a time talking to the community about PHE linkages and pro-environment and pro-health messages. To date, over 800 individuals have been counseled on PHE and reproductive health. Further, they have now begun to teach PHE and youth peer education to first year ECHNTS students. Each member of the PHE Student Association will have the chance to teach.

Dr. Castro and other BALANCED team members continued to provide virtual technical support to Ms. Lucas as she plans to begin incorporating CBD/PE systems into the Ghana Health Service in Ellembelle and initiating the formation of PHE Clubs in Senior High Schools.

- **PHE Ethiopia Consortium member LEM** – Together with representatives from the PHE Ethiopia Consortium and Kristen Stelljes (PHE Fellow), the EAC visited LEM Ethiopia's Fiche PHE project in the Girar Jarso woreda of Ethiopia. LEM has been implementing the PHE approach in this site since 2009 with funding from the David and Lucile Packard Foundation. Through the project, LEM helps to link the efforts of the Health Extension Workers (HEWs) and the Development Agents who work in agriculture, livestock, natural

resource management and cooperatives to provide integrated services to the project's communities. During the visit, the EAC recommended that LEM and PHE Ethiopia:

- Educate the community on the links between population, health, environment, and livelihoods in order to better promote the desired behaviors and practices with greater depth
  - Develop an IEC strategy and integrated PHE messages to reinforce the integrated approach and expected behaviors and/or practices promoted by the project.
  - Help institutionalize PHE by integrating it into woreda development plans and programs
- **PHE Fellows** – BALANCED provided assistance to Corina Clemente, PHE Fellow from the Carr Foundation Gorongosa National Park Restoration Project in Mozambique; and to Kristen Stelljes, the PHE Fellow in Ethiopia. Specifically:
    - a) Corina Clemente – the BALANCED Project Director invited Corina Clemente to accompany the EAC during his visit to Wildlife Conservation Society (WCS) project site in Zambia. WCS/Zambia is a BALANCED seed grant recipient. Ms. Clemente works for the Gorongosa National Park Restoration Project in collaboration with the USAID/Mozambique Ecohealth Project. During her visit to Zambia, Ms. Clemente participated in the Designing for Behavior Change (DBC) Workshop and a CBD/PE TOT with WCS Zambia and local partner staff. She also observed Dr. Hernandez as he monitored the PHE seed grant activities with WCS project staff, and worked with them as they developed their IEC messages. Dr. Hernandez reviewed the EcoHealth project activities with Ms. Clemente and provided inputs on how to fine-tune and more effectively implement the interventions.
    - b) Kristen Stelljes - In addition to Ms. Stelljes accompanying Dr. Hernandez during the site visit to Lem Ethiopia, she also accompanied him on his monitoring visit to Ethio-Wetlands and Natural Resource Association (EWNRA) – another BALANCED seed grant recipient whose PHE activities were coming to a close. Toward this end, she traveled with Dr. Hernandez to Metu to visit the seed grant activities and discuss with EWNRA staff the results of the project and lessons learned from the seed grant experience.

#### Results from Activity 1.4

- 11 (4 male, 7 female) people trained on PHE, CBD/PE systems in Ghana (1.1)
- 300 (female) nursing students trained on PHE and youth peer education (1.1)
- 48 trained nursing students teaching others on PHE and youth peer education (1.2)
- Nine post-training assistance (TA) interventions to eight NGOs/institutions (TCMP, Pangani Health office, PHE Ethiopia, LEM, CRC, FON, CEWEFIA, ECHNTS), one Peace Corp volunteer and two PHE Fellows from three BALANCED focus countries and Mozambique. (1.4a)

- Virtual and hands-on TA to TCMP on BCC communication plan and integrated IEC messages, CBD/PE job aid, monitoring PHE activities, workplanning, and WWC documentary on PHE activities in Pangani
- Hands-on TA to Pangani Health Office on youth activities and how to incorporate PHE into local government agendas and budget
- Hands-on TA to LEM and PHE Ethiopia Consortium staff on PHE activities in Girar Jarso woreda
- Virtual TA and hands-on TA to CRC and FON on revised the PHE action plan and fine-tuning of PHE activities in Shama and Ellembelle districts
- Hands-on TA to CEWEFIA and FON on CBD/PE training and developing CBD supply system
- Hands on TA to ECHNTS on YPE activities
- Virtual TA and hands-on TA to Leslie Lucas on YPE training and CBD/PE systems
- Hands-on TA to PHE Fellow in Ethiopia on monitoring PHE activities
- Hands-on TA to the PHE Fellow working for the Gorongosa National Park Restoration Project in Mozambique on designing for behavior change, CBD/PE systems, integrated IEC messages, PHE interventions and monitoring PHE activities

## **1.5 Provide technical support to ICM PHE Project**

The BALANCED Project is partnering with Partners in Expanding Health Quality and Access (hereafter Partners), on behalf of ExpandNet, to expand USAID’s global leadership in integrated PHE activities by building the capacity of Pathfinder International and its partners on PHE scale-up as part of the Health of People and Environment in the Lake Victoria Basin (HOPE-LVB) Project funded by the John D. and Catherine T. MacArthur/David and Lucile Packard Foundations and USAID. In addition to the subcontract with ExpandNet, BALANCED staff also provides technical assistance (TA) to the HOPE-LVB project. During this reporting period the following technical support was provided:

### ExpandNet

Partners/ExpandNet is helping Pathfinder, Ecological Christian Organizations (ECO), Conservation Through Public Health (CTPH), and OSIENALA to develop and test two models of integrated interventions in Uganda and Kenya that have the potential for sustainability and can be scaled-up to other districts in the regions, with the possibility of expanded relevance and replication for the other countries in the LVB region. During this reporting period, the following was achieved by ExpandNet:

- Three ExpandNet team members traveled to the LVB regions of Uganda and Kenya from January 14 to February 8, 2012 to orient the HOPE-LVB implementing team on scaling-up concepts that are discussed in ExpandNet tools and documents, to prepare the field work program, to reach consensus on issues to discuss with officials and community groups at the



proposed project sites and to meet key high-level stakeholders to discuss the HOPE-LVB project. The trip also provided the opportunity to undertake preliminary planning for the monitoring and evaluation (M&E) aspects of the project in consultation with Population Reference Bureau (PRB)-sponsored consultants Lynne Gaffikin and Sally Timpson.

- When not in Africa, the ExpandNet team members provided virtual technical support to HOPE-LVB by: a) reviewing literature on PHE in the project countries as a means to more effectively design this integrated project for scale-up; b) providing input on the project logframe, M&E framework and indicators; c) providing written feedback on several project documents; and e) assisting with substantive preparations for donor visits to the project.
- In collaboration with BALANCED Project Director, ExpandNet realigned its budget to cover additional days for Lynne Gaffikin, M&E consultant, to accomplish the additional M&E-related tasks. This funding support allowed the consultant to help the HOPE-LVB team to develop indicators, data collection strategies and tools for monitoring and documenting progress towards achieving scalability and evaluating the potential for scale-up at project end. Ms. Gaffikin also worked extensively with the baseline data collection team to incorporate scalability concepts into the baseline and endline instruments.
- Laura Ghiron and Alexis Ntabona traveled to Uganda and Kenya from June 20 to July 6, 2012 to: a) help the entire Uganda team take stock of project activities to date as they relate to addressing sustainability and laying groundwork for future scaling-up; b) discuss and begin preliminary process documentation; c) review and provide input on the draft project theory of change document, the draft value-added document, and the draft “project manual;” d) orient new project partners on the ExpandNet/World Health Organization/WHO scaling-up framework and approaches; e) meet with the baseline research team to orient them to ExpandNet tools and approaches and to give feedback on the baseline instruments before their subsequent finalization; f) conduct field visits and interview key stakeholders in Kenya project sites, and g) meet with national level stakeholders in Nairobi from the National Environment Management Authority (Executive Director and colleagues), the National Council for Population and Development (Executive Director and colleagues), the FHI360 Greenbelt Movement PHE (Project Director), the International Union for Conservation of Nature/IUCN (PHE Project Representative) and the Pathfinder Kenya Country Representative.

## BALANCED TA

In addition to the technical input provided by the ExpandNet team, BALANCED staff will also provide technical support to the HOPE-LVB Project. During this reporting period, the following technical assistance was provided:

- BALANCED staff provided virtual technical input on HOPE LVB project documents, proposed activities, including their advocacy presentation.
- Because he was in Uganda at the time, the BALANCED EAC was asked by Sono Aibe of Pathfinder International to facilitate their January 2012 HOPE-LVB team workshop that was organized to select priority interventions for the HOPE-LVB Project. During the workshop, the EAC also provided input on HOPE-LVB’s health, environment, and advocacy

interventions and activities and tasked participants to use the ExpandNet criteria to prioritize their activities and corresponding budget.

- The EAC traveled back to Uganda in March to assist HOPE-LVB staff to: a) incorporate select modules from the BALANCED PHE CBD/PE TOT curriculum into Pathfinder and agro-forestry training manuals; b) link proposed interventions/activities within HOPE-LVB's conceptual model; c) develop IEC messages, including integrated PHE messages as well as sector-specific messages that will be pretested at a later date; c) identify potential job aids for PEs, village health teams (VHT), etc.; and d) initiate a draft of their behavior change communication (BCC) plan.
- CRC developed a draft BCC plan that incorporated the draft IEC messages developed by the EAC and HOPE-LVB staff that Pathfinder could begin to revise with its partners and complete during the next BALANCED TA visit with them.
- Supported the participation of Lucy Shillingi, Pathfinder Country (Uganda) Representative to attend CRC/CI's June course on *Building Coastal Community Resilience: Population, Health and Environment Dimensions* (see Activity 1.6 below).
- Planned additional technical support on CRM, fisheries and BCC for the next quarter.

#### Results from Activity 1.5

- 5 HOPE-LVB partners incorporating ExpandNet scale-up methodology into their project activities (CTPH, Pathfinder Uganda, Pathfinder Kenya, Osienala, ECO, Pathfinder HQ, and Evaluation and Research Technologies for Health) (SO-1).
- 16 (9 male, 7 female) HOPE-LVB staff and stakeholders trained on ExpandNet scale-up methodology (1.1)
- 5 HOPE-LVB staff training others on PHE and ExpandNet scale-up methodology (CTPH – 2; Pathfinder – 2; and ECO – 1) (1.2)
- 9 TA interventions to HOPE-LVB Project (1.4a)
  - Five ExpandNet TA interventions - Pathfinder Uganda (2 visits), Pathfinder Kenya (2 visits), CTPH (1 intervention)
  - ExpandNet/M&E consultant TA on HOPE-LVB M& E plan
  - BALANCED/EAC facilitating workshop and providing input on conceptual framework and proposed interventions and activities
  - BALANCED/EAC assisting HOPE-LVB develop draft IEC messages
  - BALANCED/CRC drafting HOPE-LVB BCC plan
- 5 new organizations receiving TA from BALANCED (Pathfinder/Uganda, Pathfinder/Kenya, CTPH, ECO, OSIENALA) (1.4b)

## **1.6 Support PHE Champions to attend CRC-CI's "*Building Leaders for Coastal Community Resilience: the Population, Health and Environment Dimensions*"**

In line with recommendations from the mid-term evaluation and previous planning discussions, CRC and CI designed and implemented a three-week course on PHE and climate change, in order to spur interest in PHE and build field practitioner capacity in this integrated approach to development. The course was conducted from June 4 to 22, 2012 at the Coastal Institute located at the URI Narragansett Bay Campus, Rhode Island. Fees for this revenue-based training were paid by participants' projects, universities, or government agencies. The 17 participants—from Tanzania, Ghana, The Gambia, Senegal, Uganda, Indonesia, the Philippines, and the US—had diverse backgrounds spanning primarily the environment and health sectors. What they shared was the common goal to better understand the PHE approach and/or how to better integrate a P, H, or E component into their existing single sector projects/work. In the case of those course participants already implementing PHE projects, the opportunity was to hear and learn from the challenges and successes of other PHE projects and champions and to learn to add a "climate change" lens to their work. The course featured several BALANCED Project publications and training manuals, and at the end of the course, participants presented their plans to advocate for integrated PHE approaches upon return to their work in their home countries

By the end of the course, participants who initially had struggled with thinking "outside the box" of their single sector work/approach, were recognizing the value in, need for, and the "how to" of integrating one or two of the "other" sectors into their project/program designs and implementation. And, for those already implementing PHE projects, the achievement was in learning new tools and strategies for implementing their work even more effectively and improving the integration between the P, H, and E aspects of their project/work. Without exception, each participant left with a strengthened commitment to helping their project or agency better pursue the goals of and/or more effectively implement the PHE approach.

The BALANCED Project did not provide direct funding for the BALANCED Deputy Directors to contribute their time to course curriculum design, marketing or delivery. Rather, the efforts of Squillante, Torell, and Edmond were funded through non-BALANCED Project funds of the CRC and CI organizations. BALANCED did, however, fund two individuals to attend the course: Lucy Shillingi, the Pathfinder Country Representative/Uganda and Juma Dyegula, the BALANCED PHE Coordinator from Tanzania. Immediately following the course, Shillingi and Dyegula worked with BALANCED staff to adapt the June 2012 course curriculum for the upcoming PHE Africa course scheduled for February 2013. The February course will focus on attracting participants from Africa and will highlight—while not be limited to—case studies, PHE projects, etc. from that continent. BALANCED will also support Shillingi and Dyegula to serve as co-trainers in the 2013 course, helping build the capacity of these two PHE champions to serve in the future as PHE trainers within their region.

### Results from Activity 1.6

- 2 NGO representatives (1 male, 1 female) trained on PHE and climate change (1.1)

## **IR1 Priorities for Next Reporting Period (July 1 to December 31, 2012)**

The individual listed in bold is the lead/individual responsible for bringing the activity to completion. Supporting team members follow. This is the best estimate at the time of this report, but the lead or other team members may change based on staff availability and other factors.

- Plan the East Africa PHE course for NGOs implementing PHE interventions in Africa, tentatively scheduled for February 2013 in Tanzania/Zanzibar (**Linda**, Janet, Elin, Joan)
- Provide continued technical assistance and mentoring to BALANCED trainees and PHE Fellows in Ethiopia, Tanzania, and Ghana and Mozambique upon request. (**Elin, Ricky**, Joan, Linda)
- Provide technical support on CRM and fisheries, BCC and IEC materials development, etc. to the HOPE-LVB Project partners upon request and in line with the HOPE-LVB project activities. (**Ricky**, Joan, Linda)

## **IR2 PHE knowledge and tools developed, synthesized, and shared**

The knowledge management (KM) element of the BALANCED Project continues to serve as the nexus of IR1, *Capacity built for integrated PHE implementation* and IR3, *Results-oriented PHE field activities implemented in areas of high biodiversity*. The revised Year 4 workplan acknowledged the recommendation from the BALANCED mid-term evaluation to maintain and build only modestly on the KM-specific activities and outputs from the Project's first three years. As discussed among BALANCED Project key staff in the September 2011 strategic planning meetings, the Project KM activities during Year 4 would be more strategic and specifically designed to contribute to effective PHE implementation. This required more regular communications between technical staff working in the field and staff working on BALANCED KM activities to identify what is working in the Project's capacity building interventions and technical support to the field. The focus of IR2 activities remained on three key areas:

- Identify, document and synthesize knowledge on PHE (Activity 2.1)
- Organize existing and new knowledge for the PHE website (Activity 2.2)
- Share knowledge within the PHE community and beyond (2.3)

## **Accomplishments**

In line with our Mid-Course Strategic plan, we continued to fine-tune our KM activities that contribute to the Project's mission of ...*"building cadres of competent PHE champions and practitioners."* Toward that end, we completed and disseminated two training curricula during this reporting period. We also successfully published an article on the results of Tanzania Behavior Monitoring Survey (BMS) baseline, and submitted another article, which is being reviewed by Global Health Journal. We also continued to promote PHE approaches and PHE champions through videos and blog posts. We also worked diligently to promote PHE knowledge, information and successes to the broad PHE community of practice and beyond. Details of our IR 2 activities follow.

## 2.1 Identify, document, and synthesize knowledge

The BALANCED team finalized and disseminated multiple training guides, technical reports and PHE champion stories this reporting period as outlined below.

- Produced one peer-reviewed journal article on the Tanzania BMS baseline report, entitled “*Population, Health and Environment Situation Analysis for the Saadani National Park Area, Tanzania.*” This was the lead article in the Journal of Ocean and Coastal Management available online on May 17, 2012 (OCM 66 (2012) 1-11) .
- Drafted a manuscript on the Tanzania/Philippines Cross-Country Comparative BMS for journal publication. The article was submitted to the online journal “Ecology and Society” in February. Although the article received positive reviews from two external reviewers, they did not deem the article’s topic area suitable for the journal. The team slightly revised and shortened the manuscript to fit the focus of the Global Public Health journal. It will be submitted in July 2012.
- Produced and disseminated a baseline BMS report on FP/RH and CRM behaviors in select BALANCED-Philippines Buy-in sites.
- Finalized and disseminated the PHE CBD Manual.
- Finalized and disseminated the PHE Adult PE Manual.
- Finalized and disseminated the Reference Guide for PHE CBDs and PHE Adult PEs.
- Continued revising the training manual, “How to Develop Integrated IEC Messages and IEC Materials” based on pretests in the field. This curriculum will be finalized during the next reporting period.
- Due to the tremendous amount of staff resources it would take to edit and make 508 compliant the adapted Designing for Behavior Change curriculum, it was agreed with USAID that this curriculum will be finalized and made available to World Wildlife Fund (WWF) and DBC workshop participants as a Word file only and this task will be completed before the end of the Project.
- In collaboration with WWF-US, Jane Goodall Institute (JGI) and other PHE implementing agencies, began drafting the outline and suggested text for “*PHE Field Implementation: A Simple Guide for PHE Practitioners.*” This guide will give a brief overview of key aspects of PHE project implementation, the related tools available relative to those aspects and, where possible, provide a link to the tools. We circulated the final outline and a sample chapter format to the BALANCED team to use as they draft sections of the Guide. The goal is to have a draft compiled by mid-September 2012 to send to selected PHE implementing agencies for their review and comment.
- Published one new champion story on Filemon Romero from the Philippines via a blog post entitled, “Philippines’ Bohol Island Demonstrates Benefits of Integrated Conservation and Health and Development.” This same story, highlighting the successful BALANCED - Philippines March 2012 study tour (for VIP mayors and officials), was also disseminated in May 2012 on the New Security Beat blog.

- Collaborated with WWC’s Environmental Change and Security Project (ECSP) on the development of Tanzania PHE videos and a FOCUS article about the BALANCED Project work in Tanzania. Although technically these are WWC-ECSP and *not* BALANCED products, they will showcase important BALANCED experiences and lessons learned.
- The BALANCED Deputy Director Edmond produced two CI-hosted blogs that highlighted different PHE approaches, one was entitled “Promoting Gender Equality through Conservation” for International Women’s Day, and the other was titled “Linking Freshwater Conservation and Human Health” and was released for World Water Day.
- During this period, we provided updates to the BALANCED Advisory Committee members about Project activities and the results of the mid-term project planning meetings that had taken place in September 2011. We also collaborated with various Advisory Committee members on the HOPE-LVB project (Jason Bremner and Lynne Gaffikin) and from WWC (Geoff Dabelko) on the development of videos and on a FOCUS article on the Tanzania PHE activities. Jason Bremner (PRB) and Nancy Harris (JSI) also delivered technical presentations at the June 2012 PHE course hosted by CRC and CI.

#### Results from Activity 2.1:

- 2 training guides (PHE CBD Training Manual and PHE Adult PE Training Manual) (2.1)
- CBD/PE Reference Guides for PHE CBDs and PHE Adult PEs ) (2.1)
- 1 champion story/profile (2.2a)
- 1 blog (2.2a)
- 1 technical report Philippines BMS (2.2a)
- 1 peer-reviewed journal article (TZ BMS) (2.2b)

## **2.2 Organize existing and new knowledge for PHE**

As mentioned above, the BALANCED Project moved to a more “maintenance” type effort with the PHE Toolkit after the mid-term strategy meetings. As such, only key “new” resources were uploaded as they become readily available and as they became “known” to the team. Meanwhile, the team continued to “promote” the PHE Toolkit as a rich and easily accessible repository of the ‘best of’ PHE resources. The success of this promotion is reflected in the use statistics as reported below.

- The PHE Toolkit continued to gain users. Analysis of log file data for the January 1, 2012 to June 30, 2012 period showed an increase in usage of the site and its resources. The number of visits increased to 35,374 from 34,051 in the last period. The number of pages and resources viewed this period also increased 20% to 61,562 from 51,813 previously.

- Between January 1 and June 30, 2012 we uploaded<sup>2</sup> 39 different publications and cross-linked them into multiple sub-tabs on the PHE Toolkit. BALANCED staff also reached out to WWF and the Aspen Institute to upload end-of-project PHE documents and new PHE policy pieces, respectively. The materials fell under the categories/sub tabs of IEC materials, Food Security and Population and Climate Change, and peer-reviewed literature.
- BALANCED continues to monitor the RSS feed that it helped build and that links the PHE Ethiopia network’s library of PHE-relevant publications to the PHE Toolkit home page of the K4Health site [PHE Toolkit](#).
- The Project team continued promoting the Toolkit through various channels, including but not limited to directing to the Toolkit those audiences who receive BALANCED messages via listservs; sending personal emails and communications; directing targeted FP/RH NGOs and donors to the availability of the training manuals and reference guides; collaborating with the WWC to re-broadcast to more general audiences one champion story produced by BALANCED as well as other PHE news items; distributing the Toolkit “marketing” postcards; and including the Toolkit website address on key presentations; etc.

Results for Activity 2.2 include:

- PHE Toolkit uploaded with 39 new resources
- BALANCED Project website maintained, and content updated including the upload of two relevant news items and six technical resources

### **2.3 Share knowledge within the PHE and broader community**

This activity continued to raise awareness of and support for PHE. In the current reporting period, and in line with the BALANCED Communications Strategy, this included sending “news” announcements about PHE initiatives, champion/success stories, (both BALANCED-specific and from the larger PHE/development community) to the global PHE community of practice; presenting at key international conferences relevant to PHE; and reaching new development and conservation audiences through USAID newsletters and the International Poverty and Conservation network. Specifically, we achieved the following:

- Disseminated 11 news items to three primary target listservs—the PHE listserv, Family Planning listserv and the Africa Biodiversity Collaborative Group (ABCG) listserv. Several of these news items were re-transmitted through other channels including the WWC’s New Security Beat and the USAID Frontlines publication. This helped to further broaden our reach. On average, we reached between 700-1,400 people with each news item (see Appendix 1).

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<sup>2</sup> As a result of the September 2011 strategic planning meetings, BALANCED discontinued the Content Management Team but continued to solicit materials from PHE partners and the PHE community in general on a regular basis.

- Posted six technical resources and two news items on the BALANCED Project website (of the latter, one was the PBS video from the “Food for 9 Billion” project featuring PFPI in February 2012, and the other was the EWNRA April 2012 presentation).
- Produced and disseminated a newsletter issue entitled, “How PHE Approaches Contribute to the Millennium Development Goals (MDGs).” During the September 2011 PHE community of practice meeting, the BALANCED team had revised the theme of the newsletter to target policymakers and decision-makers in Rio+20 and other international policy fora in the spring of 2012.
- In light of the mid-term strategy changes, the BALANCED Project placed reduced priority on presenting at international or regional conferences during this period. Nevertheless, through a combination of BALANCED and non-BALANCED (leveraged) funds, BALANCED team members and BALANCED-supported champions made four such presentations:
  - BALANCED connected Shewaye Deribe, EWNRA Project Coordinator and recipient of BALANCED seed grant, to the Aspen Institute, who invited him to serve on a Women, Population and Access to Water panel held in Washington, DC on April 18, 2012. Deribe spoke on ENWRA’s integrated, community-centered approach to restoring watersheds in Ethiopia and lessons learned to date regarding community engagement, incorporating gender and improving health and conservation outcomes (subsequently, CI’s Ashley Rosenbaum authored a blog on the panel discussion and BALANCED posted the blog on the PHE listserv.) During this trip, Deribe also shared EWNRA’s experience at the Ministerial Dialogue on Sanitation and Water organized by UNICEF and the World Bank and held at the Pan America Health Organization on the 19<sup>th</sup> of April 2012. This participation was supported partially through the existing BALANCED subgrant of EWNRA with PFPI.
  - Using leveraged funds only, Dr. Richard Pollnac re-analyzed data from the BALANCED-funded Year 3 research in the Philippines and adapted it for his presentation at the February 2012 AAAS (American Association for Advancement of Science) meeting/workshop in Vancouver, British Columbia. All costs associated with this presentation were covered by non-BALANCED (leveraged) funds.
  - Joan Castro, BALANCED PTAL also leveraged non-BALANCED funding to present at two international conferences in collaboration with other PHE partners and practitioners:
    - Represented PFPI at the People and the Planet conference in London, England in March 2012 by delivering a PHE presentation entitled, “New Knowledge towards Solutions for Food Insecurity in Coastal Philippines.” This presentation was based on the IPOPCORM Project accomplishments in increasing food security and improving access to family planning from 2002-2007 (leveraged vs. BALANCED-funded activity)
    - In June 2012, PRB and BALANCED leveraged their funds to support Joan Castro’s representation at the Rio + 20 United Nations Conference on Sustainable Development. She participated in three events: a) the Forum on Science, Technology and Innovation for Sustainable Development where she made a presentation on “Human Wellbeing and Population Trends”; b) the Royal Society session on the role



of global population in sustainable development in which she presented on how population and environmental agendas can be mutually supportive; and c) the Population and Climate Change Alliance session on Human numbers and human rights – do we dare to talk about it? An article on the Huffington Post UK politics page highlighted Castro’s commitment to improving youth with access to sexual and reproductive health information, and promoting the importance of young people as stewards of the health of the environment and of their own physical/sexual/reproductive health (leveraged vs. BALANCED-funded activity)

- As part of the communications strategy outreach to new donors, promoted the BALANCED Project to donors such as the Summit Foundation, Wallace Genetic Foundation, the World Bank, international youth donors such as the UN Population Fund (UNFPA) and the UN Development Programme (UNDP).

Results for Activity 2.3 include:

- 1 electronic newsletter published and disseminated (2.2a)
- Leveraged approximately US \$11,000 for travel to international conferences (Vancouver, London, Rio) (SO2).
- 4 conference presentations by BALANCED team members (2 by Castro, 1 by Pollnac) or other PHE champion/partners (1 by EWNRA) (2.2a)
- 2 field sites (Ethiopia, Philippines) producing results that can feed into KM activities (3.3)

**IR2 Priorities for next period (July 1 to December 31, 2012)**

The individual listed in bold is the lead/individual responsible for bringing the activity to completion, followed by the names of other individuals contributing to the activity.

- Finalize and disseminate one additional training manual: “How to Develop Integrated PHE Messages and IEC Materials” (**Linda**, Joan, Lesley)
- Finalize draft of adapted Designing for Behavior Change curriculum and disseminate Word file to WWF and DCC workshop participants.
- Produce a draft of the PHE Implementers Guide that pulls together lessons learned from PHE implementation. This Guide will be finalized and disseminated in Year 5. (**Janet**, Linda, Joan, Elin)
- Continue to contact peer-reviewed journals for acceptance of BALANCED technical reports: 1) “Designing Population, Health, and Environment (PHE) Models Based on Local Context—Experience from Tanzania and the Philippines,” a cross-country comparison (**Elin**)<sup>3</sup>; and 2) “An Evaluation of Projects Integrating Reproductive Health (Family Planning) and Environmental Management Activities in the Visayas Region of the Philippines.” (**Pollnac**)
- Draft the BMS tool for review. (**Elin**, CRC)

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<sup>3</sup> Target journal is Global Public Health

- Draft FOCUS piece on Zambia PHE initiatives in August 2012. (**Linda**, Dale/WCS)
- Draft lessons learned document on EWNRA and WCS seed grants. (**Linda**, Joan) (Q2)
- Continue promoting and uploading new content to the PHE Toolkit. (**Janet**, Bob)
- Identify topic of and begin development of the last issue of the BALANCED newsletter in coordination with USAID PHE Advisor. (**Janet**) (Q2)
- Continue using the PHE Toolkit, BALANCED newsletter, WWC ECSP blog, and other electronic sites and listservs to highlight resources, individuals and organizations and their websites that promote integrated PHE approaches. (**Janet**, others)
- Continue to dialogue with PHE champions and promote them as spokespersons and technical resources, e.g. through listservs, champion stories, word-of-mouth networking, presenters at meetings and conferences, etc. (**Janet**, others)
- Identify opportunities to use non-BALANCED—i.e. fully leveraged funds—to attend and present at regional or international conferences (e.g. EcoHealth 2012 Biannual Conference in October 2012). (**All**)
- On an as-needed, case-by-case basis, solicit Advisory Committee members for input on specific issues and provide them with periodic updates on BALANCED activities/progress. (**Linda**, designee)
- Begin preliminary planning of the Year 5 Close-Out event. (**Lesley**)

### **IR3 Results-oriented PHE field activities implemented in areas of high biodiversity**

The BALANCED Project supports PHE scale-up, replication and start-up activities in countries through a small amount of USAID central funds and additional financing from a mix of USAID Mission and Bureau Buy-ins, leveraged funds from non-US Government donors, and cost share from BALANCED Project partners. The PHE interventions focus mainly on delivery of FP services to communities in BALANCED focus countries that include USAID priority biodiversity conservation areas and USAID First Tier Intensive Focus countries.

#### **Accomplishments**

Building on the activities and achievements from the first half of Year 4, the BALANCED Project continued to facilitate the replication of results-oriented PHE field-based activities in Tanzania, the Philippines, Ethiopia, Zambia, Uganda and PNG. The key to BALANCED assistance during this reporting period was to build capacity of our partners to the point they are able to effectively implement and sustain PHE activities on their own. While some countries were ready for this transition, others—especially the newer seed grant recipients—continued to need financial and technical support to fine-tune their PHE model to the point where they could replicate it on their own.

### 3.1 Scale-up PHE activities in Tanzania

In Tanzania, BALANCED is supporting the integration of family planning into CRC's on-going work through TCMP and its *Pwani* Project, which implements integrated PHE environment activities in villages surrounding Saadani National Park. These efforts are supported by the USAID Tanzania Mission with PEPFAR (President's Emergency Plan for AIDS Relief) and biodiversity conservation earmark funds. BALANCED provides modest funding to support the integration of community-based family planning (CBFP) into TCMP's integrated activities—specifically by supporting community-based distribution, peer education, behavior change communication and advocacy for District governments to adopt the PHE approach. Since Year 3 of the Project, our PHE activities have been conducted five wards— Mkwaja, Mkalamo, Mwera, Mikinguni, and Kipumbwi—in the Pangani and Bagamoyo districts. In Year 4, our focus turned to monitoring these activities and strengthening our BCC efforts to increase demand for FP services, while building the capacity of TCMP and local governments to adopt this integrated approach on their own.

In the second half of Year 4, the following was accomplished:

- In February, Sean Peoples and Michael Miller from the WWC visited Pangani to make a series of short films about the PHE activities implemented by the *Pwani* and BALANCED Projects. Interested in the linkages between family planning and environment, they met with Pangani district officials, the UZIKWASA team, and village leaders. They also interviewed PEs and CBDs to learn about FP information and services and to hear from individuals involved in fuel efficient stoves/ovens, beekeeping, theater for development, village multisectoral AIDS Committee (VMAC), and SACCOs in Sakura, Sange, Mkwaja and Mkalamo. The videos will be released later this year. To complement the videos, the team also prepared a short paper for the WWC FOCUS series. The paper is currently being edited by the WWC staff.
- In March, the new Tuungane (Let's Unite) Project led by The Nature Conservancy (TNC), Pathfinder International, and the Frankfurt Zoological Society (FZS) sent four of their staff members from Kigoma on a study tour to Pangani. The purpose was to provide participants with an overview of PHE and learn how the *Pwani* and BALANCED Projects are implementing PHE in Pangani and Bagamoyo. The participants were interested in learning about how an integrated project is managed, how staff members are trained, how work plans are shared, what the benefits and challenges are, etc. The three organizations have created a partnership to address PHE issues in the Kigoma and Mpanda districts surrounding Mahale National Park on the shores of Lake Tanganyika.
- BALANCED staff conducted regular monitoring and mentoring visits with existing CBDs, PHE providers, and adult PEs to improve the effectiveness and impact of the PHE community-based distribution and peer education outreach and service delivery systems, and to ensure trainees refer and distribute modern contraceptives as well as provide integrated PHE messages.
- PHE IEC materials (T-shirts and three radio spots) based on the revised IEC messages were finalized. The t-shirts will be distributed to all of the PHE volunteers in Pangani and Bagamoyo to identify them as PHE volunteers and to promote the PHE IEC theme of protecting one's natural resources as well as one's own personal health. Three radio spots on

PHE and family planning were pretested in the community and will be aired on the Pangani FM radio station starting July 2012. Pangani FM was started by UZIKWASA—a partner on TCMP’s HIV activities—who uses entertaining radio dramas to educate the community about HIV/AIDS. The PHE radio spots will be aired between the radio dramas and will reach Pangani and Bagamoyo districts as well as parts of Zanzibar.

- The BALANCED team attended the monthly National Family Planning Working Group (NFPWG) meetings held regularly by the Ministry of Health (MOH) in Dar es Salaam. This is very important as it allows TCMP to discuss highlights and benefits of its PHE with MOH officials and key USAID collaborating agencies working on larger FP projects.
- The EAC and Tanzania PHE Coordinator took a BALANCED PHE PE job aid and adapted it to the Tanzania context for use by Project PEs as they interact with fellow community members. The job aid has been translated into Swahili and will be printed in the first quarter of Year 5. The *Reference Guide for PHE Community-based Distributors and PHE Adult Peer Educators*, previously developed by BALANCED, has also been translated to Swahili and will be a companion to the job aid.
- The team, as well as two government officials and PHE leaders in Pangani District (Dr. Ole Tabitha Owenya), continued to conduct advocacy and planning meetings to integrate PHE into the Pangani District agenda. The District has yet to formally adopt PHE as a strategy in its development plan and budget. However, advocacy efforts continue.
- The Tanzania PHE Coordinator traveled to Rhode Island where he attended the Building Leaders for Coastal Community Resilience: Integrating Population, Health and Environment course (see Activity 1.6). During the course, he and two other Tanzanian participants (from the *Pwani* Project and USAID) designed a hypothetical PHE project on Zanzibar. The project design could be the basis for a future Zanzibar PHE proposal.
- Finally, the team started planning for a second BMS. With two data sets (2009 and 2012), we expect to assess the impacts of the BALANCED PHE activities in the Mkwaja and Mkalamo wards by measuring changes in perceptions and behaviors. As part of the survey preparation, the team recruited two graduate students who will lead the field work in Tanzania (Cathy McNally from URI and Emilia Myers from Tulane University School of Public Health & Tropical Medicine). The team prepared and translated the survey and focus group questions, obtained approval from the URI Institutional Review Board, and prepared an interview guide, coding guide, and sampling instructions. The team also recruited an on-the-ground team that will conduct the survey. The survey field work will commence on July 16, 2012.
- Twenty nine of the PHE YPEs are currently active in PHE work (one woman moved to another non-PHE village after getting married). So far, the youth have conducted 24 PHE counseling sessions in their target communities on the links between humans and the environment. They have also distributed 12,000 condoms.

As part of the Year 4 workplan, BALANCED had planned to train accredited drug dispensary outlets (ADDOs) in Bagamoyo and Pangani on PHE linkages and update them on their RH/FP skills. Management for Sciences in Health (MSH), the organization that worked closely with the Tanzanian Food and Drug Authority (TFDA) to develop the accreditation process for the ADDOs and train these pharmacy outlets, was very supportive of the BALANCED Project

providing refresher training on reproductive health, family planning and PHE linkages to ADDOs in Pangani and Bagamoyo. According to MSH, there are plenty of accredited ADDOs in Bagamoyo and a growing number in Pangani. However, when planning for the workshop, the team found out that most of the ADDOs are located in urban or semi-urban centers and in the villages where BALANCED and *Pwani* work, there are only three fully accredited ADDOs. As a result, we decided to cancel this activity.

#### Results from Activity 3.1

- 1 person trained on Building Coastal Community Resilience: Integrating Population, Health and Environment in PHE (Rhode Island training) (See Activity 1.6)

Field based PHE results are:

- 307 New users of FP services
- 2,251 cycles of pills distributed
- 924 current users of FP services that visited a CBD to renew their supply of pills or condoms
- 1,038 clients referred by PEs and PHE providers to CBDs for FP methods
- 1,692 individuals counseled by PEs and CBDs with environmental messages (fuel efficient stoves and SACCOs)
- 4,160 male condoms distributed by CBDs
- 12,000 condoms distributed by YPEs
- 168 fishermen reached through focus group meetings on HIV/AIDS prevention
- 8 fuel efficient stoves were built/sold by the Mkalamo PHE community facilitator upon request from fellow villagers

### **3.2 Scale-up PHE activities in the Philippines (Mission Buy-in)**

The United States Agency for International Development/Philippines provided a US\$1,300,000 buy-in to the USAID Washington-funded BALANCED (*Building Actors and Leaders for Advancing Excellence in Community Development*) Project to support results-oriented PHE field activities in biodiversity-rich bioregions of the Philippines over the period from December 2010 – August 2013. Funding originated from two sources within USAID/Philippines: The Office of Health (OH - \$500,000) for FP and outreach components (Intermediate Results/IRs 1, 2 and 3), and the Office of Energy, Environment and Climate Change (OEECC - \$800,000) for outreach, fisheries management and livelihood components (IRs 4 & 5 and some contributions to IR3). With OH and OEECC funding support as the basis, this Project has three distinct phases:

- Initial phase with OH funding support from December 2010 to September 2011 (9 months), which is completed.
- Overlapping OH and OEECC funding support from October 2011 to December 2012 (15 months), with OH funding for FP activities ending December 2012
- End phase with OEECC funding support from January to August 2013 (8 months)— however, supplemental field support is being considered to extend the OH-funded FP activities until August 2013

The BALANCED-Philippines activities are implemented in five provinces (Batangas, Occidental Mindoro, Oriental Mindoro, Bohol and Leyte) in two important marine eco-regions—Verde Island Passage (VIP) and the Danajon Bank bio-regions. Following are the highlights of the accomplishments of these field support activities. These highlights are derived from Quarterly Progress reports for activities from January to March and April to June, 2012 that were previously submitted to USAID/Philippines and USAID Washington (see Appendix 2 for copies of the two BALANCED -Philippines quarterly progress).

- A study tour was conducted from March 12-15, 2012 in Bohol, an island south of Manila, situated on the southern side of the Danajon Double Barrier Reef. It provided experiential learning opportunities on PHE for a total of 12 mayors, municipal administrators, municipal health officers and development planners from the VIP. The field visit portion of the Study Tour was hosted by the Mayor of Ubay and the Mayor of Bien Unido. Study tour participants visited the municipalities of Ubay and Bien Unido, the island of Bilangbilangan (located off the coast of Bien Unido) and the surrounding marine protected area (MPA) in the vicinity of the Danajon Bank. The study tour also contained an international South-to-South exchange component, with the participation of two community-based development professionals from PNG. Ruby Yamuna from Tree Kangaroo Conservation Project (TKCP) and Lillian Bago from CI's Coral Triangle Program/PNG, They participated in the study tour in order to see PHE implementation firsthand.
- The BALANCED-Philippines BCC strategy was revised and re-submitted to USAID. After much delay in getting the PHE and health messages approved by the Philippines Department of Health (DOH) and USAID/Philippines, the "3 Tips Brochure" was printed and will be distributed in July 2012. PFPI and CI will develop additional IEC materials and activities to complement and expand the reach of the messages in the "3 Tips Brochure" during the next quarter.
- There was a landmark event in Hindang Municipality (Province of Leyte) that included the passing of a PHE Ordinance mandating the local government unit (LGU) to allocate funds for PHE whether through the regular budget or through the development of funds beyond the electoral term of the current LGU officials. It is a milestone for the BALANCED-Philippines Project, since it is the first time for the Project and for the PHE arena that a local government unit has passed a PHE Ordinance. Other municipalities are initiating PHE ordinances as well.
- PFPI completed the MPA Management Effectiveness Assessment (MEAT) of 39 MPAs in Bohol and is validating the results of the assessment in order to select the three weakest MPAs to begin strengthen during the next quarter. CI/Philippines will finish its assessment of 70 MPAs in the VIP, validate the results and select the weakest MPAs to strengthen early in the next quarter.
- A conservation and enterprise workshop was conducted by Brian Crawford and Elin Torell (CRC) for BALANCED-Philippines staff and representatives from government partners and local NGOs. Participants learned how to use tools for assessing markets, to decide to proceed or not with the enterprise and to identify courses of action in developing an environmentally-friendly enterprise. The training also helped the participants critically evaluate different livelihood options to understand which might have a positive impact on both people and the environment. Based on what was learned from this workshop, PPFPI and CI/P will develop select enterprise activities in key target sites.
- Finally, Ms. Marilyn Alcanices from the Provincial Agriculture Office in Oriental Mindoro Province attended the June 2012 PHE and climate change leadership course organized by CRC and CI at the University of Rhode Island. Ms. Alcanices is one of the technical leads in the implementation of the Strategic Intervention and Community-focused Action towards Development (SICAD) program of the province and a critical partner within the VIP, thus her participation was very strategic for advocating PHE within the region.

- An additional 73 peer educators (13 in **new** sites and 60 in **maintenance** sites) were trained making a total of 904 PEs trained to date. During this quarter, an assessment of the PEs indicated that only 663 of the PEs are active (those who have submitted reports for a least two consecutive months). This represents a 27 percent dropout rate, which is good to know for future scale-up of PHE in these Provinces. Every effort will be made to resuscitate some of the dropouts as well as to provide the support that is needed by functioning PEs in order to keep them motivated and active.
- An additional 98 CBDs were trained (12 in **new** sites and 86 in **maintenance** sites), making a total of 628 CBDs trained.
- In order for CBDs to expand access to family planning and serve as FP service delivery points, cost recovery systems would be set up with a private sector supplier such as Alphamed or DKT, to make these FP supplies available to both the CBDs and the rural health units (RHU), if they lack FP supplies. During the June 2012 field visit to several **new** and **maintenance** sites by the BALANCED Project Director and Tere Carpio, USAID/Philippines, it was observed that a large number of these supply systems had not been set up or were not functioning for a variety of reasons. As a consequence, only 38 percent of the trained CBDs had FP supplies to sell to the community. Efforts to resuscitate these agreements or find different suppliers commenced immediately. Every effort will be made in the coming quarter to get the supply system back on track.

Because of the challenges in project implementation encountered during Bruce and Carpio's field visit, USAID/Philippines had questions on some of the approaches being used to expand access to family planning to the Project's target audiences. Therefore, USAID/Philippines decided to conduct a Project Implementation Review (PIR) that would allow them to take stock of where the BALANCED-Philippines Project is viz-a-viz its plans and goals, to assess the strengths and weaknesses of its approaches, and to identify the challenges and opportunities for implementing the OH-funded activities as part of the scaling-up of PHE interventions in the VIP and Danajon Bank bio-regions. The PIR is scheduled to take place on July 26th and 27th. The results of this meeting will be included in the next semi-annual report.

### **3.3 Provide seed grant and technical support to EWNRA in Ethiopia**

In October 2009, BALANCED awarded EWNRA a two-year seed grant to mainstream FP services into its ongoing landscape-based "*Integrated Wetland and Watershed Management Project*" in Agelo Shenkora and Wichi watersheds. This project covered ten kebeles<sup>4</sup> within the Metu Woreda, Ilu Aba Bora Zone, Oromia region (South west Ethiopia) serving a total population of 13,000 people. It utilized the PHE approach to ensure environmental wellbeing, improved food security, poverty reduction or livelihood enhancement, better water and sanitation practices, and awareness on HIV/AIDS and family planning. The project was scheduled to end on September 30, 2011, however gains owing to the US dollar to Ethiopian Birr exchange rate resulted in a budget surplus and a subsequent no-cost extension until May 2012.

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<sup>4</sup> A kebele has around 5,000 households



Together with Shewaye Deribe the EWNRA project coordinator and Kristen Stelljes the PHE Fellow, the EAC visited the Metu project site from February 13 to 16, 2012 to monitor the status of seed grant activities, provide technical support on strengthening the FP components of the project and conduct a seed grant close-out interview with EWNRA staff in the project site.

In summary, the EWNRA seed grant achieved the following results: 16 EWNRA, local government and NGO staff were trained on CBD/PE systems. Some of the workshop participants in turn trained 36 PHE Providers and 102 adult PEs (47 male and 55 female) to participate in the activities. The PHE providers are small store owners who provided information on PHE, FP and natural resource management (NRM) to community members and sell condoms, pills and emergency contraception pills (ECPs). Potential new FP users were referred to the government's Health Education Workers (HEWs) for counseling and screening. By the end of the project, the PHE providers had sold a total of 672 packs of combined oral contraceptives, 672 packs of emergency pills<sup>5</sup>, and 3,600 packs of condoms, which were supplied from DKT Ethiopia. While these numbers are not huge, they are significant. HEWs (located in health posts) and government clinics provide free FP services. There is no problem with availability of contraceptives. Rather, the problem lies with accessibility. For families living in the remote project sites, the nearest health post is on the average an hour away. The fact that the PHE Providers have been able to sell FP methods indicates there is a need for access to methods beyond the government service points. The presence of the PHE Providers has reduced the distance to access FP commodities from 8 kilometers to 2 to 3 kilometers.

At the micro-watershed level, the APEs sensitized the community on the linkages between family size, family wellbeing, and environmental sustainability. They conveyed these messages to over 20,000 community members and fellow farmers during group activities, on the way to the market, at public gatherings and most frequently at morning coffee ceremonies where neighbors come together to share hot coffee and chat about their social life.

In addition to the APEs, we trained 36 YPEs (14 male, 22 female) to talk to their peers about the relationship between population, environment and people's well-being. EWNRA also galvanized 80 volunteer youth (43M and 37F) to form four PHE clubs. Forty of these youth were trained on the basics of writing and performing drama and subsequently conducted community drama on PHE messages at different community events reaching 1,269 people in the Wichi watershed. Although the BALANCED seed grant to EWNRA has ended, ENWRA will scale-up these dramas to Agelo-Shenkora and other villages.

In addition to youth community drama activities, a poster depicting messages on the positive impact of smaller families on the environment and people's wellbeing was developed and distributed throughout the project sites.

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<sup>5</sup> The disproportionate number of ECPs versus oral contraceptive pills sold was a little concerning. However, ENWRA staff explained that youth normally do not go to the HEWs or government clinics for contraceptives, and the PHE Providers were the only ones in the area that carry ECPs. Once youth learned that the PHE providers sold ECPs, even youth from neighboring woredas would purchase them. BALANCED stressed the importance of talking to the youth about family planning to discourage last minute "accidents". With time, this advocacy will increase the number of you seeking FP from the HEWs.

This BALANCED seed grant provided EWNRA with \$32,500 in funding over a period of three years. While this was a relatively small grant, the achievements were big in terms of increasing access to FP commodities and winning the minds of the community and government decision-makers on integration. Among the best achievements are the lessons learned about what works and what does not work. Many other NGOs have learned from EWNRA, which has received a total of 185 visitors to their project sites. EWNRA is pleased with its achievements and is, therefore, scaling-up the integrated approach to additional kebeles with funding from other donors, most recently the Barr Foundation. EWNRA decided to retain the PHE Coordinator to continue monitoring and supervising BALANCED-trained community volunteers, and it plans to continue advocating for PHE within Ethiopia and beyond.

The success of the project was attributed to the devoted staff. They were careful not to raise the expectations of stakeholders. Trust earned was through transparency with decision-makers and the community, including openness about their financial plans. During a government-NGO forum sponsored by Christian Relief and Development Association, EWNRA presented its partnership with government as a best practice. They explained that the project was participatory in nature from design to implementation.

### Results from Activity 3.3

- Final report on ENWRA seed grant, including results of the project and lessons learned.

### **3.4 Provide seed grant and technical support to WCS Zambia**

BALANCED is providing seed grant funding and technical assistance to WCS/Zambia to integrate family planning into its conservation and livelihood activities in the Luangwa valley. WCS implements the Community Markets for Conservation (COMACO) Program to provide sustainable sources of alternative incomes and other incentives for conservation to families living around Zambia's national parks in the Luangwa Valley. It recognizes that integrating FP information and services in WCS/Zambia's livelihood and wildlife/natural resources conservation program can contribute to a better life for the nearly 55,000 families they serve

During the last reporting period, the BALANCED EAC facilitated a four-day YPE TOT for 10 participants—eight COMACO extension officers and two nurses from the nearby MOH zonal health center. The 10 YPE master trainers (8 from WCS and 2 from MOH), in turn, trained 220 youths (ages 15 to 24 years) from the three regions of Mfuwe, Chama and Lundazi on youth peer education.

Also, the EAC traveled to Zambia on March 9 to 21, 2012 to monitor the progress of the BALANCED seed grant project and help WCS identify the key success factors and barriers that influence behavior change to ensure that project and behavior change activities are implemented to achieve maximum impact. Recognizing the factors that lead to success as well as those that can be barriers to successful behavior change enables project managers to address these factors and their potential impacts on long-term, sustainable behavior change. Toward that end, Dr. Hernandez facilitated a three-day DBC workshop with seven extension officers (male) and one Ministry of Health (MOH) nurse (female). During the workshop, the participants developed a

questionnaire, a DBC framework and IEC messages for practicing the behavior change methodology. In the next reporting period, WCS will conduct a DBC questionnaire to identify key factors in the success of or barriers to their PHE activities.

The EAC also monitored the PHE activities with WCS staff and made recommendations for adjustments as needed. He also provided input on their Better Life Booklet and encouraged WCS to include the tagline “*Planned families and healthy ecosystems for food and income security*” on all IEC materials. He also helped staff develop a survey that would be conducted among the APEs, the results of which will determine the topics to be covered in the upcoming PE refresher training. Lastly, Dr. Hernandez helped staff select the IEC messages that would be incorporated into the PE job aid, prior to its translation into the local language and distribution to the PEs.

Subsequent to the EAC’s visit, WCS conducted the following activities:

- Printed and distributed copies of the Better Life booklet to a total of 2,768 producer groups from COMACO’s operational areas. The Better Life booklet is read and disseminated by trained lead farmer and producer group leaders who are responsible for carrying out FP sensitization among the other COMACO farmers. These IEC materials included information on the FP methods available and on reproductive health in general.
- Obtained the MOH endorsement for COMACO’s PHE program in the districts where it is currently operating. This allows COMACO to collaborate fully with the MOH through the District Health Management team as well as act as an intermediary between the community members and the clinics. This endorsement also allows for joint trainings and monitoring activities on the distribution and use of the FP methods available within each district.
- Conducted refresher trainings for 308 APEs in Mambwe, Lundazi and Chama. The purpose of these trainings was to update the APE’s skills on PHE integration, human fertility and reproduction, contraceptive methods, sexually transmitted infections, and effective peer communication skills and reporting.
- Developed a WCS FP Compliance plan required by USAID, which stipulates how staff on the project must behave, and how to handle any violations to the regulations set forth.

#### Results from Activity 3.4

- 8 people (7 male, 1 female) trained on DBC (1.1)
- 308 adult PEs (188 male, 120 female) re-trained on PHE and RH/FP topics (1.1)
- 1 trained WCS staff conducted the APE refresher training (1.2)
- Zambia MOH endorsement for COMACO Program (1.3)
- Technical assistance provided on IEC, job aids and DBC (1.4a)

### **3.5 Provide seed grant and technical support to Woodland Park Zoo for TKCP Project in PNG**

BALANCED is providing seed grant funding and technical assistance to the Woodland Park Zoo's TKCP program in PNG. The 18-month seed grant will support the implementation of the "Healthy Village, Healthy Forest: Integrating Healthy Family Planning and Conservation in Papua New Guinea" project and is building TKCP's capacity to integrate and implement a community-based family planning (CBFP) initiative into their conservation efforts. The project will focus on one region in the Yopno, Uruwa, and Som (YUS) Conservation Area (YUS is the primary watershed in the region) to achieve the following objectives:

- Increase awareness among YUS families of family planning and its role in health, food, and environmental conservation
- Improve access and use of FP methods and services

During this reporting period, PFPI conducted two in-country support and assistance visits to TKCP project sites. The first visit was made by Dr. Joan Castro, BALANCED PTAL from February 26 to March 4<sup>th</sup>. During this visit, she conducted a four-day workshop on PHE and how to develop a BCC strategy and integrated messages for the PHE activities. Workshop participants included five staff from the Province, District health departments and YUS. During the workshop, participants developed a BCC plan, drafted IEC messages, translated them into the local language (tok pisin) and pretested the messages amongst themselves and their friends, colleagues and family members. These IEC messages were incorporated into a poster, which was developed by PFPI staff due to the very limited graphic design capacity in PNG.

Dr. Castro traveled again to PNG from May 27 to June 7, 2012 to conduct the TOT CBD/PE workshop, set up the PE system and finalize the IEC messages and materials. Ten participants attended the TOT—seven HEWs from the TKCP project areas in the YUS region; two HEWs from the provincial and district Family Health service; one Conservation International in Milne Bay staff person (who previously attended the Study Tour in the Philippines) and one TKCP staff person. The CBD/PE referral system was also established linking the services in the field with the provincial and district health post for FP commodities. For long-term methods, PFPI facilitated a link with Marie Stopes International (MSI), which can provide for implant, interuterine device (IUD) and vasectomy methods. Also leveraged from MSI were IEC materials such as FP brochures, flipcharts, and comics for distribution at the health posts and by the PEs in the communities. TKCP also gathered existing FP IEC materials from the health department and other FP organizations for distribution and/or replication. The IEC messages developed during the first TA visit and pretested again prior to the May trip were further improved and refined, resulting in the following messages:

#### *FOR A HEALTHY FAMILY, HEALTHY FOREST AND PRODUCTIVE LAND (PHE theme)*

- Plan Your Family
- Have Your Children Immunized
- Don't Burn Grasslands
- Don't Hunt In Conservation Area

Since Dr. Castro's last TA visit, a memorandum of understanding (MOU) between TKCP and MSI has been drafted for the provision of long-term FP methods to YUS project sites. The MOU is awaiting signature from both parties. Meanwhile, arrangements have been made with the HEWs from Gangalut and Sapmanga—two key health centers located in the YUS region—as the strategic venues where MSI and TKCP can provide future permanent and surgical FP methods. In the meantime, the trained YUS community HEWs are educating the community about long-term methods and collecting a list of interested FP users. The IEC poster will be printed and distributed during the next reporting period. Also, the trained TOT participants will recruit and train APEs during the months of August and September 2012.

A streamlined version of the BMS instrument was also introduced for TKCP to gather additional changes in behavior in the community as a result of the project. The project team arranged for the APEs to use the form to collect data in the village every quarter and during their community meetings. The completed mini-BMS form will then be submitted to the Community Health Worker who will report the results to TKCP every three months. This will be in addition to the existing Nation Health Information System-Aidpost Monthly Summary data tally sheets that are collected for the Morobe Provincial Health Division.

Because of the short duration of the project and the reduced seed grant funding, the YPE TOT will not be conducted. Instead, YPEs will be identified and trained by the health workers who participated in the TOT with supervision from BALANCED key staff in the next reporting period.

#### Results from Activity 3.5

- TKCP incorporating PHE CBD/PE system into their organization (SO-1)
- 5 people trained on BCC and IEC materials development (1.1)
- 10 people trained on PHE PE/CBD systems (1.1)
- 2 technical assistance visits to TKCP (1.4b).
- TKCP replicating CBD/PE systems and BMS into their activities in PNG (3.1)

#### **3.6 Provide seed grant and technical support to VEDCO and Bwindi Mgahinga Conservation Trust in Uganda**

The BALANCED Project is providing seed grant funding and technical assistance to two organizations in Uganda to incorporate family planning into their conservation and health project activities –Bwindi Mgahinga Conservation Trust (BMCT) and Volunteer Efforts for Development Concerns (VEDCO). During this reporting period, the BALANCED EAC travelled to Uganda to provide technical assistance to both of these seed grant recipients.

#### BMCT

BMCT was established in March 1994 with a capital endowment fund of US \$ 4.3 million from the Global Environmental Facility to provide long-term reliable support for projects promoting

research or conservation of biological diversity and sustainable use of natural resources in the Mgahinga Gorilla National Park (MGNP) and the Bwindi Impenetrable National Park (BINP). It is also tasked with promoting the welfare of neighboring communities. BALANCED is providing seed grant funding and technical support to BMCT to implement the integrated project, *Integrated Community Conservation and Development for a Healthy Population around Bwindi Conservation Area*. The project enables communities in the Kanungu district to manage their resources in ways that improve their health and livelihoods, while conserving the Bwindi critical ecosystem upon which they depend.

Two BMCT staff persons attended the December 2012 PHE Program Design workshop held in Senegal. During this reporting period, the EAC traveled to Uganda and conducted a TOT on CBD/PE systems for a total of 19 (11 male, 8 female) BMCT staff, government partners and community trainers on January 16 to 20, 2012. Dr. Hernandez also helped BMCT to fine-tune its detailed implementation plan (DIP) to accommodate for the reduction in funding resulting from losses incurred from the fall in the Shillingi to US dollar exchange rate. During this process, it was agreed that MOUs will be developed with Pathfinder International's Reproductive Health Uganda and MSI for FP referrals and a source of FP commodities. It was also decided not to sell contraceptive methods because existing government village health teams (VHTs) already distribute FP commodities for free. The VHTs will be trained as PEs cum CBDs who distribute FP commodities albeit for free. Since the EAC's technical assistance visit, BMCT accomplished the following during this reporting period:

- Collaborated with Pathfinder Uganda, CTPH and the MOH to secure IEC materials for distribution to the community change agents.
- Conducted 50 community sensitization meetings in the four parishes of Barangara, Kyeshero, Rutendere and Eastern Ward. A total of 1,136 people were reached during these IEC meetings.
- The baseline survey and training of APEs will occur during the next reporting period.

### VEDCO

VEDCO is an indigenous NGO established in 1989 as a self-help organization working with other relief organizations to support communities to access basic needs, particularly safe water, adequate food and health care. VEDCO is currently implementing a five-year strategic plan (2010-2014) whose goal is "equitable wealth creation among farmers in Uganda." BALANCED is providing them with seed grant funding and technical assistance support to implement the *Improving livelihoods through increased access to Reproductive Health services among farmers* project. The goal of the 18-month seed grant support is to improve access to and use of family planning in the agriculture-dependent districts of Nakaseke, Moyo and Yumbe. The integrated PHE intervention has the potential to reach a total population of 529,221.

In December 2011, two VEDCO staff participated in the BALANCED PHE Program Design workshop that took place in Senegal. During this reporting period, the EAC conducted a TOT on CBD/PE systems with VEDCO from January 23 to 27. A total of total of 15 (7 male, 8 female) VECO staff and community trainers attended the workshop. After the workshop, the EAC also

helped VEDCO refine its PHE implementation plan. Subsequent to Dr. Hernandez’s technical assistance visit, VEDCO implemented the following:

- Conducted three inception meetings in each of the districts where the seed grant activities are being conducted. The meetings were to increase the community’s understanding of the value of PHE integration to their families and communities. A total number of 68 people (52 male, 16 female)—members of the local government, parish and at the village level—attended the meetings.
- Trained 65 (36 male, 29 female) APEs. Of these, 50 APEs are actively involved in providing information on PHE linkages and FP to the community.
- Drafted an MOA with the Uganda Health Marketing Group for CBDs to sell FP commodities at subsidized prices. Meanwhile, the project’s APEs will refer potential FP clients to the MOH clinics for screening and FP methods. Simultaneously, the project is working with the MOH to translate the referral forms into the local language.

#### Results from Activity 3.6

- 34 (18 male, 16 female) participants (15 from VEDCO and 19 from BCMT) trained on PHE CBD/PE systems (1.1)
- 65 (36 male, 29 female) VEDCO APEs trained on PHE PE/CBD systems (1.1)
- 8 VEDCO trainees training APEs (1.2)
- 2 technical assistance visits (1 to VEDCO and 1 to BMCT) made (1.4b)
- VEDCO replicating CBD/PE systems into their activities in Uganda (3.1)

### **3.7 Implement recommendations from the Glacier Melt Study**

The BALANCED Project received Buy-in funds from the USAID Asia Bureau to address selected recommendations stemming from the *Changing Glaciers and Hydrology in Asia: Addressing Vulnerabilities to Glacier Melt Impacts* report. In this reporting period, activities contributing toward this goal included:

- 1) Finalized a follow-on report with an expanded issues analysis and recommendations to USAID for integrated, multi-sectoral programming in USAID-supported Asia countries at highest risk for health and livelihood impacts from glacier melt (GM); and a matrix of current and emerging USAID Mission strategies and priority areas of investment in the countries identified. After receiving the final report, however, Mary Melnyk requested additional semantics changes. These were completed and the report resubmitted to her for final approval. Dissemination of the report remains pending receipt of this approval.
- 2) Finalized and received USAID approval of a scope of work to develop a practical, program planning tool for USAID technical and program staff (across multiple sectors) to use in guiding the design of holistic or integrated approaches to GM that address both climate-related variability *and* non-climatic change factors that predispose individuals

and communities to GM vulnerabilities (activity to be started in first quarter of next reporting period).

#### Results from Activity 3.7

- N/A<sup>6</sup>

### **3.8 Secure funding for PHE implementation for at least one country**

In Year 3, the BALANCED Project received \$500,000 in field support from the USAID/Philippines/OH for a two-year project to strengthen and scale-up the PHE approach in the VIP and Danajon Bank bioregions. The OH funds were directed at expanding access to FP information and services in these two key bio-regions. In the first half of Year 4, USAID/Philippines/ OEECC awarded the Project \$800,000 to scale-up CRM activities in the OH-funded PHE sites until August 2013. The OH-funded activities were scheduled to end October 2012. Thus, during this reporting period, USAID/Philippines OH requested that we submit a concept paper for \$300,000 of supplemental funding to extend support to the current as well as the new FP activities through August 2013.

During this reporting period we successfully leveraged \$302,886

#### Results from Activity 3.8

- Philippines Mission Buy-in of \$300,000
- US\$2,886 leveraged in the Philippines

### **IR3 Priorities for next period (July 1 to December 31, 2012)**

The individual listed in bold is the lead/individual responsible for bringing the activity to completion. Supporting team members follow. This is the best estimate at the time of this report, however, the lead or other team members may change based on staff availability and other factors.

#### **General**

Continue to leverage funds from donors and partners to support and complement the BALANCED Project in the East Africa and Asia (**Linda**, Joan, Elin).

#### **Tanzania**

- Conduct monitoring, mentoring, and follow-up meetings with existing CBDs, PHE providers, APEs and YPEs (**Juma**)

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<sup>6</sup> At the time of this report, the public report is pending final approval by Mary Melnyk, USAID



- Provide continuing technical oversight for the BALANCED-funded PHE activities in Pangani and the integration (and replication) of CBFP into the on-going USAID/Tanzania funded *Pwani* project in Bagamoyo District as the BALANCED activities wrap up in March 2013 (**Ricky, Elin**)
- Conduct the second BMS in eight villages and prepare a report that compares the 2009 and 2012 data (**Elin**)
- Air three radio spots with PHE messages on Pangani FM radio station (**Juma, Marko**)
- Conduct advocacy meetings and train PHE champions with the end goal of integrating PHE into the Pangani district development plan (**Juma**)
- Print 300 copies of the translated *Reference Guide for PHE Community-based Distributors and PHE Adult Peer Educators* and distribute to the PHE CBDs and PEs (**Juma**)
- Print 300 copies of the job aid for PHE CBDs and Adult PEs and distribute to the CBDs and PEs (**Juma**)
- Attend National Family Planning Technical Working Group meeting every month and report on TCMP PHE activities, as requested (**Juma**)

### **Philippines**

- Strengthen the FP supply system so that the majority of CBDs have a continuous supply of FP supplies in the “**new**” sites and “**maintenance**” sites (**PFPI**)
- Finalize IEC materials and distribute (**PFPI**)
- Continue to follow up on MOAs with local government units (**PFPI**)
- Strengthen the capacity of CBDs and PEs in project sites that are the most responsive through regular supportive supervision meetings and assistance (**PFPI**)
- Continue advocacy for the integration of PHE and FP/RH activities into LGU policies, such as local development/Environment/CRM/Fisheries plans, development plans, investment plans, etc. (**PFPI, CI/P**)
- Finalize the MPA assessment and identification of MPAs that will receive strengthening support in the VIP (**CI/P**)
- Initiate CRM and livelihood activities under IRs 4 and 5 (**CI/P, PFPI**)

### **Ethiopia**

- Provide technical support to PHE Ethiopia on M&E, as needed (**Elin**)

### **Zambia**

- Follow-up with WCS Zambia to monitor the status of the following activities: (**Ricky, Joan**)
  - Remaining refresher courses for APEs

- Development of an institutional PHE Policy for WCS Zambia
- Sustainability/scale-up plan for the WCS Zambia model
- Documentation of lessons learned and best practices

#### **Uganda**

- Follow-up with VEDCO and BMCT on PE training and project activities in general (**Ricky**)
- Conduct YPE TOT with VEDCO and BCMT staff (**Ricky**)
- Follow-up on VEDCO and BMCT youth activities (**Ricky**)

#### **PNG**

- Follow-up with TKCP on its PHE CBD/PE system and PE training (**Joan**)
- Train TKCP and partner staff on youth peer education (**Joan**)

#### **ANE**

- Develop a draft tool to guide the design of integrated approaches to GM vulnerability reduction that address both non-climatic and climate-related factors (**Lesley, L.D'Agnes**)
- Conduct field visit to solicit comments and feedback on the content and format of the tool from a small number of internal and/or external reviewer(s) (e.g., Rochelle Rainey, USAID/Health; Kristina Yarrow and/or personnel from USAID Central Asia; or RDMA/OFDA) and NGO practitioners, and revise accordingly (**Lesley, L. D'Agnes**)

### **III. Key Management Tasks**

#### **Accomplishments**

**Philippines Buy-in:** USAID/Philippines agreed to extend the term of the OH-financed component of the BALANCED-Philippines Buy-in through August 2013 and to obligate incremental funding of \$300,000 to support on-going FP activities and build sustainability of the PHE approach for scale-up to other Provinces. In response to this agreement, Linda Bruce, Project Director, traveled to the Philippines from June 1 to 16, 2012 to visit project sites and work with PFPI on the scope of work for the additional add-on funds. The activities defined in the scope of work were discussed with USAID/Philippines who approved the \$300,000 additional funds. During the development of the workplan for these add-on funds, the activities will be refined in close coordination with the Mission.

**LVB-HOPE Assistance:** BALANCED supported the participation of the LVB-HOPE project's Uganda country representative, Lucy Schilling, at the CRC-CI hosted June 2012 PHE course. As a result of discussions with Ms. Schilling while she was at CRC, it became evident that the LVB-HOPE project has an urgent need for specific technical/programmatic assistance (environment/fisheries). BALANCED was able to commit to helping provide some of that assistance in the next reporting period.

**PHE East Africa Course:** As a result of BALANCED having supported the attendance of several individuals to the June CRC-CI hosted PHE course, we have the makings of an excellent design and delivery team that can adapt that course for a shortened version to be offered in February 2013 in East Africa. In addition, the “research and development” costs of an initial PHE course design were borne by CRC-CI, and both organizations are willing and pleased to be able to share freely all the curriculum that was designed for the June course. This saves BALANCED the cost of having to design a course from scratch. The two BALANCED-supported participants will be co-facilitators for the East Africa Course.

The course will be offered as a revenue-based course, expecting some participants to fully “pay their way” (tuition, fees, lodging, travel), while others pay partial costs, and some attend on a full scholarship. This model may be a challenge in terms of finding enough individuals whose projects/organizations will pay all or some of their way, as Africa is a poor country and the popular mindset is that individuals attend only when all expenses are paid by the course/training hosts.

## **Challenges**

**Philippines Buy-in:** Observations made by the Project Director and USAID/Philippines during her trip to the Philippines led to a request by the Mission for a Program Implementation Review to be conducted in July 2012. The purpose of the July 2012 PIR will be for USAID/Philippines and the BALANCED team to discuss the project’s programmatic implementation strategies, progress of activities, etc., and to make any adjustments/refinements to these in order to best achieve program goals. Preparations for this review began in late June 2012 and will continue into July. This worthwhile and necessary activity did increase the demands on the time of an array of members of both the US-based and Philippines-based BALANCED team. However, all involved are confident that the extra time and effort invested in this two-day review will strengthen the program overall and maximize the USAID investment in these activities.

**LVB-HOPE Assistance:** It became necessary to provide extensive, hands-on assistance to the ExpandNet subcontractor, Partners, to help them comply with the fiscal and administrative requirements of both USAID and URI. It appears that this is the first time Partners has worked with USAID funds. This created an undue administrative burden on the BALANCED administrative/finance staff—requiring them to train Partners on USAID and URI finance procedures and the processing many times over pieces of paper/invoices that Partners should have been able to process in one pass-through from the subcontractor to the BALANCED/URI team. CRC did not take this into account when budgeting URI’s management costs for running Partner’s subcontract through URI, which will need to be increased during Year 5.

**USAID Funding:** URI did not receive its USAID Year 5 funding prior to or by the time of the start of the Project’s new fiscal year. This creates a challenge for BALANCED/URI-CRC in keeping its staff and subcontractors funded to implement the work outlined in the USAID-approved Year 5 workplan. The fallback of having CRC request a URI Dean’s Pledge to keep the project activities ongoing until USAID funds arrive is a paper-intensive and approval-intensive effort and one that is approved at the University’s discretion. Further, only a partial amount of the Project’s funding is made available through the Dean’s Pledge, making it difficult

to fund all or the Project's subcontractors whose subcontracts ended June 30, 2012.

**ANE Buy-in:** The management challenge with this Buy-in has been the slow response from the USAID team in reviewing and approving everything from scopes of work for new activities to draft reports. Much of the technical/programmatic efforts related to the current activity—the tool development—is contracted out, and we depend on the consultant/expert's availability to complete our tasks. When there are prolonged delays receiving input from USAID, there is a trickle-down effect and we may jeopardize our ability to hold to the deliverables deadlines to which we originally agreed.

### **Management Priorities for next reporting period**

In the next six-month period, the management team will give priority to:

- Ensuring the recommendations and action plan that result from the BALANCED-Philippines PIR are being implemented and results shared in a timely fashion as appropriate with USAID/Philippines and USAID Washington
- Preparing for the USAID management review scheduled for October 11, 2012
- Starting the preliminary reflection and planning for a close-out event that is informative, useful, and engaging for the USAID and the PHE community that will be invited

#### **IV. Performance Management and Reporting Plan (PMP)**

The primary goal of the PMP is to build an evidence base for the value-added of an integrated PHE model—i.e., tracking indicators that will demonstrate that integrated projects are more cost efficient, take less time to implement, and are perceived to increase the overall perception of well-being and environmental quality among local communities. A secondary goal of the M&E effort is to report results to USAID, addressing the Results Framework and indicators of both USAID/GH/OPRH and Missions that host field activities.

The PMP defines how progress on the BALANCED Program is measured and is used to monitor the activities and accomplishments of the Program, determining its level of success in meeting Project goals and targets.

## The BALANCED Project Indicators and Progress towards Targets

Indicator	Year 4 Results to date (July 2011 to June 2012 )	Jan-June 2012 results	Year 4 Target	Cumulative Results to date (Year 1-4)	LOP Target	Comments
SO-1: Number of target organizations incorporating PHE tools, protocols, etc. into their work (PRH 1.1)	7	2	6	19	24	New organizations are CTPH and TKCP
SO-2: Dollar value of funds leveraged from USAID Missions and non-USG sources to support PHE implementation and scale-ups (PRH 1.2)	\$1,144,184	\$313,886	160,000	2,856,689	2,500,000	Target reached for LOP target
1.1 Number of individuals trained by BALANCED in PHE know-how and SOTA using 21st century learning tools	1,141	759	360	2,334	200	Over target for Year 4 and LOP target
1.2 Number of participants who received BALANCED training and/or mentoring that are now providing training or TA to others on PHE implementation	75	63	29	95	45	Over target
1.3 Number of new and/or strengthened partnerships established and actively involved in advancing and supporting wider use of PHE approaches as a result of BALANCED capacity-building intervention (PRH 1.3)	1	1	2	12	16	Under target for Year 4 but on target for LOP target
1.4a. Number of technical support interventions provided by BALANCED to Missions and to organizations to implement PHE within their programs (PRH 3.2)	29	23	27	79	30	On target
1.4b. Number of new organizations receiving TA by BALANCED	10	8	8	30	30	Above target. On target for LOP target

2.1 Tools, protocols, procedures, systems, methodologies, guides, curricula, or indices with demonstrated programmatic value developed or adapted for country and/or thematic contexts (PRH IR 2.1)	4	3	7	14	25	Below target
2.2a Number of success stories, peer review articles, conference papers, research studies documenting key actionable findings about the PHE approaches, their lessons extracted, and value-added (PRH IR 2.2)	19	9	11	57	12	Above target
2.2b. Number of peer reviewed articles and research studies	1	1	2	3	No target	Below target. However, one additional target is currently under review by a peer reviewed journal
3.1 Number of PHE tools, methodologies, and actionable findings replicated in new countries and geographic areas (PRH 3.1)	7	2	2	23	9	Above target
3.2a Number PHE programs scaled up (PRH 3.4)	0	0	0	2	2	Target met
3.2b Number of geographical areas replicating PHE (PRH 3.4)	2	0	2	7	6	Target met
3.3 Number of BALANCED field site activities that produce results that can feed into KM activities (development of tools and success stories)	4	2	1	10	8	Above target

## Field Indicator Report

BALANCED provides evidence of outcomes that illustrate the value-added of an integrated PHE approach by collecting data on a set of common field-level PMP indicators. Data on these indicators are collected as part of the seed grant reports<sup>7</sup> and through data collection in field sites where BALANCED is working. Each field site reports only on those indicators that fit within the scope of their specific activities (e.g., a field project that does not include HIV/AIDS activities will not report on the indicators related to that topic).

### Tanzania PMP Field Data Summary

INDICATOR	January-June, 2012	Cumulative Results Years 1 to 4	Comments
<b>General</b>			
Number of individuals trained (disaggregated by population (P), health (H), and environment (E) topic-specific training, integrated trainings, and gender)	0	447	
<b>Family Planning and Reproductive Health</b>			
Number of new users	307	1,904	
Number of counseling visits for family planning/reproductive health (FP/RH) as a result of USG assistance	1716	7,051	
Number of USG-assisted service delivery points providing FP counseling or services		50	
Average household distance/time to access family planning commodities	No change	Less than 500 meters	

<sup>7</sup> Because the seed-grant reporting due dates do not correspond with the semiannual report schedule, the reporting dates are irregular for all sites, except Tanzania.



## Ethiopia PMP Field Data Summary

INDICATOR	December 1 to March 31, 2012	Cumulative Results Years 1 to 4	Comments
<b>General</b>			
Number of individuals trained (disaggregated by population (P), health (H), and environment (E) topic-specific training, integrated trainings, and gender)	0	138 Peer Educators (102 APE (47M;55F) and 36 YPE (14M;22F)	
<b>Family Planning and Reproductive Health</b>			
Number of USG-assisted service delivery points providing FP counseling or services		35 active PHE Providers	
Average household distance/time to access family planning commodities	8 km approximately from HEW post to 2-3 kms to PHE providers	Short walking distance for busy women	

## Zambia PMP Field Data Summary

INDICATOR	Jan 1 to June 30, 2012	Cumulative Results Years 1 to 4	Comments
<b>General</b>			
Number of individuals trained (disaggregated by population (P), health (H), and environment (E) topic-specific training, integrated trainings, and gender)	308 adult PEs (188 M and 120 F) re-trained on PHE and RH/FP topics	570 (353 males:217 females)	Same participants from previous PHE APE trainings. Modules/topics from PHE PE was used
<b>Family Planning and Reproductive Health</b>			
Number of USG-assisted service delivery points providing FP counseling or services	-		Trained PEs are providing information but not yet providing commodities since the MOH has not given yet the go signal for PE's to distribute FP commodities (pills). Endorsement from MOH just came through  1,198 referred to MOH for free FP (condoms)

Average household distance/time to access family planning commodities	10km from village to health center  1-5 km from lead farmers to household		
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### TKCP PNG PMP Field Data Summary

INDICATOR	Jan 1 to June 30, 2012	Cumulative Results Years 1 to 4	Comments
<b>General</b>			
Number of individuals trained (disaggregated by population (P), health (H), and environment (E) topic-specific training, integrated trainings, and gender)	No APES trained during this period		
<b>Family Planning and Reproductive Health</b>			
Number of USG-assisted service delivery points providing FP counseling or services	None during this period-		Some APES will be able to distribute FP methods, but no APES trained yet.
Average household distance/time to access family planning commodities	Few minutes to 12 hrs		

### Uganda (BMCT) PMP Field Data Summary

INDICATOR	Jan 1 to June 30, 2012	Cumulative Results Years 1 to 4	Comments
<b>General</b>			
Number of individuals trained (disaggregated by population (P), health (H), and environment (E) topic-specific training, integrated trainings, and gender)	No APES trained during this period		
<b>Family Planning and Reproductive Health</b>			

Number of USG-assisted service delivery points providing FP counseling or services	None		Government village health teams (VHTs) already provide free FP methods. Therefore, it was decided not to train additional CBDS, but rather to train VHTs as APEs.
Average household distance/time to access family planning commodities	Fewer km up to 8 km from village to health center		

### Uganda (VEDCO) PMP Field Data Summary

INDICATOR	Jan 1 to June 30, 2012	Cumulative Results Years 1 to 4	Comments
<b>General</b>			
Number of individuals trained (disaggregated by population (P), health (H), and environment (E) topic-specific training, integrated trainings, and gender)	65 APEs (36 M;29 F)	65 (36 M;29 F)	
<b>Family Planning and Reproductive Health</b>			
Number of USG-assisted service delivery points providing FP counseling or services	None		An MOA is in progress with the Uganda Health Marketing Group (UHMG) for CBDs to sell FP commodities at subsidized price. Meanwhile, the project peer educators will refer cases for FP methods and services to the MOH. Simultaneously, the project is working with the MOH to translate the referral forms in the local language.
Average household distance/time to access family planning commodities	Average distance from village to the health post is 2.5 km  Average distance from HH to PE is 1.5 km		

## Appendix 1. BALANCED Communications/Dissemination Activities: January – June 2012

### I. BALANCED Project Workshop on PHE Program Design Strengthens Capacity Among Africa Development Professionals

<b>Audience</b>	<b>Date Sent</b>	<b>Person Responsible</b>	<b>Number of People Reached</b>
PHE listserv	January 17, 2012	Janet Edmond	718
<b>Total</b>			<b>718</b>

### II. New PHE Champion Profile on the PHE Toolkit - Dr. Filemon Romero from the Philippines

<b>Audience</b>	<b>Date Sent</b>	<b>Person Responsible</b>	<b>Number of People Reached</b>
PHE Listserv	February 7, 2012	Janet Edmond	775
<b>Total</b>			<b>775</b>

### III. Happy International's Women's Day - check out the CI blog with PHE project highlights from Madagascar and Philippines

<b>Audience</b>	<b>Date Sent</b>	<b>Person Responsible</b>	<b>Number of People Reached</b>
PHE Listserv	March 8, 2012	Janet Edmond	822
<b>Estimated total</b>			<b>822</b>

### IV. What's New on the PHE Toolkit? WWF PHE Alliance lessons learned resources

<b>Audience</b>	<b>Date Sent</b>	<b>Person Responsible</b>	<b>Number of People Reached</b>
PHE Listserv	March 27, 2012	Janet Edmond	846
WWF International network contacts	March 28, 2012	Cara Honzak	15
<b>Total</b>			<b>859</b>

### V. New BALANCED-Philippines Survey Report on the PHE Toolkit

<b>Audience</b>	<b>Date Sent</b>	<b>Person Responsible</b>	<b>Number of People Reached</b>
PHE Listserv	April 4, 2012	Janet Edmond	852
<b>Estimated total</b>			<b>852</b>

VI. How do PHE Approaches Contribute to Progress on the Millennium Development Goals? - check out the new BALANCED newsletter

<b>Audience</b>	<b>Date Sent</b>	<b>Person Responsible</b>	<b>Number of People Reached</b>
PHE Listserv	April 20, 2012	Janet Edmond	856
UNDP Equator Prize network	April 20, 2012	Janet Edmond	1000+
CI international staff	April 20, 2012	Janet Edmond	150
PCLG Network	June 29, 2012	Janet Edmond	1000+
<b>Estimated total</b>			<b>3,006+</b>

VII. What's New on the PHE Toolkit - PHE policy briefs from the Aspen Institute's Global Health and Development Program

<b>Audience</b>	<b>Date Sent</b>	<b>Person Responsible</b>	<b>Number of People Reached</b>
PHE Listserv	May 1, 2012	Janet Edmond	876
<b>Total</b>			<b>876</b>

VIII. What's new on the PHE Toolkit? Two new resources on population and food security

<b>Audience</b>	<b>Date Sent</b>	<b>Person Responsible</b>	<b>Number of People Reached</b>
PHE Listserv	May 10, 2012	Janet Edmond	896
<b>Total</b>			<b>896</b>

IX. What's New on the PHE Toolkit? Two New BALANCED Project Training Guides<sup>8</sup>

<b>Audience</b>	<b>Date Sent</b>	<b>Person Responsible</b>	<b>Number of People Reached</b>
PHE Listserv	May 15, 2012	Janet Edmond	900
East Africa PHE listserv	May 2012	Jason Bremner	500
<b>Total</b>			<b>1,400</b>

X. Guest Contributor Janet Edmond: Philippines Bohol Island Demonstrates Benefits of Integrated Conservation and Health Development

<b>Audience</b>	<b>Date Sent</b>	<b>Person Responsible</b>	<b>Number of People Reached</b>
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<sup>8</sup> This post featured the two training guides: 1) *Population, Health, and Environment (PHE) Community-Based Distribution and Peer Education System: A Guide for Training PHE Community-Based Distributors* and 2) *Population, Health, and Environment (PHE) Community-Based Distribution and Peer Education System: A Guide for Training PHE Adult Peer Educators*

New Security Beat	May 23, 2012	Wilson Center	1000+
PHE Listserv	May 24, 2012	Schuyler Null, Wilson Center	900
CI international staff	May 23, 2012	Janet Edmond	150
ECSP News: Women's Health and Development	June 8, 2012	Wilson Center	1000+
<b>Total</b>			<b>3,050</b>

XI. New Resource for PHE Community-based Distributors and Adult Peer Educators -  
Reference Guide

<b>Audience</b>	<b>Date Sent</b>	<b>Person Responsible</b>	<b>Number of People Reached</b>
PHE Listserv	May 24, 2012	Janet Edmond	922
<b>Total</b>			<b>922</b>



**Appendix 2 – BALANCED-Philippines Quarterly Progress Reports # 5 and 6**



**Building Actors and Leaders for Advancing Community  
Excellence in Development:  
The BALANCED - Philippines Project**

**Quarterly Progress Report #5  
For Period January 1 to March 31, 2012**

**USAID Cooperative Agreement No. GPO-A-00-08-00002-00  
Population Health Environment Technical Leadership Cooperative  
Agreement**

*Implemented by:*

**PATH Foundation Philippines, Inc.  
Conservation International  
Coastal Resources Center at the University of Rhode Island**

This document was produced for review by the United States Agency for International Development under the terms of Cooperative Agreement No. GPO-A-00-08-00002-00. The Project is managed by the Coastal Resources Center at the University of Rhode Island in collaboration with Path Foundation Philippines, Inc. and Conservation International.

For more information contact: Dr. Ronald Quintana, Program Manager  
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## ACRONYMS

APE	Adult Peer Educator
BALANCED	Building Actors and Leaders for Advancing Community Excellence in Development
BD	Bantay Dagat
BEMO	Bohol Environmental Management Office
BHW	Barangay Health Worker
CBD	Community Based Distributor
CCA	Climate Change Action
CCT	Conditional Cash Transfer
CI	Conservation International
CRC	Coastal Resources Center
CRM	Coastal Resource Management
DOH	Department of Health
EMMP	Environmental Mitigation and Monitoring Plan
FMA	Fisheries Management Areas
FP/RH	Family Planning/Reproductive Health
FSSI	Foundation for the Sustainable Society, Inc.
GDA	Global Development Alliance
HealthGov	Health Strengthening Local Governance for Health
HPDP	Health Policy Development Program
IEC	Information, education, and communication
IEE	Initial Environmental Examination
IMAP	Integrated Midwives Association of the Philippines
IPC	Interpersonal Communication
IR	Intermediate Results
IRA	Internal Revenue Allocation
LCE	Local Chief Executives
LGU	Local Government Unit
LIG	Lubang Island Group
LMP	League of Municipalities of the Philippines
MEAT	MPA Management Effectiveness Assessment tool
MOU/A	Memorandum of Understanding/Agreement
MPA	Marine Protected Area
NFWF	National Fish and Wildlife Foundation
NGO	Non-governmental Organization
NRM	Natural Resource Management
NTZ	No-take Zones
OEECC	Office of Energy, Environment and Climate Change
OH	Office of Health
PAGRO	Provincial Agriculture Office
PFPI	PATH Foundation Philippines, Inc.
PGENRO	Provincial Government Environment and Natural Resource Office
PHE	Population, Health, and Environment
PNG	Papua New Guinea

PO	People's Organization
PRISM2	Private Sector Mobilization for Family Health 2
RH	Reproductive Health
RHU	Reproductive Health Unit
SEA-K	Self-Employment Assistance-Kaunlaran program
SEEM	Socio-Economic and Environmental Management
TKCP	Tree Kangaroo Conservation Project
TWG	Technical Working Group
URI	University of Rhode Island
USG	United States Government
VIP	Verde Island Passage

## I. INTRODUCTION

The United States Agency for International Development/Philippines (USAID/Philippines) is providing a US\$1,300,000 Buy-in to the USAID Washington-funded BALANCED (*Building Actors and Leaders for Advancing Excellence in Community Development*) Project to support results-oriented population, health and environment (PHE) field activities in biodiversity-rich bioregions of the Philippines over the period from December 2010 to August 2013. Funding is from two sources from within USAID/Philippines: The Office of Health/OH (\$500,000) for family planning and outreach components (Intermediate Results/IRs 1, 2 and 3), and Office of Energy, Environment and Climate Change/OEECC (\$800,000) for outreach, fisheries management and livelihood components (IRs 4 & 5 and some contributions to IR3). OH activities commenced in December of 2010 and will run through December 2012, whereas OEECC-supported activities began in December 2011 and will run through August 2013. The Coastal Resources Center (CRC) at the University of Rhode Island (URI), with PATH Foundation Philippines, Inc. (PFPI) and Conservation International/Philippines (CI/P) are the implementing agents for BALANCED-Philippines Project. The revised goal of the BALANCED-Philippines Project is to build the leadership and implementation capacities of national and local governments and stakeholders to respond in an integrated manner to interrelated population, health, and marine environmental issues. This goal is achieved through the following IRs:

- IR1 - Improved access to family planning/reproductive health services in key bioregions (OH)
- IR2 - Increased community awareness and support of family planning and conservation as a means to improve health, food security and natural resources (OH)
- IR3 - Increased policy makers' commitment to FP/RH services, CRM and integrated policies (OH & OEECC)
- IR4 - Improved governance capacities of provincial and municipal LGUs in the VIP and Danajon Bank marine ecosystems (OEECC)
- IR5. - Increased incentives for coastal and marine conservation among coastal fisher households (OEECC)

The BALANCED-Philippines Project goal and intermediate results contribute to USAID/Philippines priority goal of “Investing in People to Reduce Poverty” and also to the USAID/OH Strategic Objective of sustainably achieving improved family health and the Family Planning/Reproductive Health (FP/RH) Objective of achieving desired family size. The Project is also in line with the current U.S. Country Assistance Strategy with respect to assistance directed at reducing threats to biodiversity. The BALANCED-Philippines Project will also contribute to achieving Intermediate Result 1, “Natural Resources and Environmental Services Improved” under Objective 1, “Broad Based and Inclusive Growth Sustained” of the proposed results framework for the planned USAID/Philippines Mission’s Country Development Cooperation Strategy.

With support from USAID/OH, family planning activities are being implemented in Verde Island Passage (VIP) sites where ongoing coastal/fisheries management activities have yet to be integrated with FP/RH (herein called “new” sites), and Danajon Bank bioregions to improve and

maintain PHE initiatives that were implemented by PFPI under previous PHE projects (herein referred to as “**maintenance**” sites). Through additional support from USAID/OEECC, the Project will incorporate coastal resources management (CRM) activities in select BALANCED-Philippines sites.

This report summarizes the activities completed by BALANCED-Philippines during the reporting period January to March 2012 as per terms and conditions as approved in the Year 2 work plan and Cooperative Agreement No. GPO-A-00-08-00002-00.

## **II. PROJECT RESULTS**

With the added support from OEECC and the new partnership with CI/P, we conducted a project staff orientation on January 5 to 7, 2012. Hired personnel from implementing partners as well as the technical officers from USAID/Philippines OH and OEECC participated in the meeting. The objectives of the project orientation were to: 1) provide an overview of integrated PHE programming; 2) review the BALANCED-Philippines Project conceptual framework and modify as needed; 3) orient BALANCED-Philippines Project personnel on the BALANCED-Philippines Project; 4) conduct an orientation on USG Family Planning legislative and policy requirements; and 5) develop site-specific detailed implementation plans. Key CI/P and PFPI staff worked together in facilitating the team building exercises, PHE conceptual discussions and integrated planning activities.

The orientation activity provided an opportunity for both PFPI and CI/P staff of the BALANCED-Philippines Project to understand the project and improve synergies through joint action planning and conceptual discussions. Agreements were also made during the orientation on the deadline for submission of reports, schedules of monthly meetings and other activities such as the study tour, sharing meeting between PFPI and CI/P field staff, planning meetings, etc.

From January to March 2012, PFPI continued working with local government units (LGUs), people’s organizations (POs), communities and other nongovernmental organizations (NGOs), and the private sources of FP supplies towards achieving the Project objectives. Rollout trainings on PHE peer education and PHE community based distribution facilitated by the master trainers both in the “**new**” and “**maintenance**” sites were ongoing. The trained PHE adult peer educators (APEs) continued to provide interpersonal communication and counseling (IPC) including information on PHE linkages and referrals to sexually active men and women in the communities in the Project sites while the trained PHE community based distributors (CBDs) continued to provide FP products and FP/RH and CRM information to its clients. BALANCED-Philippines Project started the assessment of marine protected areas (MPAs) using the MPA Management Effectiveness Tool (MEAT) in Bohol. The Project also consulted with the environment, agriculture, and social welfare and development offices in the LGUs both in the Danajon and VIP as initial steps to implement the activities under IRs 4 and 5 of the BALANCED-Philippines Project. Identification, screening, selection and hiring of additional BALANCED-Philippines staff were completed during this reporting period.

For the reporting period January 1 to March 31, 2012, BALANCED-Philippines implemented various activities under IR1, IR2 and IR3. Initial activities under the additional IRs 4 and 5 as per modified program design and work plan commenced during this reporting period as well. Activities and related accomplishments are summarized below by IR.

During this reporting period, the Project has not been able to work in the Municipality of Tingloy (Batangas) – one of the “**new**” sites. The Mayor of Tingloy only allowed the conduct of RHU training but not the other activities pending the decision of the LGU whether to accept the project or not. In March 2012, the Mayor of Tingloy officially rejected the implementation of the BALANCED-Philippines Project because the LGU’s 2011 resolution declared support to the position of the Catholic Church to reject the proposed Reproductive Health Bill. Therefore, the municipality cannot allow project implementation in the area. Aside from political repercussions, Tingloy also raised concern that their internal revenue allocation (IRA) depends on the number of people, i.e. low population translates into low budget allocation from the national government, and with the project facilitating access to FP/RH commodities then it will be difficult for the municipality to increase the population in the island. The Project will seek to identify a new site to replace Tingloy.

### **IR 1: Improved access to family planning/reproductive health services in key bioregions**

BALANCED-Philippines continued to expand access to FP information and methods to poor marginalized women living in the target bioregions as well as increase their understanding of the benefits that a PHE approach can bring to people’s quality of life and to the marine environment. BALANCED-Philippines also continued to develop a network of PHE CBD outlets and strengthen the rural health unit (RHU) referral systems in the “new” sites and update the existing PHE CBD systems in the “maintenance” sites. Further, BALANCED-Philippines worked with private FP suppliers, such as DKT Philippines, for their FP social franchising program; Global Development Alliance (GDA) partner, Alphamed; and the local chapter of Integrated Midwives Association of the Philippines (IMAP) in Bohol – a partner of USAID-supported PRISM 2 Project, to establish franchisee and other arrangements in 10 municipalities to ensure a continuous supply of contraceptive products to the CBDs and RHUs trained under the Project. In the process BALANCED-Philippines was able to involve more men and PO members in all its training and other Project activities to reach more fishermen. While the project staff faces competing priorities when trying to involve men – such as men’s work on other community activities and having to work to provide for the needs of the family – progress is being made. Below is progress-to-date on IR 1 activities completed during this reporting period.

#### **1.1 Conduct training-of-trainers on PHE CBD and adult PE systems**

Previously, 62 master trainers had been trained on PHE CBD and APE systems for all target municipalities yet only 60 percent (36) of them were actively involved in conducting local municipality PHE CBD and PHE APE training. From January to March 2012, twenty four additional master trainers became actively involved in conducting local workshops and mentoring the trained PHE CBDs and PHE APes, thus bringing a total of 60 active TOT master trainers for the project. We were able to mobilize the additional master trainers by coordinating

with the LGUs and the master trainers to schedule the trainings ahead of time so that activities will be included in the LGUs' and the master trainers' calendar of activities.

In the next quarter, BALANCED-Philippines will continue to mobilize all the master trainers to co-facilitate the remaining PHE CBD and APE workshops and in all project related activities by employing the same proactive scheduling as in the reporting period.

### Results from Activity 1.1

- 96% of the master trainers actively facilitating PHE CBD and PHE APE courses.

### **1.2 Recruit and train non-clinical/non-pharmaceutical outlet owners, PO members, deputized wardens, barangay health workers (BHWs), and other community members to serve as CBD outlets and promote family planning and PHE linkages**

The project Field Coordinators and the master trainers continued to identify, recruit and train participants for the PHE CBD training. In the “**new**” sites, 12 (all females) non-mobile PHE CBDs were recruited and trained in the municipality of Paluan bringing a cumulative total of 183 CBDs trained in eight of the nine target municipalities to date. In the “**maintenance**” sites, 86 (13 males and 73 females) non-mobile PHE CBDs were trained in the municipalities of Abra de Ilog, Inabanga, Talibon and Ubay bringing a total of 445 CBDs trained or who received refresher training in 19 of the 20 target municipalities in the “**maintenance**” sites. These trained PHE CBDs consist of sari-sari (convenience) storeowners and keepers, PO representatives, fish wardens, BHWs, barangay nutrition scholars (BNS), and keepers of Botika sa Barangay (village pharmacies).

The 98 (13 males and 85 females) newly-trained non-mobile PHE CBDs learned about family planning, social marketing of FP products (pills and condoms) and the provision of information on PHE linkages and relevant site-specific environmental conservation and will serve as CBD outlets for pills and condoms. The newly-trained PHE CBDs volunteers will contribute to expanding access to and improving the delivery of RH/FP information, products and services and PHE information to target audiences in their communities.

As of this reporting period, there is one municipality (Hilongos) in the “**maintenance**” site that has yet to train PHE CBDs. The busy schedule of the LGU has caused delays in the scheduling of the PHE CBD training, despite close communication and follow up.

In the next quarter, we will seek to complete all planned PHE CBD trainings in the remaining “**maintenance**” site which is the Municipality of Hilongos in Leyte.

### Results from Activity 1.2

- 12 non-clinical/non pharmaceutical outlet owners such as sari sari store owners, POs, deputized wardens, etc. recruited and trained as CBDs in three municipalities in the “**new**” sites
- 86 non-clinical/non-pharmaceutical outlet owners, POs, deputized wardens, etc. provided refresher training on CBD in one municipality in the “**maintenance**” sites

### **1.3 Develop or strengthen system for supplying FP methods to CBD outlets**



During Year 1 of the BALANCED-Philippines Project memoranda of understanding/agreement (MOU/A) had been signed to establish a supply of FP methods for trained CBDs in two “**new**” sites (Looc and Lubang) and re-establish supplies in 11 “**maintenance**” sites. In Year two, PFPI was to continue collaboration and coordination with Alphamed Pharma Corporation and DKT Philippines to help establish a cost recovery system for LGU/RHU partners in the seven “**new**” site and nine “**maintenance**” site municipalities that have yet to (re)establish these franchises and other arrangements that will provide an interrupted supply of affordable contraceptive products flowing to BALANCED-trained RHUs and the CBDs.

As mentioned in previous BALANCED-Philippines quarterly reports, in order to establish an efficient CBD system within the Philippines context, there is a need to sign an MOU/A between the two parties (LGU and Alphamed/DKT) as a prerequisite to establishing a franchise agreement that enables trained CBDs to distribute FP commodities (pills) at the community level. The MOU/A, among other provisions, provides legal, program supervision and monitoring oversight to CBDs in the respective municipalities. Toward this end, BALANCED-Philippines personnel continues to forge these partnerships by following up and by meeting with the members of the municipal/local legislative council and with the sources of family planning supply (Alphamed and DKT) to facilitate the MOU/A process and to set-up CBD systems in the “**new**” sites and improve existing CBD systems in the “**maintenance**” sites.

While efforts are ongoing with the respective LGUs in the “**new**” sites to agree to the partnership, the Project continued to experience some challenges to establishing this partnership because of the ongoing internal re-organization within Alphamed and DKT to address its issues of lack of human resources, difficulties in coordination, and conflicts in schedule that has not been finalized yet until this reporting period. The Project team spoke to Alphamed and DKT about their inability to respond in a timely way to the LGUs interest in collaborating with them. While both companies promised that they would look into and address the problem, to date both private sector partners have yet to take concrete steps to resolve the issues. We have also informed USAID/Philippines about these matters.

Despite the challenges, the Project was able to establish/strengthen three new cost recovery supply systems for community-based distribution of FP supplies – two in the “**new**” sites (Calatagan and Nasugbu) and one in the “**maintenance**” sites (Inopacan). Cost recovery supply systems for community-based distribution of FP supplies have continuously been established strengthened in 20 (69%) of the “**new**” and “**maintenance**” sites since the start of the Project as a result of continuous coordination with the sources of FP supply and mentoring of the community-based distributors.

In the next quarter, BALANCED-Philippines staff will continue to follow-up and meet with Alphamed and DKT, and the municipal legislative council to address the above-mentioned issues and concerns, help facilitate the signing of the MOU/A between LGUs and Alphamed/DKT, and facilitate the setting up of the CBD systems in the project sites where this has yet to be done. BALANCED-Philippines will also continue to remind both Alphamed and DKT to do their share in persistently following up with the LGUs to facilitate the signing of the MOU/A between them and the LGUs.

### Results from Activity 1.3

- 3 cost recovery supply system for community-based distribution of FP supplies established/strengthened – two in the “**new**” sites and one in the “**maintenance**” sites.

#### **1.4 Strengthen LGU and RHU staff knowledge and skills on FP/RH, PHE linkages, and managing CBD systems**

During this reporting period, 34 (7 males and 27 females) RHU staff were trained in the “**new**” sites – Paluan and Tingloy, which brings a cumulative total of 334 (36 males and 298 females) RHU staff trained both in the “**new**” and “**maintenance**” sites over the life of the Project. These RHU staff members were trained in order to strengthen their capacity to provide counseling on reproductive health and family planning to women and men who are referred to them by the APEs where CBD outlets are not available. Although the Mayor of Tingloy rejected the implementation of BALANCED-Philippines Project just recently, he allowed the conduct of RHU staff training although the LGU has not made decision yet about the Project and the Mayor is still in the process of consulting with the Municipal Council to arrive at a decision on whether to accept the Project or not.

BALANCED-Philippines Project enjoys a good relationship with the RHU staff, particularly the Rural Health Unit midwives who help monitor the PHE CBD outlets to ensure efficient and effective operations and the PHE APEs. BALANCED-Philippines Field Coordinators, together with these service providers, provided the needed technical support to the trained PHE CBDs and PHE APEs during this reporting period. See Annex 1: Activity status to date (February 1 to March 31, 2012)

The 2010 baseline data collected on the Contraceptive Prevalence Rate (CPR) in Project target municipalities, which was based on the available data from the Rural Health Units (RHU), revealed the following average CPR in the five Provinces where the Project works: Batangas (27.30%); Oriental Mindoro (48%); Occidental Mindoro (39%); Bohol (22.97%); and Leyte (16.68%). CPR data collected from the RHUs in 2011 revealed increasing CPRs in the Provinces where the Project was able to collect data from all RHUs (Oriental Mindoro showed a 2% increase; Occidental Mindoro showed a 6.83% increase; Bohol showed a 27% increase; and Leyte showed 72% increase) We were not able to calculate average CPR for Batangas or Occidental Mindoro because data from some of the municipalities was not available or incomplete due to late submission of reports by the RHU midwives. See Annex 2 for CPR data collected.

Given the huge unexplained increases in CPR in Leyte, Hilongos where there are no CBDs, and Oriental Mindoro where the private sector supply chain has not even been established yet, the CPR data do not seem very reliable. There appears to be inaccuracies in the data being reported to PFPI by the RHU staff. BALANCED-Philippines staff will explore how this data is collected and reported in order to determine these unexplainable increases.

With regards to data and report collection, RHU staff from the VIP municipalities of Batangas, Oriental Mindoro and Occidental Mindoro still does not conduct monitoring, collect/consolidate data, prepare reports regularly or submit reports on time. Further, as of this writing, these RHU

staff members are still undergoing the data quality check training from the Department of Health (DOH). These factors affect the timeliness of the data reports gathered by the Project. As a result, it should be noted that the actual numbers accomplished by the Project should be more than those reflected in this report.

#### Results from Activity 1.4

- 34 (7 males and 27 females) RHU staff trained/updated on PHE links and family planning and on providing information on PHE links
- 4 organizations using the BALANCED training manuals to train PHE APEs and CBDs

#### **Status of PMP results for IR1**

INDICATOR	January-March Accomplishment
1.1 Number of people counseled in RH/FP as a result of USAID assistance ( <i>USAID/OH/custom indicator 2</i> )	6,593
1.2 Contraceptive prevalence rate ( <i>USAID/OH standard indicator 3</i> )	Increasing <sup>9</sup>
1.3 Number of couple years protection ( <i>USAID/OH standard indicator 3</i> )	80,816
1.4 Number of people trained in RH/FP with USG funds ( <i>USAID/OH standard indicator 3</i> )	132 <sup>10</sup> (20 males and 112 females)
1.5 Number of participants who received BALANCED training and/or mentoring that are now providing PHE training or technical assistance to others ( <i>BALANCED core indicator</i> )	24
1.6 Percent of FP users of modern methods obtaining supplies and services from private sector sources (CBDs, etc.) ( <i>surrogate BALANCED field indicator</i> )	1.68% <sup>11</sup>
1.7 Number of USG-assisted service delivery points providing FP services ( <i>BALANCED field indicator</i> )	99 <sup>12</sup>
1.8 Number of target organizations incorporating PHE tools, protocols, etc. into their work ( <i>BALANCED core indicator</i> )	4 <sup>13</sup>

#### **IR1 Priorities for next period (April 1 to June 30, 2012)**

<sup>9</sup> Baseline data collected; 2011 data collection shows the five target Provinces increasing while available data from some of the RHUs are incomplete for this reporting period (see Annex 2).

<sup>10</sup> 98 CBDs and 34 RHU staff

<sup>11</sup> Percentage is based on the data collected from 11 municipalities where data were collected. Data collection from the other municipalities is underway during the reporting period.

<sup>12</sup> 1 RHU (Paluan) + 98 CBDs

<sup>13</sup> RHU, MPDO, CRMO of Paluan (3) and RHU of Talibon (1). These local government organizations have been using the BALANCED training manuals to train PHE adult PEs and PHE CBDs

In partnership with the LGUs, PFPI will plan, prepare and conduct the following activities in the next quarter:

- Continue to mobilize all 62 master trainers to co-facilitate the trainings under IRs 4 and 5 in the “**new**” and “**maintenance**” sites
- Conduct the PHE CBD refresher training in the remaining “**maintenance**” site (Hilongos).
- Continue to establish/strengthen social marketing arrangements in the remaining “**new**” and “**maintenance**” sites
- Continue coordinating with Alphamed, DKT, etc. to help CBDs and RHUs in the “**new**” and “**maintenance**” sites establish a source of FP commodities to ensure uninterrupted supply to the RHU and the PHE CBDs

## **IR2: Increased community awareness and support of family planning and conservation as a means to improve health, food security and natural resources**

In order to promote pro-health and pro-environment behaviors, BALANCED-Philippines continuously worked to develop a network of community volunteer PHE APEs chosen from communities’ indigenous leaders or individuals living in the “new” and “maintenance” sites as well as promoted health, FP, PHE and CRM messages through its information, education, and communication (IEC) activities. The following IR2 activities were conducted during this reporting period.

### **2.1 Recruit, train and deploy PHE adult PEs**

The training of PHE APEs both in the “new” and “maintenance” sites is continuing. BALANCED-Philippines Field Coordinators and the active master trainers collaborated with the LGU officials, particularly the village officials, RHU staff, and staff of local government offices and other stakeholders to identify potential PHE APEs and participants for the PHE APE training. As a result of this collaboration, the project team identified and trained a total of 13 (1 male and 12 females) and 60 (11 males and 49 females) additional PHE APEs in the “new” and “maintenance” sites, respectively during this period.

Since the start of the project 904 APEs have been trained, however, only 80% of them are currently active. While 723 APEs are still active, which was the goal described in our Combined Workplan, the Project continues to identify ways to keep the APEs engaged and talking to the community about PHE and RH/FP. One way has been to encourage the APEs during the monitoring and mentoring sessions to conduct IPC sessions as a way of life- i.e. while they are doing their daily chores such as sea fishing, or when they conduct house-to-house visits as part of their tasks as health volunteers.

BALANCED-Philippines has been trying to involve more men and PO members in PHE Peer Educators training and other Project activities. While we have experienced a modest increase in

the number of male APEs we have trained, we continue collaborate and coordinate with the Bantay Dagat (fish warden) network and barangay councils to recruit male peer educators. The project team is now in the process of collecting and collating APEs' reports on the IPC sessions already conducted. A PE Diary with a simple job aid has been developed and distributed to the PHE APEs to help them effectively conduct IPCs and note the number of IPCs given during each week. This PE Diary also now serves as helpful tool for both monitoring and mentoring the PHE adult PEs.

In the next quarter, BALANCED-Philippines will continue to monitor and mentor the trained PHE APEs from both the “**maintenance**” and “**new**” sites.

### Results from Activity 2.1

- 73 (12 males and 61 females) PHE adult PEs were recruited and trained

### **2.2 Develop and implement PHE IEC strategy**

BALANCED-Philippines team continued revising the communications plan, which was drafted at the start of the Project. CI/P also provided inputs into this document, particularly in the area of coastal resource management. Specific messages to highlight the importance of CRM and MPAs were also added to the communication plan. The communications plan was also fine-tuned and the results of the baseline survey were incorporated. The final document will be sent to USAID during the beginning of the next reporting period.

During this quarter, the national DOH and the local provincial health and environment offices provided the clearance and approval of the “3 Tips” brochure after a long review and revision of the material based on their comments. The ‘3 Tips’ brochure is currently being revised based on USAID/Philippines/OH and OECC comments, and will be re-submitted to them after the revision for final clearance. The reprinting of the former IEC materials used in the previous PHE projects is still awaiting clearance from USAID/Philippines. USAID/Philippines is currently reviewing all of these IEC materials.

While the new “3 Tips” brochure is being reviewed, continuing IEC activities were conducted which resulted in a total of 20,979 individuals having seen or heard a specific FP/RH message in “**new**” and “**maintenance**” sites through various channels, events, campaigns and activities (mass media, meetings, group discussions, RHU activities, etc.). IEC activities included:

- Promotion of PHE messages and information on FP/RH were integrated into and shared during Women’s Month celebration in five municipalities with each municipality reaching out to an average of 600 women and men per municipality
- Provision of PHE messages and FP/RH information during tree planting activities in Hilongos and Leyte, which were attended by 500 men, women and youth
- PHE learning sessions conducted with partner organizations in Ubay where PHE messages and FP/RH information were also shared
- Promotion of PHE messages and FP/RH information during the LGU-organized medical mission to around 500 men and women in Looc

- Sharing of PHE messages and FP/RH information on Bambi FM Radio station, which covers Abra de Ilog and Paluan in the province of Occidental Mindoro with a listenership of around 5,000 men and women per municipality.

In the next quarter, BALANCED-Philippines will continue to conduct IEC campaigns/activities and distribute the approved IEC materials to reach more people with FP/RH and PHE information and messages. CI/P is also planning to develop IEC materials outlined in the communication plan to promote PHE approaches into CRM activities and actively distribute materials during meetings and consultation activities.

#### Results from Activity 2.2

- 1 BALANCED-Philippines communications plan revised, finalized and submitted to USAID/Philippines
- 20,979 individuals have seen or heard a specific RH/FP message

#### **Status of PMP results for IR2**

INDICATOR	January-March Accomplishment
1.4 Number of people trained in RH/FP with USG funds (USAID/OH standard indicator 3)	73 (12 males and 61 females)
2.2 Number of people who have seen or heard a specific RH/FP message (USAID/OH standard indicator 2)	20,979

#### **IR2 Priorities for next period (April 1 to June 30, 2012)**

PFPI will conduct the following activities during the next reporting period:

- Continue to build up the core of PHE APEs in the “new” sites
- Continue to mentor PHE APEs in the “new” and “maintenance” sites
- Finalize, print and distribute BALANCED-Philippines PHE IEC materials , i.e., 3 Tips brochure, and reprint and distribute previous IECs once cleared by USAID
- Continue PHE APE’s IPC activities to continually increase the number of men and women learning about PHE and reproductive health and being referred to CBDs or the RHU
- While the number of men trained in IR 1 and IR 2 has increased four percent over Year 1 of this activity, we will continue to identify, train and engage more men in the PHE activities.
- Continue IEC activities to continually increase the number of people who hear and/or receive RH/FP and pro-environment messages

### **IR 3: Increased policymaker's commitment to promote/support FP/RH services, CRM and integrated policies**

Achieving policy reforms requires following the process inherent in the local Philippine governance system. To maintain momentum in integrating PHE in local reforms and agenda, BALANCED-Philippines Project builds on collaboration and partnerships with existing PHE leaders and champions established by PFPI in its previous PHE projects to gain support from policymakers. From the start of the Project, PFPI conducted group and one-on-one meetings, such as courtesy calls, Project orientations, briefings, etc., with local chief executives (LCEs), representative from LGUs and other stakeholders to increase support and commitment for integrated PHE policy reforms, and to advocate for the allocation of a local budget for family planning and for the conservation of important natural resources.

In order to clearly demonstrate the integration of PHE in the VIP, PFPI and CI/P worked together to synchronize Project activities. Toward that end, both organizations worked to improve governance capacities by helping to sustain and strengthen policymakers support for integrated PHE policy reforms and their commitment for the conservation of important natural resources at the provincial and municipal levels.

Key IR 3 activities completed during the January to March 2012 reporting period are described below:

#### **3.1 Conduct PHE Orientation and planning with LGU, NGO, PO and Project stakeholders**

During this reporting period, CI/P began project planning and conducted start up activities, such as introducing the BALANCED-Philippines Project to stakeholders in new sites in the VIP and hiring a new Manila-based Project Coordinator and two new Field Coordinators for Lubang and Looc in the VIP. CI/P and PFPI's BALANCED-Philippines staff conducted several awareness-raising sessions on PHE linkages for local stakeholders in the VIP and Bohol. Courtesy calls, project orientations and briefings were also held with LCEs, representatives from LGUs and other project stakeholders in the VIP and are described in detail below. Due to the fact that PFPI and CI/P have on-going activities with the LGUs in the VIP that are separate from BALANCED-Philippines, it was critical to re-introduce PFPI and CI/P's joint partnership to implement the BALANCED-Philippines in that area. This was one of the activities agreed upon at the onset of the project and discussed during the BALANCED-Philippines Project staff orientation in January 2012 to show integration.

Toward that end, joint CI/P and PFPI Project presentations about the BALANCED-Philippines goals and objectives were conducted with representatives from the Batangas Provincial Government Environment and Natural Resource Office (PGENRO) and Oriental Mindoro Provincial Agriculture Office (PAgO); and the LCEs from the Municipalities of Tingloy, Batangas, Baco, San Teodoro, and Puerto Galera, Oriental Mindoro, Lubang, Looc, and Occidental Mindoro. In Bohol, with the addition of two BALANCED-Philippines staff – the Livelihood Specialist and the MPA/Fisheries Specialist – and other BALANCED-Philippines staff conducted courtesy visits to all the LGUs to introduce the new staff and inform the LGUs

about the new activities on livelihood and MPA strengthening that will be implemented in the project sites.

One of key results of the joint CI/P-PFPI activities in the VIP was the recommendation by all of the above-mentioned municipalities, except for Tingloy, and the provincial government offices in the VIP to create a tripartite partnership between CI/P, PFPI and the concerned LGUs to facilitate project implementation, including mainstreaming PHE into CRM activities. The draft tripartite MOA<sup>14</sup> has been circulated to the LGUs for evaluation and finalization.

### **3.2 Advocate and provide support for local development, environment, CRM and fisheries plans and/or agendas and leverage resources for incorporating PHE into local policies, plans and agendas**

BALANCED-Philippines staff continued to coordinate with the local LGU officials, heads of local health, environment and planning offices, and local development councils in the “**new**” and “**maintenance**” sites to advocate for incorporating PHE into local policies, plans and agendas. They also continued to encourage LGUs to support the adoption and passage of a local PHE ordinance to ensure mainstreaming of PHE in the LGU plans and agendas.

Some LCEs’ continue to express reservations about family planning, either because of their strong affiliation with the Catholic Church, fear of being reprimanded by Catholic Church, or differences in political affiliation and principles with other local officials. These reservations caused delays in the approval of plans (development, Fisheries, CRM plans), MOAs, ordinances and other local policy documents supporting PHE in some of the project sites.

Despite the challenges, the BALANCED-Philippines Project team persisted and followed up with the LGUs to encourage them to support the Project and integrate PHE into their government plans. For example, through its other projects with the VIP government, CI/P and PFPI identified opportunities such as climate change action planning and CRM planning activities to integrate PHE into the local agenda. In addition, some of the Project staff also participated in the VIP Climate Change Action (CCA) Planning Team and provided technical support to the CCA Planning of Calatagan, Batangas. The VIP CCA pool of trainers was expanded to include PHE experts from PFPI. PHE was also integrated in the CCA plan of Calatagan, Batangas. This pool of trainers will be tapped in future VIP CCA planning activities. There is a plan to conduct another CCA planning for Nasugbu, Batangas in the next quarter where population and health concerns could be integrated into the CCA plan.

During this reporting period, Barangay Sinandigan in the province of Bohol has incorporated PHE activities with a budget into their Barangay Development Plan. The municipality of Buenavista also in the province of Bohol has incorporated PHE activities and budget into their Municipal Agricultural Development Plan. Through PFPI’s Ashmore Foundation-supported youth project, the Sangguniang Kabataan (Youth Council) in the municipality of Clarin – also a BALANCED-Philippines site – has incorporated PHE activities into their Municipal Youth Development Plan.

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<sup>14</sup> These MOAs with LGUs establish clear operating roles and responsibilities among CI/P, PFPI and the respective LGU. These MOAs are different from the MOAs established with the FP providers.



Also, five additional MOAs were signed between PFPI and the LGUs of Calatagan, Lobo, Mabini, Paluan and Talibon bringing a total of nineteen (19) signed MOAs (13 with the LGUs in the “**maintenance**” sites<sup>15</sup> and six in “**new**” sites<sup>16</sup>) during the life of the Project. These MOAs define the roles of each collaborating organization and the LGUs’ agreements to provide counterpart contributions to PHE activities. Follow-up with the other MOAs is underway as the actual engagement of the LGU requires legislation by the Municipal Legislative Council.

As part of their support for the Project, we have asked LGUs to shoulder some of the expenses for training and other activities. During this reporting period, the value of resources leveraged from LGUs is estimated at US \$ 15,923 (Php683,555). This includes the costs of venues, meals, participants' time, leveraged amount for FP commodities and the conduct of PHE activities, transportation support for training participants, and other training and logistical costs.

Apart from the BALANCED-Philippines Project, PFPI is also implementing the Ashmore Foundation-supported Empowering the Youth Project or the EMPOWER Project that builds the capacity of young adults (15 to 24 yrs) to plan, implement and monitor PHE activities (including CRM and environment-friendly enterprise development/EED) in two BALANCED-Philippines municipalities in Bohol and Oriental Mindoro. There is the possibility of additional funding for extending the time frame of the Empower Project depending on the Ashmore Foundation’s evaluation of activities thus far. The Ashmore Project could complement the resources provided by USAID/Philippines Buy-in to the BALANCED Project.

In the next quarter, BALANCED-Philippines will continue to coordinate and meet with executive and legislative LGU officials, and the local development council to help encourage PHE action plans being incorporated into local policies, plans and agendas. BALANCED-Philippines will also coordinate with the LGUs to finalize the tripartite MOAs, particularly in the VIP. BALANCED-Philippines will also promote mainstreaming PHE into the CRM planning in the Danajon and VIP municipalities.

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<sup>15</sup> Tubigon, Inopacan, Bato, Getafe, Hindang, Matalom, Bien Unido, Inabanga, Ubay, Hilongos, Abra de Ilog and Batangas City

<sup>16</sup> Lubang and Looc

### Results from Activity 3.2

- 1 Barangay Development Plan and 1 Municipal Agricultural Development Plan with PHE activities and budget
- US \$15,923 leveraged from LGUs for FP/RH and PHE activities
- 5 MOAs signed between PFPI and the LGUs both in the “**new**” and “**maintenance**” sites for the BALANCED-Philippines Project in which the LGUs agreed to provide counterparts for PHE activities

### **3.3 Conduct a national-level PHE Orientation**

At the national level, PFPI and CI/P worked together in renewing the partnership with the League of Municipalities of the Philippines (LMP) through an MOU to advocate for PHE policy reforms. The MOU defines the roles of PFPI, CI/P and LMP in the partnership and the activities where PFPI, CI/P and LMP shall collaborate, which include the following:

- Data and information-sharing, particularly IEC and training materials on relevant topics;
- IEC activities to disseminate conservation and reproductive health information, issues and concerns;
- Joint planning and/or proposal development activities related to population/environment, reproductive health, migration, gender and/or HIV/AIDS as they relate to conservation and sustainable development;
- Identification and strengthening of LGUs on integrated conservation and reproductive health initiatives; and
- Advocacy for the development of national and local policies and plans to integrate conservation and reproductive health in development agenda, which may include, among others, providing resource persons to share particular expertise/experience/learning in appropriate activities such as crafting of national policies, conduct of environmental conservation and/or population-health-environment lectures/presentations during LMP events/activities (such as regional/national conferences, etc.) or provision of LMP of speakers during CI/Philippines or PFPI activities.

The renewal of this partnership was an initial step for the BALANCED-Philippines Project to conduct a national-level PHE orientation. The MOU was signed during this reporting period by Dr. Joan Castro, PFPI Executive Vice President, Romeo Trono, CI/P Country Executive Director and Hon. Strike Revilla, National President of LMP. The ceremonial signing of the MOU will be conducted in the next quarter.

### **3.4 Conduct a VIP to Danaojon Bank cross-site visit for policymakers and partners**

BALANCED-Philippines organized and conducted a VIP to Danaojon Bank cross-site visit from March 12 to 15, 2012 for LCEs and policy makers from the Project VIP target sites. The purpose of this study tour was to provide experiential learning opportunities in PHE for mayors, municipal administrators, municipal health officers and development planners from the VIP as

they visited a successful PHE site in Bohol. Twelve officials from LGUs, including three Municipal Mayors, one Municipal Councilor, two Municipal Administrators, one Municipal Development and Planning Coordinator, one Municipal Engineer, two Municipal Health Officers, one Municipal Social Welfare and Development Officer, and one staff from the Provincial Government - Environment and Natural Resources Office from the VIP region participated in the cross-site visit. Two program specialists from USAID/Philippines/OH and OEECC also attended in the study tour. Three staff from USAID/Philippines-supported Private Sector Mobilization for Family Health (PRISM2), Health-Strengthening Local Governance for Health (HealthGov) and Health Policy Development Program (HPDP) Projects joined during the last two days of the study tour. The Study Tour also contained an international South-to-South exchange component, with the participation of two community-based development professionals from Papua New Guinea (PNG). Ruby Yamuna from the Tree Kangaroo Conservation Project (TKCP) in PNG and Lillian Bago from CI/Coral Triangle Program also participated in the study tour to see PHE implementation firsthand.

The study tour aimed to: 1) broaden participants’ understanding of integrated population, reproductive health (RH) and development models and the inter-relationships of PHE and its benefits; 2) enhance participants’ knowledge of community-based family planning systems and service delivery mechanisms; 3) foster the visiting LGU executives as champions and leaders of integrated population and coastal resource management programs; and 4) have participants develop site specific PHE action plans that can be integrated into their local development agendas. This cross site visit also served as an excellent team building exercise/introduction to PHE approaches for three new CI/P staff members (Desiree Donceras, Raffy Villas and Jovelito de Luna) recently hired to coordinate activities in the VIP. During the study tour, the BALANCED-Philippines team provided technical support in the development of the action plans of the participating municipalities, namely: Lubang, Looc, Paluan and Abra de Ilog, Occidental Mindoro; San Juan and Calatagan, Batangas.

CI/P and PFPI will continue to work on promoting efforts to integrate PHE into local policy reforms and plans, in line with the approved workplan. As mentioned above, CI/P began implementing project activities this quarter and is laying the groundwork for future progress on expected NRM results and indicators as described in the Performance Monitoring Plan (See Annex 2.)

The next step for CI/P and PFPI is to monitor and work with the study tour participants’ to refine and adapt PHE action plans. CI/P will provide technical assistance particularly in the strengthening on the CRM component of the action plan.

### **Status of PMP results for IR3**

INDICATOR	January-March Accomplishment
3.1 Amount of in-country public and private financial resources leveraged by USG programs for RH/FP (USAID/OH standard indicator 1)	U\$15,923

3.2 Number of local policy reforms/plans with integrated PHE initiated (BALANCED field indicator)	2
3.3 Number of National/regional Forums where PHE approach highlighted	0

### **IR 3 Priorities for next period (April 1 to June 30, 2012)**

The following activities are planned for the next three months:

- Continue to advocate for the integration of PHE and FP/RH activities into LGU policies, such as local development/Environment/CRM/Fisheries plans, development plans, investment plans, etc.
- Continue to establish MOAs with the LGUs
- Conduct ceremonial signing of the MOU with LMP
- Coordinate with LMP for the conduct of conferences and assemblies to advocate for PHE

### **IR 4: Improved governance capacities of provincial and municipal LGUs in the VIP and Danajon Bank marine ecosystems**

BALANCED-Philippines initiated activities during this period to strengthen MPAs and MPA networks in the VIP and Danajon sites where USAID/OH- supported activities have been taking place and where a considerable number of municipal-scale MPAs currently exist. CI/P has started coordinating with provincial natural resource management (NRM) units in Batangas and Occidental Mindoro, and PFPI with the Bohol Environmental Management Office (BEMO) to use MEAT to assess current MPA management effectiveness and as a basis of formulating and implementing MPA strengthening strategies. This MEAT has only been applied to a small number of MPAs in this region but is now being considered as the national standard for assessment of municipal MPAs. BALANCED-Philippines will support the efforts of the provincial governments in the project sites with the aim of mainstreaming this governance approach at the provincial scale and within each target MPA at the municipal scale. BALANCED-Philippines will contribute to a comprehensive application of the MEAT in these provinces, identify the weak links in these MPA networks and then work at designing and implementing MPA strengthening strategies with those MPAs found to be not fully effective.

The existing MEAT tool assesses how an MPA is managed based on the following aspects:

- Management plan
- Management body
- Legal instrument for declaration
- Community participation
- Financing,
- IEC activities and materials
- Enforcement
- Monitoring
- Site Development

During this period, PFPI and CI/P worked hand in hand in developing an addendum to the MEAT tool. Additional population, health and gender indicators were added to each component. New socio-economic components were also added, namely: Population; Access to Basic Health Services; and Livelihood. These components were classified under the management of communities living adjacent to the MPAs. For each of the new components, a set of indicators was developed to describe the level of growth of the MPA. Key IR4 activities conducted during this reporting period are described below.

#### **4.1 Strengthen MPAs in select VIP and Danajon Bank sites**

In the VIP, CI/P worked in close coordination with the VIP MPA Network Chairs (MPA and Enforcement Networks) and Batangas PGENRO and Oriental Mindoro PAgO Secretariats to update the MPA management effectiveness evaluation for all MPA network-members (52 MPAs). For this reporting period, a Batangas MPA-Bantay Dagat (BD) Network meeting was organized on February 29, 2012 to discuss updates on the status of the different MPAs within Batangas, including initial results of the MPA evaluation gleaned from the workshop conducted last December 15 to 16, 2011. This December 2011 evaluation workshop was a VIP-wide (Batangas and Oriental Mindoro) MPA and BD Network meeting held to determine the current status of their MPAs (see Annex 3). This was an initial evaluation of the MPAs and the results will be validated through the implementation of the MEAT in the next reporting period. Based on the evaluation results, the Batangas MPA network also developed its action plan for 2012, which includes the implementation of the MEAT in VIP sites and capacity building and technical assistance for MPA establishment/expansion in the next reporting quarter. During the February 29 network meeting, BALANCED-Philippines staff provided background on the BALANCED-Philippines Project including support that the Project can provide to the network.

In Bohol, PFPI and BEMO were able to assess thirty five (35) MPAs using the MEAT tool. Annex 4 shows that out of the 35 MPAs that were assessed, 11 had the weakest management effectiveness (Level 1). On the other hand, seven had the best management effectiveness (Level 4) (see Annex 4 for MEAT results in Bohol). MPA assessment in Bohol is expected to be completed in the next quarter. To facilitate the selection for MPAs that will be provided strengthening and livelihood development support, a set of criteria for selection was developed by PFPI and BEMO namely:

- Local Chief Executive is supportive – with budget for CRM and law enforcement, with CRM officer and believes in PHE integration
- With potential community leader
- Cost efficient in monitoring
- Proximity to other MPAs
- No other NGOs working in the MPA
- Best performing MPAs based on MEAT assessment

PFPI's membership to the Provincial MPA Technical Working Group (TWG) in the Province of Bohol was approved during this reporting period. Application for membership to this Provincial MPA TWG was suggested by the head of Bohol Provincial Socio-Economic and Environmental Management Office.

In the next period, the CI/P MPA Specialist together with the VIP MPA Network secretariats will facilitate the implementation of the MEAT in BALANCED priority areas in the VIP<sup>17</sup>. In Bohol, BALANCED-Philippines will continue to conduct an assessment of the remaining MPAs using the MEAT. The BALANCED-Philippines team will also pilot-test the population, health, gender and socio-economic parameters that have been incorporated into the MEAT for a more comprehensive evaluation of the MPAs. Initial results will provide input into how to develop a socio-economic monitoring tool for MPAs being initiated by other groups.

In Bohol, PFPI will select at least 3 of the weakest MPAs for strengthening assistance in the next quarter. For VIP, the final results of the MEAT will be known in July. Based on the MEAT results, CI/P and PFPI will identify the MPA strengthening activities needed. The results in the VIP will also be used for the BRAVO awards.

#### **4.2 Strengthen Bantay Dagat Networks in select VIP sites**

Bantay Dagat groups play an important role in enforcing rules governing MPAs – no-fishing bans rules in core zones as well as other restrictions in those that have buffer zones. CI/P works very closely with the VIP BD Network to improve coordination among these groups on enforcement actions as well as build their capabilities to effectively enforce local and national fisheries laws and ordinances.

For this reporting period, CI/P, through the VIP Enforcement Coordinator, has been coordinating with the Batangas and Oriental Mindoro Enforcement Networks on the implementation of the 2012 network activities identified in the December 15 to 16, 2011 Workshop. In particular, monitoring and consultation meetings were conducted in Mabini, Batangas; and Baco, Calapan and San Teodoro, Oriental Mindoro to identify points of entry for PHE in enforcement, including discussions of organizational sustainability of the Bantay Dagat.

One of the highlights of the Joint Batangas-Oriental Mindoro MPA and BD Workshop last December 15-16, 2011 was the presentation of the BD evaluation and assessment results for both Batangas and Oriental Mindoro provinces. Results of the workshop were validated during the separate MPA and BD Network meetings of the two provinces. See Annex 5 for Enforcement results.

During the Batangas BD Network meeting in February, the BD network confirmed the need for the organizational strengthening of the Bantay Dagat. The target activities identified by the BD network include: regular seaborne patrol operation along the Batangas coastal; the need for patrol boats, fuel and additional fund support (potentially from an additional allocation from the LGU, private sector engagement or look for other donors); training on Basic Oil Spill Community Response; and basic training on Water Survival (funds to be raised by BD network).

Discussions with the PAgo of Oriental Mindoro emphasized the need to strengthen the enforcement network through regular meetings and formulation of tools to evaluate active/

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<sup>17</sup> CI/P activities in VIP began this reporting period. Implementation of the MEAT tool in the CI/P is scheduled for next reporting period.

inactive BDs. The PAgO also prioritized the planning/conceptualization of policy guidelines or manual of operations for the Oriental Mindoro Provincial Bantay Dagat Task force. Other target activities for the network include a refresher course/ advanced fisheries and environmental law enforcement training for new BD members and a recognition/ commendation/ incentive program for the best Bantay Dagat.

On February 6, 2012, an Oriental Mindoro MPA and Enforcement Network meeting was convened. The BALANCED-Philippines team presented information on PHE and the BALANCED Philippine Project goal and objectives. Based on the initial results of the Oriental Mindoro BD evaluation workshop, and in consultation with the PAgO, the areas of Baco, San Teodoro, and Puerto Galera have been identified as initial entry points for BD strengthening for the BALANCED-Philippines Project.

In San Teodoro and Puerto Galera, most of the BD members are inactive. The lack of logistical support, incentives and weak leadership are among the major reasons. There are also issues related to organizational sustainability, which most LGUs fail to address. There are no clear mechanisms on the institutionalization of the BD and the overall enforcement program of the LGU. In the next period, CI/P will initiate a comprehensive strategic planning for the Oriental Mindoro BD Network. The strategic plan will determine capacity building, organizational development, and livelihood/incentive needs of the BD as guided by the BALANCED-Philippines overarching PHE approach. BALANCED-Philippines will integrate PHE into the action planning of the BD in Oriental Mindoro.

Meanwhile, CI/P facilitated the community mobilization in Barangay Pulantubig for the mangrove reforestation project, which is being explored as another entry point for BALANCED Project to pilot conservation agreements in Baco, Oriental Mindoro. The mangrove reforestation project will be managed by the community under the leadership of Barangay Council of Pulantubig and the Municipal BD. This also complements the Provincial government's investment on crab fattening for the BD. The community meetings explored specific conservation actions needed to address threats in the environment, particularly in the mangrove and coastal areas, and identify what the local communities, specifically the Bantay Dagat, are able to commit to, and what benefits they can derive in a sustainable manner. During these meetings, the importance of addressing PHE issues and ecosystem-based approaches to climate change adaptation were discussed to emphasize the significance of the CI/P's mangrove reforestation activity. A plan of action, identifying activities, responsible persons/agencies and needs, has been developed by the community for the planting and monitoring of 5,000 mangrove propagules. CI/P shall facilitate the development of the conservation agreement, in which parties to be involved mutually accept and provide the incentive for the monitoring and protection of the mangrove area. The type and form of the incentives will be determined during the discussions for conservation agreements.

During the next period, priority activities are:

- Finalize mentoring and enforcement database design
- Pilot the enforcement performance rating tool in select VIP sites
- Facilitate Oriental Mindoro and Lubang Island Group (LIG) action planning

#### **4.3 Strengthen fisheries management in Lubang Island Group (LIG)**

BALANCED-Philippines endeavors to work with the two municipalities in the Lubang Island Group (LIG) to initiate fisheries management measures that will contribute to strengthening the system of MPAs, which is currently being managed jointly by the municipalities of Lubang and Looc.

For this reporting period, CI/P, together with PFPI, introduced the BALANCED Project to representatives from Lubang and Looc, Occidental Mindoro municipalities. During the March 2012 study tour to Bohol, both municipalities were represented by their respective LCEs resulting in both mayors recognizing the need to integrate PHE programs and policies into their development plans. After the Bohol visit, the Mayor of Looc convened the Municipal Health Board and appealed for an early and fast adoption of PHE projects to be supported by local ordinances, including the BD and MPA related activities. CI/P Lubang and Looc Field Assistants have also started compiling and updating information on the BD members and the socio-economic profile of both municipalities.

As a way of strengthening fisheries management, BALANCED-Philippines team, together with LGU staff, installed marking buoys to show the boundaries of the MPA no-take zone (NTZ). The delineation of the NTZ will facilitate the implementation of the MPA management plan and properly inform the local communities, particularly fishers, of the designation on the NTZ and the fishing areas.

CI/P has also conducted spot interviews of local fishers and key LGU officials on the formulation of the fisheries management areas and species-specific policies for LIG. Preliminary discussions on LGU programs and existing opportunities suggest a need for policy interventions, such as creating ordinances and guidelines for siganids, sea cucumbers, and seagrass areas for Looc and aquarium fishing for Lubang.

In the next quarter, BALANCED-Philippines will strengthen NRM capacity and enabling conditions in order to achieve the Project expected results for CRM. CI/P will conduct the following:

- Formulation of Fisheries Management Areas (FMA) and species-specific policies for Lubang and Looc
- Fisheries assessment for the selected species
- Consultations with and IEC activities for concerned fisherfolk sectors
- Facilitate the joint Lubang and Looc MPA management council meeting during which the above-mentioned points will be presented as well as recent MPA management interventions.



## Status of PMP results for IR4

INDICATOR	January-March Accomplishment
4.1 Number of people trained on NRM (disaggregated by gender and those involved in FP) ( <i>Standard USAID bio-diversity indicator</i> )	0
4.2 Number of hectares of biologically significant marine areas under improved management disaggregated by area of MPAs versus area of municipal waters <sup>1</sup> ( <i>Standard USAID bio-diversity indicator</i> )	0
4.3 Number of local institutions strengthened on NRM <sup>2</sup> ( <i>Standard USAID bio-diversity indicator</i> )	0

### IR 4 Priorities for next period (April 1 to June 30, 2012)

The following activities are planned for the next three months:

- Continue coordination with VIP MPA Network Chairs (MPA and Enforcement Networks) and Batangas PGENRO and Oriental Mindoro PAgO secretariats and BEMO in Bohol to assess MPA management effectiveness using MEAT
- Conduct MPA strengthening activities based on the results of the MPA assessment
- Continue coordination with VIP BD Network to improve coordination among these groups on enforcement actions
- Continue coordination and working with the LGUs of Lubang and Looc to discuss how to sustain current levels of effort as a first step in managed access and maintaining fishing effort at more sustainable levels

### IR 5: Increased incentives for coastal and marine conservation among coastal fisher households

BALANCED-Philippines is implementing a demand driven, LGU and stakeholder-based process-oriented approach for livelihood activities in both VIP and Danajon Bank. Toward this end, the Project is developing a sustainable livelihood framework in focal municipalities that will address food and health security of communities in the VIP and Danajon Bank in cooperation w/ LGUs and POs. The framework will include criteria for selecting livelihood enterprises that considers a threat analysis of coastal and marine conservation, and increases the economic incentives for coastal and marine biodiversity conservation. The livelihood strategies will include conservation incentives that not only provide sustainable activities but diverse livelihoods options (income and non-income sources) to ensure community resilience and poverty reduction.

In Lubang Island, likely avenues of livelihood diversification will be improved fisheries value chains (see fisheries management section mentioned above) and ecotourism. In Bohol, sustainable, eco-friendly and diversified livelihoods will be promoted as an incentive for good

marine conservation. Fishing households and those involved in MPA management, BD activities and volunteers working on PHE/RH/FP activities will be the primary target of these activities. Conservation agreements are premised on the exchange of conservation actions and benefits that can include economic incentives for communities and user groups engaged in good conservation and sustainable fisheries practices. Such incentives are in no way connected as a quid pro quo for communities or individuals commitment to family planning. Special attention will be given to ensuring equitable opportunities for women in livelihood development. In Bohol, BALANCED-Philippines currently works with BEMO and the PAgO in this process to further refine actual target areas, livelihoods promoted and interventions required.

### **5.1 Provide livelihood support with conservation action among coastal fishing households in the Danajon Bank**

BALANCED-Philippines team in Bohol conducted courtesy visits with the provincial and municipal LGUs particularly those offices which are involved in the livelihood and coastal resource management training. During these visits, some information on the LGUs' livelihood and CRM initiatives was gathered. The LCEs of Ubay and Tubigon; Municipal Councilors of Buenavista; Agriculture and CRM Officers of Clarin, Ubay and Tubigon; Municipal Planning and Development Coordinators of Clarin, Tubigon and Buenavista; Municipal Local Government Officer of Tubigon; BEMO Area Coordinators; and local Trade and Industry Officers were among those who were visited. Livelihood and CRM issues were discussed during courtesy visits, follow-up meetings, data gathering, learning sessions with LGU Department Heads, Sannguniang Bayan (SB) sessions, activity launching, livelihood planning, and strategic planning training activities.

BALANCED-Philippines also coordinated with governments, NGOs and other organizations with an enterprise development program, such as BEMO, PAgO, Socio-Economic and Environmental Management (SEEM) Office, Social Welfare and Development Office and the Department of Trade and Industry to discuss about livelihood options such as the offshore milkfish culture and the Self-Employment Assistance-Kaunlaran (SEA-K) program of the Social and Welfare Development Office whereby a loan for women's seaweed projects will be provided. A meeting with the Socio-Economic and Environmental Management Head and the Trade and Industry Provincial Director was conducted to define expectations of NGOs working in the province and project cooperation concerns such as guidelines on implementing livelihood activities. During one of the meetings with the PAgO, they mentioned that they would be responsible for the direct provision of livelihood assistance (e.g., conduct of training, provision of materials and equipment, etc.) in the Province since they have a PhP600,000 budget allocation for livelihood activities. Thus, it was suggested that PFPI/BALANCED-Philippines work closely with the PAgO in Bohol on livelihood efforts. BALANCED-Philippines can contribute assistance in terms of enterprise management and strengthening the people's organization towards a more efficient management of the enterprise.

BALANCED-Philippines staff also met and conducted key informant interviews with the Municipal Agricultural Officer, Municipal Planning and Development Coordinator, and CRM Officer of Buenavista and Inabanga municipalities to find out if there are existing livelihood projects or initiatives, resources to implement livelihood initiatives and the capacities of the

LGUs in assisting communities in managing livelihood activities . It is assumed that there are nine POs in Buenavista that are organized for fishery and farming purposes. There are also women's associations that are mobilized under the ongoing Great Women Project towards implementing the Gender and Development law, a national law that promotes women's involvement in development. In Inabanga, the LGU mentioned the Social Welfare and Development Office's SEA-K program, in which P150,000 will be loaned for women's seaweed project. SEA-K is a livelihood and capability- building program aimed at establishing sustainable community-based credit organizations by helping the poor develop socio-economic skills.

Based on the primary and secondary data gathered during these visits, the BALANCED-Philippines team began drafting the PHE sustainable livelihood development framework for Bohol, which is currently being developed in coordination with BEMO and PAgo.

In the next quarter, BALANCED-Philippines will continue to develop and finalize the livelihood framework. It will also sustain contact with local agencies at the provincial level, such as the PAgo, BEMO, Trade and Industry Office, SEEM, and Fisheries and Aquatic Resources Office while planning the afore-mentioned activities. We will also continue to identify and link with NGOs working in the project sites for possible partnership. Close coordination with the LGUs and POs will also be continued.

## **5.2 Provide livelihood support with conservation action among coastal fishing households in the Verde Island Passage**

Although initial secondary research on the socio-economic profile in Tingloy has been conducted, including preparation of the research design, the rapid appraisal in Tingloy is no longer needed. As mentioned in the introduction of this report, a replacement site for Tingloy will be identified in close consultation with USAID/Philippines. Criteria for site selection are being developed. CIP is considering Baco as the replacement for Tingloy because of the opportunities in the area. This matter will be discussed during the joint meeting with USAID/Philippines scheduled in the next quarter.

Through the support of another donor, the US-based National Fish and Wildlife Foundation (NFWF), the methodology and design for socio-economic baseline research in Lubang and Looc have been developed. This research will be conducted from April to May 2012.

Meanwhile, discussions with LGU representatives have indicated opportunities for linking the technical assistance from BALANCED Project for potential sustainable livelihood projects with existing LGU programs, such as the Akbay Program of the Department of Agriculture (providing Php10,000 per fisher/farmer as loan capital) or the conditional cash transfer (CCT) program of the Department of Social Welfare and Development.

CIP also had an exploratory meeting with the Foundation for the Sustainable Society, Inc (FSSI) to establish a partnership in the VIP to develop sustainable enterprise projects that would provide incentives for coastal and marine conservation among fisher households. The FSSI Executive Director expressed interest in becoming involved in the VIP and looks forward to supporting a pilot a sustainable marine/or coastal enterprise. There has been no discussion yet on what types

of incentives would be offered. However, FSSI can provide seed capital/loan grants if BALANCED partners could submit a good enterprise proposal.

During the next period, the Project needs to identify a replacement site for Tingloy and implement the rapid appraisal in the new site as soon as possible. CI/P will also identify opportunities to engage other local NGOs, POs and members of the private sector into supporting the sustainable livelihood program of the Project.

### **Status of PMP results for IR5**

INDICATOR	January-March Accomplishment
5.1 Number of people trained (gender disaggregated) on conservation-based enterprises <sup>3</sup>	0
5.2 Number of people with increased economic benefits derived from sustainable fisheries management	0
5.3 Number of people benefiting from conservation incentive-based enterprises	0

### **IR 5 Priorities for next period (April 1 to June 30, 2012)**

The following activities are planned for the next three months:

- Continue to initiate livelihood support-related activities as incentives for conservation in the Danajon and VIP.
- Plan and conduct training on conservation-based enterprises.
- Continue coordination meetings with the LGUs and potential local partners to discuss livelihood technical support that the BALANCED-Philippines Project will provide to target beneficiaries and to develop criteria for the selection of beneficiaries for livelihood technical support .
- Identify a replacement site for Tingloy and implement the rapid appraisal in the new site.

### III. PROJECT MANAGEMENT

During this period, BALANCED-Philippines project manager and the deputy project managers conducted monthly meetings. During these monthly meetings updates on project activities are provided and issues and concerns related to project implementation and tasks that need to be accomplished are discussed. Preparation for the study tour, updates on the status of the MOU with LMP, results of the sharing meeting in the VIP between PFPI and CI/P, reporting system and the Initial Environmental Examination (IEE) were also covered. Project Development Specialists from USAID/Philippines/OH and OEECC (Maria Teresa Carpio and Rebecca Guieb) attended the February 14<sup>th</sup> meeting. During this meeting Ms. Carpio and Ms. Guieb mentioned that they would be responsible for the development of the IEE for BALANCED-Philippines Project and the BALANCED-Philippines team would be responsible for drafting the Environmental Mitigation and Monitoring Plan (EMMP) after the IEE has been approved. As of this writing, USAID/Philippines is still in the process of developing the IEE.

For this period, CI/P completed the hiring of new BALANCED-Philippines staff last March 12, 2012. The following positions were developed and project staff hired to better address the specific needs of the project particularly in the Lubang Group of Islands:

1. Project Associate, Desiree Donceras - provides technical and administrative support for the implementation of the project including logistical support for field activities; drafts technical documents such as letters, workshop mechanics, designs and programs; documents workshops and meetings; coordination work with key partners; and assists in data gathering needs of the project, including but not limited to socio-economic profiling of project sites.
2. Field Assistants for Lubang and Looc, Occidental Mindoro, Raffy Villas (Lubang) and Jovelito de Luna (Looc) - the field assistants will coordinate the BALANCED project with all other CI/P marine projects in the municipalities of Lubang and Looc to ensure that these are all harmonized in support of the VIP objectives. Specifically, they will provide technical assistance to LGU in the management planning of MPAs, MPA networks, sustainable tourism plan and integrated coastal resource management in Lubang Island. These positions will assist in the exchange and flow of information to CI/P MPA Specialist, VIP enforcement coordinator, communications coordinator and the applied-science staff. The field assistant will also coordinate the field implementation activities related to other projects in the area.

BALANCED-Philippines project implementation has been ongoing for thirteen months and while the project has made many strides in reaching its objectives and PMP targets, we continue to face some challenges to project implementation. The inaccessibility of several sites, lack of regular transport, difficult terrain, and erratic schedule of public transportation make travelling and scheduling of activities difficult and even complicates the commitment of stakeholders to participate in activities. The lack of regular transport forces the field staff to hire transportation vehicles which results in higher than expected transportation expenses. Also, the multiple functions expected of the Field Coordinator are, by nature, challenging as is the wide project coverage area of 732 barangays and 29 municipalities.

Many of these municipalities are far apart from each other often making it difficult to monitor activities. There are limited funds in the BALANCED-Philippines budget to hire additional staff. However, we have attempted to address this challenge by building on our good relationship with RHU staff and using the RHU midwives to help mentor and monitor the PHE APEs and PHE CBDs to ensure efficient and effective operations and delivery of services. This works very well in many of our project sites. However, there are some sites where some RHU midwives do not conduct regular monitoring and reporting in their catchment areas. This coupled with the late submission of reports of the RHU midwives and the community volunteers posed a challenge in getting and collecting timely data from the RHUs for project reporting.

Another challenge is activity level of the APEs, whom we depend on to provide PHE and RH/FP information and referrals to community members. Of the 904 trained PHE APEs, about 20 percent of them are currently inactive and could not conduct IPC due to other responsibilities that prevent them from serving as APEs, such as their own work and other activities needed to make ends meet and provide the basic needs of the family. Nonetheless, during monitoring and mentoring sessions with community volunteers, BALANCED-Philippines staff continues to remind these volunteers that they can conduct IPC sessions at the same time they are doing their daily chores or during their free time.

Despite the challenges, BALANCED-Philippines has continued to exert all efforts to deliver the expected results and deliverables of the Project as indicated in the workplan. BALANCED-Philippines is considering refresher trainings for the active PHE APEs, training new PHE APEs in barangays where PHE APEs are inactive, and other solutions to address both the APE dropout rate and sustainability of this volunteer system.

Establishing a cost recovery system for FP supplies in some of the “**new**” project sites has also been difficult. While 69 percent of all the project sites have MOU/As established with DKT or Alphamed, we are working closely with these private sector suppliers to establish agreements in the rest of the BALANCED-Philippines sites. Some representatives of Alphamed and DKT Philippines have had conflicts in schedules that often results to cancellation of previously set meetings with the LGUs. Both Alphamed and DKT were informed about this concern, and the BALANCED-Philippines Project Manager reported this challenge to USAID/Philippines. BALANCED-Philippines staff in the Manila office and in the field continues to coordinate and provide feedback to these companies to encourage their Area Managers and Area Coordinators to visit the LGUs and discuss the partnership agreement needed to set up the FP supply system. Both Alphamed and DKT Philippines promised to meet with BALANCED-Philippines Project Manager to further discuss and address the issues mentioned above.

**Annex 1. Activity status to date (February 1 to March 31, 2012)**

Biogeographic Representation	Province	Municipality (clusters)	New (# brgs)	Maint. (# brgs)	Population 2007	Unmet FP Need (new) <sup>18</sup>	Unmet Need (Main)	#TOT Part.	MOAs signed <sup>19</sup> (Y/N)	# CBDs trained	# RHU trained	# PEs trained	
						(# WRA <sup>20</sup> )							
Verde Island Passage (VIP)	Batangas	Calatagan	25		51,544	4,510		9	Y	20	14	46	
		Tingloy	15		18,548	1,623					23		
		Lobo	26		37,798	3,307		5	Y	27	24	27	
		Mabini	34		40,629	3,555		5	Y	35	8	40	
		Nasugbu	42		113,926	9,969		5	Y	31	27	31	
		San Juan	42		87,276	7,637		7			36	30	44
		Batangas City/ Isla Verde		6	5,876		514	4	Y	12	21	54	
	Occidental Mindoro	Paluan	12		13,718	1,200		6	Y	12	11	13	
		Abra de Ilog		9	25,152		2,201	9	Y	9	24	19	
		Looc	9		11,310	990		8	Y	9	8	8	
		Lubang	16		28,267	2,473		4	Y	13	18	16	
	Oriental Mindoro	Puerto Galera		14	28,025		2,452			10	6	9	
		San Teodoro		8	15,039		1,316			8	5	8	
Baco			27	34,127		2,986			25	6	27		
Danajon Bank	Bohol	Bien Unido		15	23,412		2,049		Y	14	5	34	
		Buenavista		35	26,443		2,314			30	5	32	

<sup>18</sup> Estimated based on the assumptions that 20% of WRA have unmet need; and an additional 15% are in need of more effective methods (total 35% of WRA)—based on DHS data and regional data cited in “Contraceptive Needs in the Philippines.” Guttmacher Institute. In Brief Series 2009 No.1

<sup>19</sup> 3 MOAs signed in the first quarter (Tubigon, Inopacan & Bato); 4 MOAs signed in the 2<sup>nd</sup> quarter (Getafe, Hindang, Matalom & Lubang); 6 MOAs signed in the 3<sup>rd</sup> quarter (Bien Unido, Inabanga, Ubay, Hilongos, Looc and Abra de Ilog); and 1 MOA signed in the 4<sup>th</sup> quarter (Batangas City). The Memorandum of Agreement (MOA) articulates LGU support to establish a PHE community based distribution system and a provision to allocate funding support for the procurement of the FP commodities. The MOA also defines the roles of each collaborating organization and the LGUs’ agreements to provide counterpart contributions to PHE activities.

<sup>20</sup> WRA - women of reproductive age

		Clarin		24	18,871		1,651			21	3	27
		Getafe		24	27,852		2,437		Y	24	5	49
		Inabanga		50	43,331		3,791		Y	51	5	64
		CP Garcia		23	25,118		2,198			19	12	21
		Trinidad		20	27,580		2,413			19	3	28
		Talibon		25	59,274		5,186		Y	31	4	44
		Tubigon		34	44,434		3,888		Y	28	6	48
		Ubay		44	65,900		5,766		Y	43	29	67
	Leyte	Bato		32	33,930		2,969		Y	27	5	31
		Hilongos		51	53,911		4,717		Y		7	38
		Hindang		20	19,927		1,744		Y	27	6	29
		Matalom		30	31,055		2,717		Y	30	5	28
		Inopacan		20	19,276		1,687		Y	17	9	22
	<b>TOTAL</b>	<b>5 provinces</b>	<b>29 municipalities</b>	<b>221</b>	<b>511</b>	<b>1,031,549</b>	<b>35,264</b>	<b>54,996</b>	<b>62</b>	<b>20</b>	<b>628</b>	<b>334</b>



## Annex 2. Contraceptive Prevalence Rate for BALANCED-Philippines Project Sites

### CONTRACEPTIVE PREVALENCE RATE

PROVINCE	MUNICIPALITY	CPR	Year	CPR	Year	Data Source
<b>Batangas</b>						
	Batangas city	28.09%	2010	28.60%	2011	RHU
	Calatagan	29.94%	2010	32.97%	2011	RHU
	Tingloy	No longer a site	2010	No longer a site		RHU
	Lobo	14.60%	2010	No data	2011	RHU
	Mabini	18.86%	2010	11.90%	2011	RHU
	Nasugbu	33.20%	2010	37.22%	2011	RHU
	San Juan	39.14%	2010	28.52%	2011	RHU
Average CPR		<b>27.30%</b>				
<b>Oriental Mindoro</b>						
	Puerto Galera	85%	2010	85%	2011	RHU
	San Teodoro	17.98%	2010	18%	2011	RHU
	Baco	40%	2010	46%	2011	RHU
Average CPR		<b>48%</b>		<b>50%</b>		
<b>Occidental Mindoro</b>						
	Adra de Ilog	55%	2010	56.73%	2011	RHU
	Paluan	46%	2010	46.20%	2011	RHU
	Looc	32.60%	2010	42.38%	2011	RHU
	Lubang	26%	2010	42%	2011	RHU
Average CPR		<b>40%</b>		<b>46.83%</b>		
<b>Bohol</b>						
	Bien Unido	22.91%	2010	22.91%	2011	RHU
	Buenavista	12.80%	2010	17%	2011	RHU
	Clarin	21%	2010	25.64%	2011	RHU
	Getafe	20.86%	2010	21.57%	2011	RHU
	Inabanga	24.93%	2010	27.60%	2011	RHU
	CP Garcia	11%	2010	11.83%	2011	RHU
	Trinidad	0.75%	2010	35.70%	2011	RHU
	Talibon	57%	2010	65%	2011	RHU
	Tubigon	34%	2010	31.30%	2011	RHU
	Ubay	24.40%	2010	33%	2011	RHU
Average CPR		<b>22.97%</b>		<b>29.15%</b>		

**Leyte**

	Bato	10.90%	2010	17.29%	2011	RHU
	Hilongos	24.50%	2010	28%	2011	RHU
	Hindang	17%	2010	32.98%	2011	RHU
	Matalom	12%	2010	34%	2011	RHU
	Inopacan	19%	2010	31%	2011	RHU
Average CPR		<b>16.68%</b>		<b>28.65%</b>		

### Annex 3. Batangas MPA Evaluation Results

Table 1. Batangas Marine Protected Area Network

Municipality	Network Initiatives and Remaining 2011 Activities	MPA Rectified Ordinances and Resolutions	Status of MPA Delineation and Maintenance of Boundary Markers	Status of MPA Management Teams/Councils/Committees
Bauan	<ul style="list-style-type: none"> <li>• IEC</li> </ul>	<ul style="list-style-type: none"> <li>• Existing ordinance</li> </ul>	<ul style="list-style-type: none"> <li>• Established</li> </ul>	<ul style="list-style-type: none"> <li>• In –active</li> </ul>
Batangas City	<ul style="list-style-type: none"> <li>• BERT Participation</li> <li>• Additional MPAs</li> </ul>	<ul style="list-style-type: none"> <li>• Barangay Resolution</li> </ul>	<ul style="list-style-type: none"> <li>• Maintained</li> </ul>	<ul style="list-style-type: none"> <li>• Active</li> </ul>
Lemery	<ul style="list-style-type: none"> <li>• IEC</li> <li>• Additional MPAs</li> </ul>	<ul style="list-style-type: none"> <li>• Existing</li> </ul>	<ul style="list-style-type: none"> <li>• Sustainable</li> <li>• To be declared</li> </ul>	<ul style="list-style-type: none"> <li>• Active</li> </ul>
Lian	<ul style="list-style-type: none"> <li>• Proposed 4 sites</li> <li>• Operation of Mangrove Nursery transferred to PO /source of livelihood</li> <li>• Mangrove Recreational Site</li> </ul>	<ul style="list-style-type: none"> <li>• One of which has Barangay Ordinance</li> <li>• Other 3 still in process</li> <li>• LGU funded</li> </ul>	<ul style="list-style-type: none"> <li>• Delineated</li> <li>• No markers yet</li> </ul>	<ul style="list-style-type: none"> <li>• LIMPA- Oversight management body</li> <li>• MPA management committee to be organized</li> </ul>
Lobo	<ul style="list-style-type: none"> <li>• Proposed 1 new MPA</li> <li>• IEC</li> </ul>	<ul style="list-style-type: none"> <li>• Management Plan adopted by SB</li> </ul>	<ul style="list-style-type: none"> <li>• MPA delineated but not adopted</li> <li>• Installation of new markers</li> </ul>	<ul style="list-style-type: none"> <li>• To be organized</li> </ul>

Mabini	<ul style="list-style-type: none"> <li>• Public consultation for expansion of MPA</li> </ul>	<ul style="list-style-type: none"> <li>• Codification of Municipal Ordinance relative to Environmental Code of Mabini</li> </ul>	<ul style="list-style-type: none"> <li>• Installation of marker and mooring bouys in Batongbuhay MPA</li> <li>• Maintenance of boundary marker by BFARMC and Dive Boat Association</li> </ul>	<ul style="list-style-type: none"> <li>• Active</li> <li>• CRMB (Policy-making body)</li> <li>• MR-REC (Management body)</li> </ul>
Nasugbu	<ul style="list-style-type: none"> <li>• Conducted Barangay Consultation</li> <li>• Amend Resolution regarding the twin Island MPA</li> </ul>	<ul style="list-style-type: none"> <li>• Existing</li> </ul>	<ul style="list-style-type: none"> <li>• Existing markers maintained</li> </ul>	<ul style="list-style-type: none"> <li>• Active</li> </ul>
San Luis	<ul style="list-style-type: none"> <li>• IEC</li> <li>• Community organizing</li> <li>• Proposed MPA (MANGROVE Area)</li> <li>• Study tour to other mangrove recreational sites)</li> </ul>	<ul style="list-style-type: none"> <li>• Coordination and adoption of SB</li> </ul>	<ul style="list-style-type: none"> <li>• Site identified (7 has.)</li> </ul>	<ul style="list-style-type: none"> <li>• Active</li> </ul>






San Juan	<ul style="list-style-type: none"> <li>• Continuous IEC</li> <li>• Additional 3 MPA (mangrove areas)</li> <li>• Installation of mooring bouys station</li> <li>• Collection of crown of thorns</li> <li>• Public consultation (Mangrove rehabilitation - Barangay Catmon mooring bouys)</li> </ul>	<ul style="list-style-type: none"> <li>• Existing ordinance</li> <li>• Ordinance for mooring bouys station (2<sup>nd</sup> reading –SB)</li> <li>• Signing of barangay resolution for project acceptance and CI Accreditation together with PGENRO/Academe</li> </ul>	<ul style="list-style-type: none"> <li>• Installation of new markers to 5 MPAs</li> <li>• Mooring bouys station installed for bankeros</li> </ul>	<ul style="list-style-type: none"> <li>• Active</li> </ul>
Calaca	<ul style="list-style-type: none"> <li>• IEC</li> <li>• Public consultation</li> <li>• Identification of MPA site</li> </ul>	<ul style="list-style-type: none"> <li>• Coordination with SB</li> </ul>	<ul style="list-style-type: none"> <li>• None</li> </ul>	<ul style="list-style-type: none"> <li>• None</li> </ul>

**Table 2. Oriental Mindoro MPA Evaluation Results**

MUNICIPALITY	ASSESSMENT/EVALUATION
Puerto Galera	<ul style="list-style-type: none"> <li>• Regular Patrolling within MPA</li> <li>• Continuous IEC</li> <li>• Ordinance - SB level; No updates from SB Chair Committee on Agriculture</li> <li>• Some boundary markers are not yet installed (waiting for the amendment)</li> <li>• Management Plan - not fully implemented; no resolution for adoption yet</li> </ul>

San Teodoro	<ul style="list-style-type: none"> <li>• Need for new MPA markers</li> <li>• No regular fish sanctuary guards</li> <li>• Reorganization of MPA Management. Board</li> <li>• Appointment of fish warden/Sanctuary Guards</li> <li>• Installation of CMBs</li> <li>• MPA Plan adopted</li> </ul>
Baco	<ul style="list-style-type: none"> <li>• Regular patrolling and implementation Municipal Fishery Ordinance</li> <li>• Boundary dispute between Baco and San Teodoro , Baco and Calapan (should be addressed immediately)</li> <li>• MPA site to be assessed and for consultation</li> </ul>
Calapan City	<ul style="list-style-type: none"> <li>• Reef check request for Harka Piloto FS and installation of CMBs</li> <li>• Adoption to City Fishery Ordinance declaration of Silonay Mangrove MPA</li> <li>• Adoption of MPA Plan</li> <li>• Additional marker buoys and signages installed</li> <li>• Designation of a reception area at Barangay Suqui fronting Harka Piloto FS</li> <li>• Installation of concrete Watch Tower and BD Headquarters</li> <li>• Proposed establishment of Mangrove Boardwalk and aquasilviculture within the MPA</li> </ul>
Pinamalayan	<ul style="list-style-type: none"> <li>• Municipal Fishery Ordinance approved</li> <li>• Launching of New MPA areas before installation of buoy markers for MPA boundaries</li> <li>• Need to organize MPA Mgt. Board</li> </ul>
Gloria	<ul style="list-style-type: none"> <li>• MPA Ordinance rectified</li> <li>• MPA Plan adopted</li> <li>• MPA resolutions for additional 2 sites</li> <li>• Active MPA Management teams/councils/ communities</li> </ul>
Bansud	<ul style="list-style-type: none"> <li>• MPA Ordinance on review by SB members</li> <li>• Boundary markers established/maintained</li> <li>• Management Team/ Council formed Maintained</li> </ul>
Pola	<ul style="list-style-type: none"> <li>• Assessment of additional MPA sites (Misong, Calima, Buhay na Tubig, Tiguihan)</li> <li>• Lost boundary markers monitored and replaced</li> </ul>
Bongabong	<ul style="list-style-type: none"> <li>• Launching and installation of buoy markers last May 18, 2011</li> <li>• MPA ordinance still at Sangguniang Barangay for review</li> <li>• Municipal Fishery Ordinance not yet approved</li> <li>• Installation of Concrete Monitoring Blocks</li> </ul>
Mansalay	<ul style="list-style-type: none"> <li>• IEC to coastal barangays and communities near MPA</li> <li>• Implementation of MFO</li> <li>• Regular monitoring of boundaries/markers for maintenance</li> </ul>





#### Annex 4. Status of MPA'S in Bohol Assessed Using MEAT

Municipality	Level 1	Level 2	Level 3	Level 4
Tubigon	Matabao	Cabulijan Centro Pangapasan Ubay	Tinangnan	Macaas Batasan Bilangbilangan
Clarin	Bonbon  Lajog 	Nahawan Tangaran	Majigpit	
Inabanga	Lawis  Ondol 	Cagawasan		Hambungan
Buenavista		West Cabul-an East Cabul-an		Asinan
Getafe	Campao Occidental Corte-Baud Jagoliao Nasingin Tulang	Pandanon Banacon Tugas	Jandayan Norte Jandayan Sur	Handumon
Talibon		Busalian		
Bien Unido	Bilangbilangan West 			
Ubay				Sinandigan
	<b>11 "Level 1" MPAs</b>	<b>13 "Level 2" MPAs</b>	<b>4 "Level 3" MPAs</b>	<b>7 "Level 4" MPAs</b>

#### Criteria for selection of MPAs to be put under improved management

##### 1. LCE is supportive

- with budget for CRM and law enforcement
- with CRM officer
- believes in PHE integration

-  2. With potential community leader
-  3. Cost efficient in monitoring
-  4. Proximity to other MPAs
-  5. No other NGOs working in the MPA

## Annex 5. Bantay Dagat Evaluation Results

Table 1. Batangas Bantay Dagat Evaluation Results

<b>ORGANIZATIONAL STATUS</b>	<b>OPERATIONAL STATUS</b>	<b>MANAGEMENT SUPPORT AND INTERVENTION</b>
Lack of support due to political intervention	Disorganized operational activities among BD members	Full support of PNP/PCG/LGU and other local and national agencies
Weak on logistical support and other enforcement assistance	Fund sourcing/provide livelihood program	Through municipal ordinance and executive order
Inactive in terms of task	Insufficient honorarium or incentives	Municipal ordinance

Table 2. Operational Status of Oriental Mindoro Bantay Dagat Teams

<b>Implementation of Plans</b>					
<b>Municipality</b>	<b>Patrolling</b>	<b>MPA Area Covered</b>	<b>Team Composition (PNP, BD, Maritime, BFAR rep.)</b>	<b>Tactical Plan</b>	
				<b>Day &amp; Night</b>	<b>Use of Informer</b>
Puerto Galera	Regular	/	Complete	/	/
San Teodoro	Irregular	/	Complete	/	/
Baco	Irregular	/	Complete	/	/
Calapan City	Irregular	/	Complete	/	/
Pola	Regular	/	Complete	/	/
Naujan	Regular	/	Complete	/	/
Pinamalayan	Irregular	/	Complete	/	/
Gloria	Regular	/	Complete	/	/
Bansud	Irregular	/	Complete	/	/
Bongabong	Irregular	/	Complete	/	/
Roxas	Irregular	/	Complete	/	/
Mansalay	Irregular	/	Complete	/	/
Bulalacao	Irregular	/	Complete	/	/



**Management Support and Interventions received from the LGU/Private Sector to Support BD Groups**

Municipality	Operation				
	Fuel	Coordinat ion	Honorariu m	Livelihood from LGU	Monitoring/ Evaluation
Puerto Galera	Insufficient	/	/	X	/
San Teodoro	Sufficient	/	X	/(Goats)	/
Baco	Insufficient	/	X	/(Crablets, )	/
Calapan City	Sufficient	/	/	/(Fishing Gears)	/
Pola	Sufficient	/	/	X	/
Naujan	Sufficient	/	/	X	/
Pinamalayan	Insufficient	/	X	X	/
Gloria	Sufficient	/	/	/(hog raising, payao,tilapiafi ngerlings)	/
Bansud	Insufficient	/	X	X	/
Bongabong	Insufficient	/	X	/(hog dispersal)	/
Roxas	Insufficient	/	X	X	/
Mansalay	Insufficient	/	X	X	/
Bulalacao	Insufficient	/	X	X	/

## Annex 6. Performance Management and Reporting Plan and Results to Date

### *BALANCED-Philippines Project Indicators, Expected and Actual Results to Date*

INTERMEDIATE RESULT	INDICATOR	Expected Year 1 Results	Total Year 1 Results (Dec 2010 to Sept 2011)	Expected Year 2 Results	Oct to Dec 2011 Results	Jan to Mar 2012 Results	Total Year 2 Results	Comments
IR1: Improved access to family planning/reproductive health services in key bioregions	1.1 Number of people counseled in RH/FP as a result of USAID assistance (USAID/OH/custom indicator 2)	22,000	1,526	43,550	1,904	6,593	8,497	Under target  There is difficulty in collecting the data on the number of people counseled because RHU midwives in some sites do not conduct regular monitoring and reporting in some sites resulting to incomplete data. Other factors include late submission of reports causing underreporting of accomplishments and inactive PHE APEs not reporting. Collection of reports is ongoing and data that will be collected will be added in the next quarter report.

1.2 Contraceptive Prevalence Rate ( <i>USAID/OH standard indicator 3</i> )	N/A	31 (average of the 5 target Provinces)	Increasing	37.88 (average of the 5 target)	Data not collected	37.88	<p>CPR data seems to be very unreliable. Some municipalities are reporting very high increases while other municipalities report very steep declines.</p> <p>Interestingly, target sites with established cost recovery systems report a 19% increase in CPR, while target sites with no cost-recovery systems established reported a 17% increase in CPR. Further, Hilongos, which has no trained PHE CBDs, showed a 14% increase in CPR.</p> <p>There seems to be rampant inaccuracies in data collection for this indicator. Therefore, BALANCED-Philippines staff will check data to determine the reason for large variances in CPR calculations.</p>
1.3 Number of couple years protection ( <i>USAID/OH standard indicator 3</i> )		N/A	17,160	79,125	80,816	80,816	PFPI will check these numbers for accuracy as such a high CYP seems unlikely given the few number of people counseled
1.4 Number of people trained in RH/FP with USG funds ( <i>USAID/OH standard indicator 3</i> )	713	1,508 (204 m; 1,304 f)	412	215 (42 m; 173 f)	205 (32 m, 173 f)	420 (74 m; 346 F)	Over-target and 4% increase in number of men trained

1.5 Number of participants who received BALANCED training and/or mentoring that are now providing training or technical assistance to others on PHE ( <i>BALANCED core indicator</i> )	60	36	36	36	24	60	Over-target
1.6 Percent of FP users of modern methods obtaining supplies and services from private sector sources (CBDs, etc.) ( <i>Surrogate BALANCED field indicator</i> )	15%	0	15%	1%	1.68%	1.68%	Under-target Percentage is based on the data collected from 11 municipalities. Collection of data from other municipalities is ongoing as of this period.
1.7 Number of USG-assisted service delivery points providing FP services (BALANCED field indicator)	495	450 <sup>21</sup>	233	107 <sup>22</sup>	99 <sup>23</sup>	206	On-target
1.8 Number of target organizations incorporating PHE tools, protocols, etc. into their work (BALANCED core indicator)	15	23 <sup>24</sup>	20	10 <sup>25</sup>	4 <sup>26</sup>	14	On-target

<sup>21</sup> 26 RHUs + 424 CBDs

<sup>22</sup> 1 RHU + 106 CBDs

<sup>23</sup> 1 RHU + 98 CBDs

<sup>24</sup> MENRO & RHU of Calatagan (2); MAO & RHU of Lobo (2); MAO & RHU of Mabini (2); MAO & RHU of San Juan (2); MAO & RHU of Nasugbu (2); MAO & RHU of Inabanga (2); RHUs of Batangas City, Bato, Hindang, Matalom, Inopacan, Bien Unido, Getafe, Buenavista, Clarin, Tubigon & Ubay (11). These local government organizations have been using the BALANCED training manuals to train PHE adult PEs and PHE CBDs

<sup>25</sup> MAO, RHU & MSWDO of Abra de Ilog (3); MAO & RHU of Lubang (2); MAO & RHU of Looc (2); RHUs of Pres. Carlos P. Garcia, Trinidad & Hilongos.

<sup>26</sup> RHU, MPDO, CRMO of Paluan (3) and RHU of Talibon (1). These local government organizations have been using the BALANCED training manuals to train PHE adult PEs and PHE CBDs

IR2: Increased community awareness and support of family planning and conservation as a means to improve health, food security and natural resources	2.1 Number of people who have seen or heard a specific RH/FP message (USAID/OH standard indicator 2)	75,000	2,379	100,000	107,694	20,979	128,673	On-target
IR3: Increased policymakers' commitment to promote/support FP/RH services and integrated approaches	3.1 Amount of in-country public and private financial resources leveraged by USG programs for RH/FP (USAID/OH standard indicator 1)	US\$15,000	US\$112,760	US\$40,000	US\$10,282	US\$15,923	US\$26,205	On-target
	3.2 Number of local policy reforms/plans with integrated PHE initiated (BALANCED field indicator)	10	4	10	0	2	2	Under-target Local policy reforms/plans are currently being reviewed and updated. BALANCED-Philippines Project staff continues to advocate for the inclusion of PHE in local plans and agenda.
	3.3 Number of National/regional Forums where PHE approach highlighted		N/A	1		0	0	MOU with LMP was signed. Coordination with LMP for the schedule of island cluster conferences is ongoing.

IR 4: Improved governance capacities of provincial and municipal LGUs in the VIP and Danajon Bank marine ecosystems	4.1	Number of people trained on NRM (disaggregated by gender and those involved in FP) ( <i>Standard USAID bio-diversity indicator</i> )	N/A	0		0	0	
	4.2	Number of hectares of biologically significant marine areas under improved management disaggregated by area of MPAs versus area of municipal waters <sup>1</sup> ( <i>Standard USAID bio-diversity indicator</i> )	N/A	Municipal waters: 50,000ha  MPAs: 400ha.	0	0	0	MPA assessment in Bohol using the MEAT tool is ongoing. MPA assessment in the VIP will commence next quarter. VIP results will be available in July.
	4.3	Number of local institutions strengthened on NRM ( <i>Standard USAID bio-diversity indicator</i> )	N/A	14 (MPAs 10, BD 4)	0	0	0	
IR 5: Increased incentives for coastal and marine conservation among coastal fisher households	5.1	Number of people trained (gender disaggregated) on conservation-based enterprises <sup>3</sup>	N/A	Target set in Year 1 <sup>27</sup>	0	0	0	Coordination with LGUs, GOs and private organizations involved in enterprise development is ongoing. Training on conservation based enterprises will happen next quarter.
	5.2	Number of people with increased economic benefits derived from sustainable fisheries management	N/A	No target but tracked <sup>28</sup>	0	0	0	

<sup>27</sup> This target will be based on target number of people benefiting from conservation based enterprises and will be a subset of that number (see \*\*\*below).

	5.3 Number of people benefiting from conservation incentive-based enterprises		N/A	Target set in Year 1 <sup>29</sup>	0	0	0	
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<sup>28</sup> Estimated number of fishers in LIG is 1000 persons. If fishers and municipalities choose to pilot a managed access regime, then the number benefiting will be the number of fishers granted exclusive access rights. If it is for the reef fishery only, the actual number will be less than 1000 as the number of reef fishers has yet not determined, and will be baselined in Year1.

<sup>29</sup> \*\*\* In a process oriented livelihoods approach, the number of targeted beneficiaries will be determined as part of the planning conducted with LGUs in Year1. However, given budget considerations, order of magnitude approximation will be in hundreds (100-300), not thousands of households. Number of households benefiting from conservation incentive-based enterprises (gender disaggregated and by number of these people also involved in FP/RH activities) includes those households where a member has participated in diversified livelihood interventions including training, value chain improvements, etc. (TBD once livelihood strategies designed w/ LGUs but estimated at 30 per municipality X 5 = 150 households)

**Building Actors and Leaders for Advancing Community  
Excellence in Development:  
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**Quarterly Progress Report #6  
For Period April 1 to June 30, 2012**

**Submitted August 14, 2012**

**USAID Cooperative Agreement No. GPO-A-00-08-00002-00  
Population Health Environment Technical Leadership Cooperative  
Agreement**

*Implemented by:*

**PATH Foundation Philippines, Inc.  
Conservation International  
Coastal Resources Center at the University of Rhode Island**



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## 2 ACRONYMS

APE	Adult Peer Educator
BALANCED	Building Actors and Leaders for Advancing Community Excellence in Development
BD	Bantay Dagat
BEMO	Bohol Environmental Management Office
BFAR	Bureau of Fisheries and Aquatic Resources
BHW	Barangay Health Worker
BnB	Botika ng Barangay
CBD	Community Based Distributor
CCEF	Coastal Conservation and Education Foundation
CHD	Center for Health Development
CHT	Community Health Team
CI	Conservation International
CIP	Conservation International Philippines
CRC	Coastal Resources Center
CRM	Coastal Resource Management
DENR	Department of Environment and Natural Resources
DOH	Department of Health
FGD	Focus Group Discussion
FP/RH	Family Planning/Reproductive Health
FSSI	Foundation for the Sustainable Society, Inc.
ICRM	Integrated Coastal Resource Management
ICRMP	Integrated Coastal Resource Management Project
ICV	Informed Consent and Volunteerism
IEC	Information, education, and communication
IMAP	Integrated Midwives Association of the Philippines
IPC	Interpersonal Communication
IR	Intermediate Results
LAM	Lactational Amenorrhea Method
LCE	Local Chief Executives
LGU	Local Government Unit
LHAD	Local Health Assistance Division
LIG	Lubang Island Group
LMP	League of Municipalities of the Philippines
MEAT	MPA Management Effectiveness Assessment tool
MHO	Municipal Health Officer
MOU/A	Memorandum of Understanding/Agreement
MPA	Marine Protected Area
NFWF	National Fish and Wildlife Foundation
NGO	Non-governmental Organization
NRM	Natural Resource Management
OEECC	Office of Energy, Environment and Climate Change
OH	Office of Health
PAgO	Provincial Agriculture Office

PFPI	PATH Foundation Philippines, Inc.
PHE	Population, Health, and Environment
PHO	Provincial Health Officer
PHTL	Provincial Health Team Leader
PO	People's Organization
POPCOM	Commission on Population
RH	Reproductive Health
RHM	Rural Health Midwife
RHU	Reproductive Health Unit
SAFI	Sustainable Alternative Farming Institute
SICAD	Strategic Intervention and Community-focused Action Towards Development
TOT	Training of Trainers
TWG	Technical Working Group
URI	University of Rhode Island
USAID	United States Agency for International Development
VIP	Verde Island Passage
VMG	Vision, Mission, Goals

## I. INTRODUCTION

The United States Agency for International Development/Philippines (USAID/Philippines) is providing a US\$1,300,000 Buy-in to the USAID Washington-funded BALANCED (*Building Actors and Leaders for Advancing Excellence in Community Development*) Project to support results-oriented population, health and environment (PHE) field activities in biodiversity-rich bioregions of the Philippines over the period from December 2010 to August 2013. Funding is from two sources from within USAID/Philippines: The Office of Health/OH (\$500,000) for family planning and outreach components (Intermediate Results/IRs 1, 2 and 3), and Office of Energy, Environment and Climate Change/OEECC (\$800,000) for outreach, fisheries management and livelihood components (IRs 4 & 5 and some contributions to IR3). OH activities commenced in December of 2010 and will run through December 2012, with supplemental funding being considered to extend support to IRs 1 to 3 through August 2013. OEECC-supported activities began in December 2011 and will run through August 2013. The Coastal Resources Center (CRC) at the University of Rhode Island (URI), with PATH Foundation Philippines, Inc. (PFPI) and Conservation International/Philippines (CI/P) are the implementing agents for BALANCED-Philippines Project. The goal of the BALANCED-Philippines Project is to build the leadership and implementation capacities of national and local governments and stakeholders to respond in an integrated manner to interrelated population, health, and marine environmental issues. This goal is achieved through the following IRs:

- IR1 - Improved access to family planning/reproductive health services in key bioregions (OH)
- IR2 - Increased community awareness and support of family planning and conservation as a means to improve health, food security and natural resources (OH)
- IR3 - Increased policy makers' commitment to FP/RH services, CRM and integrated policies (OH & OEECC)
- IR4 - Improved governance capacities of provincial and municipal LGUs in the VIP and Danajon Bank marine ecosystems (OEECC)
- IR5. - Increased incentives for coastal and marine conservation among coastal fisher households (OEECC)

The BALANCED-Philippines Project goal and intermediate results contribute to USAID/Philippines priority goal of “Investing in People to Reduce Poverty” and also to the USAID/OH Strategic Objective of sustainably achieving improved family health and the Family Planning/Reproductive Health (FP/RH) Objective of achieving desired family size. The Project is also in line with the current U.S. Country Assistance Strategy with respect to assistance directed at reducing threats to biodiversity. The BALANCED-Philippines Project will also contribute to achieving Intermediate Result 1, “Natural Resources and Environmental Services Improved” under Objective 1, “Broad Based and Inclusive Growth Sustained” of the proposed results framework for the planned USAID/Philippines Mission’s Country Development Cooperation Strategy.

With support from USAID/OH, family planning activities are being implemented in Verde Island Passage (VIP) sites where ongoing coastal/fisheries management activities have yet to be integrated with FP/RH (herein called “new” sites), and Danajon Bank bioregions to improve and

maintain PHE initiatives that were implemented by PFPI under previous PHE projects (herein referred to as “**maintenance**” sites). Through additional support from USAID/OEECC, the Project incorporated coastal resources management (CRM) activities in select BALANCED-Philippines sites.

This report summarizes the activities completed by BALANCED-Philippines during the reporting period April 1 to June 30, 2012 as per terms and conditions as approved in the Year 2 work plan and Cooperative Agreement No. GPO-A-00-08-00002-00.

## **II. PROJECT RESULTS**

From April 1 to June 30 2012, BALANCED-Philippines continued working with local government units (LGUs), people’s organizations (POs), communities and other nongovernmental organizations (NGOs) to strengthen its community-based distribution and peer education system as well as establish fully functional family planning (FP) supply systems so that our community volunteers can make FP information and services available to Project sites. The trained PHE adult peer educators (APEs) continued to provide interpersonal communication and counseling (IPC) including information on PHE linkages and referrals, while some of the trained PHE community based distributors (CBDs) provided FP products and information on FP/RH, CRM and PHE linkages and referrals to new and continuing FP clients. In addition, PFPI together with CI/P began working with the League of Municipalities of the Philippines (LMP) in compliance with the agreed terms in the Memorandum of Understanding (MOU) signed by the three organizations.

The BALANCED-Philippines Project team finished assessing marine protected areas (MPAs) in Bohol using the MPA Management Effectiveness Tool (MEAT) in partnership with Bohol Environmental Management Office (BEMO). It is close to identifying the three MPAs that will receive MPA strengthening technical assistance from the Project. The assessment of MPAs in the VIP continues and MPAs will be identified in the next quarter. A PHE addendum questionnaire has been drafted by BALANCED-Philippines in consultation with BEMO, CI/P, etc. Two conservation enterprise workshops were conducted and some livelihood activities identified. The Project also continued coordination and discussion environment, agriculture, and social welfare and development offices in the LGUs in the Danajon and VIP to implement the activities under IRs 4 and 5 of the BALANCED-Philippines Project.

A full accounting of the activities and related accomplishments achieved during this reporting period are summarized below by IR.

### **IR 1: Improved access to family planning/reproductive health services in key bioregions**

BALANCED-Philippines continued to develop/update a network of PHE CBD outlets and strengthen the rural health unit (RHU) referral systems in the “**new**” and “**maintenance**” sites to expand access to FP information and methods as well as information on PHE linkages. Toward that end, we assessed the status of the CBDs and worked toward increasing the functionality of the CBD system. We identified which CBDs still lacked a supply system and worked with private FP suppliers, such as DKT Philippines, Alphamed Pharma Corporation (Alphamed) and

the local chapter of Integrated Midwives Association of the Philippines (IMAP) in Bohol, to ensure/explore a continuous supply of contraceptive products for the CBDs and RHUs trained under the Project. Below is progress-to-date on IR 1 activities completed during this reporting period.

### **1.1 Conduct training-of-trainers on PHE CBD and adult PE systems**

There was no training of trainers (TOT) on PHE CBD and adult PE (APE) systems conducted during this period. During the last reporting period, 60 of the 62 trained master trainers were engaged in conducting local workshops and mentoring the trained CBDs and APEs. During this reporting period no trainings took place, therefore, no master trainers were tapped to assist with conducting workshops. However, BALANCED-Philippines continued to involve the master trainers in project activities such as community-based information-education-communication (IEC) activities and advocacy, planning, and supervising, mentoring and monitoring the trained community volunteers.

#### Results from Activity 1.1

- None

### **1.2 Recruit and train non-clinical/non-pharmaceutical outlet owners, PO members, deputized wardens, barangay health workers (BHWs), and other community members to serve as CBD outlets and promote family planning and PHE linkages**

There was no new PHE CBD training conducted during this reporting period. BALANCED-Philippines field staff focused its efforts on making all the PHE CBDs functional and strengthening APEs and the referral system. See Annex 1: Activity status to date (April 1 to June 30, 2012)

As of this reporting period, there is one municipality (Hilongos) of the “**maintenance**” sites that has yet to train PHE CBDs. The local chief executive (LCE) of Hilongos is anti-RH/FP, but he signed the memorandum of agreement (MOA) between PFPI and the LGU in June 2011. However, the LGU of Hilongos does not have the funds to purchase FP commodities for either the RHU to distribute for free or for CBDs to purchase and sell in the community. Therefore, FP clients need to buy their FP supplies at local private pharmacies. The Municipal Health Officer (MHO) who is supportive of the project and willing to provide oversight to CBDs, suggested scheduling the PHE CBD training once a local private source of FP commodities has been identified. The Project Field Coordinator, Alphamed and the RHU identified two potential suppliers, but the owners of the pharmacy and local store approached were not interested at this time. We will continue to look for a local FP supplier and conduct the PHE CBD training once a local supplier is identified.

In the previous quarterly progress report, we erroneously stated that all of the CBDs were non-mobile ones. During this quarter, the Field Coordinators were able to confirm that of the 628 CBDs trained, 10% are non-mobile (i.e., sell FP commodities from fixed locations, such as a sari-sari store) and 90% are mobile (i.e., sell FP commodities when visiting the community). See Annex 2.

Field Coordinators have observed and reported that CBDs could benefit from T-shirts, hats, umbrellas or other paraphernalia that would identify them as CBDs as well as providing them with opportunities/events that bring them together for mentoring and learning. Given the large number of CBDs and the substantial distance between Project sites, monitoring and mentoring all of the CBDs to keep them motivated, skilled and functional is a challenge. Bringing the CBDs and APEs together regularly would help supervisors more effectively monitor these volunteers and to mentor them on problem solving and skills building. This would also reduce wear and tear on the Field Coordinators and RHU staff that may depend on one-on-one meetings to supervise CBDs in their sites. When additional funds become available, the Project will consider the above-mentioned activities to help maintain the skill and motivation of the CBDs.

### Results from Activity 1.2

- No new trained CBDs for this reporting period

### **1.3 Develop or strengthen system for supplying FP methods to CBD outlets**

BALANCED-Philippines continued collaboration and coordination with Alphamed and DKT Philippines to establish a cost recovery, FP supply system for LGU/RHU partners in municipalities that have yet to establish these franchises and other arrangements. These cost recovery systems would provide an uninterrupted supply of affordable contraceptive products to trained RHUs and CBDs. BALANCED-Philippines also focused its efforts on identifying other local private suppliers of FP commodities for the CBDs, especially in the municipalities that do not have a budget allocation for FP commodities.

With the LGUs, BALANCED-Philippines staff continued to forge partnerships with members of the municipal/local legislative council to facilitate the MOU/A process that would, in part, provide funding for FP commodities to both the RHU and CBDs. In order to address the issues of having non pharmaceutical, non-clinical outlets trained as CBDs (providers of FP commodities), RHU oversight to the CBD system, proper referral of potential new acceptors, and Project sustainability, the MOU/A provides a legal framework that legitimizes the CBDs as well as designates RHU supervision and monitoring oversight of the CBDs and APEs.

While efforts are ongoing with LGUs in the “**new**” and “**maintenance**” sites to implement the partnership, the Project experienced some challenges in sites where the MOU/A has not been signed. Challenges include the following: 1) some LCEs and political leaders are anti-RH/FP and is one of the key factors for the delay in signing the MOU/A in Nasugbu, Trinidad and Pres. Carlos P. Garcia municipalities; 2) there have been difficulties in coordination and scheduling conflicts with two of the FP suppliers (Alphamed/DKT); and 3) some LGUs do not have funds allocated to purchase FP commodities for the RHU to distribute to its clients or franchise to CBDs because they are not included in their current health budget. In order to address these challenges, the BALANCED-Philippines team continued to coordinate with Alphamed and DKT and inform them about the issues encountered in the field. Staff also persistently followed up with the legislative arm of the LGUs - the Municipal Council - to hasten the passage of a requisite Resolution authorizing the Mayor to sign the MOA with PFPI.

The result of these challenges has led to fewer supply systems being set up than expected, and, thus, fewer CBDs with FP supplies to sell to the community. As of June 30<sup>th</sup>, 38% of the trained CBDs had a reliable supply of FP commodities. Both “**new**” and “**maintenance**” sites in the VIP are struggling to set up these cost recovery supply systems. By the end of this reporting period, no CBDs in Occidental Mindoro had FP supplies to sell to the community. Only seven percent of the CBDs in Batangas and Oriental Mindoro had supplies. There may be several reasons for this. Batangas Province, for example, is anti-RH and as such the LGUs have not allocated much funding for FP supplies to their own RHUs. Further, Batangas is an urban Province close to Manila and its perception of PHE linkages, poverty and food insecurity may be low, perhaps reducing the perception that family planning is not important. The municipalities in Batangas are also much larger than in Leyte and more difficult for the Field Coordinator to cover.

**Maintenance** sites in the Danajon Bank were faring much better. In Bohol, 50 percent of the CBDs had FP commodities. But, many of the sites were just about to secure their supplies from Alphamed. It is anticipated that by July 30<sup>th</sup> the number of CBDs with supplies will have increased substantially. Leyte is the only Province where 83 percent of the trained CBDs had FP commodities to sell. This may be because the municipalities are smaller, closer together and easier for the Field Coordinator to visit and provide follow-up.

In the previous quarterly progress report, we reported that cost recovery supply systems were set up in Calatagan, Nasugbu (“**new**” sites) and Inopacan (“**maintenance**” site). However, these did not become fully functional for a variety of reasons, even if the initial linkages between the CBDs, APEs, RHU and the source of FP supply were established early on. In Calatagan, the RHU staff pooled their own resources to purchase FP commodities (pills and condoms) from Alphamed and distributed the products at cost on their own. The plan was for the RHU staff to sell the FP products and test if they were saleable. If so, FP products would be distributed to the trained CBDs to sell as well. During this reporting period, the RHU was considering purchasing FP products to distribute to the trained CBDs in their next order with Alphamed.

In Nasugbu, BALANCED-Philippines identified Nasugbu Women’s Cooperative—a member organization of KAMAHARI, which is an umbrella organization of cooperatives in Nasugbu—as the local private supplier of FP commodities for the CBDs, who are also members of the cooperative. KAMAHARI received a grant from Sustainable Alternative Farming Institute (SAFI) that they used to pay for the franchising fee for POPShop from DKT Philippines. KAMAHARI chose Nasugbu Women’s Cooperative to manage the POPShop. Unfortunately, Nasugbu Women’s Cooperative did not distribute the FP commodities to the Project’s CBDs as was earlier agreed upon. The Cooperative wanted the CBDs to pay upfront before they could get the commodities. However, the CBDs did not have the financial capability to pay upfront. BALANCED-Philippines continued to negotiate with Nasugbu Women’s Cooperative to allow the CBDs to have the commodities on a consignment basis, but to no avail. Given the impasse, we decided to identify another possible local private source of FP commodities during this reporting period.

In Inopacan, the RHU was identified as the source of FP commodities for the CBDs. Alphamed agreed to deliver commodities to the RHU on a consignment basis, which the RHU would distribute to the CBDs. The Inopacan RHU waited for Alphamed’s delivery of the FP supplies,



but they did not arrive. The BALANCED-Philippines team followed up with Alphamed and was informed that they had run out of supplies and are still waiting for them from their international sources.

Consequently, over 60 percent of the trained CBDs – many of whom were trained nine to 10 months ago – still lack FP commodities. The Project is working diligently to rectify this and is identifying other sources of FP supplies for its CBDs. Toward that end, the team met with Mrs. Corazon Paras, President of IMAP Bohol, to explore whether IMAP Batangas could be a possible local supplier for the VIP sites. On June 15, 2012, BALANCED-Philippines staff oriented IMAP Batangas officers/members about the BALANCED-Philippines Project and the PHE CBD system. A similar orientation was likewise provided to the national officers of IMAP on June 23, 2012. Further discussions with IMAP Batangas will be held in July 2012.

As part of the MOA with the LGUs, the RHU should be supervising the trained CBDs; however, CBDs in 15 of the Project sites are being supervised by the Project Field Coordinators. BALANCED-Philippines will begin to turn this supervision over to the RHU over the next 12 months to ensure sustainability of the CBD system.

In the next quarter, BALANCED-Philippines will continue to meet and follow-up with Alphamed and DKT regarding supply issues as well as identify new local and sustainable sources of FP supplies for the CBDs, especially in sites where the LGU does not have funds to purchase FP commodities in the current year or where CBDs cannot pay upfront for FP commodities. This will make it possible to complete the CBD training in Hilongos.

We will also follow up with the municipal legislative council in the Project sites where the MOU/A has not been signed. Drafts are in the various stages of the approval process as follows:

- With the Sangguniang Bayan, awaiting resolution authorizing the Mayor to sign – Clarin, Trinidad in Bohol and San Teodoro; and Puerto Galera in Oriental Mindoro
- With the Sanggunian Bayan, resolution authorizing the Mayor to sign – Carlos P. Garcia, Bohol; and Baco, Oriental Mindoro
- Under review by the Municipal Administrator – Nasugbu, Batangas

#### Results from Activity 1.3

- No new cost-recovery supply systems developed

#### **1.4 Strengthen LGU and RHU staff knowledge and skills on FP/RH, PHE linkages, and managing CBD systems**

There was no additional training conducted with the RHU staff during this reporting period. BALANCED-Philippines Field Coordinators continued to strengthen their relationships with the RHUs by involving them in Project activities such as IEC and advocacy, supervising, monitoring and mentoring of community volunteers and planning activities among others, and providing updates about the Project. The BALANCED-Philippines team continued to enjoy a good

relationship with the RHU staff, particularly the RHU midwives (RHM) who help monitor and provide oversight to the PHE CBDs and the PHE APEs.

Based on the data gleaned from the CBDs, APEs and RHUs, there were a total of 3,423 new FP acceptors during this reporting period. The majority of new FP acceptors are using lactational amenorrhea method/LAM (47%) while 26 percent are using pills and nine percent injectables (DMPA). There were a total of 31,117 current FP users, the majority of whom are using pills (37%) and LAM (14%). Eighteen percent requested bilateral tubal ligation. We suspect that the number of new FP acceptors and continuing users may be higher than is reported here. This is because RHU staff from the VIP municipalities of Batangas, Oriental Mindoro and Occidental Mindoro still does not prepare reports regularly or submit reports on time, which affects the timeliness of the data gathered for Project reports. The Field Coordinator in Batangas now goes to the Provincial Health Office (PHO) to gather data. We also identified PHE APE/CBD leaders in Batangas who will be tasked with collecting the APEs' and CBDs' reports. The Field Coordinator will, in turn, collect the reports from them. In other Project sites where the RHM could not collect reports, the Field Coordinators collected the reports from the PHE APEs and CBDs. Unfortunately, not all the reports are being collected due to the large number of barangays covered by the Project. However, we were able to collect some additional information, particularly data not routinely collected by the RHM, when the Field Coordinators held meetings with the PHE APEs and CBDs. During these meeting (s), Field Coordinators gathered the data needed as well as monitored and mentored the PHE volunteers in the process. The Field Coordinators conducted meetings with the PHE APEs and CBDs during RHU staff meetings when they were given a few minutes to talk to the community volunteers. While this was helpful, it was not enough time to discuss with the CBDs and APE all the issues in the field. Moreover, not all the community volunteers were present during these meetings. Given the difficulty in collecting data in a timely fashion, accomplishments and PMP data are likely to be less robust than what is actually happening on the ground.

#### Results from Activity 1.4

- There was no RHU training conducted for this period

#### **Status of PMP results for IR1**

INDICATOR	April-June Accomplishment
1.2 Contraceptive prevalence rate ( <i>USAID/OH standard indicator 3</i> )	0 <sup>30</sup>
1.3 Number of couple years protection ( <i>USAID/OH standard indicator 3</i> )	17,337
1.4 Number of people trained in RH/FP with USG funds ( <i>USAID/OH standard indicator 3</i> )	0 <sup>31</sup>

<sup>30</sup> No available data from the RHU

<sup>31</sup> No PHE APE, CBD, RHU and TOT training conducted during this period

1.5 Number of participants who received BALANCED training and/or mentoring that are now providing PHE training or technical assistance to others ( <i>BALANCED core indicator</i> )	0
1.6 Percent of FP users of modern methods obtaining supplies and services from private sector sources (CBDs, etc.) ( <i>surrogate BALANCED field indicator</i> )	3.38% <sup>32</sup>
1.7 Number of USG-assisted service delivery points providing FP services ( <i>BALANCED field indicator</i> )	0
1.8 Number of target organizations incorporating PHE tools, protocols, etc. into their work ( <i>BALANCED core indicator</i> )	2 <sup>33</sup>

<sup>32</sup> Percentage is based on the data collected from 11 municipalities where data were collected; data collection from the other municipalities is underway during the reporting period

<sup>33</sup> Bantay Dagat networks of Oriental and Occidental Mindoro - these networks consist of 15 organized groups of Bantay Dagat

## **IR1 Priorities for next period (July 1 to September 30, 2012)**

In partnership with the LGUs, we will conduct the following activities in the next quarter:

- Mobilize all 62 master trainers to help facilitate the trainings under IRs 4 and 5 in the “**new**” and “**maintenance**” sites.
- Conduct PHE CBD training in “**new**” and “**maintenance**” sites to replace CBDs that are not able to secure FP supplies at this time. Also, once a supply system is established, train PHE CBDs in Hilongos.
- Prioritize establishing/strengthening the FP supply and cost recovery arrangements in Batangas, Occidental Mindoro and Oriental Mindoro.
- Implement strategies to make all currently non-functional CBDs functional, including such interventions as the provision of CBD starter kits (using resources from private donors) in areas where the LGU does not have funds to purchase FP commodities or where the CBDs do not have financial capability to pay upfront for FP commodities.
- Continue to work with Alphamed, DKT and other private sector suppliers to help CBDs and RHUs in the “**new**” and “**maintenance**” sites establish a source of FP commodities to ensure uninterrupted supply to the RHU and the CBDs.
- Identify private local sources of FP commodities for the CBDs particularly in areas where the LGU does not have funds for FP commodities and link them with the RHU for monitoring oversight.
- Transition supervision of the CBDs to the RHUs.

## **IR2: Increased community awareness and support of family planning and conservation as a means to improve health, food security and natural resources**

The BALANCED-Philippines cadre of APEs and CBDs continued to provide information on RH/FP, CRM and PHE linkages both in the “**new**” and “**maintenance**” sites. The following IR2 activities were conducted during this reporting period.

### **2.1 Recruit, train and deploy PHE adult PEs**

There was no additional training for APEs conducted during this period. Since the Project began, 903 APEs have been trained. By June 30<sup>th</sup>, 663 of the APEs remained active (have submitted reports for at least two consecutive months), which represents about a 27 percent dropout rate. APE dropout is highest in Batangas and Leyte where only 39 percent and 51 percent of the APEs are active, respectively. BALANCED-Philippines staff will work diligently to resuscitate the APEs in these Provinces and motivate them to become active again. As with the CBDs, the APEs could benefit from receiving wearable items that would identify them in the community as PHE peer educators well as attending regular supervision and mentoring meetings. These regular meetings would help reduce the monitoring burden of RHU staff and Field Coordinators given the large distances between and within Project sites.

One of the expected results of the Project was to have at least 700 active APEs (per the Project Design document), and we are not far from this result. Having trained more APEs than expected helped to buffer against the dropout rate. Drop out among community volunteers is not uncommon and should be considered when planning activities that involve unpaid community volunteers. Knowing the dropout rate for these volunteers could prove to be useful for scaling-up the PHE approach in the future.

During this period, we conducted a total of 16,323 (5,320 males and 11,003 females) new IPC sessions and provided repeat counseling to 1,968 individuals (265 males and 1,703 females).

The Project's Field Coordinators supervise APEs in 20 of the 28 target sites. This means that five Field Coordinators are supervising over 300 APEs in addition to monitoring 286 CBDs and their other job responsibilities (i.e. monitoring the MOA, galvanizing LGU/LCE support, problem solving with DKT and Alphamed, etc.). The RHU nurses or midwives are monitoring 344 APEs in eight of the sites—in addition to their other RHU responsibilities. However, some RHM do not conduct regular monitoring visits to their assigned areas and the Field Coordinators cannot always visit all the barangays covered by the Project due to large coverage area. When possible, the Field Coordinators and some RHM and master trainers conduct monitoring and mentoring sessions with these community volunteers to support and remind them to conduct IPC sessions, but these are not regularly scheduled. Therefore, we will be working toward a more streamlined and effective monitoring and supervision system for the PHE volunteers. In the next quarter, BALANCED-Philippines, together with the RHMs and other RHU staff, will conduct municipal-level supervisory meetings with the community volunteers. During these meetings, RHU staff and Field Coordinators will help volunteers address challenges they encounter in the field, mentor them on their key responsibilities, refresh their RH/FP and PHE knowledge and counseling skills and review data collection and reporting procedures and issues.

During the previous quarter, BALANCED staff distributed PE diaries to all of the trained APEs. The APEs use this simple job aid/guide to help them effectively conduct IPCs and note the number of IPCs given during each week. The project team continued collecting and collating APEs' reports on the IPC sessions conducted and documented in their PE diary. The PE diary will be revised in the next quarter to incorporate messages included in the "3 Tips" brochure.

### Results from Activity 2.1

- None; there was no PHE APE training conducted

### **2.2 Develop and implement PHE IEC strategy**

The BALANCED-Philippines Communication Plan was reviewed, revised and fine-tuned during this reporting period. The results of the baseline survey conducted by CRC/URI and inputs from CI/P were also incorporated into the document. The final copy of the BALANCED-Philippines Communication Plan was sent to USAID/Philippines/OH in April 2012.

While the new "3 Tips" brochure was being reviewed by USAID, we continued to conduct IEC activities, which resulted in a total of 15,134 individuals (6,553 males and 8,581 females) having seen or heard a specific FP/RH message in "**new**" and "**maintenance**" sites. We delivered PHE,

FP and CRM messages to members of the target audience through various channels, events, campaigns and activities, such as the following:

- family development sessions
- barangay assemblies
- Peoples Organization meetings
- Bantay Dagat network meetings
- Planning activities
- Mother's classes
- Special events, such as Ocean Month and Earth Day celebrations, etc.

PFPI also identified the need for and developed a poster and CBD signage. The poster aims to convey the message of taking good care of the family's health and the environment and the need to plan the family – messages which are included in the “3 Tips” brochure. In June 2012, the poster was pre-tested in Bohol, Batangas, Oriental and Occidental Mindoro with 38 respondents (18 males and 20 females). The poster was found acceptable to the intended audience. The respondents understood the general message and generally agreed to the message. One respondent suggested the use of “more family members” instead of “too many people”. Two said that messages are not well supported by the visuals. Respondents also articulated particular actions that the poster wished to convey. Only three said they could not understand the message and suggested improving the graphics and drawings. Revisions were made to the poster based on the pretest results.

The CBD signage aims to provide information on the availability of FP services in the community. This will be posted where an active CBD is located. Aside from the name of the store and the label “CBD,” it includes a slogan that says “the health of the family and environment is ensured through family planning.” The CBD signage will be submitted to USAID for review and approval.

At the beginning of June 2012, USAID/Philippines provided clearance and approval for the printing of the “3 Tips” brochure. A total of 5,000 copies each of the Visayan and Tagalog versions were printed during the latter part of June 2012. Distribution of the “3 Tips” brochure in the project sites started in the latter part of June 2012 and will continue in the next quarter. See Annex 3 for the distribution plan.

For CI/P, distribution of the IEC materials will be strategically incorporated into the Project's CRM activities and, if possible, be accompanied by communication activities that would empower PEs to advocate for PHE in the coastal areas. These activities include roadshows in MPA coastal barangays, school lectures, Bantay Dagat and MPA seminars/ meetings.

Lastly, PFPI and CI/P are identifying potential PEs or youth groups that may be tapped to lead community-based theater roadshows or other arts-based IEC activities in priority MPA barangays within the VIP. The status and capacities of the PEs are critical for providing information necessary in determining the type of IEC activity best suited for the area. PFPI and

CI/P will discuss these ongoing IEC activities and explore how we reach more people and maximize our resources in the project areas.

In the next quarter, BALANCED-Philippines staff will continue to conduct IEC campaigns/activities and distribute the approved IEC materials to reach more people with FP/RH and PHE information and messages.

#### Results from Activity 2.2

- 15,134 individuals (6,553 males and 8,581 females) have seen or heard a specific RH/FP message

#### **Status of PMP results for IR2**

INDICATOR	April-June Accomplishment
1.1 Number of people counseled in RH/FP as a result of USAID assistance ( <i>USAID/OH/custom indicator 2</i> )	16,323 <sup>34</sup> (5,320 male; 11,003 female)
2.2 Number of people who have seen or heard a specific RH/FP message ( <i>USAID/OH standard indicator 2</i> )	15, 134

#### **IR2 Priorities for next period (July 1 to September 30, 2012)**

PFPI will conduct the following activities during the next reporting period:

- Continue to activate and strengthen APEs in the “**new**” sites
- Continue to mentor PHE APEs in the “**new**” and “**maintenance**” sites
- Continue to distribute BALANCED-Philippines IEC materials, such as the “3 Tips”; finalize, print and distribute PHE posters; and reprint and distribute previous IEC materials. Printing and distribution of IEC materials will be done once cleared by USAID
- Continue APE’s IPC activities to continually increase the number of men and women learning about PHE and FP/RH and being referred to CBDs or the RHU for FP methods
- Conduct IEC activities to continually increase the number of people who hear and/or receive RH/FP, integrated PHE and pro-environment messages

#### **IR 3: Increased policymaker’s commitment to promote/support FP/RH services, CRM and integrated policies**

BALANCED-Philippines worked with and involved the LGUs, including the heads and staff of various line agencies, in Project activities to increase their support for the integrated PHE approach. Both PFPI and CI/P worked together to improve governance capacities by helping to

<sup>34</sup> Only includes the individuals who were counseled for the first time; the number does not include individuals who were provided with repeat counseling (which were 1,968 - 265 males and 1,703 females)

sustain and strengthen policymakers support for integrated PHE policy reforms and their commitment for the conservation of important natural resources at the provincial and municipal levels.

Key IR 3 activities completed during the April to June 2012 reporting period are described below:

### **3.1 Conduct PHE Orientation and planning with LGU, NGO, PO and Project stakeholders**

In the last quarter, BALANCED-Philippines Project staff from PFPI and CI/P conducted joint courtesy meetings, Project orientations, briefings and awareness-raising sessions on PHE linkages in the VIP. During this quarter, we continued to coordinate efforts with LGUs, POs and other stakeholders in the project areas.

In June 2012, the BALANCED-Philippines Project Manager and the PHE/RH Training Specialist provided a brief orientation on PFPI and the BALANCED-Philippines Project for the Regional Director of the Department of Health-Center for Health Development (DOH-CHD) IV-A and the Community Health Team (CHT) Regional Coordinator. The Province of Batangas belongs to Region IV-A. We were informed that while CHT training in some Region IV-A municipalities have already been conducted, the DOH-CHD IV-A Regional Director and the CHT Coordinator mentioned that BALANCED-Philippines could still engage the trained PHE APes to become members of the CHT. During the orientation meeting, we also discussed the CBD systems and shared a copy of the Memorandum Circular No.4 2007 issued by the Regional Director of DOH-CHD IV-A authorizing the selling other health products - including FP commodities - in Botika ng Barangay (BnB), a local government pharmacy. The DOH-CHD IV-A Regional Director said that he would review the Memorandum and check it with the DOH National Office. The Regional Director of CHD IV-A further mentioned that it was good that BALANCED-Philippines coordinated with them to support the public-private partnership (PPP) strategy that the Philippine Government is advocating to maximize all resources available. He especially highlighted the training extended by the BALANCED-Philippines Project to the RHU staff, which is similar to the Family Planning community-based training that they require the RHU staff to undergo.

With regards to Informed Consent and Voluntarism (ICV) monitoring, there is no indication that that the DOH-CHD IV-A has done it already, but we were informed that they still have to check with the head of the Local Health Assistance Division (LHAD)<sup>35</sup>. The CHD IV-A Regional Director also suggested that the BALANCED-Philippines Project could coordinate with the Provincial Health Team Leader (PHTL) in Batangas and explore how they could help the Project.

BALANCED-Philippines Project Manager and PHE/RH Training Specialist also provided the head of LHAD of DOH-CHD IV-B a brief orientation on PFPI and the BALANCED-Philippines Project. The LHAD head shared that DOH-CHD IV-A has already completed the CHT training in the region. She also mentioned that it would be difficult for them to add our PEs to the CHT

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<sup>35</sup> One of the 5 major divisions of the Center for Health Development (CHD) tasked to coordinate, monitor and oversee all health assistance being provided by the DOH and CHD to the local government units.



because of the stipend/honorarium that they had already budgeted and allocated to the current CHTs members. Regarding the issues of ICV monitoring and BnBs selling FP commodities, the LHAD head would still discuss it with the DOH-CHD IV-B Regional Director and the FP Coordinator.

In the next quarter, BALANCED-Philippines staff will follow-up on the above-mentioned developments. We will also continue to coordinate and provide updates to the LGUs and other stakeholders to strengthen our partnerships with them.

### **3.2 Advocate and provide support for local development, environment, CRM and fisheries plans and/or agendas and leverage resources for incorporating PHE into local policies, plans and agendas**

During this reporting period, there were various developments in policy advocacy at the local level. Foremost, there was a landmark event in Hindang Municipality (Province of Leyte) that included the passing of a PHE Ordinance mandating the LGU to allocate funds for PHE whether it is through the regular budget or through the development of funds even beyond the electoral term of the current LGU officials. It is a milestone for BALANCED-Philippines Project, since it is the first time for the Project and for the PHE arena that a local government unit has passed a PHE Ordinance.

In May 2012, BALANCED-Philippines Field Coordinator in Leyte, together with Coastal Conservation and Education Foundation (CCEF) staff, co-facilitated the Integrated Coastal Resource Management (ICRM) Review and Planning in the municipalities of Inopacan, Hindang, Hilongos, Bato and Matalom. The output of the said activity was the draft Municipal ICRM Plans for the five municipalities where PHE activities and budget were incorporated. In the next quarter, BALANCED-Philippines will follow up on the finalization and approval of the ICRM Plans for these five municipalities. Once approved, these Municipal ICRM Plans will be included in the next report of BALANCED-Philippines

In the VIP, specifically in Oriental Mindoro, Bantay Dagat (BD) groups were able to consciously integrate population, health and gender concerns into BD strategic plans from the cluster (4) and provincial (1) level. In Occidental Mindoro, Lubang and Looc Bantay Dagat groups also drafted their operational plan with PHE and gender included. APEs and CBDs participated actively in these planning sessions. The Bantay Dagat Network, which used to be all male, has opened its membership to female members. The Bantay Dagat is supervised by the Municipal Agriculturist Office. Therefore, budgetary allocation for their plan is integrated into the Annual Investment Plan of the same office. (Details of the activity are explained under IR 4, activity 4.2) Additionally, two additional MOAs were signed between PFPI and the LGUs of San Juan, Batangas and Buenavista, Bohol bringing a total of 21 signed MOAs (14 with the LGUs in the “**maintenance**” sites<sup>36</sup> and seven in “**new**” sites<sup>37</sup>) during the life of the Project. These MOAs define the roles of each collaborating organization and the LGUs’ agreements to provide counterpart contributions to PHE activities. Follow-up with the LGUs that have yet to sign

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<sup>36</sup> Tubigon, Inopacan, Bato, Getafe, Hindang, Matalom, Bien Unido, Inabanga, Ubay, Hilongos, Abra de Ilog, Batangas City, Talibon and Buenavista

<sup>37</sup> Lubang, Looc, Paluan, Calatagan, Mabini, Lobo and San Juan

MOAs is underway as the actual engagement of the LGU requires legislation by the Municipal Legislative Council.

As part of their support to the Project, we requested LGUs to shoulder some of the expenses for training and other Project activities. During this reporting period, the value of resources leveraged from LGUs is estimated at US \$ 2,886.00 (PhP123,205.00). This includes the costs of venues, meals, participants' time, leveraged amount for FP commodities and the conduct of PHE activities, transportation support of participants during meetings and planning and logistical costs.

In the next quarter, BALANCED-Philippines will continue to coordinate and collaborate with executive and legislative LGU officials, and the local development council to help incorporate PHE activities and budget into local policies, plans and agendas. BALANCED-Philippines will continue to coordinate with the LGUs to finalize the tripartite MOAs in the municipalities of Baco, San Teodoro and Puerto Galera, which are in the various stages of approval. BALANCED-Philippines will also promote mainstreaming PHE into the CRM planning in the Danajon and VIP municipalities.

### Results from Activity 3.2

- PHE and gender considerations are integrated into 1 Provincial and 4 Cluster Bantay Dagat Strategic Plans in Oriental Mindoro and 2 BD Operational plans in the LIG
- 1 PHE Ordinance (Hindang, Leyte)
- US \$2,886. leveraged from LGUs for FP/RH and PHE activities
- 2 MOAs signed between PFPI and the LGUs both in the “**new**” (San Juan, Batangas) and “**maintenance**” (Buena Vista, Bohol) sites for the BALANCED-Philippines Project in which the LGUs agreed to provide counterparts for PHE activities

### **3.3 Conduct a national-level PHE Orientation**

At the national level, BALANCED-Philippines developed a partnership with the LMP through an MOU to advocate for PHE policy reforms. The ceremonial signing of the MOU was conducted in April 2012. As a follow through of the MOU signing between LMP, CI and PFPI, we met with the LMP technical staff and oriented them on the BALANCED-Philippines Project and other CI/P and PFPI PHE and CRM activities. During this meeting, PFPI, CI/P and LMP developed an action plan for activities where we could mutually participate, such as the island cluster conference (Luzon and Visayas clusters), LMP general assembly, and provincial health summit, among others. Both CI/P and PFPI worked with the technical team composed of LMP members and its partners to map out current projects and activities and identify areas for integration and convergence. LMP members also suggested that PFPI develop and present to the Mayors a PHE package that could be easily replicated in their respective municipalities.

The LMP also requested that PFPI facilitate their LMP Partners’ Meeting to map out programs and services of LMP partners. Opportunities for partnership were explored during the meeting. One possible outcome of this collaboration and networking is a partnership with the Department

of Trade and Industry that provides funding for enterprise projects. We will further explore this potential partnership. PFPI also worked with the LMP to try to include in the June 2012 Visayas Island Cluster meeting a presentation by a PHE champion Mayor from Bohol. Unfortunately, there was no Mayor from our Project sites in Bohol available to attend the Conference because the schedule of the Conference coincided with the visit of the Philippine President to Bohol Province.

During this period, CI/P was invited by the Coastal and Marine Management Office of the Department of Environment and Natural Resources (DENR) to provide an orientation on PHE and the PHE Network during a consultation meeting in preparation for Integrated Coastal Resources Management Project (ICRMP)'s PHE IEC activities. The ICRMP is an undertaking of the Government of the Philippines funded by the Global Environment Facility and the Asian Development Bank. Their project aims to sustainably manage coastal resources and uplift the socio-economic conditions of people living in the coastal areas particularly in the provinces of Cagayan, Zambales, Romblon, Masbate, Cebu, Siquijor, and Davao Oriental. The project seeks to educate field implementers, particularly social welfare and health workers, LGU staff, and community development officers, including PO leaders, on the proper administration of the PHE-IEC campaign, thereby improving the level of awareness and cooperation of at least 25,000 community members in the 80 ICRMP municipalities. One of the targets of the project is to increase awareness on the linkages between human population and deteriorating coastal resources. The project has requested the assistance of CI/P to mobilize the PHE Network in organizing a national PHE conference and develop guidelines for institutionalizing PHE on or before March 2013. ICRMP will organize a scoping session with its priority areas and has initially requested CI/P to provide technical inputs during the workshop.

#### Results from Activity 3.2

- None

#### **3.4 Conduct a VIP-to-Danajon Bank cross-site visit for policymakers and partners**

During the March 2012 study tour, participating LGUs developed their action plans for integrating population and coastal resources management into their programs and policies. Some LGUs have already initiated some activities outlined in their action plans.

Immediately after the study tour, the LCE of Looc, Occidental Mindoro convened the municipal health board to share the lessons learned and outputs during the BALANCED study tour. The Board came up with a resolution to develop a PHE ordinance to be led by the MHO. The LGU also initiated mangrove planting activities with the members of the Bantay Dagat (BD) as part of their May festivities. They are carefully studying possible livelihood activities for BD volunteers to increase support for enforcement and other PHE activities.

In addition to building the PHE capacities of BALANCED Municipal LGU partners, BALANCED-Philippines staff endorsed the participation of Ms. Marilyn Alcanices of the Provincial Agriculture Office (PAgO) from Oriental Mindoro Province in the June 2012 PHE and climate change leadership course organized by CRC and CI at the University of Rhode Island. Ms. Alcanices is one of the technical leads in the implementation of the Strategic

Intervention and Community-focused Action towards Development (SICAD) program of the province and a critical partner within the VIP, thus her participation was very strategic for advocating PHE within the region. As an output of the course, Ms. Alcanices agreed to be a resource person for PHE advocacy activities not only in Oriental Mindoro but also in the whole VIP region. After the course at URI, Ms. Alcanices made a brownbag presentation at the CI headquarters in Arlington, Virginia about the collaboration of the provincial government and CI on CRM and PHE.

PFPI and CI/P will continue to work on promoting efforts to integrate PHE into local policy reforms and plans, in line with the approved BALANCED-Philippines workplan. As mentioned above, CI/P began implementing Project activities this quarter and is laying the groundwork for future progress on expected natural resource management (NRM) results and indicators as described in the Performance Monitoring Plan (See Annex 2.)

### Status of PMP results for IR3

INDICATOR	April-June Accomplishment
3.1 Amount of in-country public and private financial resources leveraged by USG programs for RH/FP (USAID/OH standard indicator 1)	U\$2,886
3.2 Number of local policy reforms/plans with integrated PHE initiated (BALANCED field indicator)	8 <sup>38</sup>
3.3 Number of National/regional Forums where PHE approach highlighted	0

### IR 3 Priorities for next period (July 1 to September 30, 2012)

The following activities are planned for the next three months:

- Continue to advocate for the integration of PHE and FP/RH activities into LGU policies, such as local development/Environment/CRM/Fisheries plans, development plans, investment plans, etc.
- Continue to establish MOAs/MOUs with the LGUs and monitor compliance with the provisions in the MOA/MOU
- Continue to coordinate with LMP for the conduct of conferences and assemblies to advocate for PHE
- Coordinate with the Commission on Population (POPCOM) for PHE advocacy

<sup>38</sup> 1 Provincial and 4 Cluster Bantay Dagat Strategic Plans in Oriental Mindoro, 2 BD Operational plans in the LIG, and 1 PHE Ordinance (Hindang, Leyte)

#### **IR 4: Improved governance capacities of provincial and municipal LGUs in the VIP and Danajon Bank marine ecosystems**

During this period, PFPI continued to conduct assessments of MPAs in the 10 municipalities in the Danajon, while CI/P initiated the assessment of MPAs in the VIP. PFPI and CI/P continued to work on developing and revising an addendum to the MEAT—a tool that considers and includes population, health and gender perspective. Key IR4 activities conducted during this reporting period are described below.

##### **4.1 Strengthen MPAs in select VIP and Danajon Bank sites**

In Bohol, PFPI and BEMO were able to assess an additional four MPAs during the reporting period. These are the MPAs located in Talibon, Bohol (see Annex 4 for MEAT assessment results). Annex 4 shows that these four MPAs belong to Level 1. Although not yet finalized, initial MEAT results reveal that common issues across MPAs revolve around the capacity of the management body to supervise management of the MPAs, monitoring and evaluation and sustainable funding mechanism for protection activities. During the reporting period, validation of the previous assessments started. The validation process consists of consultations with the LGUs regarding the results, and the collection of evidence to support the ratings in the MEAT. All findings need to be validated because there is difficulty in gathering evidence biophysical conditions, results of monitoring and even the MPA plans. We also need to validate the ordinances legitimizing the existence of the MPA and the management plans. We are currently tracing the agencies that extended technical assistance to the LGUs in the establishment of the MPAs to secure copies of related documents.

A meeting to discuss the findings of the MEAT is scheduled for July 18, 2012. Representatives from BEMO, Bureau of Fisheries and Aquatic Resources (BFAR), DENR and the municipalities of Buenavista and Inabanga will be invited to the meeting. During the meeting we will discuss the issues and constraints in conducting the assessment. The way forward will be determined through a joint action plan to address the information gaps and ways to move on with MPA strengthening. During this meeting, the MPAs for improved management by the Project will finally be chosen - these should be the weakest MPAs as determined by the MEAT.<sup>39</sup> A minimum of 3 weak MPAs will be selected. Socio-economic data found in the addendum will also be pilot tested in the chosen MPAs.

As a result of PFPI's membership on the Provincial MPA Technical Working Group (TWG) in Bohol, the Project's CRM/MPA specialist was invited to the TOT workshop on biophysical assessment that BEMO will be sponsoring during the last week of August. This will authorize him to conduct training on biophysical assessment for LGUs of MPAs that will be chosen for improved management. This will also enhance the quality of technical assistance that BALANCED-Philippines can provide to MPA managers in the project areas.

In the VIP, a team of independent evaluators composed of the Network secretariats and a representative from CI/P initiated the MPA MEAT in a few of the VIP sites. The rest of the

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<sup>39</sup> The MEAT developed a classification of MPAs as follows: Level 1–Established; Level 2–Strengthened; Level 3–Sustained and Level 4–Institutionalized

MEAT assessments will be completed in 69 additional MPA sites in Batangas, Oriental Mindoro and Looc and Lubang before the end of July 2012. The initial results will be sent to the member-municipalities for validation. Only then will the final ratings be decided by the evaluation team. This set of information, which is necessary to identify the weakest MPAs in VIP, will be available in August. The slight deviation in schedule is due to changes in CI's staffing arrangements as discussed in the project management section of this report. After the results are available the Network secretariat and representatives from CI will inform the municipal coordinators as to the activities that will be conducted in order to improve MPA management in the selected BALANCED-Philippines sites. Scheduling and implementation of activities will proceed thereafter. The results will also be considered in determining the best MPA for the BRAVO awards.

Still in VIP, an MPA management effectiveness perception survey was conducted in three municipalities in Oriental Mindoro<sup>40</sup> (San Teodoro and Puerto Galera) and five municipalities and one City in the province of Batangas (San Juan, Lobo, Nasugbu, Calatagan, Mabini, Batangas City). The management effectiveness perception surveys employ the template provided in the MPA MEAT and include six (6) questions that aim to derive community perceptions as to their knowledge on MPAs and their benefits, incidence of illegal fishing, activities of MPA management bodies, sustainability of MPA efforts, and their support to its management. The initial results of the perception survey were presented to the members of the Batangas MPA and Enforcement Network during their regular meeting in June 2012.

The most common concerns based on the initial results of the survey are the capacity of the management bodies to implement management initiatives, such as maintenance of boundary markers, gaps in the enforcement of MPA policies, and the need to sustain information and education campaigns. It is apparent that illegal fishing activities, both from local and non-resident fishers, have been reduced significantly in a majority of the sites except in areas where there are management issues. Likewise, there is a general perception of support from the community for MPA establishment and strengthening in order to sustain the management of the MPAs. This is true even in certain communities that have been identified as problem sites.

In VIP, the MPA Network covers a total of 70 MPAs spread across 24 municipalities. The MPA Network of Batangas and Oriental Mindoro, together with the Lubang-Looc system of MPAs, have convened an ad hoc group representing a Marine Biodiversity Conservation Corridor-level network of MPAs in the VIP. The Batangas and OrMin MPA Network is composed of MPA managers and representatives of the Batangas and Oriental Mindoro BD Networks as represented by their chair. Aside from sharing lessons between MPAs managers and enforcers within their respective MPA Network, the ad hoc committee of the corridor level VIP MPA Network participates in discussions across MPAs through a Facebook forum. Apart from this they have been holding annual meetings since 2010.

While not a priority area in VIP, the LGU of Paluan, through PFPI, approached CI/P for technical assistance for their CRM planning. The BALANCED-Philippines Project, together with the Coral Triangle Support Partnership Program, has expressed willingness to provide initial guidance to the Municipal Agricultural Officer on how to proceed with the CRM planning.

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<sup>40</sup> Baco, Oriental Mindoro was not included because they still have to establish their MPA.

Reference materials have been shared electronically with the Paluan LGU. A briefing meeting will also be scheduled in Manila with the representative of the LGU.

During the reporting period, the project was able to support and facilitate the conduct of four MPA Network meetings (two in Oriental Mindoro and two in Batangas). The BALANCED-Philippines Project goals and objectives were presented during these activities. Among the Project related initiatives discussed were the trainings for BD teams, MPA management effectiveness evaluation, and the BRAVO awards.

BHWs and Barangay officials were also interviewed for the pilot-testing of the PHE questions to supplement MPA management effectiveness questions. Population and health data from existing municipal profiles or results of community-based monitoring system were gathered as additional documentation.

#### Results from activity 4.1

- MPA MEAT baselines conducted for four sites in Bohol
- MPA MEAT baselines of 39 sites in Bohol updated

#### **4.2 Strengthen Bantay Dagat Networks in select VIP sites**

Initial discussions on the bantay dagat (BD) mentoring program with the legal consultant for the VIP BD Network were facilitated. A junior lawyer will be hired by CI/P, with support from First Gen Corporation, to assist in facilitating the mentoring program for the Batangas BD Network in particular.

In Oriental Mindoro, results of the Project orientation with the MPA and BD network during the previous period served as the take-off point in the strengthening of BD and MPA organizational mechanisms. The PAgO and CI/P have agreed to assess and revise the Provincial BD's Vision-Mission-Goals (VMG) and strategic plan. The VMG and three-year Strategic Plan were revised from May 29 – 31, 2012 with the integration of PHE approaches and some salient points of the Climate Change Adaptation Plan of the province. The thirteen coastal municipalities of Oriental Mindoro developed their strategic plans according to their geographic cluster.<sup>41</sup>

In Lubang Island Group (LIG), CI/P facilitated the organizational consultations of BD in Lubang and Looc in April 2012. During these consultations we discussed the different options in the strengthening of organizational mechanisms of BD groups. BD Lubang has adopted major changes in their organizational mechanisms. The constitution and by-laws and organizational structure were adopted by the members in June 2012. In Looc, BD members are in the process of consultations on the adoption of new organizational mechanisms.

The VMG and Three Year plans of BD Lubang and Looc have been assessed respectively. A one-year operational plan was developed with the integration of PHE of BALANCED Project.

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<sup>41</sup> Bantay Dagat of Oriental Mindoro are grouped by cluster municipalities. Baco, San Teodoro and Puerto Galera are grouped under cluster IV, together with Calapan City.

Assessment and planning activities of the BD in these two areas were conducted last June 20 – 23, 2012.

The BALANCED Project observed the following challenges faced by VIP BD groups, which will hopefully be addressed through the next quarter's interventions:

1. Weak organizational mechanisms of BD groups that caused the major decline of membership of BD in VIP. Council, organizational structure, internal rules and regulations, constitution and by-laws among others are not being institutionalized in the BD systems.
2. Lack of integrated approaches in the implementation of MPA and enforcement intervention.
3. Gaps on the capabilities of personnel from BD and LGU especially in the technical skills in the mobilization and maintenance of BD organizations.

Challenges identified will be addressed through the mentoring program that will be facilitated through the BD network in both Batangas and Oriental Mindoro. Through the additional support from First Gen, an additional enforcement support will be provided to the Batangas enforcement network.

#### Results from Activity 4.2

- 1 Provincial Bantay Dagat Strategic Plan (Province of Oriental Mindoro), 4 Bantay Dagat Cluster Municipality Strategic Plans for the eight municipalities of Oriental Mindoro; and 2 Bantay Dagat Municipal Action Plans for Lubang and Looc, Occidental Mindoro) drafted (reported under activity 3.2)

#### **4.3 Strengthen fisheries management in Lubang Island Group (LIG)**

A scoping activity to determine fisheries management concerns was conducted in Lubang and Looc Islands last February 2012. Related activities were conducted by BALANCED-Philippines site coordinators in the succeeding months up to June of the same year. Regular discussions with the LGU representatives were conducted to determine current efforts and recurring fisheries issues that affect some 900 fisherfolks from both municipalities as an initial step to identifying potential management approaches in the area. Some of these issues are:

- *Fishing Gear Issues* - Among the most common concerns raised is the encroachment of non-resident fishers who employ municipal and commercial fishing gears. Recent use of modified gill-net fishery is also becoming a major concern since it is employed near reef areas and municipal focal persons have received numerous complaints about it already. The use of compressor fishing apparatus by certain community members and aquarium fishing, though reported to utilize standards set by the Marine Aquarium Council, is likewise causing management issues in Lubang and Looc, especially in designated protected areas.
- *Overfishing is an imminent issue in Lubang and Looc.* Though most fishers would associate some degree of increase in fish catch to improved coastal resource management



in the area, secondary data based on interviews show a significant decrease in fish catch during the last three decades with catches almost matching those recorded in the heavily fished areas in the provinces of Batangas and Oriental Mindoro. The irony is that improved management and perceived increase in catches is coupled with seemingly increasing incidences of illegal and destructive fishing in the area for nearly a year to date.

Contributing factors to what seems to be a worsening case of fisheries management in Lubang and Looc include: 1) high demand of fishery products being transported to the nearby municipality of Calatagan and also in Manila; and 2) the persistence of financially capable and non-resident buyers who offer storage and marketing opportunities to fisherfolks and the LGUs—a situation that will likely cause a further increase in fishing effort in the area. The upcoming 2013 election is already starting to take its toll especially on decision-makers at the lowest local governance units. The lack of clear and common fisheries objectives and policies between the municipalities of Lubang and Looc creates inconsistent enforcement systems. The lack of warm bodies in the LGUs has caused delays in the implementation of MPA policies and this is creating more confusion at the community level.

Next steps include the facilitation of the joint MPA management council meeting of Looc and Lubang this July. The MPA Management Plan and its Implementing Rules and Regulations will be presented during the activity. Key enforcement and fisheries issues and concerns will likewise be discussed in order to facilitate the identification of potential management approaches and initiatives that will be supported by the BALANCED-Philippines project.

#### Results from Activity 4.3

- No results yet for this reporting period

#### **Status of PMP results for IR4**

INDICATOR	April-June Accomplishment
4.1 Number of people trained on NRM (disaggregated by gender) ( <i>Standard USAID bio-diversity indicator</i> )	86 <sup>42</sup> (64 males and 22 females)
4.2 Number of hectares of biologically significant marine areas under improved management disaggregated by area of MPAs versus area of municipal waters <sup>1</sup> ( <i>Standard USAID bio-diversity indicator</i> )	0
4.3 Number of local institutions strengthened on NRM <sup>2</sup> ( <i>Standard USAID bio-diversity indicator</i> )	15 <sup>43</sup> bantay dagat

<sup>42</sup> Participants in the PHE orientation and Bantay Dagat action planning in Lubang and Looc.

<sup>43</sup> 13 Bantay Dagat groups: 13 municipalities municipalities in Oriental Mindoro, 2 LIG municipalities

#### **IR 4 Priorities for next period (July 1 to September 30, 2012)**

The following activities are planned for the next three months:

- Finalize the validation of MPAs that have undergone the MEAT assessment in the VIP
- Finalize VIP MEAT results in the VIP
- In the VIP continue implementation of MPA and BD strengthening activities, including MPA reorganizational meetings
- Conduct MPA strengthening activities for Level 1 MPAs in Bohol
- Continue coordination with VIP BD Network to improve coordination among these groups on enforcement actions
- Hold a joint MPA management council meeting of Looc and Lubang this July
- Implement a mentoring program that will be facilitated through the BD network in both Batangas and Oriental Mindoro.

#### **IR 5: Increased incentives for coastal and marine conservation among coastal fisher households**

The BALANCED-Philippines Livelihood Development Framework (See Attachment A) supports the vision of *Secure Households, Healthy Communities and Healthy Environment*. Based on an analysis of factors that threaten the coastal resources, BALANCED-Philippines identified two major Project outputs, which are: 1) improved socio economic status at the household level; and 2) increased community participation on conservation.

In order to ensure PHE integration into the livelihood projects the following potential indicators for improved socio-economic status were identified: enterprise revenue, savings, diversification of livelihoods, productive assets and health seeking behavior. Decreased incidence of diarrhea can be one of the measures for improved health.

Increased community participation involves decreased reliance on fishing, involvement in fishery law enforcement, increased capacity to mitigate threats and compliance with environmental policies and guidelines.

In order to achieve the two major outputs, the following strategies were identified:

- Identification of viable livelihood options. Other than financial viability, livelihood/enterprise projects identified should be able to support conservation objectives. Livelihood or enterprise projects should build on existing livelihood in the area and consider access to market and sources of raw materials
- Capacity building for the clients in the management of environment friendly enterprises. This will improve management and technical skills of clients in implementing the projects.

- Promotion of PHE intends to enhance the achievement population and health indicators in the project
- Financial education will help ensure that any increases in income will be channelled towards the improvement of health and nutrition. Through courses on budgeting, clients will be taught to come up with a plan for the use of incremental income that involves setting aside some funds for savings and identifying the proportion of their income that will go to food and health needs.

This BALANCED-Philippines Livelihood Development Framework was presented during the Conservation Enterprise Training conducted by CRC/URI.

### **5.1 Provide livelihood support with conservation action among coastal fishing households in the Danajon Bank**

The Provincial Government of Bohol provides incentives to well-managed MPAs. These incentives are in the form of livelihood funds provided to those MPA managers who belong to Level 4 MPAs. BEMO takes the lead role in assessing the MPAs while the Office of the Provincial Agriculturists provides funding assistance to these MPAs. There is a need to assist these communities in identifying livelihood schemes that are environment friendly

A three-day conservation enterprise and fisheries management training was held last May 22 to 24, 2012 in Tagbilaran City, Bohol. With technical assistance from two resource persons from CRC/URI, twelve participants learned to use the different tools needed in assessing and selecting conservation-based enterprises. The objectives of the training were as follows:

- Agree on a common understanding of PHE as it relates to Conservation Enterprise
- Explain what a conservation based enterprise is
- Recognize the underlying goals, benefits and pitfalls of conservation based enterprises
- Synthesize the sustainable livelihoods framework and key terms, such as diversification, supplemental, and alternative livelihoods
- Analyze local contexts and show how external factors influence the design of enterprise interventions.
- Develop conservation enterprise goals and objectives

In addition to CI/P and PFPI staff, representatives from partner organizations attended the workshop, namely, BEMO and the Office of the Provincial Agriculturist, Municipalities of Buenavista and Inabanga. Two community-based organizations from Buenavista and Inabanga also attended the workshop

As part of the workshop output, participants defined objectives of conservation enterprise in their locality and identified livelihood options that can help achieve these objectives. Specifically, participants were able to assess individual characteristics and assets and factors that may directly and indirectly influence the success of enterprises in the area. They were also able to use tools

for assessing markets, for deciding to proceed with the enterprise or not and identifying courses of action in proceeding with a certain enterprise.

The module on sustainable fisheries covered USAID environmental compliance and monitoring procedures. Participants learned to use a tool to identify the impact on conservation of fishing and non-fishing activities in a very interactive manner. The CRC resource persons also redirected the focus of enforcement on elements that promote compliance that requires changes in behavior. Overall, combining enterprise development and fisheries management modules, helped illustrate to the participants that livelihood initiatives will not reduce pressure on fisheries unless actions are taken to manage effort and limit new entries into fisheries. The training also helped the participants critically evaluate different livelihood options to understand what options might have a positive impact on both people and the environment. It will be important for project staff to follow up with the communities where livelihood activities will be implemented to ensure that the livelihood options selected meet the criteria outlined during the three day workshop.

A training workshop that replicated the course on conservation enterprise conducted by CRC was conducted in Hambungan, in Inabanga. Hambungan is an island barangay that protects a nearby coral reef. This was declared a marine sanctuary through a municipal ordinance in 1999. The Sanctuary was finally established in January 2000. This MPA is considered to be in the 4<sup>th</sup> level of management and was therefore selected as one where incentives for marine conservation will be given by the Project. Being in the level 4 means that management mechanisms have been institutionalized, like for instance, regular patrolling is being done to ensure that policies governing the MPAs are followed. Seventeen participants composed of representatives from the barangay council, barangay health workers, management committee and CBDs attended the workshop. The workshop intended to:

- Discuss PHE approaches in the context of achieving sustainable livelihood towards quality of life;
- Describe the need for a diversified livelihoods or sources of income and sustainable fisheries management;
- Assess current livelihoods, stakeholder characteristics, available assets and factors influencing current and future enterprise development;
- Define the conservation enterprise targets and objectives based on the assessments made;
- Plan a conservation enterprise strategy which will become basis for development of feasibility studies to assess viability of livelihood and enterprises

The tools learned during the conservation enterprise training were all translated into the local language so that the community would be able to understand and use them to make appropriate decisions. As a result of the workshop, participants were able to identify the following livelihood options for their community: mariculture; dressmaking; beauty and wellness services. In the next quarter, a similar workshop will be held in Asinan, Buenavista and Cuaming Inabanga in the province of Bohol.

A parallel activity to the conservation enterprise training is obtaining the support of Local Executives to fund conservation enterprises. First, this may assist the POs in accessing livelihood

funds from their respective municipalities. Second, if the POs submit proposals to the Office of Provincial Agriculturist, they would need an endorsement from their respective Mayors. All BALANCED-Philippines conservation enterprise training courses are conducted with the local government agencies in-charge<sup>44</sup> of livelihood. This has helped to strengthen the capacities of these offices in implementing integrated PHE-Conservation-based projects and ensure long term monitoring of activities.

#### Results of Activity 5.1

- A total of 39 individuals (22 males and 17 females) trained in conservation-enterprise development, sustainable livelihoods<sup>45</sup>

### **5.2 Provide livelihood support with conservation action among coastal fishing households in the Verde Island Passage**

Focus Group Discussions (FGDs) and socio-economic monitoring (socmon) baseline surveys were conducted by National Fish and Wildlife Foundation (NFWF) team in Lubang and Looc in May 2012. Local enumerators were trained on the socmon tool. The lead consultant is preparing the report, due in the next reporting period.

USAID/Philippines approved BALANCED-Philippines to replace the municipality of Tingloy, Batangas, which has been dropped by the Project, with Baco, Oriental Mindoro for IR5 activities. Baco is one of the “**maintenance**” sites of BALANCED-Philippines. The LGU of Baco has been supportive of past and current conservation activities. Although they lost their MPA due to a boundary dispute with San Teodoro, the LGU together with the community is determined to establish a new MPA or mangrove reserve that can also contribute to IR4 target on the improved management indicator. For IR5, the Baco BD Network has 24 members (Tingloy has 24 members) which will be the priority group for the livelihood intervention. Baco has been identified as one of the priority sites of the Provincial Government’s SICAD Program and some members of the private sector.

Prior to starting the work in Baco, consultations were conducted with the members of the barangay council and BDs in six coastal barangays. As an entry point for integrated implementation of different CI/P projects and SICAD program, a mangrove reforestation project, funded by Consular Corps and IKI-EbA, was initiated in Barangay Pulantubig in Baco. Conservation Agreements (Kasunduan) are being finalized and ready for signing by the concerned parties.

Meanwhile, CI/P continues to pursue partnerships for the sustainable livelihoods for VIP. A draft MOA with the Foundation for the Sustainable Society, Inc. (FSSI) to pursue partnerships in VIP is being reviewed. There are also initial negotiations with the University of Philippines College

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<sup>44</sup> Usually, local government agencies in charge of livelihood are the Office of Municipal Agriculturist, Municipal Social Welfare office, Municipal Planning and Development Office

<sup>45</sup> Conservation Enterprise Training facilitated by CRC 2 participants from the Office of Provincial Agriculturist, 3 from BEMO, 4 from the Municipality Buenavista and 3 from the Municipality of Inabanga  
Conservation Enterprise Training in Inabanga – 17 participants

of Social Work and Community Development to facilitate the income diversification process in Lubang and Looc.

An exploratory meeting was also arranged between the municipality of Lubang and the Executive Director of Earth Day Network on linking solid waste management and livelihood opportunities for communities in Lubang.

#### Results of Activity 5.2

- None to date

#### **Status of PMP results for IR5**

INDICATOR	April-June Accomplishment
5.1 Number of people trained (gender disaggregated) on conservation-based enterprises	39 (22 males and 17 females)
5.2 Number of people with increased economic benefits derived from sustainable fisheries management	0
5.3 Number of people benefiting from conservation incentive-based enterprises	0

#### **IR 5 Priorities for next period (July 1 to September 30, 2012)**

The following activities are planned for the next three months:

- Continue with the conservation-based enterprise training in Bohol, LIG and BACO
- Conduct feasibility studies to assess the viability of the livelihood projects
- Revisit and clarify the Livelihood Development Framework
- Develop project proposals for submission to appropriate agencies

### III. PROJECT MANAGEMENT

A quarterly project meeting of BALANCED-Philippines key management staff was conducted during this period. Project Development Specialists from USAID/Philippines/OH and OEECC (Maria Teresa Carpio and Rebecca Guieb) and the Project Director of BALANCED (Linda Bruce) attended the meeting. Discussed were updates on the IEC materials, particularly the “3 Tips” brochure and proposed new materials, the MPA assessment including the PHE addendum questionnaire to the MEAT, livelihood activities, and the replacement for Tingloy.

During this period, CI/P BALANCED-Philippines team began preparations for the second scope of work covering the period of July-December 2012 for CRC’s review. A planning session was also held for target activities for IR4 and 5 up to 1 December 2012. The CI/P BALANCED staff contracts ended June 30, 2012. The following staff/positions were retained and extended to December 31, 2012 to better address the specific needs of the project:

- Project Associate, Desiree Donceras (100% FTE)
- Field Assistant for Lubang and Looc, Occidental Mindoro, Jovelito de Luna (100% FTE)
- VIP Enforcement Coordinator, Joel Gutierrez (50% FTE)

Jovelito de Luna, based in Looc, will spend at least five to 10 days per month until December 2012 coordinating major project activities with the LGU of Lubang. The CI/P BALANCED Deputy Project Manager will directly coordinate with key partners on major project activities. The CI/P’s MPA Specialist and Communications Coordinator contract also ended in June 30, 2012 and was not renewed, however, a Marine Conservation and Fisheries Governance Consultant will be hired for the BALANCED-Philippines Project until December 2012 to complete the deliverables for the remaining calendar year. Meanwhile, implementation of IEC activities shall be incorporated into the workplan of the remaining project team members to be supported by short-term engagement contracts per activity. While the MPAs targeted for MEAT assessments in the Bohol were completed this reporting period, those in the VIP were not and are now slated for completion in the next reporting quarter. To substitute for several BALANCED-Philippines staff whose contracts were not renewed past June 30, 2012, we have identified and are hiring consultants to add resources to the team. We do not anticipate that these adjustments in staffing or timing of the VIP MPA assessments will negatively impact reaching the overall goals of this project activity.

For the PFPI BALANCED-Philippines team, Neil Antoque, MPA and Fisheries Specialist resigned. As a replacement, PFPI hired Jeremiah Glen Jansalin (100% FTE), a marine biologist for these responsibilities.

One key challenge for the Project was the difficulty in getting the FP supply system fully functional to consistently provide FP commodities to the trained CBDS. Consequently, over 60 percent of the PHE CBDs are not yet functioning (distributing FP commodities). This is due to various reasons including: LGUs lacking funds in the current budgets for FP commodities; some LGUs wanting to distribute FP commodities for free instead of allowing them to be consigned to CBDs; local organizations and/or RHUs lacking the start-up capital needed to purchase FP supplies from Alphamed or DKT because they have no consignment policy; and the CBDs

lacking the financial capability to pay upfront for FP commodities. Other reasons include delayed delivery from suppliers, such as Alphamed, because they do not have enough stocks on hand and the absence of local private suppliers from whom CBDs can obtain their stocks. To respond to these challenges, PFPI is looking at an alternative plan to distribute CBD kits to CBDs so they would have initial capital to buy new stocks of FP commodities. PFPI will be using funds donated by private individuals and from PFPI for this purchase.

Consistently collecting reports from the PHE APEs and CBDs and the RHU is also challenge that impacts the Project's ability to accurately report on the results of our interventions. The broad coverage of the project is another challenge in monitoring. To address this, the team together with the RHU, will be conducting supervisory meetings with the community volunteers to monitor their progress, mentor them and provide opportunities to refresh their skills as well as address reporting issues and collect information and data.

In Bohol, many of the MPAs were established around 10 to 12 years ago. In some cases, it is difficult to collect evidence to support/confirm some responses to the MEAT assessment. BALANCED-Philippines staff linked up with NGOs, provincial and national agencies, and other organizations that have worked in the area to ground-truth some of the findings. For instance, we were able to secure data on coordinates from the CCEF.



**Annex 1: Activity status to date (April 1 to June 30, 2012)**

Biogeographic Representation	Province	Municipality (clusters)	New (# brgs)	Maint. (# brgs)	Population 2007	Unmet FP Need (new) <sup>46</sup>	Unmet Need (Main)	#TOT Part.	MOAs signed <sup>47</sup> (Y/N)	# CBDs trained	# RHU trained	# PEs trained
						(# WRA <sup>48</sup> )						
Verde Island Passage (VIP)	Batangas	Calatagan	25		51,544	4,510		9	Y	20	14	46
		Tingloy	15		18,548	1,623					23	
		Lobo	26		37,798	3,307		5	Y	27	24	27
		Mabini	34		40,629	3,555		5	Y	35	8	40
		Nasugbu	42		113,926	9,969		5		31	27	31
		San Juan	42		87,276	7,637		7	Y	36	30	44
		Batangas City/ Isla Verde		6	5,876		514	4	Y	12	21	54
	Occidental Mindoro	Paluan	12		13,718	1,200		6	Y	12	11	13
		Abra de Ilog		9	25,152		2,201	9	Y	9	24	19
		Looc	9		11,310	990		8	Y	9	8	8
		Lubang	16		28,267	2,473		4	Y	13	18	16
	Oriental Mindoro	Puerto Galera		14	28,025		2,452			10	6	9
		San Teodoro		8	15,039		1,316			8	5	8
		Baco		27	34,127		2,986			25	6	27

<sup>46</sup> Estimated based on the assumptions that 20% of WRA have unmet need; and an additional 15% are in need of more effective methods (total 35% of WRA)—based on DHS data and regional data cited in “Contraceptive Needs in the Philippines.” Guttmacher Institute. In Brief Series 2009 No.1

<sup>47</sup> 3 MOAs signed in the first quarter (Tubigon, Inopacan & Bato); 4 MOAs signed in the 2<sup>nd</sup> quarter (Getafe, Hindang, Matalom & Lubang); 6 MOAs signed in the 3<sup>rd</sup> quarter (Bien Unido, Inabanga, Ubay, Hilongos, Looc and Abra de Ilog); and 1 MOA signed in the 4<sup>th</sup> quarter (Batangas City). The Memorandum of Agreement (MOA) articulates LGU support to establish a PHE community based distribution system and a provision to allocate funding support for the procurement of the FP commodities. The MOA also defines the roles of each collaborating organization and the LGUs’ agreements to provide counterpart contributions to PHE activities.

<sup>48</sup> WRA - women of reproductive age

Danajon Bank	Bohol	Bien Unido		15	23,412		2,049		Y	14	5	34
		Buenavista		35	26,443		2,314		Y	30	5	32
		Clarín		24	18,871		1,651			21	3	27
		Getafe		24	27,852		2,437		Y	24	5	49
		Inabanga		50	43,331		3,791		Y	51	5	64
		CP Garcia		23	25,118		2,198			19	12	21
		Trinidad		20	27,580		2,413			19	3	28
		Talibon		25	59,274		5,186		Y	31	4	44
		Tubigon		34	44,434		3,888		Y	28	6	48
	Ubay		44	65,900		5,766		Y	43	29	67	
	Leyte	Bato		32	33,930		2,969		Y	27	5	31
		Hilongos		51	53,911		4,717		Y		7	38
		Hindang		20	19,927		1,744		Y	27	6	29
		Matalom		30	31,055		2,717		Y	30	5	28
Inopacan			20	19,276		1,687		Y	17	9	22	
<b>TOTAL</b>	<b>5 provinces</b>	<b>29 municipalities</b>	<b>221</b>	<b>511</b>	<b>1,031,549</b>	<b>35,264</b>	<b>54,996</b>	<b>62</b>	<b>21</b>	<b>628</b>	<b>334</b>	<b>904</b>

## Annex 2. CBD/PE Overview as of June 30, 2012

Municipality	# of mobile CBDs	# of non-mobile CBDs	Total Number of CBDs Trained	Month trained	Number of CBDs w/FP supplies	% CBDs w/ FP supplies	# of PEs trained	# of functioning PEs	% functioning PEs	Number of people counseled (new IPCs)
<u>Batangas</u>										
Batangas city/Isla Verde (6 brgys)	0	12	12	Aug - Sept 2011	12	100%	54	12	22%	188
Calatagan (25 brgys)	20	0	20	Oct 2011	0	0%	46	18	39%	263
Lobo (26 brgys)	25	2	27	Sept 2011	0	0%	27	16	59%	417
Mabini (34 brgys)	35	0	35	Sept 2011	0	0%	40	12	30%	343
Nasugbu (42 brgys)	31	0	31	Oct 2011	0	0%	31	22	71%	356
San Juan (42 brgys)	36	0	36	Oct 2011	0	0%	44	15	34%	562
<b>Subtotal</b>	<b>147</b>	<b>14</b>	<b>161</b>		<b>12</b>	<b>7%</b>	<b>242</b>	<b>95</b>	<b>39%</b>	<b>2,129</b>
<u>Oriental Mindoro</u>										
Puerto Galera (14 brgys)	10	0	10	Aug 2011	0	0%	9	6	67%	104
San Teodoro (8 brgys)	8	0	8	Aug 2011	0	0%	8	3	38%	168
Baco (27 brgys)	25	0	25	Aug 2011	3	12%	27	24	89%	99
<b>Subtotal</b>	<b>43</b>	<b>0</b>	<b>43</b>		<b>3</b>	<b>7%</b>	<b>44</b>	<b>33</b>	<b>75%</b>	<b>371</b>
<u>Occidental Mindoro</u>										
Abra de Ilog (9 brgys)	9	0	9	March 2012	0	0%	19	9	47%	128
Paluan (12 brgys)	12	0	12	March 2012	0	0%	13	12	92%	113
Looc (9 brgys)	9	0	9	Aug 2011	0	0%	8	8	100%	93

Lubang (16 brgys)	10	3	13	Jul 2011	0	0%	16	16	100%	178
<b>Subtotal</b>	<b>40</b>	<b>3</b>	<b>43</b>		<b>0</b>	<b>0%</b>	<b>56</b>	<b>45</b>	<b>80%</b>	<b>512</b>
<b>MAINTENANCE SITES</b>										
<u>Bohol</u>										
Bien Unido (15 brgys)	14	0	14	May 2011	14	100%	34	34	100%	570
Buenavista (35 brgys)	26	4	30	Aug 2011	5	17%	32	32	100%	1055
Clarín (24 brgys)	21	0	21	July 2011	0	0%	27	27	100%	1295
Getafe (24 brgys)	22	2	24	June 2011	24	100%	49	49	100%	1760
Inabanga (50 brgys)	50	1	51	Aug 2011 & Feb '12	28	55%	64	64	100%	775
CP Garcia (23 brgys)	17	2	19	Aug 2011	1	5%	21	21	100%	1466
Trinidad (20 brgys)	16	3	19	Dec 2011	10	53%	28	28	100%	1070
Talibon (25 brgys)	25	6	31	Mar 2012	1	3%	44	44	100%	2470
Tubigon (34 brgys)	27	1	28	Aug 2011	28	100%	48	48	100%	650
Ubay (44 brgys)	37	6	43	Aug 2011	30	70%	67	67	100%	2200
<b>Subtotal</b>	<b>255</b>	<b>25</b>	<b>280</b>		<b>141</b>	<b>50%</b>	<b>414</b>	<b>414</b>	<b>100%</b>	<b>13,311</b>
<u>Leyte</u>										
Bato (32 brgys)	18	9	27	May 2011	27	100%	31	18	58%	no data
Hilongos (51 brgys)	0	0	0	Not yet	0	0%	38	15	39%	no data
Hindang (20 brgys)	20	7	27	May 2011	27	100%	29	13	45%	no data
Matalom (30 brgys)	25	5	30	May 2011	30	100%	28	18	64%	no data
Inopacan (20 brgys)	15	2	17	July 2011	0	0%	22	12	55%	no data
<b>Subtotal</b>	<b>78</b>	<b>23</b>	<b>101</b>		<b>84</b>	<b>83%</b>	<b>148</b>	<b>76</b>	<b>51%</b>	
<b>GRAND TOTAL</b>	<b>563</b>	<b>65</b>	<b>628</b>		<b>240</b>	<b>38%</b>	<b>904</b>	<b>663</b>	<b>73%</b>	<b>16,323</b>

### Annex 3 – 3 Tips Distribution Plan

The **3 Tips brochure** was developed/produced to support the accomplishment of Intermediate Result 2 (Increased community awareness and acceptance of family planning and conservation as a means to improve health, food security and natural resources) under the BALANCED-Philippines workplan for the second year.

This distribution guide has been developed to prioritize distribution of the **3 Tips Brochure**. The brochure was produced in three dialects: Tagalog (for the Verde Island Passage area); Boholano-Visaya (for the Bohol LGUs in the Danajon Bank) and Cebuano-Visaya (for the Leyte LGUs in the Danajon Bank area).

The number of copies corresponds to about 10 percent of the approximate number of women of reproductive age (to be covered by the Project) in each LGU site. Project field personnel will advise PFPI Home Office in Metro Manila (via the e-mail) as soon as possible if production of more copies is necessary.

- In each site, field personnel are advised to prioritize distribution to: (a) ACTIVE Community-based Distributors (CBDs) and Peer Educators (PEs); and (b) COMING-ALONG- CBDs and PEs. This material will be very useful during IPC and similar activities.
- Second level of priority is the sites that have yet to set up their FP supply distribution system. Once this supply system is established, Field personnel will distribute the 3 Tips brochure to these sites.
- Copies of the brochure shall also be disseminated to Rural Health Units (RHUs), Barangay Health Workers (BHWs) and other partners actively collaborating with Project field personnel (who will determine the actual number of copies to be distributed).
- Project Field Personnel are also advised to reserve some copies to be used during anticipated special events/activities that may occur in the future (such as barangay assemblies).
- Conservation International-Philippines shall be given a certain number of copies (in bulk) for distribution to Bantay Dagat groups, fisher folk associations and the like.
- Upon turnover of the materials, the CBDs, PEs and other volunteer-partners of both PFPI (such as BHWs) and CI shall sign a “receiving” copy, be oriented on how the material will be used and distributed as well as be instructed to record the end-users/recipients of the materials. This list shall be included in the Project Field Personnel’s reports submitted periodically to the Home Office.

The following is the distribution scheme:

Dialect	Area/Organization	No. of Copies
Tagalog	CI Philippines	1,000
	PFPI Batangas Field Office	3,750
	PFPI Home Office	250
Boholano-Visaya	Bohol Field Office	3,400
	PFPI Home Office	100
Cebuano-Visaya	Leyte Field Office	1,400
	PFPI Home Office	100
Total		10,000

#### Annex 4 – Status of MPAs in Bohol Assessed Using MEAT

Name of Municipalities	Level 1 Established	Level 2 Strengthened	Level 3 Enforced	Level 4 Institutionalized
Tubigon	Matabao	Cabulijan Centro Pangapasan Ubay	Tinangnan	Macaas Batasan
Clarin	Bonbon Lajog	Nahawan Tangaran	Majigpit	
Inabanga	Lawis Ondol	Cagawasan		Hambungan
Getafe	Campao Occidental Corte-Baud Jagoliao Nasingin Tulang	Pandanon Banacon Tugas	Jandayan Norte Jandayan Sur	Handumon
Talibon	*San Francisco *Tangaligue *Guindacpan *Cataban	Busalian		
Bien Unido	Bilang bilangan West			Bilang bilangan East
Ubay				Sinandigan
	15 MPAs	11 MPAs	4 MPAs	6 MPAs

\*Assessed during this reporting period

## Annex 5. Performance Management and Reporting Plan and Results to Date

### *BALANCED-Philippines Project Indicators, Expected and Actual Results to Date*

INTER-MEDIATE RESULT	INDICATOR	Expected LOP Results	Total Year 1 Results (Dec '10 to Sept '11)	Expected Year 2 Results	Apr to June 2012 Results	Total Year 2 Results (Oct to June)	Comments
IR1: Improved access to family planning/reproductive health services in key bioregions	1.1 Number of people counseled in RH/FP as a result of USAID assistance ( <i>USAID/OH/custom indicator 2</i> )	45,076	1,526	43,550	16,323	24,820	58% of expected LOP results  Difficulty in collecting reports and late submission of reports caused underreporting of accomplishments. Other factors include inactive PHE APEs in some areas. Collection of reports is ongoing and data that will be collected will be added in the next quarter report. Supervisory meetings with PHE APEs and CBDs and RHU will be conducted, which should help with data collection.
	1.2 Contraceptive Prevalence Rate ( <i>USAID/OH standard indicator 3</i> )	Increasing	Baseline data collected	Increasing	0	0	No available data on CPR at the RHU.
	1.3 Number of couple years protection ( <i>USAID/OH standard indicator 3</i> )	17,160	N/A	17,160	17,337	17,337	On target  Computed based on the data available at the RHU.
	1.4 Number of people trained in RH/FP with USG funds ( <i>USAID/OH standard indicator 3</i> )	1,920	1,508 (204 m; 1,304 f)	412	0	420 (74 m; 346 F)	On target

1.5 Number of participants who received BALANCED training and/or mentoring that are now providing training or technical assistance to others on PHE ( <i>BALANCED core indicator</i> )	60	36	36	0	60	On-target
1.6 Percent of FP users of modern methods obtaining supplies and services from private sector sources (CBDs, etc.) ( <i>Surrogate BALANCED field indicator</i> )	15%	0	15%	3.38%	3.38%	Under-target  Percentage is based on the data collected from 11 municipalities.
1.7 Number of USG-assisted service delivery points providing FP services (BALANCED field indicator)	683	450 <sup>49</sup>	233	0 <sup>50</sup>	206	Under target  In previous reports, we used the number of CBDs and RHU staff trained for this indicator (see footnotes below). However, based on recent discussions with USAID/Phil, USG-assisted service delivery points are now those CBDs trained <u>and</u> operating as points of supply for at least pills, and info/referrals. Based on the new definition, 240 USG-assisted service delivery points have been established since the beginning of the Project. Also, based on the new definition, the expected LOP results should be at least 628

<sup>49</sup> 26 RHUs + 424 CBDs

<sup>50</sup> No additional CBDs trained



	1.8 Number of target organizations incorporating PHE tools, protocols, etc. into their work (BALANCED core indicator)	43	23 <sup>51</sup>	20	2 <sup>52</sup>	14	On-target
IR2: Increased community awareness and support of family planning and conservation as a means to improve health, food security and natural resources	2.1 Number of people who have seen or heard a specific RH/FP message (USAID/OH standard indicator 2)	102,379	2,379	100,000	15,134	143,807	Over-target
IR3: Increased policymakers' commitment to promote/su	3.1 Amount of in-country public and private financial resources leveraged by USG programs for RH/FP (USAID/OH standard indicator 1)	US\$152,760	US\$112,760	US\$40,000	US\$2,886	US\$29,091	On-target

<sup>51</sup> MENRO & RHU of Calatagan (2); MAO & RHU of Lobo (2); MAO & RHU of Mabini (2); MAO & RHU of San Juan (2); MAO & RHU of Nasugbu (2); MAO & RHU of Inabanga (2); RHUs of Batangas City, Bato, Hindang, Matalom, Inopacan, Bien Unido, Getafe, Buenavista, Clarin, Tubigon & Ubay (11). These local government organizations have been using the BALANCED training manuals to train PHE adult PEs and PHE CBDs

<sup>52</sup> Bantay Dagat networks of Oriental and Occidental Mindoro - these networks consist of 15 organized groups of Bantay Dagat

pport FP/RH services and integrated approaches	3.2 Number of local policy reforms/plans with integrated PHE initiated (BALANCED field indicator)	14	4	10	8	10	On target
	3.3 Number of National/regional Forums where PHE approach highlighted	1	N/A	1	0	0	
IR 4: Improved governance capacities of provincial and municipal LGUs in the VIP and Danajon Bank marine ecosystems	4.1 Number of people trained on NRM (disaggregated by gender and those involved in FP) ( <i>Standard USAID bio-diversity indicator</i> )	100	N/A	0	86 (64 m and 22 F)	86	On-target
	4.2 Number of hectares of biologically significant marine areas under improved management disaggregated by area of MPAs versus area of municipal waters <sup>1</sup> ( <i>Standard USAID bio-diversity indicator</i> )	Municipal waters: 64,500ha.  MPAs: 800ha.	N/A	Municipal waters: 50,000ha.  MPAs: 400ha.	0	0	Under-target
	4.3 Number of local institutions strengthened on NRM ( <i>Standard USAID bio-diversity indicator</i> )	23	N/A	14 (MPAs 10, BD 4)	15 <sup>53</sup>	15	
IR 5: Increased incentives	5.4 Number of people trained on conservation-based enterprises <sup>3</sup>		N/A	Target set in Year 1 <sup>54</sup>	39	39	

<sup>53</sup> 15 Bantay Dagat groups in VIP

<sup>54</sup> This target will be based on target number of people benefiting from conservation based enterprises and will be a subset of that number (see \*\*\*below).

for coastal and marine conservation among coastal fisher households	5.5 Number of people with increased economic benefits derived from sustainable fisheries management	N/A	N/A	No target but tracked <sup>55</sup>		0	
	5.6 Number of people benefiting from conservation incentive-based enterprises		N/A	Target set in Year 1 <sup>56</sup>		0	

<sup>55</sup> Estimated number of fishers in LIG is 1,000 persons. If fishers and municipalities choose to pilot a managed access regime, then the number benefiting will be the number of fishers granted exclusive access rights. If it is for the reef fishery only, the actual number will be less than 1000 as the number of reef fishers has yet not determined, and will be baselined in Year 1.

<sup>56</sup> \*\*\* In a process oriented livelihoods approach, the number of targeted beneficiaries will be determined as part of the planning conducted with LGUs in Year1. However, given budget considerations, order of magnitude approximation will be in hundreds (100-300), not thousands of households. Number of households benefiting from conservation incentive-based enterprises (gender disaggregated and by number of these people also involved in FP/RH activities) includes those households where a member has participated in diversified livelihood interventions including training, value chain improvements, etc. (TBD once livelihood strategies designed w/ LGUs but estimated at 30 per municipality X 5 = 150 households)

**ATTACHMENT 1**

# BALANCED PHILIPPINES Livelihood Development Process

