

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

**Semi-Annual Results Report #7
For Period July 1, 2011 – December 31, 2011**

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Implemented by:

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

ADDO	Accredited Drug Dispensary Outlets
AOTR	Agreement Officer's Technical Representative
APE	Adult Peer Educator
AWF	African Wildlife Foundation
BALANCED	Building Actors and Leaders for Advancing Community Excellence in Development
BHC	Barangay Health Center
BHW	Barangay Health Worker
BINP	Bwindi Impenetrable National Park
BMCT	Bwindi Mgahinga Conservation Trust
BNS	Barangay Nutrition Scholars
BMS	Behavioral Monitoring Survey
CAP	Conservation Action Planning
CBD	Community-based Distributors
CBFP	Community-based Family Planning
CDM	Camp, Dresser, & McKee
CI	Conservation International
CIP	Conservation International Philippines
COMACO	Community Markets for Conservation
CRC	Coastal Resources Center
CDRA	Christian Relief and Development Association
CRM	Coastal Resources Management
CTI	Coral Triangle Initiative
CTPH	Conservation Through Public Health
CTSP	Coral Triangle Support Partnership
DBC	Designing for Behavior Change
DC	District Commissioner
DCB	Dual Capacity Building
DED	District Executive Director
DENR	Department of Environment and Natural Resources
DIP	Detailed Implementation Plan
DMO	District Medical Officer
ECO	Ecological Christian Organization
ECHNTS	Esiama Community Health Nurses Training School
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
FtF	Feed the Future

GBM	Greenbelt Movement
GH	Global Health
GH/HIDN/ID	Global Health/Health, Infectious Diseases, and Nutrition/Infectious Diseases
GHI	Global Health Initiative
GO	Government
GTZ	German Technical Cooperation Agency
HOPE-LVB	Health of People and Environment in the Lake Victoria Basin
ICAP	International Center for AIDS Care and Treatment Programs
ICEF	International Conference on Environmental Futures
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
JHU/CCP	Johns Hopkins University/Center for Communication Programs
K4Health	Knowledge for Health
KM	Knowledge Management
LOOCIP	Loongido Community Integrated Project
M4RH	Mobile 4 Reproductive Health
MGNP	Mgahinga Gorilla National Park
MOU	Memorandum of Understanding
MPA	Marine Protected Area
MSI	Marie Stopes International
NCSE	National Conference on Science and Environment
NFPWG	National Family Planning Working Group
NGO	Non-Governmental Organization
NOAA	National Oceanic and Atmospheric Administration
NPOA	National Plan of Action
OPRH	Office of Population and Reproductive Health
OSIENALA	Friends of Lake Victoria
PEPFAR	President's Emergency Plan for AIDS Relief
PFPI	PATH Foundation Philippines Inc.
PHE	Population-Health-Environment
PPE	Poverty, Population, Environment
PRB	Population Reference Bureau
PSI	Population Services International
PTAL	PHE Technical Assistance Lead
REPS	Regional Environment Program Specialist
RH	Reproductive Health

RHU	Rural Health Units
RMO	Regional Medical Officer
RRA	Rapid Rural Appraisal
SANAPA	Saadani National Park
SIDA	Swedish International Development Cooperation Agency
SO	Strategic Objective
SOTA	State of the Art
SSE-PHE	South-South Exchange on PHE
SUCCESS	Sustainable Coastal Communities and Ecosystems
TA	Technical Assistance
TCMP	Tanzania Coastal Management Partnership
TKCP	Tree Kangaroo Conservation Program
TNC	The Nature Conservancy
TNC CTC	The Nature Conservancy Coral Triangle Center
TOT	Training of Trainers
UMATI	Uzazi Na Malezi Bora (Tanzanian family planning association)
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
VIP	Verde Island Passage
VIPCMP	Verde Island Passage Marine Corridor Management Plan
WHO	World Health Organization
WPZ	Woodland Park Zoo
WWC	Woodrow Wilson Center
WWF	World Wildlife Fund

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

BALANCED continues 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 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.”

In line with our Mid-Course Strategy developed following our mid-term evaluation, we focused our technical and financial support on continuing to build the capacity of our core set of champions and institutions in the six focus countries where we have field activities, namely in Tanzania, Ethiopia, Uganda, Zambia, Papua New Guinea (PNG) and the Philippines. We mentored these champions on how to plan, implement and monitor effective PHE approaches and to serve as resources to others who wish to integrate family planning and health into conservation projects in their countries. 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. We continue to hand over PHE activities and capacity building to in-country/in-region talent.

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 and shared these and existing training curricula, job aids, manuals, and videos with at least 60 of our PHE champions in the field and to over 3,000 members of the PHE Community. Per our Mid-Course Strategy, we reduced our efforts on developing tools and focused on key legacy documents that we feel will make the most contribution to the PHE field.

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 July 1 to December 31, 2011. 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 champions while building the capacity of organizations new to the PHE approach.

Accomplishments

We continued to implement our *continuum-style* capacity building strategy that covers the pre-, intra- and post-learning periods. *The pre-learning period* involves assessing regional and institutional capacities, competencies, resources and other factors that influence an organization's capacity to integrate PHE approaches into its on-going conservation programs. As our new Uganda seed grant recipients, staff from the nearly awarded MacArthur/Packard-funded PHE project and program officers from CRC's coastal resources management (CRM) project in the Gambia were in the *pre-learning period*, we gathered information from, and held several discussions with, them to assess their learning needs and adapt the December 2011 PHE Program Design workshop to most effectively provide the information and knowledge needed by each organization. The same strategy was used for the one-day PHE Program Design workshop conducted in the Philippines. BALANCED also helped PHE Ethiopia adapt its training module for the upcoming Implementing Partner's workshop for the learning needs of nongovernmental organizations (NGOs) implementing PHE in Ethiopia.

In order to ensure the transfer of skills and knowledge during the *intra-learning period* when workshops actually take place, BALANCED made sure that its PHE Program Design workshops and hands-on mentoring were competency-based, experiential and involved substantial time to practice the new skills/information learned. Because most adult learners lose 75% of what they learn in a workshop within 48 hours, BALANCED provided additional mentoring and hands-on support to our workshop participants and trainees after the training ended.

This Post-learning period is traditionally neglected and most responsible for poor post-training results and service delivery outcomes. Therefore, we continued to provide post-training support to BALANCED champions through hands on-mentoring, continuous repetition through refresher courses, and regular virtual and in-person technical assistance, especially in Tanzania, Ethiopia,

and Ghana. This post-training support is designed to ensure ownership of the PHE process is transferred to the 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.

Lastly, building on the recommendation of the mid-term evaluation to develop a signature PHE course, the BALANCED Project began identifying at least two champion leaders to attend CRC-CI's June 2012 course: "*Building Coastal Community Resilience: Population, Health and Environment Dimensions*." Those selected will be responsible for conducting a similar course in East Africa during Year 5 of our project.

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

After several postponements, the 4th National PHE Conference, with the theme: "*Changing World, Changing Climate: Exploring Population, Health and Environment Links for Effective Local and Corporate Governance*," was conducted in General Santos City from July 27-29, 2011. The PFPI team worked closely with the Philippines PHE Network (SIGUE) to organize and facilitate a one-day (abridged) pre-conference (July 27, 2011) PHE Program Design workshop for selected participants from NGOs and government organizations (GOs) attending the PHE conference. Workshop participants were selected from a pool of applicants based on the following criteria set by the Project: 1) a staff/team member of government or NGO that has project funding and is interested in implementing an integrated PHE project; 2) has a current or existing project that they want to adapt to a more integrated PHE approach; or 3) staff person who is responsible for the planning, programming, managing, or monitoring an environment, health or family planning, or rural development program/project.

Eighteen participants (11 males and 7 females)—five government officials and 13 NGO representatives who were currently implementing or planning to implement PHE projects attended the one-day training. During the workshop, each participant developed her/his own PHE conceptual model and presented it to the group for comments and subsequent revisions.

Being a core member of the PHE network, PFPI also helped to organize the PHE conference. PFPI presented on the BALANCED Project, the results of the policymaker survey conducted for policymakers with jurisdiction over the Danajon Double Barrier Reef ecoregion in the Central Visayas, and the results of the IPOPCORM operations research. They also chaired a plenary session.

Results from Activity 1.1:

- 18 representatives from NGOs and LGUs trained on PHE Program Design (1.1)
- PHE Program Design curriculum adapted for one-day training (3.1)

1.2 Build capacity of NGOs in Africa on PHE Program Design

In order to catalyze interest in PHE among health and conservation organizations that have not yet received BALANCED training or hands-on technical support in Africa, a PHE Program Design workshop was planned in conjunction with the November 29 -December 3, 2011 International Conference on Family Planning in Dakar, Senegal. The training workshop was conducted as a post-conference workshop (December 4-7, 2011) to attract individuals who also participated in PHE-related activities at the FP conference.

BALANCED PFPI and CRC trainers used the *Designing and Implementing Integrated Approaches to PHE: Workshop for Planners and Managers* training materials during the workshop. These materials had been successfully used during the 2008 PHE Program Design workshop in Ethiopia (a pre-BALANCED activity) and for the BALANCED PHE South-to-South Exchange Study Tour held in the Philippines in 2010. For the Senegal workshop, BALANCED strengthened the training content by incorporating lessons learned from PHE implementation in Africa and the Philippines over the past three years. In addition, two individuals from the ExpandNet secretariat delivered a special session on how to apply the ExpandNet/World Health Organization (WHO) scaling-up framework and tools to PHE.

The four-day PHE Program Design workshop was designed for GO and NGO program planners and managers implementing conservation, FP/RH or rural development activities who wish to develop integrated approaches to community development. The criteria to select workshop participants were the following:

- Senior-level staff of a GO or NGO involved in conservation/fisheries/marine work
- Interested in gaining more knowledge on how to design and implement community-based and integrated approaches to PHE that are sustainable and cost-effective
- Have the skills to design a site-specific integrated PHE project or modify an existing project to include the PHE approach and formulate a follow-on and/or monitoring plan
- Strongly committed to implementing PHE
- Involved in the implementation of a BALANCED Project PHE seed grant

The objective of the Senegal training was to enable workshop participants to design PHE approaches that are replicable, sustainable, and generate impact on human and ecosystem health with a scale-up in mind. By the end of the workshop, participants would be able to:

- Describe various categories of PHE integration and key advantages and disadvantages to each
- Formulate a conceptual model that graphically depicts the demographic, social, environmental dynamics—and the relationships among these factors—at a local site
- Identify opportunities to remediate and formulate specific objectives or short-term outcomes from the conceptual model
- Formulate and use a results-chain methodology to select appropriate strategies and interventions to address root causal factors

- Describe a range of implementation models and PHE integration mechanisms
- Apply an existing PHE tool to select appropriate monitoring and evaluation indicators and devise a simple monitoring plan

Seventeen representatives (10 males and seven females) from five countries (Kenya, Senegal, Uganda, Tanzania and The Gambia) participated in the four-day PHE Program Design workshop. Of these, seven were from the Lake Victoria Basin (HOPE-LVB) Project. A significant number of individuals from NGO and donor groups also participated in segments of the workshop (ranging from a half day to two days).

During the workshop, the different country/project teams prepared their own PHE conceptual framework(s), goals, objectives and strategies. They also developed monitoring and evaluation indicators, and action plans for implementation upon their return home. Each team presented its plan and received comments and suggestions from their peers and the facilitators. BALANCED staff followed up with selected participants after the workshop to help them finalize their conceptual frameworks, goals and objectives.

Results from activity 1.2:

- 17 representatives from NGOs implementing or new to PHE activities trained on PHE Program Design (1.1)
- PHE program design workshop report with participants action plans
- Five target organizations incorporating the PHE program design protocols into their work (SO-1)
- PHE Program design protocol replicated in two new countries (Kenya and Uganda) (3.1)

1.3 Build capacity of PHE Ethiopia to conduct training activities

An earlier request from the PHE Ethiopia Consortium for BALANCED to partially support a refresher training in PHE Program Design for Consortium members was changed in November 2011 to a request for partial support of a PHE Implementers workshop for NGOs currently implementing PHE activities in Ethiopia. The purpose of the workshop was for implementing NGOs to learn from each other and to discuss how to improve the areas that are not working well for the projects. During this reporting period BALANCED staff provided virtual mentoring and support to PHE Ethiopia staff and the PHE fellow on the Implementer Workshop program of activities, facilitator's notes. PHE Ethiopia initially scheduled the three -day PHE Implementers Knowledge Sharing and Learning Workshop for December 15-17, 2011, however, the workshop has since been postponed to the first week of February 2012.

Also during Year 3, BALANCED conducted a two-day workshop on PHE Youth Peer Education (YPE), which was organized by PHE Ethiopia Consortium. The YPE workshop participants liked the training so much that they asked if the BALANCED YPE curriculum could be adapted to the Ethiopian context. BALANCED provided modest support for a group of YPE participants and PHE Ethiopia staff to adapt the curriculum. They sent us a copy of the draft "Population-Health- Environment (PHE) Youth Peer Education: A Guide for Training Youth Peer Educators

Working on PHE Activities Adapted for use in Ethiopia.” While PFPI provided comments on the adapted curriculum, communications from PHE Ethiopia have been sporadic. This has led to the decision to have the BALANCED East Africa Consultant (EAC) provide the additional technical assistance (TA) needed to finalize this draft during his TA visits to Ethiopia in February 2012.

Results from Activity 1.3

- None

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

A key element of our capacity building strategy is providing on-going mentoring and support—after formal workshop training has been completed—to build the capacity of our BALANCED trainees. Post-training repetition, learning and mentoring and regular support, especially in remote locations, are what 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 three organizations in three countries, including:

- **Tanzania Coastal Management Partnership (TCMP)**—provided virtual and in-country technical support to TCMP as they implemented BALANCED Project activities in Tanzania:
 - a) Provided inputs on how to continue to incorporate/fine tune PHE into the *Pwani* project’s workplan, and assisted the TCMP team to finalize its communications plan for the BALANCED Project in Pangani.
 - b) Helped TCMP to respond to the suggestions made in the mid-term evaluation report that TCMP should collaborate with more USAID health collaborating agencies (CAs) on its PHE/FP activities. The EAC helped TCMP learn how to become a member of the National FP working group (NFPWG), where the National Ministry of Health (MOH) Office and USAID health CAs meet quarterly to discuss the status of health and family planning activities in the country. As a result of meetings with the National MOH Office and CAs, TCMP was able to make a presentation about the BALANCED and *Pwani* Projects at the October 2011 NFPWG meeting. Subsequent to the presentation, TCMP was invited to become a regular participant and present on TCMP/BALANCED activities in future NFPWG meetings. Further, TCMP agreed to incorporate its work in the National FP Cost Implementation tracking tool, which FHI gathers quarterly. The EAC and TCMP also met with Family Health International (FHI) to discuss areas of mutual collaboration. As a result, TCMP/BALANCED agreed to use its community volunteers to promote FHI’s Mobile 4 Reproductive Health (M4RH) hotline and FHI agreed to provide TCMP/BALANCED with IEC materials on family planning.
 - c) Helped the TCMP PHE Coordinator brainstorm how to collaborate with other USAID Cooperative Agreement (CA) partners to promote and support mobile clinics that provide long-acting and permanent methods in the wards where PHE activities are being implemented. It was learned that these mobile clinics are operated by GTZ partners (Engenderhealth, Population Services International/PSI) and Marie Stopes

International (MSI) in BALANCED Project sites. The EAC prepared a list of questions that the TCMP PHE Coordinator could use to gather information from the Tanga regional office, Pangani District office and dispensaries about mobile clinics. Based on this information gathering, a plan was developed to support mobile clinics in the Pangani PHE sites (see Activity 3.1).

- d) Assisted the BALANCED Project mid-term evaluator by providing BALANCED project background and related information about BALANCED activities in Tanzania and our support to East Africa and by participating in meetings with the various regional and district officials and NGO representatives {Pangani District Executive Director, District Commissioner (DC), District Medical Officer (DMO) and staff , UZIKWASA, Tanga Regional Medical Officer (RMO), Regional Reproductive and Child health coordinator; and Loongido Community Integrated Project (LOOCIP), a partner of African Wildlife Foundation (AWF) had participated in BALANCED Project trainings).
- **FHI/GBM**—During Year 3, BALANCED provided technical input and support to the FHI/Greenbelt Movement/GBM PHE activities in Kenya. During this reporting period, BALANCED staff reviewed the FHI/GBM final draft PHE curriculum and provided comments on the training-of-trainers workshop tentatively scheduled for the last week of August 2011.
- **The Integrated Coastal and Fisheries Governance Project (ICFG) or the *Hen Mpoano (Our Coast) in Ghana***—Since 2009, BALANCED has provided technical support to integrate health and family planning into CRC’s Integrated Coastal Fisheries Governance Project’s (referred to locally as *Hen Mpoano*) CRM activities in the Ellembelle and Shama districts. In Year 3, BALANCED conducted a YPE workshop for representatives from CRC, Friends of the Nation (FON) and other *Hen Mpoano* project partners working in the Ellembelle and Shama districts. In September 2011, *Hen Mpoano* sponsored a Peace Corp volunteer, Leslie Lucas, to help lead the PHE activities in Ellembelle. Since her arrival, Leslie and two teachers (who attended the YPE workshop) have trained 80 second-year nursing students from the Esiam Community Health Nurses Training School (ECHNTS) during three weekly Saturday sessions. BALANCED provided virtual support to Leslie as she planned and implemented the YPE training. By March 2012, an additional 150 or more second-year nursing students will be trained on YPE.

In November 2011, Linda Bruce travelled to Ghana to help refine the PHE activities there. An updated PHE plan was developed that supports the following activities in Ellembelle: 1) continued training of ECHNTS’ second-year nursing students on YPE; 2) engaging select trained nursing students in a PHE practicum where they work together with other USAID CAs in the area to develop/conduct community mobilization activities and promote pro-health and pro-environment messages; 3) reprinting and distributing the Behavior Change Support (BCS) communication materials on RH/FP from Johns Hopkins University’s Center for Communication Programs (JHU/CCP), and 4) engaging ECHNTS and USAID CAs in *Hen Mpoano*’s radio drama panel discussions when health topics are covered in the weekly drama.

In Shama, PHE activities will include: 1) training the Central and Western Fishmongers Improvement Association (CEWEFIA) on community-based distribution; 2) distributing reprinted BCS communication materials during community mobilization activities and house-to-house visits; and 3) engaging CEWEFIA and other USAID CAs in *Hen Mpoano*'s radio drama panel when health topics are covered in the weekly drama.

BALANCED partner PFPI shared a list of questions and provided inputs to FON on their Rapid Rural Appraisal (RRA) exercise questionnaire. The RRA was designed to evaluate their *Hen Mpoano* NGO partners who are implementing PHE in the Shama District.

Results from Activity 1.4

- Six post-training assistance interventions to six NGOs/institutions (TCMP, FHI, GBM, FON, ECHNTS, CEWEFIA) in three BALANCED focus countries (1.4a)
 - Hands on TA to TCMP on workplan, communications plan, PHE activities, mobile clinics
 - Virtual TA to TCMP PHE Coordinator on NFPWG, mobile clinics, communications plan
 - Virtual TA to FHI and GBM on PHE training curriculum
 - Virtual TA to FON on PHE activities
 - Virtual TA to Leslie Lucas on ECHNTS YPE training
 - Hands-on TA to FON, CEWEFIA on PHE activities

1.5 Provide technical support to ICMPE Project

As part of our support to the Integrated Community Managed PHE (ICMPHE) Project, BALANCED is working with ExpandNet, an NGO specializing in designing for scale-up, to help ICMPHE design their project with scale-up in mind. In Year 4, ExpandNet will be providing technical support to the ICMPHE Project to help ensure the PHE interventions chosen for implementation are appropriate to the settings, are implemented in sustainable ways, and are designed from the start to accommodate future scaling-up to surrounding areas and more generally in the participating countries. During this reporting period, the following was achieved:

- ExpandNet staff members Peter Fajans and Laura Ghiron traveled to Dakar, Senegal from November 27 – December 7, 2011 to participate in the first two official meetings of the ICMPHE project, which during this period was renamed as the Health of People and Environment in the Lake Victoria Basin (HOPE-LVB) Project. These meetings coincided with the International Conference on Family Planning held in Dakar, Senegal from November 29 to December 2, 2011. The first meeting was the December 1st project launch—an FP Conference auxiliary evening event, attended by over 70 people. The second meeting was the Meeting of the Minds—the first official working meeting of the HOPE-LVB Project. The Meeting of the Minds, which took place on December 3rd, provided the project implementing partners, donors and those providing technical support with a briefing on recent fieldwork, the current status of project planning, presentations

highlighting partner skill sets and other relevant work to date, as well as laying out donor hopes and expectations for the project.

- Fajans and Ghiron also helped facilitate the four-day PHE Program Design Workshop organized by BALANCED in Dakar (see activity 1.2). During the workshop, Fajans and Ghiron gave a session called “Applying the ExpandNet/WHO scaling-up framework, tools and approaches.” They also assisted the HOPE - LVB-participants to: 1) develop a conceptual framework for the project; 2) review, discuss and refine the project goal, objectives and activities; and 3) establish results chains for the desired outcomes.
- The ExpandNet team began arranging the first technical assistance visit to the HOPE-LVB sites. This trip, which will include fieldwork and project planning in Kenya and Uganda, is scheduled for January 17-February 7, 2012. A team of four ExpandNet members, including Fajans, Ghiron, Alexis Ntabona and Ruth Simmons will participate in the January/February technical assistance visit.
- BALANCED supported the participation of seven HOPE-LVB participants from Pathfinder International, Conservation Through Public Health (CTPH), the Ecological Christian Organization (ECO) and OSIENALA (Friends of Lake Victoria – a local NGO) at the Senegal PHE Program Design workshop (see Activity 1.2)

In addition to the technical input provided by the ExpandNet team, BALANCED staff will also provide technical support to the HOPE-LVB Project upon request. No requests have been made to date, as the HOPE-LVB Project is only now beginning to organize itself.

Results from Activity 1.5

- ExpandNet Dakar trip report

1.6 Support PHE Champions to attend CRC-CI’s “*Building Coastal Community Resilience: Population, Health and Environment Dimensions*”

In line with the recommendations from the mid-term evaluation and previous planning discussions, CRC and CI decided to develop a three-week course on PHE and climate change, in order to spur interest in PHE and build field practitioner capacity. The course is scheduled for June 2012, and the course announcement was circulated to the PHE community in August 2011.

It is important to note that during Year 4, the BALANCED Project is not providing direct funding for the BALANCED Deputy Directors to contribute their time to course curriculum design, marketing or delivery. Rather, the direct costs for the contributions of Squillante, Torell, and Edmond are funded through other non-BALANCED Project funds of the CRC and CI organizations, and many of these costs are being captured as leveraged funding. However, BALANCED Project resources *may* contribute in the form of providing input on the curriculum and providing course scholarships. The Project *will* support the participation of two key PHE champions to attend the course.

Again, while not BALANCED-funded, this course is helping respond to the interest of the larger PHE community, and as such is furthering the BALANCED Project mandate to promote the benefits of the integrated PHE approach and to build practitioner awareness of and skills in PHE.

During the latter part of this reporting period, the curriculum development team produced a draft framework of the three-week program, with identification of specific resources appropriate for various session plans; identification of possible resource persons to help with design and delivery of various sessions. The BALANCED team also discussed potential PHE champions who BALANCED might support to attend the course and serve as co-designers and co-trainers of a possible BALANCED-funded, hosted, and designed 2013 PHE course in the Project's final year.

Results from Activity 1.6

- N/A (*identification of BALANCED scholarship recipients to the course remains pending*)

IR1 Priorities for Next Reporting Period (January 1 to June 30, 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.

- Provide technical support and mentoring to PHE Program Design participants upon request. Some of this technical support will be provided as part of IR 3 activities. (**Joan**, Ricky, Elin)
- Provide technical support and mentoring to the PHE Ethiopia consortium as they plan and implement their PHE Partner Implementers workshop (**Ricky**, Joan, Linda)
- Provide continued technical assistance and mentoring to BALANCED trainees in Ethiopia, Uganda, Tanzania, Kenya, Ghana and the Philippines upon request. (**Ricky**, Joan, Linda)
- Provide technical support on the development of IEC materials, community-based distribution and peer education, etc. to the HOPE-LVB Project partners upon request and in line with the HOPE-LVB project activities. (**Joan**, Ricky)
- Identify and invite two participants to CRC/CI's June 2011 "*Building Coastal Community Resilience: Population, Health and Environment Dimensions*". (Linda, Lesley, Janet)

IR2 PHE knowledge and tools developed, synthesized, and shared

The knowledge management (KM) element of the BALANCED Project lies at the nexus of IR1, *Capacity built for integrated PHE implementation* and IR3, *Results-oriented PHE field activities implemented in areas of high biodiversity*. It draws out the "best of" information and experience generated from Project activities and from other individuals and organizations practicing PHE and synthesizes and disseminates this to trainers, training participants, PHE implementers in the field, the larger PHE community of practice, and donors. The focus is on three key activity areas:

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

Accomplishments

During the BALANCED Project strategic planning meetings in September 2011, key personnel agreed to focus the Year 4 KM activities on our priority countries and to refine our outreach target audiences to include NGOs, donors and other PHE community stakeholders. During this reporting period, the Project staff working on KM diligently promoted PHE knowledge, information, and successes coming out of the broad PHE community of practice. However, BALANCED KM efforts overall—while still a key component of the Project—have been reduced in Years 4 and 5 in response to recommendations from the mid-term evaluation and the Project’s mid-course strategy.

2.1 Identify, document, and synthesize knowledge

The BALANCED team drafted and/or finalized and disseminated multiple training guides, technical reports and PHE champion stories this reporting period, with specifics on each as outlined below.

- One new technical report—findings of the baseline Behavior Monitoring Survey (BMS) on FP/RH and coastal resources management behaviors conducted in select BALANCED-Philippines sites—was finalized and will be disseminated widely in the next reporting period
- One previously finalized technical report, “Population, Health and Environment Situational Analysis for the Saadani National Park Area, Tanzania,” was submitted to and accepted by the peer-reviewed Ocean and Coastal Management Journal. Edits based on review comments are underway and availability of the report will be announced upon publication of the journal issue.
- One new PHE training guide was finalized and made accessible to the public:
 - “Population, Health and Environment (PHE) Community-based Distribution and Peer Education System: Train-the-Trainer Guide for Training PHE Community-based Distributors and PHE Adult Peer Educators” (October 2011)
- One additional training guide—“Population, Health and Environment (PHE) Community-based Distribution and Peer Education System: A Guide for Training PHE Peer Educators”—was completed but was not finalized (made 508-compliant) prior to the end of this reporting period. It will be posted to the PHE Toolkit and disseminated to the public in the next reporting period, and thus counted in the next reporting period’s PMP.
- Three new champion stories—Zo Zatovonirina of Madagascar (August 2011); Pascal Gakwaya Kalisa of Rwanda (October 2011); and Jeanne Nyirakamana of Rwanda (November 2011)—were written and disseminated. *Note: two additional champion*

stories—one from the Philippines and one from Belize—were drafted and are in final stages of approval for dissemination next reporting period.

- Several other PHE tools are still under development and will be finalized in the next reporting period. These include the “Population, Health and Environment (PHE) Community-based Distribution and Peer Education System: A Guide for Training Community-based Distributors”, “Reference Guide for PHE CBDs and PEs,” “How to Develop Integrated PHE Messages and IEC Materials Curriculum” and the “Designing for Behavior Change (DBC) for PHE Projects guide.”
- During this period, and on a case-by-case basis, we engaged BALANCED Advisory Committee members in dialogue about Project activities. Several of these committee members, along with other experts in the PHE community, joined the September 14, 2011 BALANCED meeting to vet the Project’s proposed mid-course strategic planning initiatives. BALANCED adopted several of the suggestions regarding new or refined activities for the remainder of Year 4. We also collaborated with Advisory Committee members from the Population Reference Bureau (PRB) and the Woodrow Wilson Center (WWC) on the design and implementation of the PHE panel at the November 2011 International Family Planning Conference in Dakar, Senegal.

Results from Activity 2.1:

- One training guide (PHE CBD/PE TOT) (2.1)
- Three champion stories/profiles (2.2a)

2.2 Organize existing and new knowledge for PHE

A significant amount of effort last reporting period went into surveying users of the PHE Toolkit, addressing that input, and populating the site. With the agreed upon reduced effort in BALANCED KM activities in Years 4 and 5, however, the team has moved to a more “maintenance” type effort, uploading only key “new” resources as they become readily available and “known” to the team and continuing to “promote” the 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. Specifically,

- The PHE Toolkit continued to gain users. Analysis of the logfile data for the July 1, 2011 to December 31, 2011 period showed a significant increase in usage of the site and its resources. The number of visitors jumped 90% during this period to 34,051 from the previous period’s user count of 17,888. Also, the number of page views increased from the prior reporting period’s 34,394 to 51,813 this period. There was also a 51% increase in the number of pages and documents viewed during this vs. the prior reporting period.

- Between July 1, 2011 and December 31, 2011 we uploaded¹ 21 different publications and cross-linked them into multiple sub-tabs on the PHE Toolkit. The materials fell under the categories/sub tabs of “HIV/AIDS and the Environment,” “Peer-Reviewed Literature,” and “Zoonosis.”
- During this reporting period, the PHE Toolkit team constructed and activated a PHE Gateway comprised of a collection of 20 organizational websites or document collections that have significance to the PHE community of researchers and practitioners. This new Gateway will assist those working in PHE to more readily access the corpus of documents available. (Background on the term “Gateway”: the K4Health website provides a custom search feature that allows for searching specialized collections. These collections are “nested”—i.e., a structure that allows the scope of the search to range from searching only a document collection in an individual toolkit, to searching across all toolkits, searching across the entire K4Health website, or searching a special collection of external websites called a Gateway.)
- 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 home page of the K4Health site <http://www.k4health.org/PHE>. This reporting period they uploaded two new publications of note: the country’s “Climate-Resilient Green Economy” strategy document, which references throughout its pages the links between health of the economy and environmental and human health [Ethiopia's Climate-Resilient Green Economy Strategy](#). Another is the 2011 Ethiopian Demographic and Health Survey [2011 Ethiopia Demographic and Health Survey](#).
- The Project team continued promoting the Toolkit through various channels, including but not limited to directing audiences who receive BALANCED messages via listservs to the Toolkit; sending out personal emails and communications; directing targeted youth NGOs and donors to the availability of the YPE Guide; collaborating with the WWC to re-broadcast three BALANCED champions stories and news items to more general audiences; distributing the Toolkit postcards; and including the Toolkit website address on key presentations; etc.
- One new PHE tool was identified for development in Years 4-5. A previous survey of the PHE community identified tools that do not exist, but would be useful to PHE practitioners in their work. As follow-up, the BALANCED team vetted this list and solicited the advice of a select subgroup of its partners for additional suggestions and input. This led to the decision to develop a tool entitled: PHE Field Implementation: A Simple PHE Practitioner Guide. This tool will be finalized and disseminated in Year 5.

Results for Activity 2.2 include:

- PHE Toolkit uploaded with 21 new resources

¹ As a result of the September 2011 strategic planning meetings, the Project discontinued the Content Management Team but continued to solicit materials from PHE partners and the PHE community in general on a regular basis.

- BALANCED Project website maintained, and content updated including the upload of 10 relevant news items

2.3 Share knowledge within the PHE and broader community

This activity seeks 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; attending and 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 having:

- Ten news items disseminated to three primary target listservs—the PHE, Family Planning and the Africa Biodiversity Collaborative Group (ABCG) listservs—and re-transmission of several news items by the WWC’s New Security Beat and the USAID Frontlines publication, thereby broadening our reach. Overall, we reached on average 1,500 people with each news item, an increase over the previous reporting period when 1,000 people were reached on average. See **Annex A** for the list of news items and numbers reached.
- The BALANCED Project’s “[Youth Peer Education: A Guide for Training Youth Peer Educators Working on PHE Activities](#)” was highlighted in the “New Resources” section of the first edition of *PRH Connect*, a bimonthly e-newsletter published by USAID’s Office of Population and Reproductive Health.
- The June/July 2011 online version the USAID Frontlines magazine featured a revised version of the earlier (February 2011) BALANCED-produced PHE champion story of Rukia Seif of Tanzania and her efforts to improve community health [Frontlines Article](#).
- The BALANCED Project and the PHE approach were represented at several important international or regional conferences, with several of these being joint collaborations with other PHE partners and practitioners:
 - Don Robadue presented at the Coastal Zone 2011 “Winds of Change: Great Lakes, Great Oceans, Great Communities” conference July 17-21, 2011 in Chicago, Illinois. His presentation was entitled: “Practice, Harvest, and Exchange: Supporting Networks of Practice Fostering the Population, Health and Environment (PHE) Approach in Coastal Areas.”
 - Patrick Kajubili and Elin Torell from URI CRC delivered a BALANCED Project presentation at WWC’s Environmental Change and Security Program (ECSP) event highlighting PHE Approaches in Tanzania on July 19, 2011. The presentation described CRC efforts to integrate FP services and outreach with livelihoods and coastal resources management approaches in and around the Saadani National Park.
 - Through match funding, Richard Pollnac attended and presented at the 6th “International Conference on Environmental Futures (ICEF): Interdisciplinary Research and Management Practice Across the Environmental Domain”

Conference held at the University of Newcastle, England from 18-22 July, 2011. His paper/presentation was entitled “*Do integrated population, health and environment projects produce added value?*”—which drew on the BALANCED-supported research conducted in Year 3 in the Philippines.

- Elin Torell and Juma Dyegula delivered two presentations at the WIOMSA scientific symposium “Coping with Global Change” on October 28 and 29, 2011 on “Integrated PHE for Resilient Coastal Communities: the Tanzania Case.” One of the presentations was given in a special PHE workshop organized by Blue Ventures.
- Four individuals—Joan Castro, BALANCED PTAL; Baraka Kalangahe from TCMP; Semu Tilahun of ENWRA; and Vik Mohan from Blue Ventures—attended the 2011 “Family Planning Conference: Research and Best Practices” held in Senegal from November 29 – December 2, 2011.
- Three of these individuals (Kalangahe, Tilahun and Mohan) also presented: “Integrated PHE for Resilient Coastal Communities: the Tanzania Case (Kalangahe);” “Population-Health-Environment-Livelihood Integration: a Cradle for Effective Rural Family Planning/RH (Tilahun);” and “Reaching the Hardly Reached in Southwest Coastal Madagascar” (Mohan). These presentations were part of the PHE panel session entitled “Reaching the Hardly Reached: Delivering Family Planning through Population, Health, and Environment,” which was co-organized by PRB and the BALANCED Project.
- 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).
- Produced a draft of the upcoming February 2012 e-newsletter on the topic of PHE as a development approach that can advance achievement of selected Millennium Development Goals. The newsletter will be finalized and disseminated in the next reporting period.

Results for Activity 2.3 include:

- 10 information feeds on PHE news and resources disseminated to selected outlets (e.g., PHE listserv, FP community listserv, ABCG listserv, PRB’s East Africa PHE Network updates)—reaching on average 1,500 individuals per posting
- Seven conference presentations (2.2a)
- Two field sites (Tanzania and Ethiopia) producing results that can feed into KM activities (3.3)

IR2 Priorities for next period (January 1 to June 30, 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.

- Disseminate technical report on the findings of baseline BMS on FP/RH and coastal resources management behaviors in selected BALANCED-Philippines sites (**Janet**)
- 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**)²; and 2) “An Evaluation of Projects Integrating Reproductive Health (Family Planning) and Environmental Management Activities in the Visayas Region of the Philippines” (**Pollnac**)³
- Finalize and disseminate three additional training guides: 1) Population, Health and Environment (PHE) Community-based Distribution and Peer Education System: A Guide for Training PHE CBDs; 2) PHE CBD and PE Reference Guide; and 3) How to Develop IEC Messages and Materials (**Linda, Lesley; Janet**/dissemination)
- Seek permission from USAID to make a final draft copy only of the “Designing for Behavior Change” for WWF and/ or other organizations/projects to finalize. Due to the length of the document and how difficult it is to edit because of that fact that it was converted from Adobe to Microsoft Word, BALANCED lacks sufficient manpower to thoroughly edit and make 508-compliant this cumbersome curriculum and at the same time meet its obligations on other KM tools and products (**Linda to discuss with AOTR**)
- Draft one new tool for PHE practitioners, entitled, “PHE Field Implementation: A Simple PHE Practitioner Guide”
- Produce and disseminate the BALANCED e-newsletter on how PHE approaches can contribute to the MDGs in March 2012 (**Janet, Bob**)
- Continue promoting and uploading new content to the PHE Toolkit (**Janet, Bob**)
- Support the WWC staff person as he travels to Tanzania to produce a series of field videos showcasing the BALANCED project’s PHE implementation in the Pangani and Bagamoyo Districts (**Elin**)
- 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**)

² Target journals are: “Ecology and Society”, “the Journal of Public Health Frontiers”, or “Society and Natural Resources”

³ This paper—with a reanalysis of the data—will be presented at the February 2012 AAAS (American Association for Advancement of Science) meeting in Vancouver, British Columbia. Comments from this presentation/meeting will be used to develop a publishable paper, with potential candidate journals being: 1) Ecology & Society; 2) Human Organization; 3) Environmental Management; 4) Conservation and Ecology; 5) Ecological Applications; 6) Science

- 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)
- 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)
- In partnership with WWC, continue discussion of organizing a panel (prior to June 20, 2012) on the topic of PHE and Millennium Development Goals—as follow-up to the BALANCED e-newsletter on this same topic (March 2012 issue)

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 Year 3, the BALANCED Project continued to facilitate the replication of results-oriented PHE field-based activities in Tanzania, the Philippines, Ethiopia, Zambia, Uganda and PNG. Details follow.

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. While BALANCED activities in Years 1 and 2 were concentrated in the Mkwaja and Mkalamo wards, in Year 3 the Project expanded the PHE-CBD network to three new wards— Mwera, Mikinguni, and Kipumbwi—wards that already had MOH-certified CBDs. In Year 4, our focus turned to monitoring and providing technical support to these PHE activities while building the capacity of TCMP and local governments to adopt this integrated approach on their own.

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

- A new community mobilizer, Mr. Hassan Kizuki, was hired in Buyuni village to support the PEs and CBDs and encourage the community to adopt CRM, good health practices,

and family planning. He is a trained PHE CBD and a member of Buyuni's Village Multi-Sectoral AIDS Committee. Mr. Hassan joined the two community mobilizers that were hired for the Mkalamo/Mbulizaga and Sange/Mikocheni villages in Year 3.

- Based on feedback from the BALANCED mid-term evaluation, the team began exploring how to collaborate with the mobile clinics that exist in Pangani. These clinics provide long term and permanent methods, such as intrauterine devices (IUDs), mini lapps, and vasectomies. In September, the in-country team had a first meeting with Rehema Kahando, the Engenderhealth Field Manager in their Sub Office in Arusha. It was agreed to collaborate with Engenderhealth to promote and, possibly support mobile clinics in BALANCED sites. In order to support the mobile clinics in Pangani, BALANCED will need to train its CBDs and adult PEs—in partnership with Engenderhealth—to advocate for long-term FP methods and inform potential clients about the mobile clinics. This will hopefully increase the number of clients that visit the mobile clinics when they come to the local dispensary. However, there are no regularly scheduled visits by the mobile clinics to the Pangani dispensaries because this is not in Engenderhealth's budget or portfolio. Pangani clinics seem to lack funding to hold these mobile clinics themselves. Therefore, BALANCED was asked about supporting the costs of the mobile clinics (e.g. fuel and paying the district hospital and dispensary staff). BALANCED is reviewing its budget to decide if such support is or is not possible.
- Began promoting FHI's M4RH hotline in Pangani and Bagamoyo districts where BALANCED and *Pwani* Projects are implementing PHE activities.
- TCMP joined the Tanzania National Family Planning Technical Working group (FPTWG) and attended one of their meetings in October 2011. The meeting was held at the Reproductive and Child Health section at the Muhimbili hospital. Participants included: MoH, Pathfinder, FHI, USAID, JSI, PSI, UMATI/Uzazi Na Malezi Bora *Tanzania* (a Tanzanian family planning association), Engenderhealth, the International Center for AIDS Care and Treatment Programs (ICAP), JHPIEGO, Futures Group, MSI, and DSW (Deutsche Stiftung Weltbevoelkerung— an international development and advocacy organization). Among the issues discussed during the meeting was the development of a roadmap for strengthening Community based Family Planning in Tanzania. BALANCED staff will continue attending these quarterly meetings and receive the meeting reports.
- TCMP BALANCED staff organized a one-day advocacy meeting for Pangani district officials, CBDs, dispensary staff, ward leaders, sub-villages and village and religious leaders on PHE youth peer education.
- Using the methodologies presented during the 2010 YPE TOT, BALANCED held a subsequent three-day PHE YPE training for thirty 15 to 24 year old youths in November 2011. Participants were from the Mkwaja and Mkalamo wards and are interested in PHE and willing to act as youth volunteers. These youths were trained to provide information and promote responsible sexuality, reproductive health/family planning and environment awareness among their peers. They will be connected to youth clubs established by the District, which has set up a youth center where YPEs can congregate and provide information to their peers on pro-conservation and pro-health behaviors. A memorandum of understanding (MOU) between TCMP BALANCED and the Pangani District and

which outlines the roles and responsibilities between the two groups in establishing, monitoring, and assisting the youth program was signed in April 2011.

- Together with staff from the Pangani District Hospital, TCMP BALANCED staff conducted four monitoring and mentoring visits to BALANCED CBDs, adult PEs and PHE providers in five wards. During the supervision visits, the team collected data (reported under results below) and provided technical assistance.
- TCMP BALANCED and *Pwani* staff had the opportunity to make presentations about PHE, the BALANCED Project, our successes, and lessons learned in Mombasa and Senegal (reported under IR 2.3). The team also gave a presentation about PHE at an international coastal management course organized by WIOMSA and sponsored by the Swedish International Development Agency (SIDA) on Zanzibar in October 2011.
- With funding from the *Pwani* Project, BALANCED staff supported a PHE PE workshop, held in the Mkange ward and Saadani village in August 2011. This was the first step in expanding PHE to the Bagamoyo district. Sixty-six individuals were trained (7 men and 29 women in Mkange and 14 men and 16 women in Saadani). In Mkange, all of the adult PEs (except a few village health workers, leaders, and dispensary staff) are members of the savings and credit cooperative organization (SACCO) “UAMKE”, which means “wake up” in English. This SACCO, which is primarily made up by female members, has as its goal to empower women, reduce poverty, and conserve the environment. The SACCO members heard about PHE through the grapevine and buying into the concept, they decided to add the “P” to their goal statement. As adult PEs, they will talk to their community members about the value of savings and credit, biodiversity conservation, family planning, and gender as well as the linkages between reproductive health/family planning and natural resources. The PEs will increase the use of family planning by referring their peers to CBDs, PHE providers and dispensaries.
- Through the *Pwani* project, BALANCED staff also participated in focus group discussions with fishermen in Bagamoyo about HIV/AIDS and gender. These focus group discussions included topics such as sexual responsibility and the dual protection of condoms. In the upcoming six months, the *Pwani* Project will establish condom social marketing outlets connected with the trained fishermen, PEs, and credit associations.
- Budget constraints to-date have led BALANCED to not hold the annual meeting for all Pangani PHE volunteers; however, if as we approach the end of Year 4, there appear to be sufficient budget savings, it may be possible to hold the meeting afterall.

Results from Activity 3.1

- 30 PHE YPEs trained (1.1)
- 66 PHE PEs trained (primarily funded by the *Pwani* Project) (1.1)
- One individual who received training by the project providing training on YPE to others (1.2)
- YPE tool replicated in Tanzania (3.1)
- PHE activities replicated in Bagamoyo (3.2b)

- 1 community mobilizer for Buyuni village recruited
- 4 supervision trips conducted
- 520 cycles of pills distributed
- 903 current users of FP services visited a CBD to renew their supply of pills or condoms
- 269 clients referred by PEs and PHE providers to CBDs for FP methods
- 381 individuals counseled by PEs and CBDs with environmental messages (fuel efficient stoves and SACCOs)
- 6,382 male condoms distributed
- 127 fishermen reached through focus group meetings on HIV/AIDS prevention
- 9 fuel efficient stoves built/sold by the Mkalamo PHE community facilitator upon request from fellow villagers

Key activities planned for next reporting period (January 1 to June 30, 2012):

- Conduct a training for accredited drug dispensary outlets (ADDOS) in Pangani and Bagamoyo
- Conduct advocacy meetings and train PHE champions with the end goal of integrating PHE into the Pangani district development plan
- Hold consultative meetings with MOH, district officials and village leaders
- Develop information, education, communication (IEC) materials, including radio and t-shirts
- Ongoing monitoring and mentoring visits for BALANCED trainees
- Consider holding the Annual meeting for Pangani PHE volunteers—*currently canceled*, see note above – depending on resources available next reporting period.
- Consider holding the Tanzania PHE Program Design Workshop, *which is currently on hold*

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

The United States Agency for International Development/ Philippines provided a total of US\$1,300,000 Buy-ins to the USAID Washington-funded BALANCED Project to support results-oriented PHE field activities in selected biodiversity-rich bioregions of the Philippines. URI-CRC, PFPI, and CI/Philippines are the implementing agents for BALANCED-Philippines Project.

In December 2010, an initial support of US\$500,000 was provided by the Philippines Mission's Office of Health (OH) to implement FP services, behavior change communication and policy reform components for 22 months. In December 1, 2011, the Mission's Office of Energy and Environment (OEE) provided additional funding of US\$800,000 for outreach, fisheries management and livelihood components to be implemented through August 31, 2013. The goal of BALANCED-Philippines 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 conservation issues. BALANCED-Philippines will also contribute to the overarching BALANCED Project objective of advancing and supporting wider use of effective PHE approaches worldwide.

The BALANCED Philippines Project goal will be achieved through five intermediate results (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 promote/support FP/RH services, CRM and integrated policies (OH & OEE)
- IR4 - Improved governance capacities of provincial and municipal LGUs in the VIP and Danajon Bank marine ecosystems (OEE)
- IR5. - Increased incentives for coastal and marine conservation among coastal fisher households (OEE)

Following are the highlights of the accomplishments of the BALANCED-Philippines Project derived from Quarterly Progress reports, covering activities from July to September 2011 and October to December 2011, previously submitted to USAID Philippines and USAID Washington.

- 12 additional master trainers trained on PHE CBD/PE systems, making a total of 62 master trainers (20 males and 42 females) from the health (38) and environment (24) sectors trained during the PHE CBD/PE TOT workshops. Of those trained, 36 are currently actively involved in the local municipality CBD and PE training. PFPI is working diligently to involve more of the 62 master trainers in the local training activities.
- An additional 421 non-mobile PHE CBDs were recruited and trained—171 in **new** sites and 250 in **maintenance** sites. The trained CBDs consist of sari-sari (convenience) storeowners and keepers, People's Organization (PO) representatives, fish wardens, Barangay Health Workers (BHW), barangay nutrition scholars (BNS), and keepers of Botika sa Barangay.
- Seven cost recovery FP supply systems for community-based distribution of FP supplies were established or strengthened—two in the **new** sites and **five** in the maintenance sites.
- 162 Rural Health Unit (RHU) staff were trained—67 in the **new** sites and 95 in the **maintenance** sites. This training has strengthened RHU capacity to deliver quality FP and PHE information and services to both males and females referred by PHE CBDs and adult PEs—particularly persons seeking IUDs, surgical methods of contraception, treatment for STIs, and other RH/FP services. BALANCED-Philippines works closely with these RHU staff to develop and/or strengthen the referral system for women who are seeking FP methods that are not available at the CBD outlets.

- 127 adult PEs were trained in the **new** sites and 455 adult PEs were added to the **maintenance** sites. These trained PHE adult PEs are responsible for providing integrated PHE IEC messages and materials as well as for motivating the community on pro-health, pro-FP/RH and pro-conservation behaviors.
- A communications plan was drafted and sent to the Mission for review. Based on the results of the baseline BMS, the communications plan will be revised to incorporate additional CRM and health messages.
- 3,430 (887 males and 2,543 females) were provided counselling on family planning/reproductive health and provided information on CRM and PHE linkages.
- 107, 694 individuals have seen or heard a specific FP/RH message in “**new**” and “**maintenance**” sites through mass media such as radio interviews and reports, text blasts, meetings, group orientations/discussions and other IEC events.
- Seven additional MOAs were signed between PFPI and the participating local government units (LGUs) to galvanize partnerships and define the roles of each collaborating organization and the LGUs’ agreements to provide counterpart contributions to PHE activities. With these 7 additional MOAs, there are now 14 signed MOAs (11 with the LGUs in the **maintenance** sites and 3 in **new** sites).
- CI/P, PFPI and USAID/Philippines/ OH and OEE conducted a planning meeting on November 23, 2011 to fine tune strategies on how integration will take place operationally, the roles and responsibilities of PFPI and CI/P in implementing specific project activities, and systems and procedures related to operations, monitoring, reporting, etc. It was also agreed that there would be a project orientation meeting for all BALANCED-Philippines project staff after everyone is hired to ensure all team members share a common understanding of the project, to review the conceptual framework, to discuss and plan for ensuring that activities are operationally integrated, and to hold a team-building activity.
- An additional \$12, 774 was leveraged from LGUs for FP/RH and PHE activities as part of BALANCED- Philippines Project.

See Appendix 2 for copies of the BALANCED -Philippines quarterly progress reports submitted to USAID Philippines during this quarter.

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. The project covered ten kebeles within the Metu Woreda, Ilu Aba Bora Zone, Oromia region (South west Ethiopia). While the project was scheduled to end on September 30, 2011, gains owing to the US dollar to Ethiopian Birr exchange rate have resulted in a budget surplus. This allowed PFPI to execute in October 2011 Modification No. 3, which will provide ENWRA with a no-cost extension until March 31, 2012 to complete project activities. The agreement is that EWNRA will use these excess funds to

implement additional activities to strengthen the FP component of its wetlands conservation activities:

PHE IEC activities and advocacy:

- Educate/orient 40 PHE club members who are both non-PEs and PEs on PHE.
- Train PHE clubs members on basic skills of writing and performing drama using experienced trainers for youth club members to educate the public about PHE through drama at different public events (coffee ceremonies, water points) including official meetings in the kebeles.
- Identify relevant youth issues encountered by youth in their youth peer education and with BALANCED staff, identify topics to be used for a one-day refresher training to 36 active YPEs.

Service delivery:

- Conduct a one-day refresher course with 36 previously trained PHE Providers and 102 adult PEs (63 previously trained adult PEs and 36 newly trained PEs who were not yet included in the last report submitted) to update their knowledge on PHE and clarify issues regarding collecting and recording the number of individuals obtaining FP methods and referrals to the Health Extension Worker (HEW)
- Obtain data for new and continuing users from the HEW and report to the BALANCED Project

During this reporting period, the PEs and PHE Providers continued to share pro-health and conservation information with the community. The PEs counselled 250 couples in Wichi and 200 couples in Agelo Shenkora. PHE Providers also sold 11 cycles of pills and 54 packs of condoms. Low contraceptive sales by the PHE Providers were reportedly due to the availability of a free supply of contraceptives from the health posts and the HEWs where the communities get their supply. During the next reporting period, the BALANCED EAC will visit the EWNRA project site to monitor the activities conducted, provide additional technical assistance in data collection, draft lessons learned with EWNRA and prepare for the close-out of the seed grant. BALANCED will also draft lessons learned on selecting ENWRA as a seed grant recipient and use these lessons learned to improve on-going seed grants in Papua New Guinea and Uganda.

Results from Activity 3.3

- 450 couples counseled by the PEs
- 11 cycles of pills sold to continuing users
- 3 new pill acceptors recruited who obtained pills from PHE Providers
- 5 women referred to HEW by PEs and PHE Providers

3.4 Provide seed grant and technical support to WCS Zambia

In Zambia, Wildlife Conservation Society (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. WCS 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. In October 2010, the BALANCED Project provided a two-year seed grant to WCS Zambia to integrate family planning into its conservation and livelihood activities in the Luangwa valley.

During this reporting period, the EAC traveled to Zambia from July 13 to August 3, 2011 to provide technical assistance to WCS Zambia. The EAC facilitated a four-day YPE TOT for 10 participants—8 male COMACO extension officers and 2 nurses (one male and one female) from the nearby MOH zonal health center. Six participants, including the male nurse, had attended the BALANCED PHE CBD/PE TOT held in October 2010. The EAC also spent one day with the extension officers to monitor their progress in implementing the project activities. A streamlined BMS for gathering baseline information needed to monitor seed grant activities was shared with WCS staff, who stated they could insert additional questions into the BMS on specific topics of interest to COMACO.

After the EAC visit, 10 YPE master trainers (8 from WCS and 2 from MOH) trained 220 youths aged 15 to 24 years from the three regions of Mfuwe, Chama and Lundazi on youth peer education. During the training, the youth learned about the PHE linkages in their region and how to talk about and promote pro-conservation and safe RH behaviors with their peers in schools and their communities. They were also trained on how to advocate for the importance of preserving natural resources; the effects of rapid population growth on natural resources and the importance of youths waiting for the right time to engage in sexuality as a way of planning for their future families. Inspired by the YPE workshop, trained nurses offered to revive a youth-friendly corner for condom distribution at the health center and link the YPEs to the health center's youth program.

The WCS Zambia CBD/PE system is a model composed of the 350 volunteer PHE adult PEs and 220 PHE YPEs delivering PHE messages, promoting family planning to their peers, distributing free FP commodities from the MOH to continuing users and referring potential and new FP users to the MOH health post/center. These PEs were trained after the BALANCED October 2010 PHE CBD/PE TOT workshop and the July 2011 PHE YPE TOT. They serve as behavior change agents and contribute to increased awareness and demand for FP commodities. The access to FP supply is supposed to be provided by the MOH health post. In Mfuwe, the MOH District coordinator agreed to supply 3,000 condoms to the adult PEs for distribution.

The systems for project implementation and monitoring have been put in place. Supervision and monitoring of the PHE volunteers and activities are done during monthly meetings and reporting, which is integrated into the WCS Extension Activity Monthly Report. During this reporting period, WCS staff monitored the adult PEs and oriented them on how to use their diaries, referral slips and commodity distribution forms. Also, a project senior extension worker conducted a PHE orientation for COMACO staff and key field stakeholders in Lundazi, Chama and Mfuwe.

However, the PHE activities are experiencing some minor challenges. WCS has not met its target of training 410 adult PEs because of lack of funds (WCS underestimated the cost of training so many adult PEs). Nonetheless, WCS decided to train the remaining 60 adult PEs during monthly meetings where WCS trainers would cover one or two CBD/PE modules at a time, until the new adult PEs are fully trained on all the modules. Another challenge is that the adult PEs are only distributing condoms, not contraceptive pills as the MOH has not yet given permission for PE's to distribute FP commodities. During the next reporting period, the EAC will meet with WCS and MOH staff to shepherd along this distribution agreement.

During this reporting period, WCS revised its "Better Life" booklet, an IEC material with messages on food security, family planning, nutrition, budgeting, and highlighting the theme that conservation farming in the long run requires less effort and, therefore, fewer children are needed for farm labor. WCS requested BALANCED input on the revised booklet. This input will be provided (virtually) during the next reporting period. In addition, during the EAC's visit to Zambia in March 2012, he will help them finalize and pretest the document. This booklet is part of WCSs' communication strategy, which also includes posters and a job aid for adult PEs.

Last year, WCS was awarded financial support from USAID's Flex Fund to replicate their PHE model to three additional COMACO sites. As part of BALANCED technical assistance to WCS, the EAC also conducted a PHE CBD/PE TOT for WCS Zambia staff and extension officers from the Flex fund sites (Nyimba, Serenje and Chinsali). WCS Zambia staff and BALANCED trainee, Nathan Mulambya, co-facilitated the workshop. A total of 20 male COMACO extension officers participated. A Peace Corp volunteer, Laura Walls, also joined as an observer. Due to various logistical challenges during this training, the five-day workshop training was reduced to three days. However, there was minimum loss of information and workshop objectives were still met.

During his July 2011 visit, the EAC and WCS staff met with Dr. George Sinyangwe and Dr. Masuka Musumali of USAID Zambia and updated them on WCS seed grant activities. It was agreed that WCS Zambia will share reports about the BALANCED-supported project with USAID. Mr. Sinyangwe also invited WCS Zambia to become a member of the Family Planning in Zambia and volunteered to introduce WCS Zambia to the FP NGOs and the MOH.

Results from Activity 3.4

- 10 (9 males and 1 female) WCS staff trained as YPE master trainers (1.1)
- 220 (115 males and 105 females) youth trained as PHE YPEs (1.1)
- 21 (20 males and 1 female) trained on PHE CBD/PE TOT from Flex fund sites (1.1)
- 1 WCS BALANCED trainee conducting CBD/PE TOT (1.2)
- 10 BALANCED trainees conducting YPE training (1.2)
- YPE tool replicated in 1 new country (3.1)
- PHE activities replicated in Flex Fund sites (Nyimba, Serenje, and Chinsali) (3.2b)

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

The Tree Kangaroo Conservation Program (TKCP) in Papua New Guinea (PNG) was founded in 1996 by Dr. Lisa Dabek, Senior Conservation Scientist and Director of TKCP at the Woodland Park Zoo (WPZ) in partnership with CI and James Cook University. The goal of the TKCP is largely to protect the endangered Matschie's tree kangaroo. Recognizing the links between increasing population, health and conservation in the TKCP project areas, BALANCED key staff and Lisa Dabek began discussing the possibility of integrating family planning into TKCP's ongoing community-based program. During the visit of the BALANCED PHE Technical Assistant Lead (PTAL) to the TKCP project sites in June 2011, it was decided to give WPZ a seed grant to integrate family planning into its ongoing community-based program.

During this reporting period, BALANCED issued an 18 month seed grant to WPZ for up to \$40,000 to implement the "Healthy Village, Healthy Forest: Integrating Healthy Family Planning and Conservation in Papua New Guinea" project. The project will focus on one region in the YUS Conservation Area (YUS is an acronym for the Yopno, Uruwa, and Som rivers—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

The PTAL will visit PNG during the next reporting period to help them develop their integrated IEC materials and set up their CBD/PE system. Given that both BALANCED and WPZ are partners with CI, the CI/PNG staff will be invited to all BALANCED training workshops in PNG and to an upcoming study tour in the Philippines (conducted as part of the BALANCED-Philippines activities).

Results from Activity 3.5

- None, to date

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

In June 2011, BALANCED distributed a targeted notice to PHE practitioners from East Africa and to BALANCED partners (PRB, WWC, BALANCED Advisory Committee members, etc.) to elicit concept notes from organizations in Africa interested in applying for a BALANCED seed grant and receiving technical support to integrate FP/RH into on-going conservation activities. Of the 20 concept notes received, three NGOs from Uganda were shortlisted. In August 2011, the EAC visited the three shortlisted candidates to determine the final two seed grant recipients. After visiting the three organizations and reviewing their finances, the two seed grant recipients selected were Volunteer Efforts for Development Concerns (VEDCO) and Bwindi Mgahinga Conservation Trust (BMCT).

VEDCO is an indigenous NGO established in 1989 as a self-help organization working with other relief organizations to support communities in accessing 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.” They work in Kapeka, Nakese District—the same areas as FHI –and the two organizations are in communication with each other. FHI staff mentioned their willingness to collaborate with VEDCO given that FHI recently received funds from the USAID Mission to expand their community work. FHI is interested in learning how the private sector complements public sector volunteers and what comparisons can be drawn from both approaches. The goal of the 18 month seed grant is to improve access 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.

BMCT was established in March 1994 with a capital endowment fund of US \$ 4.3 million from the Global Environmental Facility (GEF) 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 Bwindi Impenetrable National Park (BINP). It is also tasked with promoting the welfare of neighboring communities. The 18 month seed grant will support BCMT’s “Integrated Community Conservation and Development for a Healthy Population around Bwindi Conservation Area” Project and enable 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.

During this reporting period, two participants from each seed grant recipient attended the December 2011 PHE Program Design workshop held in Senegal (see Activity 1.1). In the next reporting period, the EAC will travel to Uganda to train VEDCO and BCMT on PHE CBD and PE systems and help them to refine their implementation plans.

Results from Activity 3.6

- 4 participants (2 from BCMT, 2 from VEDCO) trained on PHE Program Design (counted under Activity 1.1)
- 2 target organizations incorporating PHE tools, protocols, etc. into their work (counted under Activity 1.1)

3.7 Implement recommendations from the Glacier Melt Study

The BALANCED Project received Buy-in funds from the Asia Bureau to address selected recommendations stemming from the *Changing Glaciers and Hydrology in Asia: Addressing Vulnerabilities to Glacier Melt Impacts* report. The scope of work for these funds proposed to implement a series of data collection and consensus building activities to further identify the countries/areas at highest risk of health and livelihood vulnerabilities due to glacier melt, describe those vulnerabilities, and propose areas where USAID could utilize integrated health and conservation funding strategies to synergistically address these vulnerabilities. After several discussions with USAID on project activities, BALANCED implemented several activities:

- 1) Drafted a follow-on report that included 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; and a matrix of current and emerging USAID Mission strategies and priority areas of investment in the countries identified, including but not limited to the Global Health Initiative (GHI); Feed the Future (FtF); and Global Climate Change, Biodiversity and Democracy and Governance.
- 2) Designed and co-hosted with the USAID Asia/Near East Regional Mission a three-day workshop (December 5 to 8, 2011) in Almaty Kazakhstan for high level USAID and other USG agency officials as well as representations of other bi-lateral and multi-lateral agencies/donors that are funding work on this issue in this region.
- 3) Presented key workshop findings/outcomes to a selected USAID Washington audience after conclusion of the workshop—to promote the issue of Glacier Melt and expose a wider and multi-sector USAID audience to the issues and the potential opportunities to address these.
- 4) Produced a post-workshop report for internal (USAID) consumption.
- 5) Created public and private (limited to USAID access) websites with workshop reports and materials as appropriate to the different audiences (public vs. internal).

After completing the above mentioned activities, BALANCED is identifying a discreet activity that will contribute to the initial goal of the ANE Buy-in with the modest amount of funds that remain.

Results from Activity 3.7

- N/A⁴

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 South Sea and Visayan Bioregions. During this reporting period, we submitted a concept note to the USAID/Philippines/ OEE for scale-up of CRM activities in the OH-funded PHE sites and were awarded US \$800,000 to integrate CRM activities into the BALANCED-Philippines activity in the Danajon Bank and Verde Island Passage bio-regions. The Project Design Document and combined OH and OEE workplan were finalized and approved by USAID in December 2011.

Building on our successful PHE model in Pangani, we submitted an unsolicited concept note to USAID Tanzania in March 2011 for Mission field support to replicate the PHE approach in different areas of Tanzania. Results of our mid-term evaluation, however, led us to revise and resubmit the concept note in September 2011. This revised concept proposed scaling-up the PHE model being implemented in five wards in Pangani to the entire Pangani district as a model for other districts. As of the date of this report, we are still awaiting word from the Mission

⁴ At the time of this report, the public report remains under review by Mary Melnyk, USAID

regarding their interest in funding the work outlined in this concept note. Considering the amount of time that has gone by without a statement of such interest, however, we believe funding is highly unlikely.

Nevertheless, during this reporting period we successfully leveraged \$830,298.

Results from Activity 3.8

- Philippines Mission Buy-in of \$800,000
- \$12,774 leveraged in the Philippines
- \$17,524 leveraged in Tanzania for training of PEs, holding focus group meetings for fishermen, and travel to Mombasa, Kenya to present on PHE at the WIOMSA symposium.

IR3 Priorities for next period (January 1 to June 30, 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

- Provide on-going monitoring and mentoring visits for PHE activities in Pangani (**Juma**, Ricky, Elin)
- 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 (**Ricky**, Elin)
- Conduct the final BMS (**Elin**)
- Train ADDOs in Pangani and Bagamoyo (**Juma**, Ricky)
- Finalize IEC activities, including the production of radio spots and thematic t-shirts (**Juma**, **Marko**, Ricky)
- Conduct advocacy meetings and train PHE champions with the end goal of integrating PHE into the Pangani district development plan (**Juma**, Ricky)
- Conduct the Tanzania PHE Program Design Workshop, if circumstances permit (**Juma**, Ricky, Elin)

Philippines

- Conduct remaining PHE CBD training in the remaining “**new**” sites and refresher training for previously trained CBDs in the “**maintenance**” sites (**Ronald**)
- Organize and conduct training for government health/RHU personnel in the remaining “**new**” sites (**Ronald**)
- Conduct study tour for officials from select new sites to successful maintenance learning sites (**Ronald**)
- Finalize IEC materials and distribute (**Ronald**)
- Continue to support the signing of MOAs and setting up CBD systems in new sites (**Ronald**)
- Continue to train and mentor PHE adult PEs in “**new**” and “**maintenance**” sites (**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**)
- Initiate CRM and livelihood activities under IRs 4 and 5 (**CI/P, PFPI**)

Ethiopia

- Provide technical support to ENWNRA to successfully complete their project activities and finalize data collection (**Ricky**)
- Close-out the EWNRA seed grant (**Joan**)
- Draft lessons learned from the EWNRA seed grant experience (**Ricky, Joan, Linda**)

Zambia

- Follow-up with WCS Zambia to monitor the status of the following activities: (**Ricky, Joan**)
 - Complete the training of 60 additional CBDs (WCS Zambia)
 - Finalize the distribute the WCS “Better Living” booklet and other IEC materials (WCS Zambia)
 - Obtain permission from the MOH for WCS adult PEs to distribute FP supplies

Uganda

- Train VEDCO and BCMT staff on PHE CBD/PE systems and help them set up the system in their project sites (**Ricky**)
- Provide technical support and monitor seed grant activities (**Joan, Ricky**)

PNG

- Provide technical assistance on development of IEC messages and materials (**Joan**)

- Help TKCP set up the PHE CBD/PE system in YUS sites (**Joan**)
- Invite two people from PNG (one YUS and one CI/PNG staff person) to participate in the study tour being conducted in the Philippines (**Joan**)

ANE

- Finalize the follow-on report (**Lesley**)
- Identify a discreet activity to wrap up the ANE funding (**Lesley**)

III. Key Management Tasks

Midterm evaluation: During this reporting period, the BALANCED Project underwent an external mid-term Project evaluation. In preparation, BALANCED staff:

- Reviewed and commented on the mid-term evaluator's scope of work
- Collected the following reports, documents, KM tools etc. for the mid-term evaluator to read:
 - Annual Workplans, Years 1-3
 - Monitoring and Evaluation Plan and Report
 - Semi-Annual Reports, #1-5
 - Results Reviews - Years 2, 3
 - List of BALANCED country activities, contact persons and contact information
 - List of PHE collaborating partners and key contact persons and contact information
 - List of all products (training curricula, websites, documents etc.) produced by BALANCED and weblinks to the products. Electronic copies were provided if weblinks are unavailable.
 - Final communications strategy and resource mobilization strategy
- Conducted a self- assessment of the BALANCED Project among the team members
- Participated in individual interviews with the mid-term evaluator
- Sent the East Africa Consultant to Tanzania to accompany the evaluator on his field visit to BALANCED PHE activities in Tanzania, and to introduce him to BALANCED partners in the field
- Reviewed the draft evaluation report and provided input, including corrections, to the findings report
- Developed a mid-course strategy to address valid recommendations and solicited feedback from PHE community in the September 14 meeting.
- Strengthened communications among team members, honed the roles and responsibilities of each member, and developed a mid-Project strategy in response to selected

recommendations from the evaluation and from input from a strategic review and planning meeting with a subset of BALANCED partners

Philippines Buy-in: Successfully managed the administration—from development of the program statement and Year 1 workplan and budget to the hiring of new staff—for the new BALANCED-Philippines Buy-in that included funding from the Mission’s Office of Energy and Environment

ExpandNet: Added ExpandNet as a new subcontractor on the BALANCED Project to provide technical support to the MacArthur/Packard Funded HOPE-LVB project in Uganda

Challenges

- Mid-term evaluation. The mid-term evaluation process, which began in April 2011 and ended in August 2011, required substantially more staff time and costs than CRC was told to expect by USAID. In February 2011, USAID informed the BALANCED team that, “the only time the BALANCED would need to pay (for mid-term evaluation costs) would be time spent with the evaluator either talking to him/her or preparing documents to send to him/her” In fact, the opposite was true. BALANCED staff spent an enormous amount of staff time and unanticipated project funds to prepare the documents for the evaluator, meet together in DC to conduct the self-assessment and prepare for the evaluation, send the EAC to Tanzania outside of his regular travel schedule to meet the evaluator, meet in DC to discuss the results with the mid-term evaluator and with USAID, and develop our response to the evaluation results. Overall, the evaluation process consumed a substantial amount of staff time and project resources from April through mid-November 2011, when the previously-approved Year 4 workplan was revised and submitted to USAID. USAID should consider the impact on project resources and inform project staff ahead of time of the potential costs in staff and project resources that they should expect as part of participating in such an evaluation. Had we been informed during our Year 4 workplan planning period, we would have allocated the appropriate costs and staff time to this exercise.
- Mid-term evaluation results—The team feels that the evaluation was overly focused on the less positive aspects of the Project’s progress vs. its relatively significant achievements given its relatively modest funding base—while at the same time acknowledging that the team/Project was somewhat urged to start implementing project activities before it had given sufficient time to engage in team building, strategic visioning, etc. While the team did not agree with several of the report findings, the Project did act quickly to refine its project strategy and hone proposed Year 4 and 5 activities to achieve expected results.
- Philippines Buy-ins—Having secured joint field support funding from two different offices/sectors of the USAID Philippines Mission has provided BALANCED with an interesting opportunity to demonstrate how one PHE project can manage multiple funding streams and the mandates of two different USAID offices/sectors and subsequent funding restrictions (i.e. biodiversity funds cannot be used to develop or print any

material that mentions family planning). This same opportunity, however, has also proven an administrative challenge—in terms of trying to synchronize everything from reporting/funding periods to reconciling the need to collect different PMP data. Additionally, delays in getting the funding from the Mission to the DC agency to URI-CRC has seriously impacted start dates for hiring and implementing work activities.

Management Priorities for next reporting period

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

- Developing a strategy and well-honed Year 5 workplan and budget request that allows BALANCED to leave the next global leadership PHE Project with important lessons learned and which allows BALANCED to leave behind a strong legacy of improved PHE tools and resources and increased PHE capacity in the field.
- Informing USAID of our need for early funding for Year 5 and working with them to provide the documentation to make this possible.

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 to December)	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)	5	6	17	24	Over target for Year 4, but on target for LOP target
SO-2: Dollar value of funds leveraged from USAID Missions and non-USG sources to support PHE implementation and scale-ups (million dollars) (PRH 1.2)	830,298	160,000	2,542,803	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	382	360	1,575	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	12	29	32	45	Under target for Year 4, but on target for LOP 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)	0	2	11	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)	6	27	56	30	Above LOP target, below target for Year 4. However, many TA interventions planned for second half of Year 4.
1.4b. Number of new organizations receiving TA by BALANCED	2	8	21	30	On target. At least five new organizations in Kenya and Uganda will receive TA in second half of Year 4.

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)	1	7	11	25	Below target, however, we expect at least 4 tool, procedures, systems, etc. for second half of Year 4
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)	10	11	48	12	On target for Year 4 and above LOP target.
2.2b. Number of peer reviewed articles and research studies	0	2	2	No target	Two articles have been submitted to journals
3.1 Number of PHE tools, methodologies, and actionable findings replicated in new countries and geographic areas (PRH 3.1)	5	2	21	9	Above target
3.2a Number PHE programs scaled up (PRH 3.4)	0	0	2	2	Target met
3.2b Number of geographical areas replicating PHE (PRH 3.4)	2	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)	2	1	8	8	Target met

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 on a semi-annual basis 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).

INDICATOR	Year 4 July to Dec 2011					Cumulative Results				
	Philippines	Tanzania	Ethiopia	Zambia	Total	Philippines ⁵	Tanzania	Ethiopia	Zambia	Total
General										
Number of individuals trained	215	96		220	531	783	447	234	220	1,464
Family Planning and Reproductive Health										
Number of new users		316	5		321	8,150	1,597	5		9,752
Number of counseling visits for family planning/reproductive health (FP/RH) as a result of USG assistance	1904	1928	450		4,282	1,904	5,335	450		7,689
Number of USG-assisted service delivery points providing FP counseling or services						411	50	67		528
Average household distance/time to access family planning commodities		Less than 500 meters	Between 50 m and 3 km	10km from village to health center				Between 50 m and 3 km		

⁵ This is data from the Philippines buy-in

Economic growth										
Number of full time jobs in excess of two weeks created		60		60			60			60
HIV/AIDS prevention										
Number of targeted condom service outlets		115		115	0		115	0		115
Number of the targeted population reached with individual and/or small group level HIV prevention intervention		636		636	0		636	0		636
Integrated indicators					0		0	0		0
Number of population, health, environment organizations addressing non-traditional audiences					49		2	1		52
Number of local ordinances enacted that integrate PHE					6		0	0		6

Annex 1: BALANCED Communications/Dissemination Activities (July to Dec 2011)

I. FP Integration Article in the BALANCED Project June Newsletter – July 8, 2011

Audience	Date Sent	Person Responsible	# of People Reached
FP Community Listserv	July 8, 2011	Torell/Edmond	450
PCLG News Promoting mutual learning on conservation-poverty linkages	July 13, 2011	Edmond	1,500
Total			1,950

II. Meeting unmet FP need in TZ through integrated approaches in PHE projects – July 13, 2011

Audience	Date Sent	Person Responsible	# of People Reached
PHE Listserv	July 13, 2011	M. Parker	579
FP Community Listserv	July 13, 2011	Edmond	450
Africa Biodiversity Collaborative Group (ABCG) Listserv	August 3, 2011	Edmond	500
Total			1,529

III. New BALANCED PHE Youth Peer Education Training Guide - July 25, 2011

Audience	Date Sent	Person Responsible	# of People Reached
PHE Listserv	July 25, 2011	Bruce	580
FP Community Listserv	August, 2011	Edmond	450
USAID PRH Connect biweekly e-newsletter	August 26, 2011	Edmond	1000+
Estimated total			1,930

IV. Family Planning + Fuel-Efficient Cook Stoves = Better Health for Tanzania - June/July 2011

Audience	Date Sent	Person Responsible	# of People Reached
Front Lines USAID Magazine – Staff Online Extra	July 25, 2011	Edmond	1000+
USAID PRH Connect biweekly e-newsletter	August 26, 2011	Edmond	1000+
East Africa Network	August 2011	Bremner, PRB	200
Total			2,200+

V. BALANCED Project Announces Brief on Philippines Family Planning and Environment Assessment– August 2, 2011

Audience	Date Sent	Person Responsible	# of People Reached
PHE Listserv	August 2, 2011	Edmond	631
USAID PRH Connect biweekly e-newsletter	August 26, 2011	Edmond	1000+
East Africa PHE Network update	October 25, 2011	Bremner	200
Estimated total people reached			1,830+

VI. PHE Champion Zo Zatovonirina: Improving Human Health and Conservation in Madagascar's Forest Communities – August 9, 2011

Audience	Date Sent	Person Responsible	# of People Reached
PHE Listserv	August 9, 2011	Edmond	631
Wilson Center New Security Beat	August 17, 2011	Edmond	1000+
East Africa PHE Network update	August 2011	Jason Bremner	200
Estimated total people reached			1,831+

VII. New Train-the-Trainer Guide for Community-level Population, Health and Environment (PHE) practitioners available -October 18, 2011

Audience	Date Sent	Person Responsible	# of People Reached
PHE Listserv	October 18, 2011	Edmond	680
FP Community Listserv	August, 2011	Edmond	450
Total			1,130

VIII. PHE Champion in Rwanda on the PHE Toolkit - Pascal Gakwaya Kalisa – October 28, 2011

Audience	Date Sent	Person Responsible	# of People Reached
PHE Listserv	October 28, 2011	Edmond	682
ABCG	November 2011	Edmond	500
ECSP News	November 4, 2011	Edmond	1000+
New Security Beat	November 3, 2011	Edmond	1000+
Total			3,182

IX. Jeanne Nyirakamana, PHE Champion from Rwanda – November 28, 2011

Audience	Date Sent	Person Responsible	# of People Reached
PHE Listserv	November 28, 2011	Edmond	689
FP list serve	December 5, 2011	Edmond	500
Wilson Center New Security Beat	November 2011	Edmond	1,000+
Total			2,189+

X. BALANCED Project Expands Efforts to Integrate Family Planning and Reproductive Health into Marine Conservation in the Verde Island Passage and Danajon Bank, Philippines – December 20, 2011

Audience	Date Sent	Person Responsible	# of People Reached
PHE Listserv	December 20, 2011	Edmond	703
Total			703

Annex 2 – BALANCED Philippines Quarterly Progress Reports # 3 and 4

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

**Quarterly Progress Report #3
For Period July 1 to September 30, 2011**

November 15, 2011

Submitted November 10, 2011

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

Implemented by:

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

I. INTRODUCTION

The United States Agency for International Development (USAID)/Philippines/Office of Health (OH) provided a 22-month Buy-in to the USAID global “*Building Actors and Leaders for Advancing Community Excellence in Development*” (BALANCED) Project to implement population, health and environment (PHE) field activities in key marine biodiversity areas in the Philippines. The Coastal Resources Center at the University of Rhode Island (CRC-URI) and PATH Foundation Philippines Inc. (PFPI) are the lead implementing agents for the BALANCED-Philippines Project. The revised goal of the 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 intermediate results (IRs) that are funded by USAID Philippines Office of Health:

- IR1: Improved access to family planning/reproductive health services in key bioregions
- IR2: Increased community awareness and support of family planning and conservation as a means to improve health, food security and natural resources
- IR3: Increased policymakers’ commitment to FP/RH services and integrated policies

The BALANCED-Philippines Project goal and intermediate results contribute 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.

From July to September 2011, PFPI continued working with local government units (LGU), people’s organizations (POs) and other nongovernmental organizations (NGOs) towards achieving the Project objectives. Rollout trainings on PHE peer education and PHE community based distribution both in the “**new**” and “**maintenance**” sites continued this reporting period. This report summarizes the activities completed by BALANCED Philippines during the reporting period as per terms and conditions as approved in the Year 1 work plan and Cooperative Agreement No. GPO-A-00-08-00002-00.

II. PROJECT RESULTS

Table 1: Activity status to date (February 1 to September 30, 2011)

Biogeographic Representation	Province	Municipality (clusters)	New (# brgs)	Maint. (# brgs)	Population 2007	Unmet FP Need (new) ⁶	Unmet Need (Main)	#TOT Part.	MOAs signed ⁷ (Y/N)	# CBDs trained	# RHU trained	# PEs trained
						(# WRA ⁸)						
Verde Island Passage (VIP)	Batangas	Calatagan	25		51,544	4,510		9			14	46
		Tingloy	15		18,548	1,623						
		Lobo	26		37,798	3,307		5		27	24	27
		Mabini	34		40,629	3,555		5		35	8	40
		Nasugbu	42		113,926	9,969		5			27	31
		San Juan	42		87,276	7,637		7			30	44
		Batangas City/ Isla Verde		6	5,876		514	4		12	21	54
	Occidental Mindoro	Paluan	12		13,718	1,200		6				
		Abra de Ilog		9	25,152		2,201	9	Y			
		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

⁶ 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

⁷ 3 MOAs signed in the first quarter (Tubigon, Inopacan & Bato); 4 MOAs signed in the 2nd quarter (Getafe, Hindang, Matalom & Lubang); and 6 MOAs signed in the 3rd quarter (Bien Unido, Inabanga, Ubay, Hilongos and Looc). 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.

⁸ WRA - women of reproductive age

Biogeographic Representation	Province	Municipality (clusters)	New (# brgs)	Maint. (# brgs)	Population 2007	Unmet FP Need (new) ⁶	Unmet Need (Main)	#TOT Part.	MOAs signed ⁷ (Y/N)	# CBDs trained	# RHU trained	# PEs trained
						(# WRA ⁸)						
		Buenavista		35	26,443		2,314			30	5	32
		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	11	5	64
		CP Garcia		23	25,118		2,198			19	12	21
		Trinidad		20	27,580		2,413				3	
		Talibon		25	59,274		5,186				4	
		Tubigon		34	44,434		3,888		Y	28	6	48
		Ubay		44	65,900		5,766		Y	37	29	51
	Leyte	Bato		32	33,930		2,969		Y	27	5	31
		Hilongos		51	53,911		4,717		Y		7	
		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
	TOTAL	5 provinces	29 municipalities	221	511	1,031,549	35,264⁹	54,996¹⁰	62	13	424	276

⁹ Revised calculation- previously 41,797 in the Program Design Document

¹⁰ Revised calculation – previously 57,979 in the Program Design Document

For the reporting period July 1 to September 30, 2011, BALANCED-Philippines implemented various activities under IR1, IR2 and IR3 that contribute to the goal of the BALANCED-Philippines. These activities and their related accomplishments are summarized below by IR.

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

During Year 1, BALANCED-Philippines planned to conduct a number of capacity building activities in all the “new” project sites. In the “maintenance” sites, the objective was to scale-up the reach and coverage of PHE within every barangay, and to help ensure FP commodities are easily accessible. Since the start of project implementation in February 2011, BALANCED-Philippines has: 1) conducted a training-of-trainers on PHE community-based distribution and PHE adult peer education systems; 2) delivered a roll-out training for PHE community-based distributors (CBDs) and PHE adult peer educators (PEs); and 3) established a CBD system for the distribution of FP products and PHE information both in the “new” and “maintenance” sites.

BALANCED-Philippines has been trying to involve more men and people’s organization (PO) members in all its training and other project activities to reach more men ,particularly the core fishermen. Some of the POs that the Project has been working with include fisherfolk associations and/or fish warden organizations, such as Tagapangalaga ng Likas Yamang Dagat mula sa Kilitisan (TALIMUSAK), which manages the Calatagan Mangrove Forest Conservation Park (‘Ang Pulo’); the Calatagan Mangrove Alliance (CALMADA); the Calatagan Sea farmers Association (CASEPA). BALANCED Philippines has also been coordinating and involving members of women’s groups such as Kalipunan ng Liping Pilipina (KALIPI), an organization under the local social welfare and development office committed to responding to the needs of organizing women and promoting women’s development and empowerment; and the Rural Improvement Club (RIC), an organization under the local office of agriculture committed to making women effective and productive partners in community development.

Below is progress to date on IR 1 activities completed during July to September 2011.

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

Ongoing	Activity leaders: Ronald Quintana and Luz Escubil
Activity Start: 07/01/11	Activity End Date: 09/30/11

During this period, a total 12 (4 males and 8 females) participants attended the training-of-trainers (TOT) workshop in the municipalities of Lubang and Looc in the province of Occidental Mindoro. The participants included representatives from both health and environment government offices/sectors. BALANCED Philippines staff worked closely with LGUs, local leaders and Conservation International Philippines (CI-P) to identify participants for the TOT. The training aimed to increase participants’ understanding and general knowledge on PHE linkages, reproductive health/family planning (RH/FP), interpersonal communications techniques on PHE linkages and on the mechanics and operation of the PHE CBD and PE program to enable provision of community-based, integrated PHE education and services.

Information provided about family planning and reproductive health emphasized the importance of informed choice and voluntarism. The majority of the trainees reported having limited or no PHE background prior to the training. The TOT workshop evaluation results showed that all of the participants learned the importance and benefits of linking PHE and FP/RH. During the workshop, participants demonstrated the knowledge and skills to be able to train PHE adult PEs and CBDs in their own areas.

At the end of year 1, a total of 62 participants (20 males and 42 females) from the health (38) and environment (24) sectors participated in the PHE CBD/PE TOT workshops. This is more than the expected TOT participants of 60 set by the project. Those who attended these TOT workshops have been helping the project to train PHE CBDs and PHE adult PEs in their own municipalities. Currently, of those trained, 36 are actively involved in the local municipality CBD and PE training, which includes the Municipal Health Officers (MHO), Municipal Agriculturists (MA/ Municipal Environment and Natural Resources Officers (MENRO), and staff from both the health and environment offices. Other master trainers have been unable to facilitate the local trainings because of conflicts in schedules in their respective offices/agencies.

To identify training participants for these TOT workshops, BALANCED-Philippines has been coordinating with the LGUs, POs and conservation NGOs, such as Conservation International-Philippines (CI-P), which has been providing assistance to the LGUs in the Verde Island Passage (VIP) to establish and/or strengthen marine protected areas (MPAs), and to strengthen the bantay dagat networks, etc. We also coordinate with the Coastal Conservation and Education Foundation (CCEF), which is implementing a USAID/Philippines/OEE-supported conservation project in the Danajon Bank (DB) area, to help PFPI identify additional individuals who can participate in the TOT and who can, in turn, conduct the local CBD and PE trainings. Staff from these organizations and/or their partners has been involved in BALANCED Philippines trainings and other activities.

In the next quarter, BALANCED Philippines will continue to mobilize all the master trainers trained to co-facilitate the remaining local PHE CBD and PHE adult PE trainings.

Results from Activity 1.1

- 12 participants trained in PHE CBD/PE TOT
- 36 of the 62 trained LGU/NGO staff and PO members from eight municipalities trained as PHE CBD and PHE adult PE training facilitators are now involved in training PHE adult PEs and PHE CBDs.

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

Ongoing	Activity leaders: Ronald Quintana and Luz Escubil
Activity Start: 07/01/11	Activity End Date: 09/30/11

During this reporting period, the BALANCED-Philippines Field Coordinators and the TOT participants, in consultation with the local community leaders, staff of government agencies and other stakeholders in the targeted “**new**” and “**maintenance**” sites, continued to identify, recruit and train participants for the PHE CBD training. During this reporting period, 84 (3 males and 81 females) non-mobile PHE CBDs were recruited and trained in four of the nine target municipalities in the “**new**” sites, for a total of 84 CBDs trained in the **new** sites during Year 1. In the “**maintenance**” sites, 231 (19 males and 212 females) non-mobile PHE CBDs were trained during this reporting period, making a total 340 CBDs trained or received refresher training in 16 of the 20 target municipalities in the “**maintenance**” sites during Year 1 —137% of the Year 1 target of 249. The trained CBDs consist of sari-sari (convenience) storeowners and keepers, PO representatives, fish wardens, BHWs, barangay nutrition scholars (BNS), and keepers of Botika sa Barangay.

The 315 (22 males and 293 females) non-mobile PHE CBDs trained during this reporting period 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. These newly trained CBDs will expand access and improve the delivery of RH/FP information, products and services and PHE information to target audiences in their communities.

During this reporting period, the training was slower than anticipated in the “**new**” sites as the actual establishment of the CBD system depends on the finalization of the social marketing arrangements between the LGU and the FP product supplier. One reason for this delay is because the formal commitment has not yet been secured from seven of the LGUs. 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, which is not supported by the project. In order to secure an MOA, the legislative council needs to authorize the Local Chief Executive (LCE) or the mayor to enter into a formal agreement with the project. The funding support also requires legislation from this body, and the process takes time. As of this writing, a plan to get back on schedule is being implemented to help ensure the projected number of CBDs for recruitment and training will be reached particularly in the “**new**” sites. In the “**maintenance**” sites, the CBD training is on target because the MOAs were signed more quickly. Also, there were a number of CBDs who were already in place and only needed refresher training. Being a scale-up area, many of the LCEs were already familiar with, and, therefore, more receptive to the project.

As MOAs are put into place, the first quarter of Year 2 will focus on recruiting and training PHE CBDs and PHE adult PEs in the remaining “**new**” and “**maintenance**” sites.

Results from Activity 1.2

- 315 (22 males and 293 females) non-mobile PHE CBDs both in “**new**” and “**maintenance**” sites were trained/re-trained respectively on social marketing of FP products (pills and condoms)

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

Ongoing	Activity leaders: Ronald Quintana and Luz Escubil
Activity Start: 07/01/11	Activity End Date: 09/30/11

BALANCED-Philippines continued collaboration and coordination with sources of FP commodities such as the Global Development Alliance (GDA) partner Alphamed Pharma Corporation and DKT Philippines, in order to help the BALANCED-Philippines Project partner LGUs/RHUs, etc. in the “**new**” sites to initiate discussions and establish franchisee and other arrangements that keep an interrupted supply of affordable contraceptive products flowing to the BALANCED-trained RHUs and the CBDs. These private sector suppliers, together with BALANCED-Philippines and partner LGUs/RHUs, etc., are continuously developing a system for supplying FP methods to CBD outlets. In the “**maintenance**” sites, these private sector suppliers provided an uninterrupted supply of contraceptive products to the continuum of venues from RHUs to the trained CBD outlets.

The PHE CBD system needs a cost-recovery mechanism that makes FP supplies readily available and helps ensure that their distribution is sustained over the long term. The prerequisite of a signed MOA for the establishment of franchisee arrangements is one major challenge for the Project team and the stakeholders, especially in the “**new**” sites. During this reporting period, only two (Looc and Lubang) of the nine “**new**” sites, have signed MOAs. BALANCED Philippines is addressing the establishment of MOAs in the other “**new**” sites through constant follow-up and meetings with the members of the municipal legislative council. They will also make a presentation during the session of the council so as to further clarify the concept of the CBD system.

In addition, it has been a challenge for the local partners and BALANCED Philippines Field Coordinators to be in close contact with the representatives of the FP product suppliers. Some representatives have had conflicts in schedules and others have had difficulty traveling to the area, particularly the island municipalities in both the “**new**” and “**maintenance**” sites. These private sources of FP supply also have problems with the lack of human resources since one Area Coordinator is covering a number of provinces and municipalities. However, they have planned to hire additional staff and implement internal re-organization to address this issue. The BALANCED Philippines team has also assisted the local partners by following up with the Manila offices of both Alphamed and DKT Philippines, to check on when and how their Area Coordinators could meet with the LCEs and MHOs in the project sites. As a result of these efforts, meetings are now scheduled.

During this reporting period, BALANCED Philippines also met with the national Corporate Affairs Manager of DKT Philippines and discussed updates on the PopShops established in the project sites and strategized on how to link these with the CBDs particularly in the “**new**” sites. DKT and Alphamed field staff will also meet with BALANCED-Philippines Field Coordinators for further collaboration.

In the “**maintenance**” sites, BALANCED-Philippines continued to work with municipalities to set-up/strengthen FP suppliers to improve existing systems, and five MOAs were signed during this reporting period. By end of the first year, eleven municipalities in the “**maintenance**” sites had established social marketing arrangements at their level, which is 100% of the expected results (target was nine). This will ensure that the supply of contraceptive products will be continuous and adequate to meet the needs of the community.

The focus for the next quarter is to set up franchises/social marketing arrangements in seven municipalities in the “**new**” sites, and to strengthen the existing FP supply system in the other sites. BALANCED Philippines will document successful models of CBD operations so both the project team and the partners will learn from them.

Results from Activity 1.3

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

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

Ongoing	Activity leaders: Ronald Quintana and Luz Escubil
Activity Start: 07/01/11	Activity End Date: 09/30/11

Training for the RHU staff in the “**new**” sites and refresher training for RHU staff in the “**maintenance**” sites continued during this reporting period. A total of 138 (11 males and 127 females) RHU staff both in the “**new**” and “**maintenance**” sites were trained during this reporting period – 67 (8 males and 59 females) in the “**new**” sites and 71 (3 males and 68 females) in the “**maintenance**” sites. This training has strengthened RHU capacity in both “**new**” and “**maintenance**” sites to deliver quality FP and PHE information and services to both male and female referred by PHE CBDs and adult PEs—particularly persons seeking intrauterine devices, surgical methods of contraception, treatment for sexually transmitted infections (STIs), and other RH/FP services. BALANCED-Philippines continued to work closely with these RHU staff to develop and/or strengthen the referral system for women who are seeking FP methods that are not available at the CBD outlets.

The project partnered with the RHU staff, particularly the Rural Health Midwives, in monitoring the CBD outlets to ensure their efficient and effective operations. BALANCED-Philippines Field Coordinators, together with these service providers, provided the needed technical support to the trained PHE CBDs and PHE adult PEs.

By the end of Year 1, a total of 129 (15 males and 114 females) RHU staff were trained in seven of the nine municipalities in the “**new**” sites—19 more than the BALANCED-Philippines Year 1 target. BALANCED-Philippines also provided refresher training to a total of 147 (8 males and 139 females) individuals within the RHU staff in 19 of the 20 municipalities in the “**maintenance**” sites—99 more individuals than the BALANCED-Philippines Year 1 target. The Municipal Health Officers and public health nurses in the 10 municipalities in the province of

Bohol have already attended the data quality workshop facilitated by USAID-assisted Healthgov Project.

For the next quarter, the remaining 30 RHU staff in the “**new**” sites and 20 RHU staff in the “**maintenance**” site will be trained. BALANCED-Philippines staff will also follow-up with and mentor all trained RHU staff so as to ensure they are able to carry out their expected roles.

Results from Activity 1.4

- 138 (11 males and 127 females) RHU staff trained/updated on PHE links and family planning and providing information on PHE links
- 11 additional RHUs from “**new**” and “**maintenance**” sites serving as referral points for FP and PHE information services during this reporting period
- 23 organizations using the BALANCED training manuals to train PHE adult PEs and PHE CBDs
- Contraceptive prevalence baseline conducted – see Appendix 1.

Status of PMP results for IR1

INDICATOR	July-September Accomplishment
1.1 Number of people counseled in RH/FP as a result of USAID assistance (<i>USAID/OH/custom indicator 2</i>)	1,526
1.2 Contraceptive prevalence rate (<i>USAID/OH standard indicator 3</i>)	Baseline data collected
1.3 Number of people trained in RH/FP with USG funds (<i>USAID/OH standard indicator 3</i>)	465 (37 males and 428 females)
1.4 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>)	36
1.5 Percent of FP users of modern methods obtaining supplies and services from private sector sources (CBDs, etc.) (<i>surrogate BALANCED field indicator</i>)	0 ¹¹
1.6 Number of USG-assisted service delivery points providing FP services (<i>BALANCED field indicator</i>)	326 (315 CBDs & 11 RHUs)
1.7 Number of target organizations incorporating PHE tools, protocols, etc. into their work (<i>BALANCED core indicator</i>)	23 ¹²

¹¹ Data collection is ongoing

¹² 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

IR1 Priorities for next period (October 1 to December 31, 2011)

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

- Conduct PHE CBD/PE TOT in the municipality of Tingloy in Batangas, as conditions permit
- Continue to mobilize all master trainers to co-facilitate the remaining CBD and adult PE trainings (Activity 1.1)
- Help TOT participants from the “**new**” sites recruit and train PHE CBDs.
- Conduct refresher training for previously trained CBDs in the “**maintenance**” sites. In barangays with no CBDs, conduct new training for CBDs.
- Organize and conduct training/refresher training for government health/RHU personnel in the “**new**” and “**maintenance**” sites.
- 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 family planning commodities, thus, helping to ensure uninterrupted supply of FP 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 will develop a network of community volunteer PHE adult PEs chosen from communities’ indigenous leaders or individuals living 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

Ongoing	Activity leaders: Ronald Quintana and Luz Escubil
Activity Start: 07/01/11	Activity End Date: 09/30/11

The local training of PHE adult PEs both in the “**new**” and “**maintenance**” sites continued this reporting period. BALANCED Field Coordinators and the TOT participants sought assistance from the LGU officials, particularly the village officials, RHU staff, and staff of local government offices and other stakeholders to identify potential adult PEs and participants for the PHE adult PE training. During this reporting period, a total of 497 (105 males and 392 females) additional PHE adult PEs were trained – 127 (23 males and 104 females) in the “**new**” sites and 370 (82 males and 288 females) in the “**maintenance**” sites – to increase demand for family planning and promote pro-environment behaviour.

The trainers who facilitated the PHE adult PE training were participants of the BALANCED Philippines-led TOT CBD/PE workshops conducted during the first quarter of 2011. To date, 36

of these master trainers/facilitators are now providing training to PHE adult PEs and PHE CBDs. These trainers/facilitators include MHOs, MENROs, Municipal Agriculturists (MA) and staff from both health and environment offices of the partner LGUs.

Working together, the trained LGU/NGO staff, PHE adult PEs and CBDs use their newly gained information and experience to conduct peer outreach to educate fishers, women and men on modern FP methods. The trained PHE adult PEs were deployed in their respective communities and have started conducting interpersonal counseling (IPC) sessions. Since most of the PHE PEs are actually BHWs, BNSs, Bantay Dagat volunteers, and/or barangay leaders, the task of counseling and sharing information on PHE is just one of their responsibilities. However, these volunteers have other responsibilities which often compete with the PEs’ time and effort on PHE. During monitoring and mentoring sessions with community volunteers, BALANCED-Philippines staff reminds these volunteers that they can conduct IPC sessions at the same time they are doing their daily usual chores—for example, when they are sea fishing, or when they conduct house-to-house visits as part of their tasks as health volunteers.

The project team is now in the process of collecting and collating their reports on the IPC sessions already conducted. A PE Diary with a simple job aid has been developed to help the PHE adult PEs effectively conduct IPCs and note the number of IPCs given during each week. It is currently being field tested with PHE adult PEs in project sites. This will be a major tool for both monitoring and mentoring the PHE adult PEs.

By the end of Year 1, 212 PHE adult PEs (30 males and 182 females) have been trained in seven of the nine municipalities in the “**new**” sites—57 over the Year 1 target. In the “**maintenance**” sites, 534 PHE adult PEs (104 males and 430 females) have been trained in 16 of the 20 municipalities—285 over the Year 1 target. BALANCED Philippines have been trying to involve more men, such as members of bantay dagat, people’s organizations, in the trainings and other activities to reach the core fishermen in the project sites. The challenge in involving more men is their lack of time to participate in the activities since their priority is to work for the family to provide daily needs such as food and to make both ends meet.

Results from Activity 2.1

- 497 (105 males and 392 females) PHE adult peer educators were recruited and trained

2.2 Develop and implement PHE IEC strategy

Ongoing	Activity leaders: Ronald Quintana and Luz Escubil
Activity Start: 07/01/11	Activity End Date: 09/30/11

During this reporting period, BALANCED-Philippines prepared and revised a draft communications plan framed within the Department of Health (DOH) Family Planning framework. It included communications objectives, and proposed integrated PHE themes and specific targeted messages. This communications plan has been revised and submitted to USAID/Philippines/OH for review and comments. The communications plan was adjusted for the inclusion of OEE field support activities and messages in the IEC package and may be fine-

tuned, as needed, based on the results of the baseline behavior monitoring survey (BMS). This BMS survey is funded by BALANCED core funds and as of this reporting period, CCEF—a BALANCED partner for this survey— is in the process of encoding the data gathered.

Materials developed and used in previous PHE projects form part of the IEC package, particularly since they have been pretested and found to be effective in conveying integrated messages to the target audience. A new material—the ‘3 Tips’ brochure—was also developed and is currently being pre-tested. A copy of the material was also sent to DOH for approval and clearance since the DOH logo will be used in the material. The challenge with this is the busy schedule of the DOH staff who will be reviewing the material which is taking a long time to get the required DOH approval. The Bohol Environmental Management Office (BEMO) and the Province of Bohol have already reviewed the material and they already gave BALANCED Philippines permission to use their logos in the IEC material. With the upcoming OEE Buy-in, the material may be revised to include additional coastal resources management (CRM) and livelihoods messages from OEE-funded activities in order to achieve impact in changing individual fisheries or CRM behaviors. The messages would address specific environmental behaviors related to OEE interventions, for example stopping all fishing in MPAs, reporting illegal fishermen and poachers, or participating in coastal clean-ups. BALANCED-Philippines will coordinate with CI-P on the development and pretesting of these new materials in the Danajon Bank and Verde Island Passage project municipalities. The revised English version of the “3 Tips” brochure was written at a 6th grade reading level, translated to local dialects (Tagalog and Visayan) and pretested to ensure comprehension of the messages and to test the various print formats preferred by the community. Creative briefs for the existing PFPI IEC materials including copy of these materials were already sent to USAID/Philippines/OH and now awaiting clearance for them to be reprinted and distributed in the field.

The IEC materials and activities will seek to promote positive behavior change both in the health and fisheries/CRM areas and will be geared toward a variety of target communities, especially fishers and LGU policy makers. In the next quarter, BALANCED Philippines will conduct IEC campaigns/activities to reach more people with FP/RH and PHE information and messages.

Results from Activity 2.2

- 1 BALANCED Philippines communications plan developed
- 962 individuals received existing PHE communication materials

Status of PMP results for IR2

INDICATOR	July-September Accomplishment
1.2 Number of people trained in RH/FP with USG funds (<i>USAID/OH standard indicator 3</i>)	497 (105 males and 392 females)
2.1 Number of people who have seen or heard a specific RH/FP message (<i>USAID/OH standard indicator 2</i>)	962

IR2 Priorities for next period (October 1 to December 31, 2011)

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

- Continue to train and mentor PHE adult PEs in the “**new**” and “**maintenance**” sites
- Finalize BALANCED Philippines’ communications plan and PHE IEC package and develop/replicate, pre-test (as appropriate) and distribute PHE IEC materials
- Increase the number of IPCs and people who hear and/or receive RH/FP and pro-environment messages

IR 3: Increased policymaker’s commitment to promote/support FP/RH services and integrated approaches

Achieving policy reforms takes time and requires going through a tedious process inherent in the local governance system. The BALANCED-Philippines Project, however, builds on collaboration and partnerships with existing PHE leaders and champions established by PFPI in its previous PHE projects. Thus, from the start of the project, PFPI conducted a number of group and one-on-one meetings, such as courtesy calls, project orientations, briefings, etc., with local chief executives, 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. Key IR 3 activities completed during July to September 2011 are described below:

3.1 Conduct PHE Orientation and planning with LGU, NGO, PO and project stakeholders

Completed – August 2011	Activity leader: Ronald Quintana
Activity Start: 07/01/11	Activity End Date: 09/30/11

At the beginning of the project, BALANCED-Philippines activities were launched through a series of Orientation and Planning Workshops with barangay captains, municipal/city mayors, and heads of the health and environment offices of the municipality/city and province as participants. PHE orientation and planning activities were completed in August 2011. A total of 911 participants from the 29 municipalities attended the workshop.

During this reporting period, the BALANCED-Philippines Field Coordinators coordinated all Project activities with the LGUs, NGOs, POs and other stakeholders in the Project sites. The Field Coordinators also continued to follow up on the status of the integrated PHE action plans developed during the PHE orientation and planning to ensure that these plans are incorporated in the development plans and other plans of the barangay and municipal LGUs. BALANCED Philippines does not anticipate further additional workshops under this activity in the next quarter. However, if orientation workshops do occur, they will be reported on in the quarterly narrative reports.

Results from Activity 3.1

- None; PHE orientation and planning completed in August 2011.

3.2 Advocate and provide support for local development, environment, coastal resources management (CRM) and fisheries plans and/or agendas and leverage resources for incorporating PHE into local policies, plans and agendas

Ongoing	Activity leaders: Ronald Quintana and Francis Magbanua
Activity Start: 07/01/11	Activity End Date: 09/30/11

During this reporting period, BALANCED Philippines staff continued to coordinate with the local LGU officials, heads of local health, environment and planning offices and the local development council to advocate for incorporating PHE into local policies, plans and agendas. PHE action plans developed during the PHE orientation and planning which totaled 609, were endorsed by the Office of the Municipal Mayor and the Municipal Planning and Development Office to the Municipal Development Council for integration into existing plans of the municipality. These plans have to be followed up by BALANCED Philippines field staff to ensure that these plans will be integrated into existing plans of the LGU. BALANCED-Philippines Field Coordinators are experiencing difficulty in following this up with the Municipal Development Council, particularly in the “**new**” sites, given the expansive and tough terrain of the Project sites. Being island municipalities, several “**new**” sites were inaccessible during the rainy season, even when there was no typhoon. This and the current debate surrounding the RH bill were among the challenges facing the Project team during this reporting period. Some LCEs, particularly those with strong affiliation with the Catholic Church, had reservations about supporting the Project. Moreover, there are some municipalities where the Mayor and the Vice Mayor or the Mayor and the Municipal Council are not in good terms due to political reasons, which also cause delays in the approval of plans, MOAs, ordinances and other local policy documents.

The BALANCED-Philippines Project team continued to galvanize partnerships with the LGUs through MOAs between PFPI and the LGUs. In this reporting period, six additional MOAs (Bien Unido, Inabanga, Ubay, Hilongos, Abra de Ilog and Looc) were signed between PFPI and the participating LGU. These MOAs define the roles of each collaborating organization and the LGUs’ agreements to provide counterpart contributions to PHE activities. With these six additional MOAs, there are now thirteen (13) signed MOAs (eleven with the LGUs in the “**maintenance**” sites¹³ and two in “**new**” sites¹⁴). Follow-up is currently underway as the actual engagement of the LGU requires legislation by the Municipal Legislative Council—a process that takes a long time. Also, during this period the municipality of Tubigon in the province of Bohol has incorporated RH/FP into their coastal resource management (CRM) plan.

The value of resources leveraged from LGUs totaled an estimated US \$ 2,492 (PhP106,643.68) during this reporting period. These resources provided by local partners include the costs of venues, meals, participants' time, leveraged amount for FP commodities and the conduct of PHE activities, and transportation support to training participants. During the PHE orientation, planning and training activities, some of the LGUs shouldered the expenses for the venue, and

¹³ Tubigon, Inopacan, Bato, Getafe, Hindang, Matalom, Bien Unido, Inabanga, Ubay, Hilongos and Abra de Ilog,

¹⁴ Lubang and Looc

some of the costs of meals and transportation for some participants, and costs of selected other logistics.

In the next quarter, BALANCED Philippines will continue to follow up on the progress of the site-specific action plans developed during the consultations made for the duration of the Project. As of this writing, development and annual operational planning is underway at the local level. The BALANCED Philippines field staff will follow-up on the process and ensure that action plans are incorporated in the CRM plans or the development or annual investment plans of the municipality.

Results from Activity 3.2

- 1 Municipal CRM plan with integrated PHE activities and budget
- US \$2,492 leveraged from LGUs for FP/RH and PHE activities
- 6 MOAs signed between PFPI and the LGUs for the BALANCED-Philippines Project in which the LGUs agreed to provide counterparts for PHE activities for this reporting period.

Status of PMP results for IR3

INDICATOR	July-September 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\$2,492
3.2 Number of local policy reforms/plans with integrated PHE initiated (BALANCED field indicator)	1

IR 3 Priorities for next period (October 1 to December 31, 2011)

The following activities are planned for the next three months:

- 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.
- Continue to establish MOAs with the LGUs

Other Challenges

The first year of Project implementation posed several challenges for the BALANCED-Philippines team. The inaccessibility of several sites, particularly the island municipalities, proved to be a difficulty faced by both Project staff and stakeholders. These areas are isolated and almost impossible to reach with the onset of inclement weather, even if there is no typhoon. The lack of regular transport and the difficult terrain in areas, such as Looc and Lubang in Occidental Mindoro, makes travelling difficult, affects scheduling of activities and even complicates the commitment of stakeholders to participate in activities. Even with the presence of regular transport, travel is still a challenge across the sites in the province of Batangas since travel is dependent upon the erratic schedule of public jeepneys and buses, which only proceed to their destination once they are at full capacity with passengers.

Also, we have only one Field Coordinator per province. Given the wide area of coverage across the 10 municipalities in the province of Bohol, we realize that one field staff may not be sufficient. While the Field Coordinator has been able to facilitate the activities, it has also been difficult for her physically. Even in the other areas with fewer Project sites, the multiple functions expected of the Field Coordinator is, by nature, challenging. That said, the cost of adding more staff is not within the parameters of the BALANCED-Philippines Project budget.

In addition, it has been a challenge for the local partners and BALANCED Philippines Field Coordinators to be in close contact with the representatives of the FP product suppliers: Alphamed and DKT Philippines. Some representatives of Alphamed and DKT Philippines have had conflicts in schedules and others have had difficulty traveling to the area, particularly the island municipalities in both the “new” and “maintenance” sites. These private sources of FP supply also have problem on lack of human resources since one Area Coordinator is covering a number of provinces and municipalities. These private sources of FP supply have planned to hire additional staff and implement internal re-organization to address this issue. It also seems that the Area Coordinators of these private sources of FP supply are not aggressive enough to make a follow up/through with BALANCED Philippines partner LGUs who expressed willingness to partner with them and become the sources of FP supply for these municipalities. BALANCED Philippines staff in the national office and in the field constantly coordinates and provides feedback to these sources of FP supply and keep on begging their Area Coordinators to visit the LGUs and talk to them so that they would be able to discuss partnership and agreement but they are not that responsive enough.

The ongoing debate on the country’s Reproductive Health bill has made LCEs and even some community members reluctant to support the Project. Some mayors or barangay captains with direct or indirect affiliation with the Catholic Church are hesitant to openly support the Project, and some are outright opposed to spending for FP products for their constituents. Moreover, there are some municipalities where the Mayor and the Vice Mayor or the Mayor and the Municipal Council are not in good terms due to political reasons, which also cause delays in the approval of plans, MOAs, ordinances and other local policy documents.

III. Performance Management and Reporting Plan

BALANCED Philippines Project Indicators and Expected Results

INTERMEDIATE RESULT (IR)	INDICATOR	Expected Year 1 Results	Feb to Mar-Results.	April to June Results	July to Sept Results.	Total Year 1 Results
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>)	22,000	0	0	1,526	1,526
	1.2 Contraceptive Prevalence Rate (<i>USAID/OH standard indicator 3</i>)	N/A	N/A	N/A	Baseline data collected	Baseline data collected
	1.3 Number of people trained in RH/FP with USG funds (<i>USAID/OH standard indicator 3</i>)	713	50 (16 m; 34 f)	496 (46 m; 450 f)	962 (142 m; 820 f)	1,508 (204 m; 1,304 f)
	1.4 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	0	32	36	36
	1.5 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	0	0 ¹⁵	0

¹⁵ Data collection is ongoing

	1.6 Number of USG-assisted service delivery points providing FP services (BALANCED field indicator)	495	0	124	326	450 ¹⁶
	1.7 Number of target organizations incorporating PHE tools, protocols, etc. into their work (BALANCED core indicator)	15	0	13	23	23 ¹⁷
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	0	1,417	962	2,379
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\$49,963.28	US\$60,305	US\$2,492	US\$112,760
	3.2 Number of local policy reforms/plans with integrated PHE initiated (BALANCED field indicator)	10	0	3	1	4

¹⁶ 26 RHUs + 424 CBDs

¹⁷ 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

Appendix 1 – Contraceptive Prevalence Rate for BALANCED-Philippines Project Sites

CONTRACEPTIVE PREVALENCE RATE

PROVINCE	MUNICIPALITY	CPR	Year	Data Source
Batangas				
	Batangas city	28.09%	2010	RHU
	Calatagan	29.94%	2010	RHU
	Tingloy	29.05%	2010	RHU
	Lobo	14.60%	2010	RHU
	Mabini	18.86%	2010	RHU
	Nasugbu	33.20%	2010	RHU
	San Juan	39.14%	2010	RHU
Average CPR		27.55%		
Oriental Mindoro				
	Puerto Galera	85%	2010	RHU
	San Teodoro	17.98%	2010	RHU
	Baco	40%	2010	RHU
Average CPR		48%		
Occidental Mindoro				
	Adra de Ilog			
	Paluan			
	Looc	29.30%	2010	RHU
	Lubang	no data		
Average CPR		N/A		
Bohol				
	Bien Unido	22.91%	2010	RHU
	Buenavista	12.80%	2010	RHU
	Clarin			
	Getafe	20.86%		
	Inabanga	24.93%	2010	RHU
	CP Garcia			
	Trinidad	0.75%	2010	RHU
	Talibon	57%	2010	RHU
	Tubigon	34%	2010	RHU
	Ubay	24.40%	2010	RHU
Average CPR		24.70		
Leyte				
	Bato	no data		
	Hilongos	24.50%	2010	RHU

	Hindang	17%	2010	RHU
	Matalom	35%	2010	RHU
	Inopacan	12%	2010	RHU
Average CPR		22.13%		

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

**Quarterly Progress Report #4
For Period October 1 to December 31, 2011**

Resubmitted February 15, 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.

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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 and Environment/OEE (\$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 OEE-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 & OEE)
- IR4 - Improved governance capacities of provincial and municipal LGUs in the VIP and Danajon Bank marine ecosystems (OEE)
- IR5. - Increased incentives for coastal and marine conservation among coastal fisher households (OEE)

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/OEE, the Project will incorporate coastal resources management (CRM) activities in select BALANCED-Philippines sites.

From October to December 2011, PFPI continued working with local government units (LGUs), people’s organizations (POs) and other nongovernmental organizations (NGOs) 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 continued this reporting period. 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. With USAID/Philippines OEE Buy-in, the identification, screening, selection and hiring of additional BALANCED-Philippines staff both for PFPI and CI/P were conducted during this period.

Also during this reporting period, CI/P, PFPI and USAID OH and OEE staff conducted a planning meeting held on November 23, 2011 as an initial activity to ensure smooth implementation and operational integration of Project activities. Discussed during this planning meeting were the strategies on how integration will take place operationally, the roles and responsibilities of PFPI and CI/P in implementing specific Project activities, and systems and procedures related to operations, monitoring, reporting, etc. It was also discussed during the meeting that there is a need to develop integrated criteria for the selection of areas/sites for MPA and Bantay Dagat activities; to share with USAID the PHE Project documents such as evaluation reports, CI reports and documents related to PHE; the need to clarify in the BALANCED-Philippines workplan/Project design document (PDD) which staff will support/fund the follow-on BMS; and to put back the couple years protection (CYP) in the performance monitoring plan (PMP) for IR1 as per the initial Project PDD. It was also agreed that there would be a Project orientation meeting for all BALANCED-Philippines Project staff after everyone is hired to generate a common understanding of the Project, review the conceptual framework, discuss and plan how to ensure that integration will happen operationally, and conduct a team building activity.

This report summarizes the activities completed by BALANCED-Philippines during the reporting period October to December 2011 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

For the reporting period October 1 to December 31, 2011, BALANCED-Philippines implemented various activities under IR1, IR2 and IR3 that contribute to the goal of the BALANCED-Philippines Project. These activities and their related accomplishments are summarized below by IR. Activities under the additional IRs 4 and 5 will commence in the next quarter.

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 that 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 refresh 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 the fishermen, despite the challenges. Men often lack the time to participate in trainings because of their work on other community activities and their having to work to provide for the needs of the family. Therefore, Project staff faces these competing priorities when trying to involve men in Project's activities. However, steps forward are being made. Below is progress-to-date on IR 1 activities completed during this reporting period.

1.2 Conduct training-of-trainers on PHE CBD and adult PE systems

The training-of-trainers (TOT) workshop on PHE CBD and APES systems has been completed for all target municipalities except in Tingloy. Previously, 62 participants were trained in the TOT workshops. However, only 60% (36) of those trained remain actively involved in the local municipality PHE CBD and PHE APES trainings. During this reporting period, no additional master trainers became actively involved in conducting local PHE CBD and APES workshops. This is due to the fact that many of these master trainers are fully occupied with their respective offices/agencies and simultaneous government-initiated activities and campaigns both at the local and national levels. Their workload conflicts with the time needed to facilitate the local trainings.

In the next quarter, BALANCED-Philippines will continue to identify ways to mobilize the majority of the master trainers to co-facilitate the remaining local PHE CBD and PHE APES trainings as well as the other workshops that will be undertaken by the Project under IRs 4 and 5. BALANCED-Philippines Field Coordinators will seek to coordinate with the LGUs and the master trainers and try to schedule the training ahead of time so that the training will be included in the LGUs' and the master trainers' calendar of activities. If need be, we will identify and train additional master trainers who have time to conduct the local training.

Results from Activity 1.1

- 60% (36) of those trained remained actively involved in facilitating the local trainings

2.2 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

During this reporting period, the BALANCED-Philippines Field Coordinators and the TOT participants continued to identify, recruit and train participants for the PHE CBD training. A total 87 (6 males and 81 females) non-mobile PHE CBDs were recruited and trained in three additional target municipalities in the “**new**” sites bringing a cumulative total of 171 CBDs trained in seven of the nine target municipalities to date. In the “**maintenance**” sites, 19 (2 males and 17 females) non-mobile PHE CBDs were trained in the municipality of Trinidad during this reporting period, making a total of 359 CBDs trained or who received refresher training in 17 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.

The 106 (8 males and 98 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. These newly trained PHE CBDs 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 are two remaining municipalities (Tingloy and Paluan) in the “**new**” sites and three municipalities (Abra de Ilog, Talibon and Hilongos) in the “**maintenance**” sites that have yet to train PHE CBDs. This is because the formal commitment for a Project partnership has not yet been secured from the LGUs of Tingloy and Paluan. The Local Chief Executive (LCE) of Tingloy continues to express opposition to the family planning component of the Project because of his affiliation with the Catholic Church. In the municipalities of Paluan and Talibon, the LCE and the Municipal Council still need to review the Memorandum of Agreement (MOA). In the municipalities of Abra de Ilog and Hilongos, the MOAs have already been signed; however, the busy schedules of the LGUs have caused delay in the scheduling of the PHE CBD training.

In the next quarter, BALANCED Philippines will seek to complete all planned PHE CBD and PHE APEs trainings in the remaining “**new**” and “**maintenance**” sites. Building on CI/P’s partnership on the BALANCED- Philippines Project and CI/P’s good relationship with the LGU of Tingloy on their CRM project, PFPI and CI/P field staff will jointly meet and discuss the additional BALANCED CRM and livelihood activities with the Tingloy LCE in the next quarter, while striving to build trust and a partnership that will eventually open to the acceptance of family planning as a means to improve food security in the municipality. Also, BALANCED Philippines Field Coordinators will continue follow-up with the LCEs and the Municipal Councils and attend sessions of the Municipal Councils in the municipalities of Paluan and Talibon to facilitate the signing of the MOA. In the municipalities of Abra de Ilog and Hilongos, BALANCED Philippines Field Coordinators will continue to coordinate with the LGUs and try to schedule the PHE CBD training ahead of time so that the training will be included in the LGUs’ calendar of activities.

Results from Activity 1.2

- 87 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
- 19 non-clinical/non-pharmaceutical outlet owners, POs, deputized wardens, etc. provided refresher training on CBD in one municipality in the “**maintenance**” sites

2.3 Develop or strengthen system for supplying FP methods to CBD outlets

Previously, BALANCED-Philippines established franchisee and other arrangements that provide an interrupted supply of affordable contraceptive products flowing to BALANCED-trained RHUs and the CBDs in two of the “**new**” site municipalities. During this reporting period, PFPI continued collaboration and coordination with sources of FP commodities, such as the GDA partner Alphamed Pharma Corporation and DKT Philippines, for LGU/RHU partners in the seven “**new**” site municipalities that have yet to establish these franchises.

One of the obstacles to establishing a franchise is the prerequisite of a signed MOA between the LGU and Alphamed/DKT for providing a supply of FP commodities to the CBDs for an efficient CBD system. BALANCED-Philippines has been constantly following-up and meeting with the members of the municipal legislative council to facilitate the MOA process and to set-up CBD systems in the “**new**” sites and improve existing CBD systems in the “**maintenance**” sites.

In the “**maintenance**” sites, these private sector suppliers already established a system of uninterrupted supply of contraceptive products to the RHUs and to the trained CBD outlets. However, challenges remain. For example, ongoing internal re-organization within Alphamed and DKT to address its issues of lack of human resources, difficulties in coordination, conflicts in schedule and addressing LGUs’ concerns related to FP supply has not been finalized. There were also concerns about the high prices of pills and condoms from the local suppliers of DKT/Alphamed compared to the prices in private pharmacies in the Project sites. This issue was raised by BALANCED-Philippines team to Alphamed and DKT, and both companies promised that they would look into and address the issue.

The focus for the next quarter is to remain setting up franchises/social marketing arrangements and to strengthen the existing FP supply system in the Project sites. BALANCED-Philippines field staff will continue to follow-up and meet with the municipal legislative council to help facilitate the signing of the MOA between the LGU and Alphamed/DKT and to facilitate the setting up the CBD systems in the Project sites. 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 MOA between them and the LGUs.

Results from Activity 1.3

- No new cost-recovery supply systems developed. However, cost recovery supply system for community-based distribution of FP supplies has continuously been strengthened in the “**new**” and “**maintenance**” sites

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

During this reporting period, 24 (6 males and 18 females) RHU staff were trained in Abra de Ilog, a municipality in the “**maintenance**” sites. BALANCED-Philippines continued to work closely with the RHU staff both in the “**new**” and “**maintenance**” sites to develop and/or strengthen the referral system for women who are seeking FP methods that are not available at the CBD outlets.

The Project partnered with the RHU staff, particularly the Rural Health Midwives, in monitoring the CBD outlets to ensure efficient and effective operations. BALANCED-Philippines Field Coordinators, together with these service providers, provided the needed technical support to the trained PHE CBDs and PHE APEs.

There are two remaining municipalities (Tingloy and Paluan) in the “**new**” sites that have yet to train RHU staff (reasons as stated under Activity 1.2 above). Training plans are underway in the next quarter. Meanwhile, BALANCED-Philippines staff will also continue to follow-up and mentor all trained RHU staff to ensure they are able to carry out their expected roles.

With regards to data and report collection from the RHU staff, the VIP municipalities (Batangas and Occidental Mindoro) do not conduct monitoring, collect/consolidate data and prepare reports regularly. Thus, reports gathered by the Project are not on time as well. Thus, the actual numbers accomplished by the project should be more than those reflected in the report. Further, as of this writing, the RHU staff from these same provinces has yet to undergo the data quality check training from the Department of Health (DOH).

Results from Activity 1.4

- 24 RHU staff trained/updated on PHE links and family planning and on providing information on PHE links
- 10 organizations using the BALANCED training manuals to train PHE adult PEs and PHE CBDs

Status of PMP results for IR1

INDICATOR	October-December Accomplishment
1.1 Number of people counseled in RH/FP as a result of USAID assistance (<i>USAID/OH/custom indicator 2</i>)	1,904
1.2 Contraceptive prevalence rate (<i>USAID/OH standard indicator 3</i>)	- ¹⁸
1.3 Number of couple years protection (<i>USAID/OH standard indicator 3</i>)	79,125
1.4 Number of people trained in RH/FP with USG funds (<i>USAID/OH standard indicator 3</i>)	130 ¹⁹ (14 males and 116 females)

¹⁸ Baseline data collected; available data from the RHUs for this quarter are incomplete.

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>)	36
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% ²⁰
1.7 Number of USG-assisted service delivery points providing FP services (<i>BALANCED field indicator</i>)	107 ²¹
1.8 Number of target organizations incorporating PHE tools, protocols, etc. into their work (<i>BALANCED core indicator</i>)	10 ²²

IR1 Priorities for next period (January 1 to March 31, 2012)

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

- Conduct PHE CBD/PE TOT and PHE CBD training in the municipality of Tingloy in Batangas, as conditions permit
- Continue to mobilize all 62 master trainers to co-facilitate the remaining PHE CBD and PHE adult PE trainings in the “**new**” sites
- Conduct PHE CBD training in the remaining “**new**” sites and refresher training for previously trained CBDs in the “**maintenance**” sites. In “**maintenance**” site barangays with no CBDs, conduct new training for CBDs
- Organize and conduct training for government health/RHU personnel in the remaining “**new**” sites
- 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

¹⁹ 106 CBDs and 24 RHU staff

²⁰ Data collection is ongoing; Percentage is based on the data collected from 6 municipalities

²¹ 1 RHU + 106 CBDs

²² 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. 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

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. 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 continued this reporting period. BALANCED-Philippines Field Coordinators and the active TOT participants 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 APEs training. During this reporting period, a total of 85 additional PHE APEs (28 males and 57 females) were trained in the “**maintenance**” sites.

Since most of the PHE PEs also serve as BHWs, BNSs, Bantay Dagat volunteers, and/or barangay leaders, the additional task of providing counseling and sharing information on PHE often competes with their other roles and tasks. During monitoring and mentoring sessions with these community volunteers, BALANCED-Philippines staff continues to provide support and remind the volunteers that they can conduct IPC sessions while they are doing their daily chores—for example, when they are sea fishing, or when they conduct house-to-house visits as part of their tasks as health volunteers.

The Project team is now in the process of collecting and collating their reports on the IPC sessions already conducted. A PE Diary with a simple job aid has been distributed to help the PHE APEs effectively conduct IPCs and note the number of IPCs given during each week. This diary is currently being field tested with PHE APEs in Project sites and now serves as a tool for both monitoring and mentoring the PHE APEs.

Despite the challenges faced in involving more fishermen—i.e. competing with their other priorities—BALANCED-Philippines staff continues to encourage members of the bantay dagat and POs to participate in the trainings and other related activities.

During the next reporting period BALANCED will train additional PEs from both the “**maintenance**” and “**new**” sites.

Results from Activity 2.1

- 85 (28 males and 57 females) PHE APEs were recruited and trained

2.2 Develop and implement PHE IEC strategy

During this reporting period, BALANCED-Philippines continued revising the communications plan, which was drafted at the start of the Project. The plan provides guidance on the development of integrated IEC messages, materials and activities that BALANCED-Philippines

will use to promote positive behavior change toward pro-health and fisheries/CRM behaviors by target communities, especially fishers and LGU policy makers. CI/P expressed interest in reviewing the draft communications plan and providing inputs, particularly on the CRM and livelihoods messages that will influence individual fisheries/ CRM behaviors. The communications plan will be fine-tuned, as needed, based on the results of the baseline behavior monitoring survey (BMS).

A new material being developed for the Project—the ‘3 Tips’ brochure—is currently being revised based on the results of the pre-test. Pre-testing of the ‘3 Tips’ brochure was conducted through focus group discussions (FGDs) both in the “**new**” and “**maintenance**” sites. The FGDs were conducted with one group of mothers and one group of fathers with 8-10 members in two barangays for each province (Batangas, Oriental Mindoro, Occidental Mindoro, Bohol and Leyte) covered by the Project. The profile of the FGD participants was the same with the profile of the target audience of the material, i.e. men and women of reproductive age, with primary level of education, single or married, and can speak Tagalog or Visayan.

A copy of the material was also sent to local provincial health and environment offices for approval and clearance so that the logos of those offices can be included on the brochure. USAID/Philippines OH and OEE made the suggestion of using these logos as a way to facilitate the clearance, approval and finalization of the material. Because the IEC material is only intended for local distribution at the Project sites, it may not need the national health and environment offices logos. However, the brochure will need to be cleared with the national DOH as suggested by USAID/Philippines/OH because DOH clearance enables potential distribution at the national scale. Therefore, the “3 Tips” brochure was submitted to DOH for their review on October 2011. As of the time of this report, it remains under review by the DOH and, if approved, will require final clearance from USAID/Philippines.

During this reporting period, a total of 107,694 individuals have seen or heard a specific FP/RH message in “**new**” and “**maintenance**” sites through the following channels, events, campaigns and activities:

- Mass media, such as radio interviews of BALANCED-Philippines staff who shared messages/information on FP/RH and PHE, and radio reports on PFPI and BALANCED Philippines activities
- Text blasts where BALANCED-Philippines Field Coordinators and PEs sent text messages/information on FP/RH and PHE linkages to community members and peers who are men and women of reproductive age
- Meetings with the barangay and municipal councils, etc. where messages and information on FP/RH and PHE were shared by BALANCED-Philippines staff to the members of the barangay and municipal councils
- Group orientations/discussions, such as during “tipok tipok” (small community gatherings) and barangay assemblies
- RHUs’ activities, such as mothers’ classes, responsible parenthood movement classes/sessions and during immunization and pre-natal activities in the health centers

- LGUs’ activities, such as during orientation on tuberculosis, orientation on the 3P’s (Pantawid Pamilyang Pilipino) program, nutrition activity in the barangay (Pabasa) and day care parents’ meetings where BALANCED-Philippines staff shared messages/information on FP/RH and PHE.

BALANCED-Philippines seized every opportunity to share FP/RH and PHE information in activities/events such as those above-mentioned. FP/RH and PHE messages/information, which were shared during these activities, include an explanation of family planning, its benefits, its range of methods, information on modern FP methods, and PHE linkages and its benefits. In the next quarter, BALANCED-Philippines will continue to conduct IEC campaigns/activities to reach more people with FP/RH and PHE information and messages.

Results from Activity 2.2

- 1 BALANCED-Philippines communications plan developed and currently being revised to include CI/P’s inputs on CRM and livelihoods
- 107,694 individuals have seen or heard a specific RH/FP message

Status of PMP results for IR2

INDICATOR	October-December Accomplishment
1.4 Number of people trained in RH/FP with USG funds (<i>USAID/OH standard indicator 3</i>)	85 (28 males and 57 females)
2.2 Number of people who have seen or heard a specific RH/FP message (<i>USAID/OH standard indicator 2</i>)	107,694

IR2 Priorities for next period (January 1 to March 31, 2012)

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

- Continue to train and mentor PHE APEs in the “**new**” and “**maintenance**” sites
- Finalize BALANCED-Philippines’ communications plan and PHE IEC package, and print and distribute PHE IEC materials
- Continue IEC and PE activities to continually increase the number of IPCs and 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. The BALANCED-Philippines Project, however, builds on collaboration and partnerships with existing PHE leaders and champions established by PFPI in its previous PHE projects to gain support from policymakers. Thus, 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, 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. Key IR 3 activities completed during the October to December 2011 reporting period are described below:

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

PHE orientation and planning activities were completed in August 2011. A total of 911 participants from the 29 municipalities attended the PHE orientation workshop, where they developed PHE action plans. During this reporting period, the BALANCED-Philippines Field Coordinators coordinated all Project activities with the LGUs, NGOs, POs and other stakeholders in the Project sites. With the start-up of the OEE Buy-in, the BALANCED-Philippines staff will hold joint courtesy meetings and orientation with the LGUs in the next quarter to inform them about the new activities and partnership between PFPI, CI/P, and USAID.

Results from Activity 3.1

- None

3.2 Advocate and provide support for local development, environment, coastal resources management (CRM) and fisheries plans and/or agendas and leverage resources for incorporating PHE into local policies, plans and agendas

During this reporting period, BALANCED-Philippines staff continued to coordinate with the local LGU officials, heads of local health, environment and planning offices and the local development council to advocate for incorporating PHE into local policies, plans and agendas. The Field Coordinators also continued to follow-up on the status of the integrated PHE action plans developed during the PHE orientation and planning to ensure that these plans are incorporated in the development plans and other barangay and municipal LGUs plans. 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' expressed reservation about family planning, either because of 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. Despite these challenges, the BALANCED-Philippines Project team persisted and followed up with the LGUs to support the Project. The BALANCED-Philippines team also plans to invite the LCEs, i.e. Tingloy, etc. to participate in a study tour to the selected PHE learning sites as a strategy to eventually gain their commitment and support for the integrated PHE approach. The study tour is scheduled to take place in the next quarter.

In this reporting period, one additional MOA was signed between PFPI and the LGU of Batangas City bringing a total of fourteen (14) signed MOAs (12 with the LGUs in the “**maintenance**”

sites²³ and two in “**new**” sites²⁴). Follow-up with the other MOAs is underway as the actual engagement of the LGU requires legislation by the Municipal Legislative Council—a lengthy process.

The value of resources leveraged from LGUs totaled an estimated US \$ 10,282 (PhP446,046.44). These resources provided by local partners include 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.

In the next quarter, we will continue to coordinate and meet with executive and legislative LGU officials and the local development council to ensure that PHE action plans are incorporated into local policies, plans and agendas.

Results from Activity 3.2

- US \$10,282 leveraged from LGUs for FP/RH and PHE activities
- 1 MOA signed between PFPI and the LGU of Batangas City for the BALANCED-Philippines Project in which the LGUs agreed to provide counterparts for PHE activities for this reporting period

3.3 Conduct a national-level PHE Orientation

No activity to date

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

No activity conducted to date

²³ Tubigon, Inopacan, Bato, Getafe, Hindang, Matalom, Bien Unido, Inabanga, Ubay, Hilongos, Abra de Ilog and Batangas City

²⁴ Lubang and Looc

Status of PMP results for IR3

INDICATOR	October-December 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\$10,282
3.2 Number of local policy reforms/plans with integrated PHE initiated (BALANCED field indicator)	-
3.3 Number of National/regional Forums where PHE approach highlighted	-

IR 3 Priorities for next period (January 1 to March 31, 2012)

The following activities are planned for the next three months:

- 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.
- Continue to establish MOAs with the LGUs
- Review, revise and sign MOA with League of Municipalities of the Philippines
- Conduct planning meetings to discuss the study tour
- Organize and conduct the study tour for selected policymakers

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

There was no activity on IR 4 during this period.

4.1 Strengthen MPAs in select VIP and Danajon Bank sites

No activities were conducted during this reporting period.

4.2 Strengthen Bantay Dagat Networks in select VIP sites

No activities were conducted during this reporting period.

4.3 Strengthen fisheries management in LIG

No activities were conducted during this reporting period.

IR 4 Priorities for next period (January 1 to March 31, 2012)

The following activities are planned for the next three months:

- Initiate coordination with VIP MPA Network Chairs (MPA and Enforcement Networks) and Secretariats (Provincial Government Environment and Natural Resources Office for Batangas and Provincial Agriculture Office for Oriental Mindoro) and BEMO in Bohol to assess MPA management effectiveness using the MEAT tools
- Conduct initial coordination with VIP Bantay Dagat Network to improve coordination among these groups on enforcement actions
- Conduct initial meetings 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

There was no activity on IR 5 during this period.

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

No activities were conducted during this reporting period.

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

No activities were conducted during this reporting period.

IR 5 Priorities for next period (January 1 to March 31, 2012)

The following activities are planned for the next three months:

- Initiate livelihood support-related activities as incentive for conservation in the Danajon and VIP
- Conduct coordination meeting with the LGUs to discuss livelihood technical support that the BALANCED-Philippines Project will provided to target beneficiaries and to develop criteria for the selection of beneficiaries for livelihood technical support

III. PROJECT MANAGEMENT

On November 23, 2011 PFPI, CI/P and USAID OH and OEE staff conducted a planning meeting as an initial activity to ensure smooth implementation and operational integration of BALANCED-Philippines activities in lieu of the additional OEE field support. During the meeting, we discussed strategies on how integration will take place operationally; the roles and responsibilities of PFPI and CI/P in implementing specific Project activities; and systems and procedures related to operations, monitoring, reporting, etc. It was also decided that there was a need to: 1) develop integrated criteria for the selection of areas/sites for MPA and Bantay Dagat activities; 2) share Project documents, such as evaluation reports, CI reports and documents related to PHE with USAID; 3) clarify in the BALANCED-Philippines workplan/PDD who will support/fund the follow-on BMS activity; and 4) put back CYP in the BALANCED-Philippines PMP for IR1 as per the initial PDD. It was also agreed that there would be a Project orientation meeting for all BALANCED-Philippines staff after everyone is hired with the goal of ensuring there is a common understanding of the Project, review the Project's conceptual framework, discuss and plan for ensuring integration will happen operationally, and conduct a team building activity.

Since this meeting CI/ P began officially collaborating closely with URI CRC and PFPI to begin planning for implementation of the IR3, 4 and 5 activities as part of the CI/P scope of work. The main focus for CI/P during this reporting period was on building relationships and establishing coordination and integration mechanisms for CI/P and PFPI as key implementers of the project. CI/P and PFPI agreed to integrate work plans and identify key action points that would demonstrate not only the operationalization of the integrated PHE approach in the field but also to reinforce the partnership between the project implementers.

Key management/Project coordination activities scheduled for next reporting period include the following:

- BALANCED-Philippines Project Staff Orientation – scheduled for January 5 to 7, 2012 – CI/P will work with PFPI on the BALANCED-Philippines Orientation and Action Planning with CI/P, PFPI and USAID representatives. The activity will provide an opportunity for both organizations to understand the Project and improve synergies through joint action planning and conceptual discussions. Key CI/P and PFPI staff will work together in facilitating the team building exercises, PHE conceptual discussions and integrated planning. One expected key output of the activity is that both organizations will agree upon the BALANCED-Philippines Project conceptual framework. This common awareness of the Project framework is critical for a synergized Project implementation especially in the field sites.
- BALANCED-Philippines Study Tour Planning – Both CI/P and PFPI will begin planning the program and itinerary for BALANCED Study Tour tentatively scheduled to take place in March 2012. Key LGU executives and/or decision-makers along with CI/P BALANCED staff are expected to participate in the activity.

- VIP BALANCED-Philippines Planning – scheduled for January 17, 2012 – Although both PFPI and CI/P will be working together throughout the implementation of the Project, the integration is also imperative in the Verde Island Passage where CI/P and PFPI are both present. Key technical staff and field coordinators from CI/P will participate in a knowledge sharing on FP/RH and CRM (MPA networks and enforcement) concepts and methodologies, which will be followed by the strategic and action-planning for the VIP.

Table 1: Activity status to date (February 1 to December 31, 2011)

Biogeographic Representation	Province	Municipality (clusters)	New (# brgs)	Maint. (# brgs)	Population 2007	Unmet FP Need (new) ²⁵	Unmet Need (Main)	#TOT Part.	MOAs signed ²⁶ (Y/N)	# CBDs trained	# RHU trained	# PEs trained
						(# WRA ²⁷)						
Verde Island Passage (VIP)	Batangas	Calatagan	25		51,544	4,510		9		20	14	46
		Tingloy	15		18,548	1,623						
		Lobo	26		37,798	3,307		5		27	24	27
		Mabini	34		40,629	3,555		5		35	8	40
		Nasugbu	42		113,926	9,969		5		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				
		Abra de Ilog		9	25,152		2,201	9	Y		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

²⁵ 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

²⁶ 3 MOAs signed in the first quarter (Tubigon, Inopacan & Bato); 4 MOAs signed in the 2nd quarter (Getafe, Hindang, Matalom & Lubang); 6 MOAs signed in the 3rd quarter (Bien Unido, Inabanga, Ubay, Hilongos, Looc and Abra de Ilog); and 1 MOA signed in the 4th 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.

²⁷ WRA - women of reproductive age

Biogeographic Representation	Province	Municipality (clusters)	New (# brgs)	Maint. (# brgs)	Population 2007	Unmet FP Need (new) ²⁵	Unmet Need (Main)	#TOT Part.	MOAs signed ²⁶ (Y/N)	# CBDs trained	# RHU trained	# PEs trained
						(# WRA ²⁷)						
		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	11	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				4	
		Tubigon		34	44,434		3,888		Y	28	6	48
		Ubay		44	65,900		5,766		Y	37	29	51
	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
TOTAL	5 provinces	29 municipalities	221	511	1,031,549	35,264	54,996	62	14	530	300	831

III. Performance Management and Reporting Plan

BALANCED-Philippines Project Indicators and Expected Results

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	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	The number of people counseled by the peer educators is now part of the data being collected by the RHU. However, the RHUs do not conduct monitoring, collect/consolidate data and prepare reports regularly, thus, the reports that the project gather are not on time as well. To address this, the project field staff will collect the number of people counseled by the peer educators during mentoring and meeting sessions. BALANCED Philippines staff will also discuss and think of other strategies to address this and other report gathering-related concerns.

1.2 Contraceptive Prevalence Rate (<i>USAID/OH standard indicator 3</i>)	N/A	Baseline data collected	Increasing	- ²⁸	We will verify RHU data and provide during next reporting period.
1.3 Number of couple years protection (<i>USAID/OH standard indicator 3</i>)		N/A	17,160	79,125	
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)	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	36	We will try to schedule the training ahead of time so that the training will be included in the LGUs' and the master trainers' calendar of activities.
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%	Data collection is ongoing; percentage is based on the data collected in 6 municipalities. Data that will be collected after this reporting period will be included/considered for the next quarter report.
1.7 Number of USG-assisted service delivery points providing FP services (<i>BALANCED field indicator</i>)	495	450 ²⁹	233	107 ³⁰	On-target

²⁸ Baseline data collected; available data from the RHUs for this reporting period are incomplete.

²⁹ 26 RHUs + 424 CBDs

³⁰ 1 RHU + 106 CBDs

	1.8 Number of target organizations incorporating PHE tools, protocols, etc. into their work (BALANCED core indicator)	15	23 ³¹	20	10 ³²	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)	75,000	2,379	100,000	107,694	
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	
	3.2 Number of local policy reforms/plans with integrated PHE initiated (BALANCED field indicator)	10	4	10	-	
	3.3 Number of National/regional Forums where PHE approach highlighted		N/A	1	-	
IR 4: Improved governance capacities of provincial and	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	-	

³¹ 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

³² 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.

municipal LGUs in the VIP and Danajon Bank marine ecosystems	4.2 Number of hectares of biologically significant marine areas under improved management disaggregated by area of MPAs versus area of municipal waters ¹ (<i>Standard USAID bio-diversity indicator</i>)		N/A	Municipal waters: 50,000ha. MPAs: 400ha.	-	
	4.3 Number of local institutions strengthened on NRM ² (<i>Standard USAID bio-diversity indicator</i>)		N/A	14 (MPAs 10, BD 4)	-	
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 ³		N/A	Target set in Year 1 ³³	-	
	5.2 Number of people with increased economic benefits derived from sustainable fisheries management		N/A	No target but tracked ³⁴	-	
	5.3 Number of people benefiting from conservation incentive-based enterprises		N/A	Target set in Year 1 ³⁵	-	

³³ 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).

³⁴ 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.

³⁵ *** 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)

