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

Year 5 Workplan

July 1, 2012 – September 16, 2013

Revised and submitted June 20, 2012

Approved June 30, 2012

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

Implemented by:

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

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 University of Rhode Island Coastal Resources Center in collaboration with PATH Foundation Philippines, Inc. and Conservation International.

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ACRONYMS LIST

ANE	Asia and Near East
AOTR	Agreement Officer's Technical Representative
BALANCED	Building Actors and Leaders for Advancing Community Excellence in Development
BINP	Bwindi Impenetrable National Park
BMCT	Bwindi Mgahinga Conservation Trust
BMS	Behavior Monitoring Survey
CA	Collaborating Agency
CBD	Community Based Distributor
CBFP	Community-based family planning
CCP	Center for Communication Programs
CI	Conservation International
CI/P	Conservation International Philippines
COMACO	Community Markets for Conservation
CRC	Coastal Resources Center
CRM	Coastal Resources Management
CTI	Coral Triangle Initiative
CTPH	Conservation Through Public Health
DKT	DKT International
EAC	East Africa Consultant
ECO	Ecological Christian Organization
ECSP	Environmental Change and Security Project
FHI	Family Health International
FON	Friends of the Nation
FP	Family Planning
GH	Global Health
HOPE-LVB	Health of People and Environment in the Lake Victoria Basin
ICM	Integrated Coastal Management
IEC	Information, Education and Communication
IFHP	Integrated Family Health Program
IMAP	Integrated Midwives Association of the Philippines
IPOPCORM	Integrated Population and Coastal Resources Management
IR	Intermediate Result
JHU	John Hopkins University
JHU-CCP	John Hopkins University, Center for Communication Program
K4Health	Knowledge for Health
KM	Knowledge Management

LGU	Local Government Unit
LLG	Local level government
LMP	League of Municipalities of the Philippines
LVB	Lake Victoria Basin
M4RH	Mobiles for Reproductive Health
MDG	Millennium Development Goals
MEAT	MPA Management Effectiveness Assessment Tool
MGNP	Mgahinga Gorilla National Park
MOH	Ministry of Health
MOU	Memorandum of Understanding
MPA	Marine Protected Areas
M&E	Monitoring & Evaluation
NGO	Non-Governmental Organization
NRM	Natural Resources Management
OEECC	Office of Environment, Energy and Climate Change
OH	Office of Health
OPRH	Office of Population and Reproductive Health
PE	Peer Educator
PEPFAR	President's Emergency Plan for AIDS Relief
PFPI	PATH Foundation Philippines Inc.
PHE	Population, Health and Environment
PMP	Performance Monitoring Plan
PNG	Papua New Guinea
PO	People's Organization
PRB	Population Reference Bureau
PRISM	Private Sector Mobilization for Health Project (Philippines)
PSI	Population Services International
PTAL	PHE Technical Assistance Lead
RH	Reproductive Health
RH/FP	Reproductive Health/Family Planning
RHU	Rural Health Unit
RSS	Real Simple Syndication
SACCO	Savings and Credit Cooperative
SANAPA	Saadani National Park
SO	Strategic Objective
SOTA	State-Of-The-Art
SSE-PHE	South-to-South Exchange PHE
TCMP	Tanzania Coastal Management Partnership
TKCP	Tree Kangaroo Conservation Program
TNC	The Nature Conservancy
TOT	Training of Trainers

UNDP	United Nations Development Program
URI	University of Rhode Island
USAID	United States Agency for International Development
USAID/GH	United States Agency for International Development/Global Health
VEDCO	Volunteer Efforts For Development Concerns
VIP	Verde Island Passage
WCS	Wildlife Conservation Society
WPZ	Woodland Park Zoo
WWC-ECSP	Woodrow Wilson Center, Environmental Change and Security Program
WWF	World Wildlife Fund
YPE	Youth Peer Educator
YUS LLG	Yopono, Uruwa and Som Local Level Government

OVERVIEW

CORE WORKPLAN ACTIVITIES YEAR 5: July 1, 2012 to September 16, 2013

IR 1	<ul style="list-style-type: none"> 1.1 Build capacity of champion NGOs in Africa on PHE 1.2 Provide on-going support to BALANCED trainees and PHE practitioners 1.3 Provide technical support to HOPE-LVB 	Point person: Linda Bruce	PRH
IR 2	<ul style="list-style-type: none"> 2.1 Identify, document and synthesize knowledge 2.2 Organize existing and new knowledge for PHE website 2.3 Share knowledge within the PHE and broader Community 2.4 Project Close out 	Point person: Lesley Squillante	PRH
IR 3	<ul style="list-style-type: none"> 3.1 Wrap up PHE activities in Tanzania 3.2 Scale-up PHE activities in the Philippines (Mission Buy-in) 3.3 Provide technical support to WCS Zambia seed grant activities 3.4 Provide seed grant and technical support to Woodland Park Zoo for TKCP Project in PNG 3.5 Provide seed grant and technical support to Volunteer Efforts for Development Concerns in Uganda 3.6 Provide seed grant and technical support to Bwindi Mgahinga Conservation Trust in Uganda 3.7 Implement recommendations from Glacial Melt Study (Asia Bureau Buy-in) 	Point Person: Joan Castro	PRH; USAID Philippines Buy-in Asia Bureau Buy-In

Budget Allocation by Intermediate Result

By Intermediate Result:	July 1, 2012 – September 16, 2013	July 1, 2012 – September 16, 2013	July 1, 2012 – September 16,2013 Total Budget All Sources
	Year 5 Budget	Cost Share	
IR 1. Capacity built for PHE implementation	\$524,447	\$159,577	\$684,024
IR 2. PHE knowledge and tools developed, synthesized, shared	\$692,541		\$492,541
IR 3. Results-oriented PHE field activities implemented in areas of high biodiversity	\$183,012		\$183,012
Total by IR	\$1,400,000	\$159,577	\$1,559,577

Budget Allocation by Object Class Category

By Object Class Category	July 1, 2012 – September 16, 2013	July 1, 2012 – September 16, 2013	July 1, 2012 – September 16, 2013 Total Budget All Sources
	Year 5 Budget	Cost Share	
Personnel	246,612	79,260	325,953
Fringe	92,681	23,778	116,459
Consultants	71,562		71,562
Other direct costs	110,355		110,355
Subcontracts	585,991	14,293	600,284
Domestic Travel	21,000		21,000
Foreign Travel	35,840		35,840
Total Direct Costs	1,164,041	117,331	1,281,373
Indirect	235,959	42,246	278,205
Total by Object Class Category	1,400,000	159,577	1,559,577

PROJECT SUMMARY

As part of its efforts to support and expand Population, Health, and Environment (PHE) programs worldwide, the United States Agency for International Development (USAID) Bureau for Global Health (USAID/GH) awarded the new 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) on September 17, 2008. The BALANCED Project is supported by a highly qualified team of international partners that in addition to URI-CRC includes PATH Foundation Philippines, Inc. (PFPI) and Conservation International (CI). The five-year BALANCED Project has a ceiling of \$5 million in core funding from the USAID/GH Office of Population and Reproductive Health (OPRH) and an additional \$2.5 million ceiling for Mission Buy-ins. To date, BALANCED Buy-ins total US\$ 1,581,738.

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

- IR 1 – Capacity built for integrated PHE implementation
- IR 2 – PHE knowledge and tools developed, organized, synthesized and shared
- IR 3 – Results-oriented PHE field activities implemented in areas of high biodiversity

With the ultimate vision in mind of, *“cadres of competent PHE champions and practitioners from Africa and Asia promoting the comparative advantage of approaches that simultaneously support family planning and conservation, are working collaboratively with other groups globally to apply PHE knowledge and state of the art (SOTA) practices in biodiversity-rich areas and actively documenting and sharing evidence of value-added and better practices of PHE using 21st century knowledge management and learning tools,”* the final year of the BALANCED Project will focus on continuing to build the capacity of PHE champions in Africa and Asia, gathering evidence and promoting the benefits of PHE, finalizing and disseminating the latest Knowledge Management (KM) tools, refining promising PHE models and transferring PHE activities and advocacy over to the champions who we have cultivated over the past four years.

Toward that end, BALANCED will provide one last capacity building push to bring our newest PHE practitioners and champion organizations in BALANCED focus countries up to the point where they can successfully implement and advocate for PHE in their organizations and regions. We will also engage our key PHE champions to share PHE best practices and transfer PHE knowledge and skills to others in Africa during our PHE Africa Regional workshop, which will coincide with our formal close-out and transfer of our PHE activities in Tanzania. We will also finish two key tools that will be useful for PHE practitioners as they plan for and implement PHE activities. Two of our key PHE projects have been in Tanzania (through Core funds) and in the Philippines (through Mission Buy-in funds). We will conduct final baseline surveys in these two countries to measure the impact of our PHE

activities there and extract substantiated benefits of this integrated approach that can be shared with donors, international organizations and local groups considering integrated approaches. In the field, we will finalize our seed grant activities and assist our partners to develop and implement a sustainable plan that enables them to continue to implement and scale up the integrated model that was tested as a result of the seed grant funding and technical assistance. Additionally, the remaining funds from our Asia Bureau Buy-in will be used to develop a tool for program planners working on glacier melt issues to consider other human/demographic factors that should influence program/project designs—a ground-breaking tool for addressing the emerging issue of glacier melt and climate change. Finally, as BALANCED comes to a close, we will finalize case studies and stories about our Project activities for “telling our story” and commence with close-up preparations. A detailed description of BALANCED Year 5 activities follows.

IR 1: Capacity built for integrated PHE implementation

Total Year 5 IR 1 Activities	\$524,447
1.1 Build capacity of champion NGOs in Africa on PHE	
1.2 Provide on-going support to BALANCED trainees and PHE practitioners	
1.3 Provide technical support to the HOPE-LVB Project	

Capacity building is one of the key elements in achieving our vision of building “*Cadres of competent PHE champions and practitioners from Africa and Asia [that] are promoting the comparative advantage of approaches that simultaneously support family planning and conservation....*” The BALANCED Project’s capacity building strategy has always endorsed two key state-of-the art training approaches for building cadres of competent PHE practitioners: 1) the dual capacity building training approach where participants simultaneously acquire skills in PHE training and delivery while learning PHE content, and 2) a training continuum that includes capacity development at the pre-learning, intra- (during) learning and post-learning periods. This approach has helped to build local institutional capacity to implement and advocate for integrated PHE activities.

During Year 5, BALANCED will continue to provide post-training support to the last seed grant recipients in Uganda and Papua New Guinea (PNG) to help transfer skills and know-how to effectively integrate family planning and health into their conservation activities. However, we will transition to local trainees the responsibility for training their counterparts on PHE. Toward that end, we will conduct a PHE Africa Regional course that will draw on local BALANCED trainees and experienced PHE practitioners to assist in transferring to their African counterparts the skills for promoting and implementing PHE in their countries. The regional workshop will also share critical lessons learned and “promising” practices that can be used to further PHE in Africa, where the need for family planning is highest in the rich biodiverse regions of this continent.

1.1 Build capacity of champion NGOs in Africa on PHE

New Activity	Activity leader: Linda Bruce
Activity Start Date: July 1, 2012	Activity End Date: March 31, 2013

RATIONALE FOR ACTIVITY

In June 2012, CRC and CI are implementing a three-week course on PHE and climate change, entitled, “Building Coastal Community Resilience: Population, Health and Environment Dimensions”, in order to spur interest in PHE and build field practitioner capacity on integrated PHE approaches. The BALANCED Project is supporting the participation of two key PHE champions to attend the course – one from Tanzania and another from Uganda.

Building on this course, BALANCED plans to adapt the June 2012 course curriculum in order to design and host a February 2013 PHE Africa Regional Workshop for non-governmental organizations (NGOs) and institutions already implementing PHE or interested in implementing PHE projects in Africa. This course will serve to show case PHE projects in Africa, share lessons learned and state-of-the-art (SOTA) and/or promising tools and approaches. Two BALANCED-supported participants who attend the June 2012 course will serve as co-designers and co-trainers for PHE Africa Regional. Several PHE champions and former BALANCED trainees will also serve as resource people in the workshop.

ACTIVITY SUMMARY

The ten-day intensive PHE Africa Regional course for professionals working in population, health and/or environment in Africa will be designed so that “[existing] *cadres of competent PHE practitioners from Africa are promoting PHE approaches that simultaneously support family planning and conservation and[how to]work collaboratively with other groups to apply PHE knowledge and state-of-the art practices....*”. The course will promote advanced thinking, lessons learned and practical tips on PHE implementation based on the PHE experience in Africa over the past 5 years. The sessions will allow for a robust exchange of experiences so that participants learn from each other and the PHE experts/champions/resource people in the group. Many participants will be at different stages of PHE implementation. Therefore, the course will be tailored to participant skill development needs and include opportunities to address individual learning needs, build technical and management skills and provide practical “how-to” necessary for the successful implementation of PHE projects. This will also be an opportunity to share the best SOTA tools and “promising” practices that can be adapted to the local context. At the conclusion of this course, participants will be able to:

- Champion the PHE approach
- Implement proven techniques for building community resilience through integrated programming
- Design integrated PHE issue assessments in areas of high biodiversity

- Develop integrated interventions that address root causes of environmental and social change across PHE sectors
- Apply improved professional skills to conduct their PHE activities

The target audience for the course will be representatives from NGOs and government officials who already include or who want to include PHE in their programs and/or donor-funded projects. A secondary audience is university researchers and students interested in PHE. Teams of participants who live/work in the same place will work on a place-based project throughout the course. By the end of the workshop, participants will have developed for their PHE scenario:

- A conceptual framework and case statement;
- An analysis of PHE issues in their place;
- Proposed integrated PHE interventions and strategy for moving forward (personally and with colleagues) with implementing a PHE project in their home countries; and;
- A commitment to play a PHE leadership role in their place.

The training will be hosted by the BALANCED in-country team in Tanzania. The workshop will be held either in Bagamoyo, where the Tanzania Coastal Management Partnership (TCMP) main office is located, or on Zanzibar. We will compare both options regarding costs, ease of logistical arrangements, and opportunities for field visits. Selected PHE champions and BALANCED trainees—including BALANCED trainees from the Pangani District government—will serve as co-facilitators and resource persons alongside BALANCED staff.

This course uses a fee-based model, whereby participants are requested to pay “tuition” or a “fee” to cover the costs of the training course registration, lodging, meals and travel. CRC has used this fee-based model successfully for over 25 years in its international training courses and hopes it can be successful once again when used for the BALANCED PHE Africa workshop. In contrast to having all costs borne by the agency providing the training, the fee-based model signals a true commitment on the part of the participants and their funding organizations/projects to the training topic at hand—in this case, PHE. The likely scenario is that some participants will be able to absorb all the costs of attending the workshop; others will be able to pay for some portion of the costs; and some will need full support from the Project. We will test this model, which is at best partially income generating, and determine in late fall of 2013 if early indicators from interested applicants are that this is a feasible approach. If we do not attract the kinds of participants we are targeting, we will revisit the fee-based approach and consider alternative financing options, including full Project funding for a much small number of individuals.

Specific technical activities will include:

- Develop workshop design/Agenda (end of August 2012)
- Develop detailed training modules and session plans

- Prepare workshop logistics and training materials
- Deliver 10-day workshop that includes a one to two-day field trip
- Prepare facilitators’ notes/workshop agenda for distribution
- Prepare workshop report with lessons learned

ORGANIZATIONS INVOLVED

Funded partners: PFPI, CRC, CI

Strategic Champion Partners: Pathfinder International, TCMF

KEY OUTPUTS

- Facilitators’ notes/workshop agenda
- Report on PHE Regional Africa workshop

EXPECTED RESULTS AND INDICATORS

Expected results:

- At least 15 representatives from NGOs and government institutions implementing or new to PHE activities have strengthened skills in PHE (1.1)
- At least four BALANCED trainees training others on PHE implementation (2.1)
- Course facilitators’ notes and workshop agenda (2.1)

INDICATOR	YR 5 TARGET
1.1. Number of individuals trained by BALANCED in PHE know-how and SOTA using 21 st century learning tools	15
1.2. Number of participants who received BALANCED training and/or mentoring that are now providing TA to others on PHE	4
2.1 Number of tools, protocols, procedures, systems, methodologies, guides, curricula, or indices with demonstrated programmatic value developed or adapted for country and/or thematic contexts (OPRH IR 2.1)	1

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

New	Activity leader: Joan Castro
Activity Start Date: July 1, 2012	Activity End Date: June 30, 2013

RATIONALE FOR ACTIVITY

Since Project start-up, BALANCED has employed a continuum-style capacity building approach to build local expertise in PHE by providing technical support throughout all the stages of the learning process. Within 48 hours after any “intra-learning” or workshop event, most adults forget up to 50 per cent of what they learned in the training. Therefore, the post-

learning period is critical for building sustainable on-the-job capacity, improved project outcomes and “*competent PHE champions and practitioners.*” Toward this end, BALANCED staff provides technical support and mentoring to BALANCED trainees who are implementing PHE activities in their countries. Continuous repetition, learning, mentoring, and monthly support, especially to organizations working in remote locations, has been provided throughout the Project to ensure practitioners are truly capable of designing and implementing integrated PHE projects and to promote ownership in the PHE approach.

Over the past two years, we have narrowed our post-training support to PHE practitioners working in BALANCED focus countries in order to truly strengthen their capacity to sustain PHE efforts beyond the BALANCED Project and serve as leaders, champions and purveyors of technical assistance to other organizations in their countries interested in the PHE approach.

During Year 5, all capacity building and post-training support will focus on handing over PHE implementation and training to BALANCED PHE champion organizations and practitioners as a way of ensuring that PHE will be sustained after the Project support ends. Post-training support will be provided only to implementing institutions and governments in BALANCED focus countries—Tanzania, Ethiopia, and Ghana—and to select PHE South-to-South Exchange (SSE-PHE) participants who are not in BALANCED focus countries, but who, with minimal support, can serve as a strong PHE resource in their country. Please note that post-training support to seed grant recipients is covered in the IR 3 section of this workplan.

ACTIVITY SUMMARY

The Year 5 post-training support plan includes technical support to organizations that received BALANCED assistance in Years 3 and 4 and which continue to implement their PHE activities. In Africa, this includes TCMP and local governments in Tanzania; PHE Ethiopia and its partners in Ethiopia; and CRC’s coastal and fisheries project in Ghana, including their partner Friends of the Nation (FON) and others; and CI in PNG.

With the Project vision in mind, the post-training activities planned for this final year will include the support and mentoring needed to enable the PHE champions identified, trained and mentored by BALANCED during the life of the Project to plan, implement and monitor effective PHE activities, sustain achievements made with BALANCED support, promote and advocate for the wider use of integrated PHE approaches and to serve as a PHE technical resource to others in their organization and country. As part of this support, select BALANCED trainees will be given opportunities to train their regional peer and colleagues on the PHE approach. Post-training support to seed grant recipients is described under IR 3 of this workplan.

For continuity sake, the BALANCED East Africa Consultant (EAC) will continue to assist East African NGOs and governments to put in place the capacity and mechanism needed to sustain PHE activities beyond the BALANCED Project. Specific activities will include, but are not limited to, providing continuing assistance to:

- USAID PHE Fellow based in Ethiopia on PHE implementation and monitoring and evaluation
- USAID PHE Fellow based in Mozambique on PHE implementation
- USAID PHE Fellow based in Uganda
- In coordination with USAID PHE fellow, PHE Ethiopia Consortium on monitoring and use of PHE indicators and use of a web-based system for systematically collecting monitoring and evaluation (M&E) data from PHE consortium members
- NGOs currently funded and working in PHE in four BALANCED focus countries:
 - Ethiopia: at least two organizations
 - Tanzania: at least four institutions
 - Ghana: at least three institutions
 - PNG: at least one institution

ORGANIZATIONS INVOLVED

Funded partners: CRC, PFPI, CI

Strategic champion partners: TCMP, PHE Ethiopia, CI-PNG, and local governments in above-mentioned countries

KEY OUTPUTS

- Conservation and rural development organizations from three USAID Family Planning Tier 1 countries receiving PHE technical assistance support
- Coral Triangle Initiative (CTI) focus country receiving PHE technical assistance support
- Trip reports on technical assistance support provided by BALANCED team members

EXPECTED RESULTS AND INDICATORS

Expected results:

- At least two PHE BALANCED trainees providing PHE technical assistance to others in-country (1.2)
- At least seven technical support interventions provided to eight NGO and/or government institutions who participated in BALANCED capacity building events receiving post training support (1.4)

INDICATOR	YR 5 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	2
1.4a Number of technical support interventions provided by BALANCED to Missions and organizations to implement PHE within their programs (PRH 3.2)	7

1.3 Provide technical support to the HOPE-LVB Project

On-going	Activity leader: Elin Torell
Activity Start: July 1, 2012	Activity End: June 30, 2013

RATIONALE FOR ACTIVITY

The John D. and Catherine T. MacArthur Foundation and the David and Lucile Packard Foundation recently awarded Pathfinder International funding to work with the Ecological Christian Organization (ECO), Conservation Through Public Health (CTPH) and OSIENALA (Friends of Lake Victoria) to implement the Health of People and Environment in the Lake Victoria Basin (HOPE-LVB) Project. Under this project, partners will develop and test a set of coordinated and scalable activities in Uganda and Kenya that addresses the interconnections between human life and the Lake Victoria Basin (LVB) ecosystem.

As part of our support to the HOPE-LVB Project, BALANCED is working with Partners in Expanding Health Quality and Access (ExpandNet), an NGO specializing in designing for scale-up, to help Pathfinder and partners design their project with scale-up in mind. Working with ExpandNet, Pathfinder, ECO, CTPH, and OSIENALA will develop and test two models of integrated interventions in Uganda and Kenya that have the potential for sustainability and can be scaled-up to other districts in the regions, with the possibility of expanded relevance and replication for the other countries in the LVB region.

During Year 4, ExpandNet provided technical support to the HOPE-LVB Project to design project interventions and help ensure that the PHE interventions chosen for implementation are appropriate to the settings, implemented in sustainable ways, and designed from the start to accommodate future scaling-up to surrounding areas and more generally in the participating countries. Additionally, BALANCED trained HOPE-LVB project staff on PHE Program Design and provided technical assistance on the development of information, education, and communication (IEC) messages for communication materials and training activities. We also assisted HOPE-LVB partners to begin designing an integrated training curriculum particular to their project and capacity building needs.

During Year 5, BALANCED will continue to provide technical support to HOPE-LVB project through interventions and support from ExpandNet and BALANCED technical staff.

ACTIVITY SUMMARY

BALANCED will continue to partner with ExpandNet to enable them to provide technical support to HOPE-LVB partners on PHE implementation, scale-up and M&E during the second year of their Project. ExpandNet's activities during Year 5 will serve two main objectives: (1) to continue providing technical guidance to Pathfinder International and the implementing partners in the design and implementation of a scalable PHE pilot project in Uganda and Kenya; and (2) to build the capacity of the implementing organizations (Pathfinder, ECO and Osiendela) to serve as resource organizations for scaling-up the project activities. At the same time, BALANCED staff will also continue to help ExpandNet incorporate lessons learned from other PHE projects in Africa and Asia.

USAID/OPRH awarded the BALANCED Project additional funding to continue to provide technical assistance support to the partners implementing the HOPE-LVB project. As part of this support, BALANCED will provide both hands on and virtual technical support to Pathfinder International and its project partners on behavior change communication, curriculum development, and/or other topics that HOPE-LVB identifies as needed for successful implementation of their project. Three hands-on visits are budgeted for training or mentoring, and sufficient staff time has been allotted to provide on-going virtual support. All technical support will be coordinated with Pathfinder, Expandnet and PRB to ensure that we are providing a coordinated technical assistance package.

ORGANIZATIONS INVOLVED

Funded partners: CRC, PFPI

Strategic champion partners: Pathfinder International, CTPH, ECO, OSIENALA, Partners in Expanding Health Quality and Access/ExpandNet

KEY OUTPUTS

- Reports on BALANCED technical support provided to HOPE-LVB
- Reports on ExpandNet technical assistance to HOPE-LVB

EXPECTED RESULTS AND INDICATORS

Expected results:

- Three HOPE-LVB partners implementing BALANCED tools, protocols, etc.(SO-1)
- At least two PHE BALANCED trainees providing PHE technical assistance to others in-country (1.2)
- At least six representatives from HOPE-LVB project receiving post-training support (1.4)

INDICATOR	YR 5 TARGET
SO-1: Number of target organizations incorporating PHE tools, protocols, etc. into their work (PRH 1.1)	3
1.2 Number of participants who received BALANCED training and/or mentoring that are now providing training or TA to others on PHE implementation	2
1.4a. Number of technical support interventions provided by BALANCED to Missions and to organizations to implement PHE within their programs (PRH 3.2)	3

IR 2: PHE knowledge and tools developed, organized, synthesized and shared

Total Year 5 IR 2 Activities:	\$692,541
2.1 Identify, document, and synthesize knowledge	
2.2 Organize existing and new knowledge for PHE website	
2.3 Share knowledge within the PHE and broader community	
2.4 Project Close out	

During Year 4, the Project honed its knowledge management (KM) activities and concentrated efforts on producing and disseminating PHE implementation tools, in order to share PHE best practices in the field. In that vein, the Project finalized, published and disseminated several PHE training and implementation tools, such as the Community-based Distributor (CBD) and Peer Educator (PE) Training-of-Trainers manual, individual PHE CBD and PHE PE training guides, and a combined CBD and PE Reference Guide. At the same time, the Project continued to promote the benefits of PHE approaches and highlighted several PHE champion stories and successful projects, particularly in our focal countries of Ethiopia, Ghana, Kenya, the Philippines, Tanzania, Uganda and Zambia. We published an e-newsletter on how PHE approaches contribute to the Millennium Development Goals (MDGs) and disseminated it widely within the international community to help broaden the discussion of development effectiveness and the role that integrated development approaches such as the PHE approach can play in helping make better progress toward these MDGs.

Building on these efforts, in Year 5 the BALANCED team will produce a range of end-of-Project lessons learned and best practices resources that draw upon and synthesize our capacity building and field implementation efforts over the previous years. The proposed products will range from four-to-10 page overviews for general public audiences, such as FOCUS pieces with the Woodrow Wilson Center Environmental Change and Security Program (WWC/ECSP), to more detailed, technical lessons learned on scaling-up PHE approaches that are targeted at more seasoned PHE practitioners and policymakers. In line with our overall BALANCED Project goal of promoting and advancing PHE approaches, we will rely on existing mechanisms such as the PHE Toolkit and several listservs, as well as new avenues, to reach a wide audience with our successes, to promote PHE tools and best practices, and to help refine the practice of PHE approaches within the PHE community and among new audiences.

2.1 Identify, document, and synthesize knowledge

On-going	Activity leader: Lesley Squillante
Activity Start Date: July 1, 2012	Activity End Date: August 30, 2013

RATIONALE FOR ACTIVITY

Since the beginning, the BALANCED Project has highlighted the critical role of the KM activities as the connection or nexus between the capacity building and field-based PHE implementation components of the Project. In Year 5, proposed KM activities will continue to rely on the collaboration and collective critical thinking of all BALANCED Project staff to analyze, synthesize and produce high-quality, technical products that can help advance and promote PHE approaches as effective development practices.

During Year 4 (up to May 2012), the Project adapted, field-vetted and finalized three essential PHE training manuals and one reference guide on CBD and PE systems. In addition, the team also submitted peer-reviewed articles for journal publication on a cross-country (Philippines and Tanzania) comparative Behavior Monitoring Survey (BMS), and on research findings (Year 3 research) on PHE in the Philippines. At the end of Year 4, BALANCED is finalizing the IEC Materials Development Training Guide and is beginning the development of a field implementation tool, called the *PHE Field Implementation: A Simple PHE Practitioner Guide*. The guide's overarching goal and proposed outline were based on several inputs: results of a survey conducted in Year 3 to identify what PHE practitioners believe are gaps in the tools they need to do their work, BALANCED staff field experience, and discussions with representatives of the PHE community.

For more general audiences, the KM staff continued to identify and produce PHE champion and success stories from the field and shared these and other important PHE-relevant news and information through additional communications venues, such as InterAction and other development NGO listserves, in an effort to expand our reach to new audiences.

ACTIVITY SUMMARY

In the final year of the Project, BALANCED will tell the story of our most promising PHE best practices in East Africa and Asia through a series of targeted documents including tools, lessons learned overviews, case studies, and PHE champion syntheses. These documents will be written differently depending on the target audiences. For example, in close collaboration with WWC ECSP we will produce two brief (eight to ten - page) FOCUS pieces¹ (Zambia, PNG) aimed at the general public and those new to PHE. As well, we will produce case studies and lessons learned documents for more experienced PHE practitioners and others more familiar with PHE.

As mentioned above, BALANCED will finalize and publish two new tools. One is a very simple resource guide—“*PHE Field Implementation: A Simple PHE Practitioner Guide*”—that includes PHE basic resources and “how to” tips for those implementing PHE activities and projects. This simple guide will be drafted by the end of August 2012, and vetted within the PHE community. After revisions based on feedback, we will finalize and disseminate the guide prior to the PHE Regional Africa course scheduled for February 2013. Several aspects of tools proposed in the previous Year 4 workplan submitted in June 2011 will be incorporated into this “how to” guide. This includes simple M&E guidance, tips for talking to local stakeholders about PHE, etc. The second tool is a “how to” guide for conducting

¹ A FOCUS piece on Tanzania is planned for production in Year 4 and dissemination in Year 5.

behavior monitoring surveys in the field, based on the process, survey questions, etc. used for conducting a BMS in Tanzania. A first draft will be ready for the first quarter of Year 5, following by field testing of the tool, revisions, and a final version of the tool ready for dissemination in March 2013.

In terms of lessons learned from the BALANCED Project and our partners, we will produce two documents examining important aspects of the Project—seed grants and scaling-up PHE—both of which have played a significant role in how we have reached our overall Project objectives. In these documents we will describe our rationale and experience with seed grants and scaling-up and make recommendations for the target audience—future PHE implementers. An internal draft of the document on seed grants will be drafted as each seed grant ends. Information from these internal drafts will be compiled and lessons learned extracted and written up in a summary final product which will be vetted and finalized by June 2013. The document on PHE scale-up will draw on the BALANCED Project experience, including that of its BALANCED-Philippines and ExpandNet work, as well as from the experience of collaborating PHE implementers such as WWF. These documents will be disseminated widely at conferences, workshops and on the PHE Toolkit and BALANCED website.

On all KM products, the team will confer with selected Advisory Committee members in cases where their individual or collective expertise could be valuable.

The team will also conduct an end-of-Project survey of targeted FP/RH and coastal resources management (CRM) behaviors in the sites of the BALANCED-Philippines (Mission Buy-in) project. Results of this survey will be compared to the baseline survey completed in the same sites in 2011, and will assess the degree of change in targeted behaviors for the Project's field supported activities.

Specific activities will include:

- Produce a first draft of the “*PHE Field Implementation: A Simple PHE Practitioner Guide*” by August 2012; and vet the draft with key PHE experts and incorporate comments for final publication in January 2013 – Janet, Linda, Joan
- Draft, field test, and produce “*Conducting PHE Behavior Monitoring Surveys: A Practical How-To Tool*” that builds off the BMS process, protocols, survey questions, etc. of the Tanzania BMS. First draft July 2012 with final publication in November 2012 – Elin, Emilia Myers (BALANCED intern)
- Draft a tool for use in designing USAID projects that take into consideration the non-environmental stressors that increase community vulnerability to the impacts of glacier melt due to climate change—drafted, field-tested, vetted by USAID Mission and regional NGO(s), etc. (exact audience TBD). It is anticipated that the tool will be completed by January 2013 – Lesley (see Activity 3.7)
- Produce a draft FOCUS article on PHE efforts in Zambia, in collaboration with Wildlife Conservation Society (WCS)/Zambia and WWC-ECSP in August 2012. Final

publication is scheduled for December 2012 – Linda, Dale Lewis (Zambia), Ricky, in collaboration with Meaghan Parker at WWC-ECSP

- Produce a FOCUS article on PHE efforts in PNG, in collaboration with Woodland Park Zoo (WPZ) and WWC-ECSP in April 2013. Final publication is scheduled for June 2013 – Janet, Joan, in collaboration with Lisa Dabek (WPZ) and Meaghan Parker at WWC-ECSP
- Produce a lessons learned document on the BALANCED Project experience implementing seed grants in three to four countries and publish recommendations for future seed grant programming by July 2013 – Joan, Ricky, Linda
- Produce a lessons learned document on PHE scale-up, drawing on the experiences of the BALANCED Project and collaborating PHE implementers, and including experiences from BALANCED-Philippines, ExpandNet, WWF, other PHE organizations by June 30, 2013 – Janet, Elin, Joan
- Publish final Tanzania BMS report with survey findings in March 2013 – Elin
- Prepare article on the Tanzania BMS comparing data from the 2009 and 2012 surveys for submission to peer reviewed journal for publication in June 2013² – Elin
- Complete survey field data collection, finalize the text and data analysis of the second phase of the Philippines BMS survey by August 2013 in preparation for submission to a peer reviewed journal³ – Pollnac, Crawford
- Identify and craft stories that highlight successful PHE projects and/or “champions” from the field and distribute via the New Security Beat blog, videos, etc. – Janet, Lesley, Joan
- Provide updates for Advisory Committee members at least semi-annually – Linda

ORGANIZATIONS INVOLVED

Funded partners: CRC in consultation with PFPI and CI on all activities

Collaborative partners: Population Reference Bureau (PRB); WWF-US, WWC-ECSP, selected Advisory Committee members on case-by-case basis

KEY OUTPUTS

Articles/Stories

- Two articles prepared for submission to peer-reviewed journals
- Two FOCUS articles – Zambia, PNG
- Two lessons learned documents – one on PHE scale-up, one on lessons learned from implementing PHE seed grants and disseminate in final three months of Project and at end-of-Project conference

² Due to the usually lengthy process of getting articles in press, it is unlikely the article will be published before the end of the Project

³ Due to the usually lengthy process of getting articles in press, it is unlikely the article will be published before the end of the Project

- BMS end-line reports from Tanzania and the Philippines
- One to two champion stories (individuals or projects) – only as they present themselves to the team (i.e., a responsive vs. proactive effort)

Tools

- PHE Field Practitioner Guide
- Conducting PHE Behavior Monitoring Surveys: A Practical How-To Tool
- Tool that integrates P, H and E factors in USAID program designs in countries facing impacts glacier melt from climate change (TBD, depending approval of Mary Melynk see Activity 3.7)

EXPECTED RESULTS AND INDICATORS

Expected Results:

- three tools, protocols, guides, etc. made publicly available (2.1)
- six or more success stories, technical articles, etc. published and disseminated (two lessons learned documents , two FOCUS articles; two BMS reports (2.2)

INDICATOR	YR 5 TARGET
2.1 Tools, protocols, procedures, systems, methodologies, guides, curricula, or indices with demonstrated programmatic value developed or adapted for country and/or thematic contexts (PRH IR 2.1)	3
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)	6
2.2b. Number of peer reviewed articles and research studies	TBD

2.2 Organize existing and new knowledge for PHE website

On-going	Activity leader: Lesley Squillante
Activity Start Date: July 1, 2012	Activity End Date: June 30, 2013

RATIONALE FOR ACTIVITY

The PHE Toolkit continues to serve as a key tool for outreach and communications on PHE. The Toolkit is located on the Johns Hopkins University (JHU) Center for Communications Program (CCP) Knowledge for Health (K4Health) website. It provides a one-stop PHE reference/resource library where users can access a wide range of the best of PHE publications, training curricula, research articles, and other resources. In Year 4, BALANCED only focused on populating the site with important new PHE materials and on maintaining the current level of the site’s functionality and features. During Year 5, we will prepare for the eventual transition of authority or ownership of the PHE Toolkit to JHU or the follow-on PHE Project, as appropriate.

The BALANCED Project website will continue to be a venue for PHE approaches and tools and sharing information on the BALANCED Project and its accomplishments and, consequently, the team will continue to periodically update it with tools and documents developed by BALANCED and to provide important links to and from the PHE Toolkit.

As we prepare for the end-of-Project conference in September 2013, we will work with K4Health to prepare final PHE Toolkit thumb drives by the end of June 2013.

ACTIVITY SUMMARY

In Year 5, BALANCED will continue to focus on populating the site only with important new PHE materials and on simply maintaining the current level of the site's functionality and features and will no longer actively pursue additional upgrades to the Toolkit. Activities will be limited to writing abstracts for and uploading important new PHE materials and resources, periodically spot-checking the site to ensure links are working properly and that the RSS (Real Simple Syndication) feed to the PHE Ethiopia's website PHE document library is functioning as it should and is feeding truly PHE-relevant materials. Over the course of this final year, BALANCED Project staff will prepare for the transition of authority or ownership of the PHE Toolkit to JHU. Working together with the USAID PHE Technical Advisor and JHU we will develop a strategy for this handover. This will include, but is not limited to the development of a short document providing a brief summary of the methodology used for keeping the toolkit up-to-date, a list of any "time bound" materials or content that will/should be removed, a list of "lessons learned", as appropriate, and any explanation of any "quirky" aspects of the site for the next activity manager to continue the Toolkit. This document will be finalized and sent to JHU by June 30, 2013.

The team will continue, meanwhile, to refine and implement its strategy for increasing traffic to the Toolkit, identifying and implementing activities that are the most feasible and that offer the potential for the greatest return on investment. Examples of such activities include: 1) produce posts for the New Security Beat blog on stories from BALANCED staff visits to the field; and 2) send updates to listservs as new resources are uploaded to the Toolkit. The team will continue to track data reports on usage of the Toolkit—number of visitors, most frequently accessed resources, etc. In a supporting role to the Toolkit, the team will update and maintain the BALANCED Project website.

Specific activities will include:

- Continue to update the PHE Toolkit with new content only
- Maintain the PHE Gateway section of the toolkit
- Maintain link with the PHE Ethiopia website library through the RSS tool
- Prepare end-of-Project PHE Toolkit thumb drives for distribution at the Africa PHE workshop and other events, as appropriate.
- Track Toolkit usage patterns, including visits to the on-line PHE Ethiopia Network library collection
- Maintain the BALANCED website

ORGANIZATIONS INVOLVED

Funded partners: CRC, CI

Collaborative partners: JHU, PHE community members and PHE project implementers and PHE networks on a case-by-case, as-opportunities-arise basis

KEY OUTPUTS

- PHE Toolkit with increased number of tools
- Increased PHE Toolkit usage

EXPECTED RESULTS AND INDICATORS

Expected results:

- PHE Toolkit maintained with an increased number of new resources uploaded, and increased number of visits and hits
- BALANCED Project website maintained and expanded

2.3 Share knowledge within the PHE and broader community

On-going	Activity leader: Janet Edmond
Activity Start Date: July 1, 2012	Activity End Date: August 30, 2013

RATIONALE FOR ACTIVITY

The BALANCED Project plays an active role in reminding the PHE community—and those outside of the PHE community, but who could be potential advocates—of the resources available and where and how to access them (including via the PHE Toolkit). Following on recommendations in the BALANCED mid-term evaluation, the focus in Year 5 will be in more aggressively performing this sharing role and helping promote the PHE tools and resources that are available for the practitioner community to access in their work.

Recognizing that different audiences respond to different communications mechanisms, the BALANCED Project shares information using a range of tools and techniques that include in-person presentations at regional and global fora and conferences; electronic/on-line media such as the PHE Toolkit, e-newsletters, websites, listservs, blog posts and videos and news postings on the BALANCED Project website; and through distribution of hard copy technical reports, fact sheets, guides, etc.

ACTIVITY SUMMARY

In Year 5, BALANCED will continue to gather stories of individual PHE champions as well as "champion" PHE projects and disseminate these in various formats including short story pieces, blog posts for the New Security Beat, video clips, e-newsletters, etc. We plan to collaborate with our PHE partners on several of these products, particularly with WWC-ESCP on the blog posts and videos.

In line with the streamlined focus on KM activities, BALANCED proposes to produce one e-newsletter in Year 5 on themes and topics derived from the BALANCED Project experience in such areas as lessons learned from our country-specific interventions or adapting the Integrated Population and Coastal Resources Management (IPOPCORM) model to the African context. The final topic will be determined together with the USAID PHE Technical Advisor. The e-newsletter will be distributed widely to more than 1,000 interested PHE professionals, including audiences at international policy venues.

The BALANCED team will distribute the e-newsletter and other KM products to the extensive list of audiences targeted in the Project's communication strategy, including new audiences and stakeholders—especially those working in family planning and health—in countries where BALANCED is working to raise awareness and interest in the benefits of PHE approaches. We will also foster PHE champions by supporting them to participate and demonstrate leadership in conference venues and key public speaking roles where opportunities present themselves; and spreading news of their successes. In collaboration with natural resources management (NRM), FP and health partners we plan to leverage existing PHE community investments in communications and outreach events to call attention to the importance of PHE at critical times, such as at the World Conservation Congress in September 2012 and the EcoHealth conference in China in October 2012.

With the BALANCED Project drawing to a close in September 2013, Year 5 communication activities will focus on spreading the word of BALANCED Project accomplishments in PHE and highlighting the successes of our partners, from capacity building to seed grants. Building on the BALANCED Project's communications and outreach efforts in the first four years of the Project, Year 5 activities will target both old and new audiences at the field, regional, national and international scales—PHE field practitioners, networks and organizations, etc.—to receive targeted messages about PHE events, resources available on the PHE Toolkit, conference and professional development opportunities and other PHE-related topics. We will reach out to international development practitioners and funders such as InterAction and the United Nations Development Program (UNDP) and continue to promote the PHE Toolkit and its varied features to both field practitioners and policy level advocates for PHE in East Africa and Asia.

Specific activities will include:

- Through targeted email and listserv announcements, continue to maintain regular dialogue with the PHE community to increase access to and promote PHE tools, knowledge, etc. that are accessible on the PHE Toolkit and BALANCED websites
- Develop one e-newsletter on BALANCED Project experiences in June 2013 and disseminate in final three months of Project and at end-of-Project conference
- Disseminate FOCUS pieces to key PHE contacts, donors and international health and development policymakers, not already reached by the Wilson Center
- In line with our vision of “*cadres of competent PHE champions and practitioners from Africa and Asia promoting the comparative advantage of approaches that simultaneously support family planning and conservation ...*” continue to promote

champions and their success stories; support and promote champions to attend and/or speak at conferences, the Wilson Center, training courses, and other venues as the opportunity arises; and request champions to contribute to technical reports, newsletters, blog posts for WWC’s New Security Beat, think pieces, etc. as appropriate

- By invitation, attend at most one conference—the EcoHealth 2012 Biannual Conference entitled “Sustaining Ecosystems, Supporting Health” in Kunming, China from October 15-18 2012— with attendance dependent upon ALL costs fully supported by non-BALANCED funds
- As opportunities arise, collaborate with PHE community partners and champions to sponsor PHE-related seminars and outreach events (virtual or in-person) to promote PHE around key current events such as the World Conservation Congress (September 2012)

ORGANIZATIONS INVOLVED

Funded partners: CI, CRC and PFPI

Collaborative partners: WWC, PHE Policy & Practice Group and other organizations and networks with active listservs; WWF, PRB, WCS, Ethio-Wetlands and Natural Resource Association, Blue Ventures, and PHE networks, K4Health Project and other organizations interested in PHE

KEY OUTPUTS

- PHE and BALANCED-related news and information feeds to selected outlets
- One electronic newsletter developed and disseminated
- Possible conference representation by BALANCED staff if outside funding secured
- PHE partners/champions presenting at two external events (virtual or in-person)
- Two PHE champions presenting at WWC and two PHE champions presenting at international conferences

INDICATORS AND EXPECTED RESULTS

Expected Results:

- PHE news and outreach-specific content disseminated via PHE Toolkit and BALANCED Project websites
- One electronic newsletter developed and disseminated (2.2)
- One conference presentation (2.2)

INDICATOR	YR 5 TARGET
2.2a Number of success stories, peer review articles, conference papers, research studies documenting key actionable findings about the PHE approaches, their lessons extracted and value-added (PRH IR 2.2)	2

2.4 Project Close out

New	Activity leader: Lesley Squillante
Activity Start Date: July 1, 2013	Activity End Date: September 16, 2013

RATIONALE FOR ACTIVITY

The BALANCED Project—as it concludes its five-years as a PHE global leadership project—looks to ensure its key lessons learned, research findings, successes and challenges are shared in an open forum with the larger PHE community of practitioners and donors. By June 30, 2013, this will already have been accomplished to some degree through the production and dissemination of hard copy and electronic publications, training guides, tools, research papers, and the e-newsletter and through postings on the PHE Toolkit of the “best of” PHE resources produced by both BALANCED and other organizations and projects. However, BALANCED will exploit one last opportunity to invite a select group of PHE stakeholders to an event where they will both hear about seminal lessons learned from the BALANCED Project, and also engage in a reflective discussion of the future of PHE as a development approach that continues to gain the support of a number of donors⁴. As part of this wrap-up period, we will disseminate four resources that highlight BALANCED accomplishments – the Philippines final BMS report describing our accomplishments in scaling up the PHE approach in the Philippines, lessons learned in scaling up PHE, lessons learned from the seed grants and the final e-newsletter. In addition to this more reflective “summing up” activity, we will engage in a suite of more administrative tasks that are a standard element of the USAID project close-out process.

ACTIVITY SUMMARY

The overarching goal of the Project’s final 11-week period (July 1 – September 16, 2013) is to bring to a professional and smooth conclusion all Project activities. This includes designing and making preparations for a modest, half-day/several hour DC-based event in which BALANCED can share its seminal lessons learned and can engage the larger PHE community in a reflective dialogue on what our “collective” lessons learned might tell us about the “future” of PHE. To avoid being repetitive of other USAID PHE Project close-out events, the segment of the event on BALANCED “lessons learned” will speak to topics less frequently discussed at project-end—for example, lessons learned on: 1) success factors for and challenges of providing PHE seed grants; 2) lessons learned from scaling up PHE; and 3) potential sustainability factors, and other topics to be determined together with the PHE Advisor and BALANCED AOR. This reflective type sharing will be the springboard for a wider audience discussion of lessons learned in the now almost 10 years of USAID-supported PHE practice and what these “collective” years of experience might tell us about the opportunities and potential challenges to the “future” of PHE—what do the funding opportunities look like? What new partners, stakeholders, sectors should we be engaging in order to deepen PHE practice? In addition to this more thought-provoking event, the team

⁴ Will be modeled on the thought-provoking 2011 meeting led by Don Lauro (BALANCED Project evaluator), which engaged a range of PHE practitioners and USAID representatives in discussion of such topics

will be engaged in finalizing the end report and implementing its close-out plan in compliance with USAID guidelines.

Specific activities will include:

- Finalize all logistical arrangements for, and implement a half day (or less) “Lessons Learned” and reflective dialogue event/meeting in Washington DC
- Further disseminate the BMS Philippines report and the e-newsletter Finalize the BALANCED semi-annual report (for Core activities implemented between January – June 2013) due August 15, 2013
- Finalize BALANCED-Philippines quarterly and final report due to USAID August 15, 2013
- Write and submit the final Project close-out report due September 16, 2013
- Close down subcontracts with BALANCED Partners
- Close down Project Director’s office in DC
- Ensure all Project key documents are loaded on the CRC server, website, BALANCED website, K4H PHE Toolkit, and DEC
- Finalize plans for a transfer of responsibility for the PHE Toolkit to another party/entity and/or arrange for its withdrawal from the K4H site
- Officially advise the BALANCED Advisory Group of the Project’s official end date and thank them for their contributions over the Life-of-Project

ORGANIZATIONS INVOLVED

Funded partners: CI, CRC and PFPI

Collaborative partners: To be determined based on final decision of close-out event

KEY OUTPUTS

- Close-out event on “Lessons Learned & Where are We Headed”
- Final Project reports for USAID/W and Philippines

INDICATORS AND EXPECTED RESULTS - NA

IR 3: Implement results-oriented PHE field activities in areas of high biodiversity

Total Year 5 IR 3 Activities	\$183,012
3.1 Wrap up PHE activities in Tanzania	\$89,779
3.2 Scale-up PHE in the Philippines (Mission Buy-in)	
3.3 Provide technical support to WCS Zambia seed grant activities	\$19,219

3.4 Provide seed grant and technical support to the TKCP Project in PNG \$30,767

3.5 Provide seed grant and technical support to Volunteer Efforts for Development Concerns in Uganda \$31,233

3.6 Provide seed grant and technical support to Bwindi Mgahinga Conservation Trust in Uganda \$31,233

3.7 Implement recommendations from Glacial Melt study (Asia Bureau Buy-in)

The purpose of BALANCED IR 3 activities is to bring existing, successful PHE interventions to scale as well as to test small, field-based PHE interventions and models in East Africa. Over the last four years, BALANCED has developed and tested a PHE model in Tanzania—adapted from the Philippines IPOPCORM model—and initiated five seed grant projects in areas of high biodiversity in three African countries (Ethiopia, Zambia and Uganda) and Papua New Guinea, a USAID Coral Triangle Initiative (CTI) country, all of which were funded by a small amount of USAID central funds and additional financing from a mix of USAID Mission funds. In December 2010, we began scaling-up PHE in two key marine bio-zones in the Philippines with support from two Buy-ins from USAID Philippines. In addition to our capacity building activities, these field-based activities contribute to our vision of “ *build[ing] cadres of competent PHE champions and practitioners from Africa and Asia promoting the comparative advantage of PHE approaches, are working collaboratively with other groups globally to apply PHE knowledge and state of the art practices.* ”

During Year 5, BALANCED will phase out its PHE support in Tanzania and hand over the supervision of current PHE volunteers to the Pangani District government. Similarly, for the seed grant to WCS/ Zambia, BALANCED will transfer responsibility for continued capacity building of staff and replication of the PHE model to WCS’s Community Markets for Conservation (COMACO) Project. We will continue to provide technical support, monitor, and mentor the remaining three seed grants initiated in Year 4. However, all seed grant activities will end in May 2013 with a full sustainability plan in place. BALANCED-Philippines scale up will also end June 30, 2013 and be transferred to local government units (LGUs) for sustainability of the integrated approach.

As part of its Asia Bureau-funded activity, the BALANCED team will work closely with external PHE experts/consultants who are also well-versed in the Central Asian region and the issues of glacier melt to develop a tool that helps program planners working on the glacier melt issues to consider other human/demographic factors that should influence program/project designs. Following is a full description Year 5 IR 3 activities:

3.1 Wrap up PHE activities in Tanzania

On-going	Activity leader: Elin Torell and Ricky Hernandez
Activity Start: July 1, 2012	Activity End: March 30, 2013

RATIONALE FOR ACTIVITY

In Tanzania, BALANCED is supporting the integration of family planning into CRC's on-going work through the 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), climate change adaptation, and biodiversity conservation 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 distributors (CBDs), PHE peer educators (PEs), and PHE providers.

In Years 2 and 3, BALANCED integrated CBFP activities in five wards in the Pangani District, where 50 Ministry of Health (MOH) CBDs, 116 PHE adult PEs and 47 PHE providers (storeowners) have been trained to provide information on PHE linkages, family planning and conservation. CBDs were also trained to provide certain FP commodities and refer clients interested in other methods to the local health facility. Posters and leaflets with integrated IEC messages were distributed to the Pangani Hospital, health dispensaries, village offices, CBDs, PHE providers, adult PEs, theatre groups, Pangani district council, local NGOs, and the Pangani ferry and market. Further, the MOH signed a Memorandum of Understanding (MOU) with TCMP to initiate youth activities in the Pangani District. In Year 4, BALANCED continued supporting PHE volunteers operating in the five wards, with the goal of gradually turning over the PHE activities to the *Pwani* Project and the Pangani District government. The end goal is to have PHE mainstreamed into the Pangani District Development Plan. Strategies to reach this goal included sending two key district government staff to the BALANCED-led PHE Program Design Workshop in Senegal (where they developed a PHE design for the Pangani District); holding periodic advocacy meetings with government officials; and providing regular follow-up support to BALANCED-trained CBDs and PEs. As a strategy to increase family planning access to these remote areas, we also worked with EngenderHealth and Population Services International (PSI) to promote their mobile clinics for long-acting methods through our CBDs and adult PEs, and promote Family Health International's (FHI) mobile for reproductive health (M4RH) mobile telephone hotline on reproductive health and family planning. Further, TCMP joined the National Family Planning Working Group. In Year 4, we switched the IEC focus from posters and leaflets to radio, developing a series of short radio spots with PHE messages. In collaboration with the MOH, which is leading the youth center in Pangani, BALANCED also trained 30 youth PHE PEs in the Mkwaja and Mkalamo wards to promote pro-environment and pro-health messages. The youth PEs support and promote the PHE community-based CBD systems in the Mkwaja and Mkalamo wards.

Through the *Pwani* Project, PHE activities were replicated in the Bagamoyo District and BALANCED staff trained PHE adult PEs in two villages (Saadani and Mkange) there. The PHE adult PEs are connected to local savings and credit cooperative organizations and energy saving technologies supported by *Pwani*. 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.

BALANCED is working to promote PHE with other conservation groups and toward this goal, the team organized a study tour for The Nature Conservancy (TNC) and Pathfinder to the Pangani and Bagamoyo District field sites. The field trip took place in March 2012.

ACTIVITY SUMMARY

In Year 5, BALANCED will phase out its PHE support in Tanzania and hand over the supervision of current PHE volunteers to the Pangani District government. We will continue to monitor, supervise, and mentor the current PHE volunteers in Bagamoyo and Pangani every six or eight weeks together with the District Health Team until March 2013, when the Tanzania activities will come to an end. Since the Pangani government health team visits the wards with PHE volunteers on a regular basis for other health related supervision visits, they feel confident that they will be able to continue supporting the volunteers after the BALANCED Project ends. We will also continue working with the district to mainstream PHE into its Integrated Coastal Management (ICM) plan, which is incorporated into the District Development Plan. This is another strategy to ensure sustainability after the BALANCED Project ends.

To celebrate our accomplishments and share lessons learned, we will organize a two-day end-of-Project meeting in February/March 2013 for local government officials and all CBDs and PEs that are connected with the BALANCED Project in Tanzania. During the meeting, we will discuss and plan for how to continue the PHE volunteer work after the BALANCED Project ends and formally endorse the community volunteers to the local government. We will also give out awards to the best performing CBDs and PEs, and find other ways to celebrate success and encourage the volunteers to continue their good work.

In Year 5, we will continue to promote the FHI M4RH telephone hotline and IEC activities using radio spots. New radio spots will be developed based on the IEC messages developed and tested on family planning, fuel-efficient stoves, sexually active youth, and community-based SACCOs. The radio spots will be aired on the local Pangani FM radio station.

The largest activity in Year 5 will be the BMS, implemented in eight villages. The survey, which will mirror the baseline BMS conducted in 2009, will provide information on socio-demographic, health, coastal conservation and climate change-related questions as well as opinion questions on population-health-environment linkages. Comparing the results from the 2009 and 2012 surveys will help us measure the effectiveness of field-based activities and track changes in target groups' awareness and practices over the duration of the project.

Specific activities will include:

- Conduct the second BMS in eight villages and prepare a report that compares the 2009 and 2012 data, analyzing changes and trends related to PHE perceptions and trends.
- Field test and finalize a PHE BMS tool.
- Conduct monitoring, mentoring, and follow-up meetings with existing CBDs, PHE providers, and youth and adult PEs to improve the effectiveness and impact of the

PHE community-based distribution and peer education outreach and service delivery systems, and to ensure trainees refer and distribute modern contraceptives as well as provide integrated PHE messages.

- Conduct celebratory/final meeting for all Pangani PHE volunteers (CBDs, PEs, and local government officials).
- Develop radio spots based on the IEC messages revised and tested in Year 4.
- Conduct advocacy meetings with Pangani District staff with the goal of integrating PHE into the Pangani District ICM Plan

ORGANIZATIONS INVOLVED

Funded partners: CRC and PFPI

Strategic champion partners: TCMP, Pangani District Council, Mkalamo, Mkwaja, Mwera, Mikinguni, and Kipumbwi wards and village governments, SANAPA, UZIKWASA, Bagamoyo District Council, Pathfinder/TNC

KEY OUTPUTS

- Radio spots aired in Pangani and Bagamoyo
- PHE mainstreamed into the Pangani District ICM Action Plan
- Field indicator results related to family planning, HIV/AIDS, biodiversity conservation, and economic development collected
- BMS report comparing 2009 and 2012 data

INDICATORS AND EXPECTED RESULTS

Expected Results

- BMS report
- BMS Tool

INDICATOR	YR 5 TARGET
2.1 Tools, protocols, procedures, systems, methodologies, guides, curricula, or indices with demonstrated programmatic value developed or adapted for country and/or thematic contexts (PRH IR 2.1)	BMS tool (reported under 2.1)
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)	BMS report (reported under 2.1)
3.3 Number of BALANCED field site activities that produce results that can feed into KM activities (development of tools and success stories)	1

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

Ongoing	Activity leader: Joan Castro
Activity Start: July 1, 2012	Activity End: December 31, 2012 (OH); June 30, 2013 (OEE)

RATIONALE FOR ACTIVITY

USAID Philippines provided a US\$1,300,000 Buy-in to the BALANCED Project to support results-oriented PHE field activities in biodiversity-rich bioregions of the Philippines over the period from December 2010 –August 2013. Funding is from two sources from within the Mission. In Year 3, the Office of Health (OH) provided a \$500,000 Buy-in for family planning and outreach components (IRs 1, 2 and 3), with funding for these activities ending December 31, 2012. In Year 4, the Mission’s Office of Energy, Environment and Climate Change (OEECC) provided a \$800,000 Buy-in for outreach, fisheries management and livelihood components (IRs 4 & 5 and some contributions to IR3) to incorporate CRM into the OH-funded BALANCED-Philippines Project. These activities end August 30, 2013. During year 4, BALANCED-Philippines continued implementing activities towards achieving the goal of the Project to “build [ing] 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” through the following IRs:

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

ACTIVITY SUMMARY

In Year 5, the BALANCED-Philippines Project will continue to strengthen the PHE CBD and PE systems both in the “new” and “maintenance” sites in the two marine bioregions—the Danajon Bank and the Verde Island Passage (VIP). This will be done by continuously monitoring and providing mentoring to the trained PHE adult PEs and PHE CBDs to further improve the delivery of FP/RH information, including information on CRM and PHE linkages, and services. As part of the PHE CBD/PE system, the Project will continue to coordinate and collaborate with the Rural Health Units (RHU) and USAID collaborating agencies (CAs), such as Private Sector Mobilization for Health Project (Philippines)/ PRISM 2, to strengthen referral systems for FP/RH services. BALANCED-Philippines will continue to work with private FP suppliers such as DKT Philippines, Alphamed, and the local chapter of Integrated Midwives Association of the Philippines (IMAP)—a partner of USAID-supported PRISM 2 Project in Bohol—to ensure a continuous supply of contraceptive products to the CBDs and RHUs trained under the Project.

BALANCED-Philippines will continue to implement the IEC strategy to promote the linkages of health-seeking and pro-environment behaviors that improve health, food security and availability of natural resources for the future. We will also initiate activities at the national level to educate and advocate for PHE with a greater number of policymakers through a national level PHE orientation and advocacy in partnership with the League of Municipalities of the Philippines (LMP). Advocacy efforts will build on on-going collaborations and partnerships with existing PHE leaders and champions

OH-funded activities will end December 2012. However, the CRM and livelihood activities continue to August 2013 and will be focused in a subset of the “**new**” and “**maintenance**” site municipalities where the FP/RH activities are occurring. In Year 5, BALANCED-Philippines will continue to conduct assessments of marine protected areas (MPAs) to identify the weakest MPAs using the MPA Management Effectiveness Assessment Tool (MEAT) with PHE and gender parameters incorporated. Based on the results of the MPA assessment both in the Danajon Bank (Bohol) and the VIP, the Project will strengthen and improve the management effectiveness of the weakest MPAs. In both the VIP and Danajon Bank regions, sustainable, eco-friendly and diversified livelihoods will be promoted among men and women stakeholders as an incentive for good marine conservation and sustainable fisheries practices. Technical assistance on sustainable livelihood activities will be provided to those members or groups that have been engaging in good conservation practices, particularly those people’s organizations (POs) that are involved in the management of MPAs that are being effectively managed based on the results of MPA assessment. Year 1 of the OEECC-funded activities ends December 31, 2012 and the Year 2 workplan (January 1 to August 31, 2013) is due to USAID in September 2012.

Throughout the project, BALANCED-Philippines is coordinating with the LGUs to galvanize their commitment and support for FP/RH services and integrated PHE approaches and policy reforms, including budget allocation for family planning and for the conservation of important natural resources. BALANCED-Philippines will continuously work towards integrating both fisheries/CRM and FP/RH activities into municipalities’ planning processes as a step toward institutionalizing and making PHE sustainable over the long term. See BALANCED-Philippines Combined Workplan for more details.

USAID/Philippines has offered to provide additional field funds to compliment the OH-funded family planning activities, which currently end December 2012. The additional funds will be used to strengthen FP activities and extend them until August 15, 2013 when the CRM activities also end.

During Year 5, BALANCED will also use funds from its Core award to conduct a second round of BMS in select BALANCED-Philippines sites where a baseline BMS was conducted to monitor changes in health and pro-environment behaviors.

ORGANIZATIONS INVOLVED

Funded partners: CRC, PFPI, CI

Collaborative Partners: LGU, RHU, NGOs, relevant USAID SO3 CAs, LMP, Municipal Planning and Development Office, Barangay and Municipal Development Councils, Provincial/Municipal Agricultural Office, Provincial/Municipal Environment/CRM Office, DKT Philippines, Alphamed, PRISM 2, IMAP and/or other private sector sources of FP supplies and services

Key inputs, expected results and indicators can be found in the recent BALANCED-Philippines Combined Workplan.

INDICATOR	YR 5 TARGET
SO-2: Dollar value of funds leveraged from USAID Missions and non-USG sources to support PHE implementation and scale up (million dollars) PRH 1.2)	.3

3.3 Provide technical support to WCS Zambia seed grant activities

Ongoing	Activity leader: Joan Castro
Activity Start July 1, 2012	Activity End: September 30, 2012 (with possibility of no cost extension)

RATIONALE FOR ACTIVITY

In Zambia, WCS implements the 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.

In Year 4, the BALANCED EAC travelled twice to Zambia to build capacity of WCS personnel and partners on PHE CBD and PE systems, PHE youth peer education, designing for behavior change, refinement of their communications strategy and integrated IEC materials, and design of a streamlined BMS. BALANCED also provides technical support to WCS for the scale-up of PHE activities through its USAID Washington Flex Fund.

As a result of the seed grant and technical support received from the BALANCED Project, WCS Zambia strengthened its capacity to integrate health and family planning into its livelihood activities and establish a PHE community-based system—training a significant number of volunteer PHE PEs and forging partnerships with local health stations to increase access to FP commodities for the 17,000 farmers participating in COMACO. The trained staff and volunteers are now educating other individuals and COMACO members on PHE and working collaboratively with the local MOH to increase access to FP methods. In order to support the provision of FP commodities to the PEs and access to data and information about FP access, the MOH sent WCS Zambia a letter of endorsement for these activities.

ACTIVITY SUMMARY

Seed grant support to WCS Zambia ends September 30, 2012. A no- cost extension may be considered depending on WCS's pipeline and active completion of agreed upon activities. In the time remaining on the seed grant, BALANCED will continue to provide technical assistance to strengthen WCS and its partners' capacity to monitor the trained volunteers engaged in implementing the PHE peer education and community-based distribution systems and to refine their PHE model to help ensure sustainability and scalability. BALANCED will also help with the institutionalization of PHE within COMACO and with government stakeholders so as to expand and/or sustain the gains made during the period of the seed grant.

BALANCED will help WCS Zambia institutionalize PHE into its operations by assisting WCS COMACO to draft a policy that incorporates PHE into WCS COMACO's operating procedures. With this policy, WCS Zambia officially recognizes the benefits of PHE, especially among the COMACO Producers Group, and helps ensure that the PHE approach will form part of future WCS Zambia proposals and programs, and demonstrates its intention to help galvanize further scale-up in the region of existing PHE activities and the PHE model. In Year 5, the BALANCED Project will continue to follow-up on the development and signing of an MOU between WCS and the MOH for the provision of some FP methods.

As part of the close out, BALANCED will help WCS Zambia develop a sustainability action plan that identifies key project outputs and result areas that bring add/added value to the organization; activities that can be sustained post-BALANCED and the human/financial resources needed to do so; partnerships and how to leverage financial support through its partners and donors. We will review all project documents and conduct a project close-out interview with WCS staff to identify successes, challenges and lessons learned from having given WCS a seed grant to initiate PHE activities in Zambia. We will use this information to develop an internal report on lessons learned from having selected and worked with WCS Zambia as a seed grant recipient. This internal report, along with the internal reports of the all the seed grant recipients, will feed into a public report on lessons learned from our seed grant activities and experience.

Specific Activities include:

- Conduct remaining refresher courses for adult PEs
- Help develop an institutional PHE Policy for WCS Zambia
- Develop sustainability /scale-up plan for the WCS Zambia model
- Document lessons learned and best practices

ORGANIZATIONS INVOLVED

Funded partners: CRC, PFPI

Strategic champion partners: WCS Zambia, COMACO, local MOH

KEY OUTPUTS

- Report on the final year of seed grant activities
- Report on WCS Zambia seed grant results that summarizes key findings, lessons learned and best practices
- Sustainability /turn over/scale-up plan

EXPECTED RESULTS AND INDICATORS

Expected results:

- At least two WCS/COMACO staff trained by BALANCED training others on PHE

INDICATOR	YR 5 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	2
1.4a. Number of technical support interventions provided by BALANCED to Missions and to organizations to implement PHE within their programs (PRH 3.2)	1
3.3 Number of BALANCED field site activities that produce results that can feed into KM activities (development of tools and success stories)	1

3.4 Provide seed grant and technical support to Tree Kangaroo Conservation Project in PNG

Ongoing	Activity leader: Joan Castro
Activity Start: July 1, 2012	Activity End: June 30, 2013

RATIONALE FOR SUMMARY

The Tree Kangaroo Conservation Program (TKCP) at the Woodland Park Zoo (WPZ) is an initiative to protect the endangered Matschie tree kangaroo in PNG. The Program was started in 1996 by Dr. Lisa Dabek, Senior Conservation Scientist and Director of TKCP at WPZ. During Year 4, BALANCED executed an 18-month seed grant to WPZ to integrate family planning into its conservation and health activities. Funding for the seed grant activities is scheduled to end June 30, 2013. Entitled “Healthy Village, Healthy Forest: Integrating Healthy Family Planning and Conservation in Papua New Guinea” the seed grant activities focus on one region in the Yopono, Uruwa and Som Local Level Government (YUS LLG) area and aims to:

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

As part of BALANCED seed grant process, we provide technical assistance to build the seed grant recipients' capacity to develop, implement and sustain a PHE model that operationally integrates health activities into conservation programs. Toward that end, BALANCED has mentored TKCP staff and its partners on how to design an integrated PHE model that can be replicated and scaled-up to other villages in the TKCP project area, trained them on how to develop a PHE CBD/PE system and helped them to develop a communications plan and integrated PHE messages that can be used by trained community PHE adult PEs in Year 4. Given the close proximity to the Philippines, one TKCP staff person participated in the March 2012 study tour conducted by the BALANCED-Philippines project.

Given that CI is a partner on the BALANCED Project and leads the Coral Triangle Initiative (CTI) Milne Bay project close to the TKCP site, BALANCED is also including staff from the CI/Milne Bay project (part of the Coral Seas Initiative) in some of its capacity building activities, in addition to the BALANCED-Philippines study tour, so that they, too, can learn more about PHE, observe how it is operationalized, and potentially adapt an integrated approach for their projects in PNG (Year 5 technical support to CI/Milne Bay is described under Activity 1.4).

ACTIVITY SUMMARY

In Year 5, BALANCED will continue to monitor and strengthen TKCP, its partners and stakeholder's capacity to implement PHE project activities initiated during Year 4. BALANCED will also provide guidance on how to monitor the PHE Adult PEs and conduct refresher training for active PHE PEs to address issues and capacity needs identified during supervisory and monitoring activities. If time permits and the project progresses well, we will also help TKCP train PHE youth peer educators (YPE) and support them to be champions and stewards of the environment and their bodies.

Despite the very short project duration, TKCP shows clear interest in scaling-up PHE organizationally as was revealed during the development of their conceptual framework. TKCP staff clearly acknowledged the benefits of PHE approaches and included population and health issues as an integral approach to their current conservation activities. In order to help TKCP maintain its PHE activities and model, BALANCED will mentor them and their partners on how to sustain project efforts and gains and scale-up the model to other sites in the Morobe Province where the project is located. This will include furthering the collaboration between the Morobe Provincial office and TKCP so as to help institutionalize the approach within the government institution as well.

All project activities will cease in May 2013 in order to allow time for WPZ TKCP to submit its final report to BALANCED staff by June 30, 2013. As part of the close-out, BALANCED will help TKCP to develop a sustainability action plan that identifies key project outputs, result areas and activities that brought added-value organizationally, defines activities that can be sustained post-BALANCED, describes the human/financial resources and partnerships needed, and outlines how to leverage financial support through its partners and donors. We will review all project documents and conduct a project close-out interview with WPZ TKCP staff to identify successes, challenges and lessons learned from having given TKCP a seed grant to initiate PHE activities in PNG. We will use this information to develop

an internal report on lessons learned from having selected and worked with TKCP as a seed grant recipient. This internal report, along with the internal reports of the all the seed grant recipients, will feed into a public report on lessons learned from our seed grant activities and experience.

Also, as mentioned in the IR 2 section of this workplan, in spring 2013 and in collaboration with ECSP, we will also produce a general audience FOCUS article on our seed grant experiences in PNG.

Specific Activities include:

- Conduct training of trainers (TOT) on PHE YPE – as time permits
- Develop TKCP replication /scale-up plan of PHE YUS model

ORGANIZATIONS INVOLVED

Funded partners: CRC, PFPI, CI

Strategic champion partners: TKCP, Provincial Health Office, YUS LLG

KEY OUTPUTS

- TKCP staff and partners trained on PHE YPE - TBD
- Sustainability /turn over/scale up plan
- Report on TKCP seed grant results, which summarizes key findings, lessons learned and best practices

EXPECTED RESULTS AND INDICATORS

Expected results:

- TKCP incorporating BALANCED tools to implement PHE activities (SO-1)
- At least 12 TKCP staff and partners trained on PHE YPE (1.1 & 3.1)
- At least two TKCP trainees training others on CBD/PE systems, YPE, etc.(1.2)

INDICATOR	YR 5 TARGET
SO-1: Number of target organizations incorporating PHE tools, protocols, etc. into their work (PRH 1.1)	1
1.1 Number of individuals trained by BALANCED in PHE know-how and SOTA (State of the Art) practices using 21st century learning tools	12
1.2 Number of participants who received BALANCED training and/or mentoring that are now providing training or TA to others on PHE implementation	2
1.4a. Number of technical support interventions provided by BALANCED to Missions and to organizations to implement PHE within their programs (PRH 3.2)	1
3.1 Number of PHE tools, methodologies, and actionable findings replicated	1 (YPE)

in new countries and geographic areas (PRH 3.1)

3.5 Provide seed grant and technical support to Volunteer Efforts for Development Concerns in Uganda

Continuing	Activity leader: Joan Castro
Activity Start: July 1, 2012	Activity End: June 30, 2013

RATIONALE FOR ACTIVITY

In November 2011, BALANCED awarded a seed grant to Volunteer Efforts for Development Concerns (VEDCO) to implement the project entitled, “Improving livelihoods through increased access to reproductive health (RH) services among farmers.” This 18-month project ends June 30, 2013. VEDCO is an indigenous NGO established in 1989 in response to challenges of poverty aggravated by social and economic disruption caused by the military conflicts between 1980 and 1986 in Luwero. VEDCO began 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) the goal of which is “equitable wealth creation among farmers in Uganda.” VEDCO’s work addresses cross-cutting issues—e.g., HIV/AIDS, reproductive health, gender and environment management—which are mainstreamed and integrated within their program activities.

The BALANCED seed grant aims to improve access and use of family planning in agriculture-dependent areas through PHE integration in the Nakaseke, Moyo and Yumbe Districts to:

- increase access to RH/FP services in selected districts
- increase community awareness of the PHE linkages and RH/FP information through culturally and gender-sensitive behavior change communication messages and materials
- strengthen institutional capacity to design, implement, monitor, and evaluate community-based RH/FP programs

In Year 4, BALANCED helped build the capacity of VEDCO and its partners to design, implement and monitor PHE integrated interventions. Toward that end, two of VEDCO’s key personnel participated in the BALANCED-led PHE Program Design Workshop in Senegal, which provided an opportunity for them to learn about PHE and how to implement PHE programs. Subsequent to the Senegal workshop, the BALANCED EAC conducted a PHE CBD/PE TOT for VEDCO staff, stakeholders and partners to build their capacity on CBFP and how to train PHE adult PEs and CBDs for their project activities.

ACTIVITY SUMMARY

In Year 5, BALANCED will support VEDCO to accomplish all activities as per terms and conditions of their agreement of the seed grant. We will continue to build the capacity of VEDCO staff and their partners to strengthen, monitor and supervise previously trained PHE CBDs and adult PEs. In addition, BALANCED key personnel will conduct a four-day TOT

with out-of-school youth leaders, VEDCO staff and other stakeholders and partners to address reproductive health/ gender issues among youth. The participants from the YPE TOT, will, in turn, train YPEs in the project sites. The YPEs will be responsible for providing outreach and talking to their peers about how to be good stewards of the environment and their bodies. These efforts have contributed to the goal of the BALANCED Project by increasing the number of PHE champions and advocates within VEDCO project areas and Uganda.

All seed grant project activities will end May 2013. BALANCED will work closely with VEDCO to consolidate and plan a close-out activity, including plans to institutionalize PHE into VEDCO's existing projects and/or with local government stakeholders. As part of this close-out plan, we will work with VEDCO and its partners to develop a sustainability action plan. The plan will identify the key project outputs and results VEDCO hopes to see sustained, what resources will be needed in order to do so, and whether it will be VEDCO or its partner institutions or both that continue the efforts. We will also review all project documents and conduct a project close-out interview with VEDCO staff to identify successes, challenges and lessons learned from having given VEDCO a seed grant to initiate PHE activities in Uganda. We will use this information to develop an internal report on lessons learned from having selected and worked with VEDCO as a seed grant recipient. This internal report, along with the internal reports of the all the seed grant recipients, will feed into a public report on lessons learned from our seed grant activities and experience.

Specific activities will include:

- Provide technical support on how to monitor and supervise PHE outreach and peer education
- Conduct TOT on PHE YPE
- Train PHE youth leaders and YPEs
- Develop closeout/institutionalization plan
- Document lessons learned and best practices
- Assist VEDCO staff and PHE champions to tell their success story and identify possible venues for presentations

ORGANIZATIONS INVOLVED

Funded partners: CRC, PFPI

Strategic champion partners: VEDCO, FHI, local government agencies

KEY OUTPUTS

- YPE curricula adapted and used by seed grant recipients
- Trained and active PHE CBDs and adult PEs working in seed grant project sites
- Trained and active PHE YPEs in seed grant project sites

- Report on BMCT seed grant results, which summarizes key findings, lessons learned and best practices

EXPECTED RESULTS AND INDICATORS

Expected results:

- VEDCO incorporating BALANCED tools to implement PHE activities (SO-1)
- At least 15 VEDCO and partners trainers trained on PHE YPE (1.1 & 3.1)
- At least 5 BALANCED trainees from the seed grant recipients training PHE youth PEs (1.2)

INDICATOR	YR 5 TARGET
SO-1: Number of target organizations incorporating PHE tools, protocols, etc. into their work (PRH 1.1)	1
1.1 Number of individuals trained by BALANCED in PHE know-how and SOTA (State of the Art) practices using 21st century learning tools	15
1.2 Number of participants who received BALANCED training and/or mentoring that are now providing training or TA to others on PHE implementation	5
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 activities	1
1.4a. Number of technical support interventions provided by BALANCED to Missions and to organizations to implement PHE within their programs (PRH 3.2)	1
3.1 Number of PHE tools, methodologies, and actionable findings replicated in new countries and geographic areas (PRH 3.1)	1 (YPE manual)

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

Continuing	Activity leader: Joan Castro
Activity Start: July 1, 2012	Activity End: June 30, 2013

RATIONALE FOR ACTIVITY

In Year 4, BALANCED provided a seed grant to Bwindi Mgahinga Conservation Trust (BMCT) to integrate CBFP into their conservation activities. BMCT was established in March 1994 with a capital endowment fund of US\$ 4.3 million from the Global Environmental Facility (GEF)—initially administered by the World Bank, but now in the hands of a multi-sectoral Trust Management Board with a Trust Administration Unit to manage the day-to-day operations. BMCT’s aim is 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), while at the same time promoting the well-being of neighboring communities.

With seed grant funding, BMCT is implementing the “Integrated Community Conservation and Development for a Healthy Population around Bwindi Conservation Area Project.” As part of this 18-month project, BMCT seeks to help communities in Kanungu District to manage their resources in ways that improve their health and livelihoods, while conserving the Bwindi critical ecosystem upon which they depend. Specifically, the project will work towards:

- Developing/establishing synergies between FP/RH, conservation and development partners to improve community livelihood and increased access to FP/RH services
- Building capacity of community change agents and health workers in health units in Kanungu to deliver FP/RH services to communities for improved family health
- Creating awareness among the youths, women and men on FP /RH and PHE links for improved family health and development

In Year 4, two key BMCT staff refined their project activities after they participated in the BALANCED-led PHE Program Design Workshop in Senegal. Following on the Senegal workshop, the BALANCED EAC provided technical support and mentoring to BMCT on how to further refine their project design, and implement and monitor PHE integrated interventions. He also conducted a five-day TOT on PHE CBD and adult PE systems with BMCT staff, stakeholders and partners. Those trained will, in turn, train four adult PEs and CBDs in their respective project sites.

ACTIVITY SUMMARY

During year 5, BALANCED will continue to build the capacity of BMCT staff and their partners to strengthen the PHE CBD systems, train YPEs and monitor CBDs and PEs who were trained during Year 4. BALANCED will also assist BMCT in developing, designing and adapting IEC materials and activities with integrated PHE messages targeted to adults and youth. BALANCED will regularly monitor project reports and provide technical support on issues and challenges that occur along the way. Along with capacity building activities, BALANCED will endeavor to work with BMCT in planning and consolidating an exit strategy towards institutionalizing PHE into BMCT’s existing projects and/or with local government stakeholders.

All project activities will end May 30, 2013 to allow one month for BMCT to submit their final report. Similar to the other seed grant awardees, BMCT will also undergo a close-out process, which will include working with BMCT and its partners to develop a sustainability action plan. The plan will identify the key project outputs and results BMCT hopes to see sustained, what resources will be needed in order to do so, and whether it will be BMCT or its partner institutions or both that continue the efforts. We will also review all project documents and conduct a project close-out interview with BMCT staff to identify successes, challenges and lessons learned from having given BMCT a seed grant to initiate PHE activities in Uganda. We will use this information to develop an internal report on lessons

learned from having selected and worked with BMCT as a seed grant recipient. This internal report, along with the internal reports of the all the seed grant recipients, will feed into a public report on lessons learned from our seed grant activities and experience.

Specific activities will include:

- Monitor and supervise PHE CBDs and PEs
- Conduct a PHE YPE TOT
- Train PHE youth leaders and YPEs
- Develop a closeout/institutionalization plan and assist BMCT to identify possible revenues of funding
- Document lessons learned and best practices
- Assist BMCT to tell their success story

ORGANIZATIONS INVOLVED

Funded partners: CRC, PFPI

Strategic champion partners: BMCT, local government agencies

KEY OUTPUTS

- Adapted YPE curricula and other learning tools used by seed grant recipients
- BMCT personnel and partners trained on YPE systems
- Active Youth PEs in seed grant project sites
- Report on BMCT seed grant, summarizing results, key findings, lessons learned, best practices

EXPECTED RESULTS AND INDICATORS

Expected results:

- BMCT incorporating BALANCED tools to implement PHE activities (SO-1)
- At least 10 BMCT and partner staff trained on PHE YPE (1.1 & 3.1)
- At least five BALANCED trainees from seed grant recipients training YPEs (1.2)

INDICATOR	YR 5 TARGET
1.1 Number of individuals trained by BALANCED in PHE know-how and SOTA (State of the Art) practices using 21st century learning tools	10
1.2 Number of participants who received BALANCED training and/or mentoring that are now providing training or TA to others on PHE implementation	5
1.4a. Number of technical support interventions provided by BALANCED to Missions and to organizations to implement PHE within their programs (PRH 3.2)	1
3.1 Number of PHE tools, methodologies, and actionable findings replicated in new countries and geographic areas (PRH 3.1)	1 (YPE manual)

3.3 Number of BALANCED field site activities that produce results that can feed into KM activities (development of tools and success stories)	1
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3.7 Implement recommendations from Glacial Melt Study (Asia Bureau Buy-in)

New	Activity leader: Lesley Squillante
Activity Start: July 1, 2012	Activity End: March 31, 2013

RATIONALE FOR ACTIVITY

In Year 4, BALANCED in partnership with its Project AOTR and Mary Melnyk, NRM senior advisor to the USAID Asia Bureau, produced a follow-on desktop report entitled “*Exploring Options for Addressing Accelerated Glacier Melt Vulnerability in Asia*” in preparation for a three-day workshop in Almaty, Kazakhstan to discuss USAID options for implementing integrated, multi-sectoral programming in those Asia Near East (ANE) countries at highest risk for health and livelihood impacts from glacier melt. Seventy participants from USAID Washington, USAID/Kazakhstan, and other US Agencies attended, representing both global health and the natural resources management interests. Also included in that number were external regional and international experts on issues of health, glacier melt, biodiversity, and water security.

The workshop, while useful, had a greater focus on the NRM and water security aspects of glacier melt than on the health aspects. As such, the next step is for BALANCED to develop a tool that can be used by program planners at USAID, Private Voluntary Organizations (PVOs) and NGOs and working on issues related to glacier melt to help them integrate into their program designs consideration of more non-climate change factors (particularly demographic dynamics) that predispose communities to glacier melt vulnerabilities.

ACTIVITY SUMMARY

The BALANCED team will work closely with external PHE experts/consultants who are also well-versed in the ANE region and the issues of glacier melt to develop a tool that helps program planners working on the glacier melt issues to consider other human/demographic factors that should influence program/project designs. The tool will be drafted and vetted with others working in PHE, NRM, and on the glacier melt issue specifically, and if time allows, this tool will be field-tested before being finalized and disseminated. The tool will emphasize health/population issues that indirectly contribute to glacier melt vulnerability and will offer examples of how FP and maternal and child health interventions can be integrated into a risk reduction approach that is holistic and addresses both direct and indirect factors that contribute to vulnerability.

Specific activities will include:

- Develop a draft tool; solicit input and produce a revision; field test; disseminate the final tool

ORGANIZATIONS INVOLVED

Funded partners: CRC, PFPI (Leona D'Agnes)

Collaborative partners: TBD

KEY OUTPUTS

- Tool for program planners working on issues of glacier melt that includes consideration of health, family planning, and other demographics factors in program designs

PROJECT MANAGEMENT

Staff Responsibilities for Year 5 Key Program Results and Activities

The following table lists key staff responsible for the successful implementation of various activity areas within each results category of this workplan.

Program Areas	Key Staff Responsible	Organization
IR 1 PHE Capacity Built		
1.1 Build capacity of champion NGOs in Africa on PHE	Linda Bruce	CRC
1.2 Provide on-going support to BALANCED trainees and PHE Practitioners	Joan Castro	PFPI
1.3 Provide technical support to HOPE-LVB	Elin Torell	CRC
IR 2 PHE Knowledge and Tools Developed, Synthesized and Shared		
2.1 Identify, document, and synthesize knowledge	Lesley Squillante	CRC
2.2 Organize existing and new knowledge for PHE website	Lesley Squillante	CRC
2.3 Share knowledge within the PHE and broader community	Janet Edmond	CI
2.4 Project Close out	Lesley Squillante	CI
IR 3 Results-oriented PHE Field Activities Implemented in Areas of High Biodiversity		
3.1 Wrap up PHE activities in Tanzania	Elin Torell	CRC
3.2 Scale-up PHE activities in the Philippines (Mission Buy-in)	Joan Castro	PFPI
3.3 Provide technical support to WCS Zambia for seed grant activities	Joan Castro	PFPI
3.4 Provide seed grant and technical support to Tree Kangaroo Conservation Project in PNG	Joan Castro	PFPI
3.5 Provide seed grant and technical support to Volunteer Efforts for Development Concerns in PNG	Joan Castro	PFPI
3.6 Provide seed grant and technical support to Bwindi Mgahinga Conservation Trust in Uganda	Joan Castro	PFPI
3.7 Implement recommendations from Glacier Melt Study (Asia Bureau Buy-in)	Lesley Squillante	CRC

Key Year 5 Management Tasks

The Project Director and each key Project personnel will continue to work diligently to ensure the entire Project team is working to implement successfully the BALANCED mid-course strategy and working on improving Project team communications and dynamics.

The BALANCED Project Director, PHE PTAL, and other team members, as appropriate, will develop a well thought-out “hand-over” strategy for its key partners in the field—a strategy that can hopefully help these partners to continue strengthening their PHE capacity and that will help ensure that the progress these partners have made in PHE to-date has the best chances of being sustained after BALANCED support ends at the close of Year 5.

The Project Director and CRC Business Manager will design and implement a close-out plan for the Project, including ensuring all team members understand the actions needed at all levels—i.e., at the home offices, at the field level, at the key partner/subcontractors level—and that each team member is clear on his/her role and responsibilities for ensuring a smooth, efficient and timely close-out.

The Project Director and Deputy Directors anticipate participating in a final year Management Review with the BALANCED AOR and/or other USAID staff as appropriate.

The Project Director and BALANCED staff in the field will continue to monitor FP compliance in BALANCED field sites and note any areas in which the process for monitoring of compliance could be improved.

Staff at the CRC home office in RI will continue to provide backstopping support in TraiNet, branding, and 508 compliance—helping to ensure the Project complies with federal and USAID-specific administrative regulations and guidelines.

Routine Project Management and Administration Activities

The following table lists the routine and recurring Project management and administrative activities, reports and plans required annually. It covers the Year 5 workplan period of July 1, 2012 to September 16, 2013.

Activity	July 2012 – September 16, 2013														Responsible Person/ Institution	
	J	A	S	O	N	D	J	F	M	A	M	J	J	A		S
<i>Progress Reports</i>																
Semiannual program report to USAID		x						x						x		LB
Quarterly narrative reports to USAID Philippines		x			x			x			x			x		LB
Semiannual PMP report		x						x						x		ET
Quarterly PMP reporting to CRC		x			x			x			x			x		CI, PFPI
Results Review					x											CRC
Final Project Technical Report															x	CRC
Input TraiNet data into USAID web	x	x	x	x	x	x	x	x	x	x	x	x	x			KK
<i>Financial Management/Reports</i>																
Quarterly expenditure reports from subcontractors to CRC/URI	x				x			x			x			x		CI & PFPI
Quarterly expenditure reports to USAID from CRC/URI		x			x			x			x			x		CRC
Quarterly 269 report to USAID from URI. CRC to send electronic copy to Nonie Hamilton (AOR) and Hannah. Marqusee		x			x			x			x			x		URI and CRC

Key: LB-Linda Bruce (CRC), LS-Lesley Squillante (CRC), JE-Janet Edmond (CI), ET-Elin Torell (CRC), JC-Joan Castro (PFPI), CM-Cindy Moreau (CRC), KK-Kim Kaine (CRC)

Travel Schedule

The following table represents the tentative international and domestic travel schedule for key staff and consultants related to IRs and Project management activities for the Year 5 workplan period of July 1, 2012 to September 16, 2013.

IR	Approx Date	Person	From	Destination	Days	SOW (workplan activity)
2, 3	July '12	Elin Torell and Emilia Mayers (intern)	Providence	Tanzania	6 weeks	Conduct final BMS (3.1, 2.1)
1, 3	August '12	PFPI	Manila	Tanzania, but trips to - Pangani (1) - Zambia (1) - Uganda (1)	Total 27 days: 10 (TZ) 7 (Z) 10 (U)	Provide follow-up to PHE activities and BALANCED trainees in Tanzania, Zambia; and Uganda (1.4, 3.1, 3.3, 3.5, 3.6)
1, 4	August '12	Linda Bruce	DC	Tanzania and Uganda	10 days	Visit Uganda seed grants and Tanzania activities
3.1	Oct' 12	CRC – Person TBD	Providence	Philippines	10 days	Provide TA to BALANCED-Philippines project and assist with prep of next workplan
1	Feb '13	Elin Torell, PFPI, Glenn Ricci	Providence/Manila	Tanzania	14 days	Conduct PHE Regional Course
1, 3	Feb/Mar '13	PFPI	Tanzania	Uganda	7 days	Provide TA to Uganda seed grants and document lessons learned
2	March '13	Richard Pollnac	Providence	Philippines	5	Help design the final BMS survey (2.1, 3.2)
2	May '13	Richard Pollnac	Providence	Philippines	5	Monitor BMS survey and data collection
M	TBD	Joan	Manila	DC	6	Participate final BALANCED Partners meeting (M)
3	Jan-Feb 2013	Joan Castro	Manila	PNG	12	Provide TA to TKCP
1	TBD	Joan or Ricky	Manila	Uganda	10	Provide TA to HOPE-LVB Project (1.3)
1	TBD	Joan or Ricky	Manila	Uganda	10	Provide TA to HOPE-LVB Project (1.3)
2	Sept' 13	Joan and Ricky	Manila	Wash DC	5 days each	Participate in Project close out event

IR	Approx Date	Person	From	Destination	Days	SOW (workplan activity)
Domestic Travel						
2, M	Sept '12 April '13 Sept '13	Elin Torell	Providence	Washington	3 trips: total 8 days	Meeting of the Minds (1.3) BALANCED Partner's meeting (M)
2, M	Oct '12 April '13 Sept '13	Lesley Squillante	Providence	Washington	3 trips: 8 days	Project Management and KM-related (M)
M	Oct '12 Feb '13	Cindy Moreau	Providence	Washington	2 trips, 5 days	BALANCED and USAID meetings (M)
M	Sept '13	Brian Crawford	Providence	Washington	1 Trip, 3 days	
M,2	July '12 Jan '13 April '13 Sept '13	Linda Bruce	Washington	Providence	4 trips 13 days	Project Management
2	July '12 June '13	Janet Edmond	Washington	Providence	2 trips, 6 days	KM activities

APPENDICES

Appendix 1 – Summary of Year 5 PMP Targets

BALANCED Project Indicators and Targets

INDICATOR	Year 5 target summary	Actual results from project start until Dec 31, 2011	Original LOP target	Comments on target progress
SO-1: Number of target organizations incorporating PHE tools, protocols, etc. into their work (PRH 1.1)	5	17	24	We are striving to meet this target, but may come up a little short.
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)	300,000	2,542,803	2,500,000	LOP Target met
1.1 Number of individuals trained by BALANCED in PHE know-how and SOTA using 21st century learning tools	52	1,575	200	Exceeded 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	22	32	45	We anticipate meeting the 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)	1	11	16	We are not sure whether we will meet this target or not. It has been more difficult than anticipated to secure the partnerships as defined in the indicator definition

INDICATOR	Year 5 target summary	Actual results from project start until Dec 31, 2011	Original LOP target	Comments on target progress
1.4a. Number of technical support interventions provided by BALANCED to Missions and to organizations to implement PHE within their programs (PRH 3.2)	14	56	30	Exceeded LOP target
1.4b. Number of new organizations receiving TA by BALANCED	0	21	No target	This sub-indicator does not have a LOP target.
2.1 Tools, protocols, procedures, systems, methodologies, guides, curricula, or indices with demonstrated programmatic value developed or adapted for country and/or thematic contexts (PRH IR 2.1)	4	11	25	Based on evaluation feedback, the project increased efforts in IR 1 and 3, and reduced IR 2 efforts, hence, reducing the number of tools. However, we feel that we will come close to the LOP target.
2.2a Number of success stories, peer review articles, conference papers, research studies documenting key actionable findings about the PHE approaches, their lessons extracted, and value-added (PRH IR 2.2)	8	48	12	Exceeded LOP target
2.2b. Number of peer reviewed articles and research studies	0	2	No target	No LOP target for this indicator
3.1 Number of PHE tools, methodologies, and actionable findings replicated in new countries and geographic areas (PRH 3.1)	3	21	9	Exceeded LOP target
3.2a Number PHE programs scaled up (PRH 3.4)	0	2	2	No LOP target change

INDICATOR	Year 5 target summary	Actual results from project start until Dec 31, 2011	Original LOP target	Comments on target progress
3.2b Number of geographical areas replicating PHE (PRH 3.4)	0	7	6	Exceeded LOP target
3.3 Number of BALANCED field site activities that produce results that can feed into KM activities (development of tools and success stories)	3	8	8	We anticipate exceeding the LOP target