

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

**Semi-Annual Results Report #2
For Period January 1 - June 30, 2009**

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

BALANCED	Building Actors and Leaders for Advancing Community Excellence in Development
BMS	Behavioral Monitoring Survey
CAP	Conservation Action Planning
CBD	Community-based Distributors
CI	Conservation International
CIP	Conservation International Philippines
CPE	Couple Peer Educators
CRC	Coastal Resources Center
CTI	Coral Triangle Initiative
CTO	Cognizant Technical Officer
DCB	Dual Capacity Building
DENR	Department of Environment and Natural Resources
DIP	Detailed Implementation Plan
DMO	District Medical Officer
EH	Environmental Health
EWNRA	Ethiopian Wetlands and Natural Resources Association
FISH	Fisheries Improved for Sustainable Harvests
FP	Family Planning
GH	Global Health
GLC	Global Learning Center
GTZ	German Technical Cooperation Agency
ICM	Integrated Coastal Management
IEC	Information, Education and Communication
IR	Intermediate Result
IPOPCORM	Integrated Population and Coastal Resources Management
JGI	Jane Goodall Institute
JHU/CCP	Johns Hopkins University/Center for Communication Programs
K4H	Knowledge for Health
KM	Knowledge Management
ME&L	Monitoring, Evaluation and Learning
MOH	Ministry of Health
MOU	Memorandum of Understanding
NCSE	National Conference on Science and Environment
NGO	Non-Governmental Organization
NPOA	National Plan of Action
OPRH	Office of Population and Reproductive Health
PEPFAR	President's Emergency Plan for AIDS Relief
PFPI	PATH Foundation Philippines Inc.

PHE	Population-Health-Environment
PPE	Poverty, Population, Environment
PRB	Population Reference Bureau
PSI	Population Services International
PTAL	PHE Technical Assistance Lead
REPS	Regional Environment Program Specialist
RH	Reproductive Health
RHU	Rural Health Units
SANAPA	Saadani National Park
SO	Strategic Objective
SOTA	State of the Art
SUCCESS	Sustainable Coastal Communities and Ecosystems
TA	Technical Assistance
TCMP	Tanzania Coastal Management Partnership
TNC	The Nature Conservancy
TNC CTC	The Nature Conservancy Coral Triangle Center
TOT	Training of Trainers
TRG	Training Resource Group
URI	University of Rhode Island
USAID	United States Agency for International Development
USG	United States Government
UZIkwASA	Tanzanian Health Organization
WWC	Woodrow Wilson Center
WWF	World Wildlife Fund

I. Introduction

On September 17, 2008, the United States Agency for International Development Bureau for Global Health (USAID/GH) awarded the new Population, Health and Environment (PHE) technical leadership Cooperative Agreement, *Building Actors and Leaders for Advancing Community Excellence in Development (BALANCED)* to the Coastal Resources Center (CRC) at the University of Rhode Island (URI) and its highly qualified team of international partners, PATH Foundation Philippines, Inc. (PFPI) and Conservation International (CI). The five-year BALANCED Project has \$5 million in core funding from the USAID/GH Office of Population and Reproductive Health (OPRH) and a potential additional \$2.5 million budget for Mission buy-ins from all accounts.

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

II. Project Results

This semi-annual report covers the period from January 1, 2009 to June 30, 2009. It describes progress made on the IRs and results achieved during this period. The report also provides a brief listing of achievements since the start of the Project and covers challenges, solutions and upcoming priorities for the next six-month reporting period. The format of the report follows the BALANCED Year 1 workplan format for ease of reading and tracking actual progress against planned.

IR 1. Capacity built for integrated PHE implementation

The BALANCED Project's overall capacity building goal is to increase the number of health and environment organizations adopting and implementing PHE approaches globally. During Year 1, the BALANCED Project focused on building the capacity of nongovernmental organizations (NGOs) in East Africa to implement PHE activities.

In Tanzania, BALANCED is supporting the integration of family planning into CRC's ongoing USAID/Tanzania funded Sustainable Coastal Communities and Ecosystems (SUCCESS) project implemented through the Tanzania Coastal Management Partnership (TCMP). The SUCCESS project is currently integrating health and environment in villages surrounding the Saadani National Park area through Mission PEPFAR (President's Emergency Plan for AIDS Relief), biodiversity conservation, and water and sanitation earmark funds. While scale-up activities in Tanzania fall under IR 3, BALANCED took advantage of these capacity-building opportunities to simultaneously build the capacity of representatives from other NGOs that are implementing or are new to PHE in East Africa.

In Madagascar, BALANCED is assessing capacity building needs and planning to conduct a workshop on PHE program design for NGOs implementing or new to PHE interventions. In the previous reporting period, we conducted the following IR1 activities:

- Developed criteria for selecting non-TCMP participants for the PHE information, education, and communication (IEC) and PHE community-based distribution workshops and vetted them with PHE partners and USAID
- Obtained the Tanzania MOH guidelines for training community-based distributors (CBDs) and began drafting the train-the-trainer (TOT) curriculum for PHE partners on how to recruit and train PHE CBDs
- Organized a Madagascar PHE working group as a venue for PHE partners and USAID to coordinate PHE activities in Madagascar and to discuss ways to leverage and secure resources for PHE activities there

Accomplishments

During this reporting period, BALANCED implemented one key capacity building event and prepared for another one scheduled for the beginning of Year 2.

1.1 Conduct training on how to develop integrated PHE IEC materials in Tanzania

In the SUCCESS project site, there are currently no integrated IEC materials available. Thus, the BALANCED Project planned to conduct a regional workshop to train TCMP staff and partners, as well as representatives from other East African NGOs implementing integrated projects, to develop PHE messages and IEC materials for use in educating the community and mobilizing them to protect their natural resources, health and family. The regional IEC workshop was originally scheduled to immediately precede the regional PHE CBD train-the-trainer workshop in order to maximize the presence of the PFPI technical team being in Tanzania.

During this reporting period, BALANCED refined the criteria for selecting non-TCMP participants to the regional IEC workshop based on experience from the PHE CBD train-the-trainer workshop conducted in March 2009 (see Activity 1.3). These criteria require that non-TCMP participants come from East African nongovernmental organizations (NGOs) or government entities that:

- Are interested in developing integrated messages and IEC materials for their PHE activities
- Already have developed some core PHE, conservation, health, family planning and/or water and sanitation messages
- Can use the integrated PHE messages and materials developed during the workshop in their project interventions
- Have funding to develop IEC materials developed in the workshop and roll out their IEC strategy

A list of participants for the IEC was developed, invitation letters drafted, and a job aid on how to develop integrated PHE IEC materials drafted. For logistical and timing reasons it was not possible to conduct the IEC workshop and the CBD TOT back-to-back. Thus, the decision was made to conduct the CBD training first and the IEC workshop in the beginning of Year 2.

Results from Activity 1.1 include:

- Draft job aid on how to develop integrated PHE IEC materials
- Criteria for inviting non-TCMP participants to IEC workshop

1.2 Conduct training on how to develop performance-oriented job aids for CBDs and couple peer educators (CPEs)

During the Year 1 BALANCED Project planning process, the team proposed working with TCMP staff to develop policies and performance expectations that would be used to guide the selection of the CBDs and CPEs and to help assess their on-the-job performance. Based on these policies and expectations, the BALANCED team would train TCMP staff on how to develop a job aid for their CBDs and CPEs to use as they counsel community members about PHE and family planning. As with the IEC workshop, participants would include individuals from non-TCMP NGOs who would come to learn how to develop performance-oriented job aids for their CBDs.

During this reporting period, BALANCED staff developed general criteria for selecting CBDs, PHE providers, and CPEs. They also developed standard performance expectations for each of these outreach workers. These criteria and performance expectations were incorporated into the PHE CBD TOT curriculum (see Activity 1.3). The BALANCED team used these criteria and performance expectations along with key points from the TOT curriculum for training CBDs (see Activity 1.3) to develop a Reference Guide for CBDs, PHE providers, and CPEs that could be used as a job aid.

A job aid is needed when there are new employees, new tasks or when on-the-job tasks are not being implemented to satisfaction. Ideally, the job aid should state on-the-job tasks based on performance expectations and, in some cases, include the key messages from IEC materials. Given that the Reference Guide was developed to follow job aid methodology and adequately outlines the “new tasks” for the “new” PHE CBDs and CPEs, it was decided to postpone the job aid training for the time being. The job aid training would be more appropriate after CBDs and CPEs have been working in the field for a while using the Reference Guide and after program managers have had an opportunity to observe any new tasks or any gaps in performance that need to be included in the Reference Guide. At that point in time, the BALANCED Project will either hold a workshop or provide hands-on-mentoring on the job aid methodology and on how to revise the Reference Guide to incorporate new information/tasks and to address gaps in CBD/CPE performance. Often, learning is best sequenced—i.e., not given all at one time—so that short-term visible results occur and competency is gradually developed as new program elements are added.

Results from Activity 1.2 include:

- Draft job aid entitled Reference Guide for CBDs, PHE Providers and CPEs

1.3 Conduct training on community-based distribution and peer education in Tanzania

As part of CRC's multi-sectoral conservation and health project, the BALANCED Project planned to train TCMP and partner staff how to implement a PHE CBDs and peer educators system. It was decided to expand this PHE CBD training to include representatives from non-TCMP NGOs working in Tanzania, Kenya and Rwanda who were also interested in learning about PHE CBD systems for their projects. The workshop was designed to serve as a TOT opportunity for TCMP and other NGOs implementing PHE activities in East Africa.

In June 2009, PFPI conducted the five-day TOT on PHE Community-based and Peer Education System at the TCMP office in Dar es Salaam. Thirteen participants from both health and environment NGOs and non-government agencies from Tanzania, Kenya and Rwanda attended the training. Of the 13 participants, two were from World Wildlife Fund (WWF) in Kenya, namely APHIA II Coast and the Ministry of Health; one was from the SPREAD Project in Rwanda; and 10 were from Tanzania, including two from Engender Health; two from Jane Goodall Institute (JGI); three from the Pangani District Hospital; one from the Saadani National Park (SANAPA); and two from TCMP. The three objectives of the TOT were to enable participants to:

- Understand the link between population, health and environment,
- Establish family planning (FP) education and services to the community using integrated PHE approaches, and
- Train CBDs and CPEs on PHE community-based distribution systems, using a very participatory methodology.

The TOT employed a Dual Capacity Building (DCB) training approach whereby participants simultaneously acquire skills in PHE training delivery while learning PHE content. Instead of allowing participants to be passive recipients of learning, this participatory and cost-effective methodology stimulates participants to "learn by teaching each other". Dual capacity building will enable BALANCED to rapidly expand the number of advocates, champions and trainers promoting and supporting wider use of effective PHE approaches.

Except for one workshop participant who had implemented PHE projects, the majority of the trainees expressed limited or no PHE background prior to the training. At the end of the training, evaluation results revealed that all of the participants learned the importance and benefits of linking PHE. They also reported that the training equipped them with the knowledge and skills to train CPEs and CBDs in their own areas. Participants stated they greatly enjoyed the participatory teaching methodology of the training.

As part of the workshop, BALANCED staff prepared organizational profiles that were based on participants' pre-workshop application forms and their post CBD TOT action plans and stated needs for further technical assistance (TA). This includes TA in developing PHE training curriculum for youth; how to secure funds to conduct PHE training for CBDs and CPEs; and developing IEC materials, etc. (see Annex 1: PHE CBD System Post-training Follow-up)

After the training, the BALANCED Project staff continued dialogue with the workshop participants through email communications. In Year 2, the needs identified by the participants in their post-training plans can be further validated, updated and refined. Based on these plans, the BALANCED Project will provide TA in the form of providing relevant materials and information, involving participants in additional capacity building activities, and providing other in-country technical support.

The team produced a facilitator's guide entitled *Guide for Training Community-Based Distributors and Couple Peer Educators Working on Integrated PHE Activities*—adapted from PFPI's *Community-Based Integrated Reproductive Health and Coastal Resource Management Training of Trainers Manual for Community Health Outreach Workers*. It includes instructions on how to use the DCB approach for training CBDs and CPEs and includes the latest in international family planning and sexually transmitted infections (STI)/HIV norms and guidance. The TOT workshop participants received a pilot copy of the Guide, which will be revised to include adjustments suggested by TOT workshop participants. We will also strengthen the explanation of the DCB approach for users who have not attended the workshop and who have not experienced the DCB teaching methodology in practice.

Results from Activity 1.3 include:

- Pilot draft of TOT Facilitator's Guide entitled, *Guide for Training Community-Based Distributors and Couple Peer Educators Working on Integrated PHE Activities*
- Thirteen participants from both health and environment NGOs and non-government agencies from Tanzania, Kenya and Rwanda trained on PHE community-based distribution and how to train CBDs and CPEs

1.4 Assess program design competencies and gaps of NGOs that implement FP or conservation programs and hold great potential for PHE implementation activities in Madagascar

USAID/GH/PRH recently invested in the development of a training curriculum and materials on PHE program design, which were tested in Ethiopia. During Year 1, the BALANCED Project had planned to strengthen the capacity of PHE network members and NGOs implementing or new to PHE activities in Madagascar to design and monitor results-oriented PHE program activities. Madagascar had been selected because it has the potential to expand on its history of PHE programs, has a PHE network and because there is a possibility of Mission funding to support and expand selected PHE activities there.

Further, CI, a BALANCED Project partner, has an office in Madagascar and can assist with information gathering and workshop logistics.

During this reporting period, CI and BALANCED staff in Washington, DC participated in the formation and operation of the PHE Madagascar working group, along with representatives of USAID, PRB and WWF. The purpose of the group was to coordinate PHE activities in Madagascar and to discuss ideas for further coordination with in-country staff at CI and WWF. The PHE Madagascar working group held planning meetings on January 23, 2009, and began action planning in February and March 2009.

In consultation with CI Madagascar and WWF Madagascar staff, the DC-based group proposed a series of field-based interviews with key health and development groups with experience in PHE. In March 2009, the DC based group developed a list of interview questions designed to assess knowledge and attitudes concerning PHE among the NGOs that have PHE experience. Using the questionnaire, CI and WWF staff in Madagascar teamed up with Voahary Salama staff, to conduct almost 20 interviews with key field staff to determine the current state of PHE and potential for future action. CI Arlington staff facilitated two video conference calls (May and June 2009) to discuss the data from the interviews and the proposed report outline. A draft report containing interview data and recommendations for future actions was completed and circulated by CI Arlington staff to all PHE Madagascar working group staff on June 30, 2009.

Unfortunately, CI and BALANCED initiated the Madagascar interviews at the same time the country was immersed in a political crisis, which resulted in the Malagasy president being overthrown and the installation of a new government in March 2009. This change in government has caused the US Government to suspend support for development (health and conservation, in particular) except humanitarian aid. The local Madagascar staff found it challenging to conduct discussions about future plans in light of the uncertain political situation and resulting funding implications. One of the report recommendations points to a need for “scaling-up” PHE in Madagascar for future activities, however, this and other recommendations in the report may be “on hold” until the political situation in the country changes.

1.5 Prepare for PHE Program Design Workshop in Madagascar

The BALANCED Project’s Year 1 workplan included preparations for a PHE Program Design workshop in Madagascar to be held at the beginning of Year 2. As already mentioned above, because of the political turmoil in the country right now the PHE working group agreed that such a workshop may not be the most appropriate intervention for Madagascar at this time.

Results of the PHE assessment conducted this reporting period indicate the need for 1) a workshop that will present lessons learned from PHE projects in Madagascar and 2) an action plan for reviving PHE in Madagascar through coalition building and shared learning across NGOs and organizations. However, future capacity building and scale-up activities will depend up on a resolution to the political crisis and a resumption of USG support.

IR1 Priorities for Next Period (July 1 to December 31, 2009)

- Finalize job aid entitled: Developing Integrated PHE IEC Materials: A Job Aid for PHE Practitioners to distribute to IEC workshop participants
- Develop Facilitator’s Guide for the IEC workshop for internal use.
- Conduct regional workshop on PHE IEC materials development for TCMP and NGOs already implementing or those new to PHE activities in East Africa.
- Finalize the Guide for Training Community-Based Distributors and Couple Peer Educators Working on Integrated PHE Activities and send to TOT workshop participants.
- Finalize Reference Guide for CBDs, PHE providers, and CPEs and send to TOT workshop participants (job aid).
- Conduct “south-to-south” exchange visit and document the proceedings.
- Conduct a tailored version of the PHE Program Design workshop for NGOs working on or interested in implementing PHE activities in the Philippines and selected other CT countries.
- Adapt the PHE Program Design curriculum to be incorporated into The Nature Conservancy’s Coastal Triangle Center (TNC-CTC) syllabus.
- During all training events, ask participants to develop action plans for how they plan to use the new knowledge and skills acquired and identify specific needs for continuing technical support.
- Based on participants’ action plans, technical support needs, availability of NGOs to fund their PHE activities, and their readiness to implement the new skills learned at the workshop, provide post-training support to select participants/NGOs.
- Work with those selected to develop follow-up plans, which will be monitored over time.
- Provide all BALANCED Project trainees with additional resources as available—e.g., curricula, manuals, materials for youth, tested job aids, websites and listservs.
- Finalize and disseminate report on PHE lessons learned gleaned from the Madagascar assessment.
- Develop a concept paper for potential USAID/Madagascar mission buy-in.

Status of PMP Results for IR 1

INDICATOR	YR 1 TARGET	YTD
1.1 Number of individuals trained by BALANCED in PHE know-how and SOTA (State of the Art) practices using 21st	51	13

century learning tools		
1.4 Number of technical interventions provided by BALANCED to Missions and organizations to implement PHE within their programs (PRH 3.2)	2	1
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	1

IR 2. PHE knowledge and tools developed, synthesized, and shared

The knowledge management element (IR2) of the BALANCED Project lies at the nexus of IR1, *Capacity built for integrated PHE implementation* and IR3, *Results-oriented PHE field activities implemented in areas of high biodiversity*. It draws out the “best of” information and experience generated as part of the activities of those two IRs, and synthesizes and disseminates it to trainers, training participants, PHE implementers in the field, the larger PHE community of practice and donors. As such, this intermediate result serves as an “integrating” arm of the Project and focuses on three key activity areas:

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

In the previous reporting period, the team completed the following IR 2 activities:

- Introduced the BALANCED Project to the PHE community through press releases, facts sheets, and presentations at conferences (International EcoHealth Forum) and other venues (Wilson Center)
- Conducted preliminary research and information-gathering on the PHE community of practice—who they are, how they communicate, what information they need and want to share—to inform the BALANCED KM and communications strategy
- Conducted preliminary research on the benefits of the PHE approach—to inform both a background findings report and the Year 2 field-based research agenda

Accomplishments

This reporting period saw significant progress in IR2 activities as outlined below. All of these are iterative and will continue to grow and be expanded through the life-of-Project.

2.1 Identify, document, and synthesize knowledge

- Identified, invited and secured the agreement of seven experienced PHE experts to serve on the BALANCED Project Advisory Committee and attend a first Advisory

Group meeting in September 2009 at URI. These members are: Dr. David Carr (University of California, Santa Barbara), Geoff Dabelko (Wilson Center), Judy Oglethorpe (WWF), Dr. Lori Hunter (University of Colorado), Nancy Harris (JSI), Mark Freudenberger (ARD), Lynne Gaffikin (consultant and PHE expert).

- Continued with preliminary research (via website, one-on-one discussions, etc.) to better understand how PHE actors share knowledge and information—including through formal or informal networks. A spreadsheet of 1,534 names and 64 "events" (organizations, meetings, mentions in key documents) was compiled and explored using social network software that shows how individuals and organizations working in PHE are "connected". This "map" will be refined and expanded as information is gathered at events attended by the BALANCED team and its partners. Findings from this research, combined with that of the John Hopkins University (JHU) audience research study were to be laid out in a report outlining a PHE knowledge sharing strategy for BALANCED. As a result of the delay in the JHU report (originally due spring 2009 and now slated for summer/fall 2009), however, this knowledge sharing strategy document will be produced in the next BALANCED reporting period.
- Presented results of the preliminary PHE community of practice "map" at the April 14, 2009 PHE Policy and Practices Group meeting in Washington D.C.; at the April 16, 2009 New Trends in Informatics Research seminar at the University of Albany; and the June 19, 2009 BALANCED Project team work session at URI.
- Completed a preliminary collection and review of documents on the value-added of PHE and conducted initial discussions with PHE partners such as CI, WWF and USAID on this same topic. Findings from the review and discussions informed the design of the BALANCED value-added research agenda for Year 2. While a report on the findings and recommendations from this research was drafted, it requires significant vetting and editing before dissemination to the wider PHE community. The edited report is scheduled to be completed in the next reporting period.
- It is worthwhile noting that key findings from the research concluded that:
- The best research design to assess value-added is one that: 1) looks across multiple PHE sites that have been ongoing for a number of years and, 2) includes both PHE and non-PHE control sites. Unlike some earlier major PHE operations research conducted in the Philippines and Madagascar, the BALANCED team will not use a longitudinal study design. Rather, it will use baseline independent and quantitative methods, supplemented with a few in-depth qualitative case studies. This design requires a large number of PHE sites (>30). The team's research in Year 1 also confirmed that Madagascar and the Philippines are the only two countries that meet both design criteria. While Tanzania might come close to meeting the criteria, many of its PHE programs are still relatively new. Hence it would be difficult, if not impossible, right now for Tanzania to provide a sufficient number of sample sites. Given Madagascar's current political context, it too has been eliminated as a candidate for this field research. Thus, the BALANCED Year 2 field research will take place in the Philippines, will include a URI graduate student on the team, and will begin in the second quarter of Year 2. (A second value added study requires

tracking selected PMP indicators over time and as such will be scheduled for later in the Project).

- Completed adaptations of the CRC-build web-based system for PMP baselines and data collection to incorporate the needs of the BALANCED performance monitoring plan (PMP) and targets (see note in PMP section).
- Conducted several DC-based meetings with representatives from USAID and key organizations managing PHE programs (CI, WWF, JGI, Technical Resources Group/TRG, the Population Reference Bureau, Woodrow Wilson Center/WWC, and the Environmental Health/EH project) to: 1) introduce the BALANCED Project, and 2) learn how the Project, including its knowledge management components, might build from and add to ongoing PHE work and information sharing.
- Vetted selected KM outputs and lessons learned from Project Year 1 at the April 2009 annual BALANCED Project team meeting. With less than six full months of Project implementation underway at that time, however, the amount of experience available to share was limited. This is expected to change in Year 2.

2.2 Organize existing and new knowledge for PHE website

During this reporting period, agreement was reached by the COTRs of both the BALANCED Project and the Knowledge for Health (K4H) project—led by the John Hopkins University Center for Communication Program—that the PHE website would be transferred from its current host, the Environmental Health site, to the K4H project website. This move enables the BALANCED Project to build on JHU/CCP’s many years experience in promoting knowledge management and managing active health-oriented websites for the large international health community.

The following tasks accomplished during this reporting period laid the groundwork needed to enable the launch of the new PHE web site in August /September 2009 (final dates dependent on readiness of overall K4H site).

- Completed the inventory of existing content and materials on PHE sites (e.g., the EH project, INFO Health) and continued the process of identifying gaps in content, ease of access to information, categorization/labeling of information.
- Met with collaborators at JHU/CCP to refine the design and implementation of the new K4H PHE website. Guy Chalk from CCP visited CRC and presented the status of the new site development and discussed currently anticipated launch schedules. August 2009 is the anticipated date for a “soft” launch of the new site. This "soft" launch will be announced within the audience of BALANCED Project collaborators, the Policy and Practice Group, and USAID. A more formal or “hard” launch (widely publicized announcement) of the full site will be scheduled for early October 2009—coordinated with the launch of the K4H umbrella site.
- Completed an analysis of existing PHE documents to prepare a preliminary list of PHE topic terms to be used in selecting PHE website tabs and subheadings and categorizing documents to be uploaded to the new site, as well as in preparing

document abstracts and key words (thesaurus). This process included a content management work session at URI in March attended by Janet Edmond, BALANCED Deputy Director. This work was presented during the BALANCED Project team's work session at the University of Rhode Island on June 19, 2009 and will be further vetted and expanded by the team in a weeklong working session in July 2009. The team also "tested" the process of analyzing document content to prepare document abstracts; developed criteria for posting of documents on the PHE website; and made a first cut at identifying a content management team for the site and protocols for uploading documents.

- Prepared for the launch of the now more populated BALANCED website (previously the site was limited to a modest landing page) to go live in July. This site will expand to include a growing number of publications, news items from the BALANCED Project, links to other PHE sites and resources, etc. as the Project's capacity building efforts and technical assistance to the field expand, and as its communications strategies (see activity 2.3) become more robust and are implemented. The website will include a prominent link to the PHE website that is being designed as one portal within the larger K4H site as described above.

Results from Activity 2.2 include:

- Draft guidelines (under continued development) for new structure of PHE website
- BALANCED Project website online (however, with launch announcement slated for next reporting period)

2.3 Share knowledge within the PHE and broader community

During this reporting period, BALANCED staff developed a project resources mobilization strategy (reference Activity 3.3) and a PHE communications and outreach strategy. Both are designed to promote PHE approaches and to strengthen the global PHE community of practice. While first iterations of the strategies were finalized during this reporting period, both are meant to be "living" documents/strategies and will be adapted as appropriate throughout the life of the Project, in consultation with USAID. In this reporting period, BALANCED staff completed the following activities toward the goal of sharing PHE knowledge through a range of communications and outreach activities and mechanisms:

- Announced the BALANCED Project by distributing a press release in February 2009 that was delivered to over 300 PHE contacts worldwide including USAID Cooperating Agencies, Foundation staff, international development NGOs, and other key contacts.
- Produced three fact sheets and drafted one report:
 - a one-page BALANCED Project overview, which was sent to USAID Missions in Haiti, Ethiopia, and the PHE Network in Ethiopia and NGOs inquiring about the BALANCED Project—this same fact sheet was then adapted for and distributed at the World Oceans Conference (May 2009)

- a statement on the potential role for the BALANCED Project in the Coral Triangle Initiative/CTI for USAID/RDMA/Thailand (February 2009)
- an overview piece on the BALANCED Project’s KM portfolio for the Policy and Practice Meetings in Washington, DC
- Participated in conferences and other organized professional venues to promote learning and knowledge about PHE and the BALANCED Project. This includes attendance by BALANCED staff at meetings in Washington, DC and the Philippines in which they highlighted the Project and its mission to promote greater technical leadership in the PHE community. This included the participation of BALANCED team members and consultant as follows:
 - At PHE Policy and Practice meetings March 4, and April 14, 2009, discussed with other NGO partners ideas for promoting PHE trainings and knowledge management and fundraising for field activities.
 - Presented at Asia’s Future conference, organized by the Wilson Center and held in Bangkok Thailand on March 30-31, 2009.
 - Attended the MEASURE evaluation/technical advisory session on PHE training materials (June 16, 2009).
 - Presented on PHE as an approach to mainstreaming climate change adaptation in the coastal setting at the World Ocean Conference (WOC) in Manado, Indonesia (May 2009) as part of a larger one-day pre-conference workshop organized by CRC-URI entitled “*Climate Change Adaptation Strategies and Actions for Coastal Areas.*” More than 50 participants attended and received the BALANCED Project fact sheet. Several expressed interest in the PHE approach and asked about the behavior monitoring systems used and about PFPI’s experience with culture/church in integrating population dimensions into conservation projects. The conference was also an opportunity to meet key decision makers in the Coral Triangle area and other stakeholders, share information about PHE and the BALANCED Project, and explore possible collaborations with USAID, CTI and other donors such as UNFPA.
 - At the June 28-30, 2009 meeting of the Mayors of the Philippines coastal municipalities, presented on PHE and BALANCED Project.
 - Engaged in discussions with PRB, PAI, Wilson Center, WWF and Lori Hunter (moderator of the Population and Environment Research Network) that led to agreement by the parties to make stronger linkages between NGOs and academic institutions.
- Developed a communications and outreach strategy with strategic input and support that was refined during a series of work sessions facilitated by Jason Bremner of PRB—PRB is both a PHE partner of BALANCED and an expert in crafting outreach and communications materials. Also, developed a resource mobilization strategy (see IR 3). The final versions of both strategies were shared with the BALANCED Project USAID Technical Advisor in mid-June, after which

modest revisions were made and the documents/strategies approved and made ready for Year 2 implementation.

- A BALANCED listserv was developed drawing upon the names on listservs of several of the team members. However, no formal criteria were developed for how the BALANCED listserv gets further refined and developed over time. These criteria will be developed during this reporting period.

Results for Activity 2.3 include:

- Presentations on PHE and BALANCED at three key conferences: Asia's Future, the World Ocean Conference, and the Philippines Municipal Mayors Conference

IR 2 Priorities for next period (July 1 to December 31, 2009)

- Building on results of the Year 1 and ongoing analysis of the PHE community of practice as well as results of the JHU audience research, produce a strategy document for PHE knowledge sharing.
- Continue cataloging the global portfolio of PHE projects and interventions (builds on Year 1 inventory of documents on the EH website and preliminary bibliography lists of PHE documents provided by partners). This "inventory" serves as a mechanism for informing what will be loaded onto the newly designed PHE website and for informing research on the benefits of the PHE approach.
- Finalize the research agenda, design and methodology for documenting the benefits of the PHE approach using Philippines sites for the study; identify collaborative partners in this research; and begin field implementation of the study.
- Engage with the BALANCED Project KM Advisory Committee to identify gaps in BALANCED knowledge management activities, including the research on benefits of the PHE approach, and identify ways to close these gaps to improve information sharing services to the PHE community.
- Based on continued discussions with the KM Advisory Committee, PHE Policy and Practice Group, and other PHE partners, continue to update the PHE topic content maps and the PHE thesaurus (building on work of Year 1) to more effectively reflect how individuals "categorize" PHE topics, the terms they use to discuss or write about PHE, and, thus, how they logically expect to access information about these PHE topics.
- Complementing the above and building on Year 1 work, conduct a five-day work session at URI with a BALANCED Project staff experienced in PHE to continue to develop and apply topic maps to existing PHE website documents, develop the classification schema, and prepare the meta-data necessary to upload existing documents to the new PHE website.
- Activate the PHE website, which includes:
 - Establish a "PHE site content management team" and define their roles, responsibilities, and authorities

- Prepare abstracts for existing and new content
- Finalize criteria against which documents/information will be vetted for inclusion/uploading to the PHE website and share with the PHE community
- Upload documents and information that meet criteria
- Announce the site’s launch; develop a system for routinely “marketing” it and its latest tools and information to users and to encourage new uploads from the PHE community—with a special focus on practitioners in the field
- Contribute to and maintain BALANCED website based on periodic feedback from partners and visitors to the site to respond to user needs.
- Design and launch semi-annual electronic newsletter—with a focus on filling a niche not already filled by the Wilson Center.
- Increase implementing and funding agency awareness of PHE approaches and success stories through development and dissemination of PHE factsheets and briefing materials.
- Establish mechanisms to engage in dialogue with PHE champions and promote them as spokespersons and technical resources (e.g. through listservs, word-of-mouth networking, etc.)
- Present at multi-sectoral conferences involving new partners and potential donors—e.g., academic institutions, development NGOs, and international overseas development institutions such as the European Union, The UK Department for International Development (DFID) and other European bilaterals. Suggestions include the Coastal Zone 09 Conference (7/09) and the Family Planning Conference in Uganda (11/09) sponsored by Gates Foundation.

Status of PMP results for IR 2

INDICATOR	YR 1 TARGET	YTD
2.2 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	3 (Castro at WOC and Mayors Conference; D’Agnes at Asia’s Future Conference)

IR 3. Results-oriented PHE field activities implemented in areas of high biodiversity

The BALANCED Project supports PHE scale-up, replication and start-up activities in countries through a small amount of USAID central funds and additional financing from a mix of Mission and Bureau buy-ins, leveraged funds from non-US government donors, and

from BALANCED Project partner cost share. The PHE interventions focus mainly on the delivery of family planning services to communities in priority biodiversity conservation areas and corridors within the USAID First Tier Intensive Focus countries.

The Year 1 work plan intentionally included a discrete set of field-based initiatives, which could be started relatively quickly, including:

1. Integrating family planning and reproductive health activities into the CRC-led SUCCESS Project in Tanzania, making Tanzania one of several PHE models for East Africa
2. Scaling-up PHE initiatives in the Philippines through PFPI's Population, Poverty and Environment (PPE) project, co-financed by the David and Lucile Packard Foundation. This project is designed to build the capacity of local governments to adapt the IPOPCORM model—particularly in the Danajon Double Barrier Eco-region and Verde Passage
3. Strengthening existing working relationships and partnerships in existing PHE networks, such as in the Philippines, Ethiopia and Madagascar
4. Forging new communities of practice in order to promote PHE as an effective development approach
5. Exploring the potential for small-scale PHE activities to provide opportunities for selected NGOs to participate in targeted research on learning topics such as: gender-related value-added outcomes of PHE approaches and how PHE can strengthen climate change adaptation and resilience building
6. Prior to this reporting period, the BALANCED PHE Technical Assistant Lead (PTAL), and Monitoring, Evaluation and Learning (ME&L) Specialist traveled to Tanzania to:
 - Participate in the selection and hiring of a new PHE coordinator
 - Assess the Project site, assist in the planning of the BALANCED PHE component in Tanzania and draft a the Year 1 detailed implementation plan (DIP)
 - Collect reference materials related to community-based distribution in Tanzania
 - Hold meetings with groups and individuals in Pangani town (UZIKWASA, the District ICM facilitator, and the District FP/RH officer); in the Mkwaja village (village leaders, dispensary staff, and individuals involved in SUCCESS activities); and at the Saadani National Park headquarters
 - Vet the BALANCED Project and plans for integrating PHE with key stakeholders
 - In the Philippines, prepare to document lessons learned in the ecosystems scale-up and provide technical support to the local PHE network in the Bohol province

Accomplishments

From January to June 2009, the BALANCED Project implemented a number of activities to scale-up PHE in Tanzania and the Philippines and to secure funding to expand or scale-up PHE in other places.

3.1 Scale-up PHE activities in Tanzania

BALANCED laid the foundation to integrate family planning and reproductive health activities into the CRC-led SUCCESS project in Tanzania—a five-year project to conserve coastal and marine biodiversity while improving the well being of coastal residents through integrated HIV/AIDS prevention and coastal management strategies.

UZIKWASA, an NGO based in Pangani town and a local health partner of CRC/URI, implements the HIV/AIDS component including condom social marketing. Livelihoods and natural resource management components are implemented under the leadership of an integrated coastal management (ICM) facilitator located within the Pangani District.

During the reporting period, a number of activities outlined in the Year 1 workplan were implemented. First, the BALANCED team obtained the Government of Tanzania's Ministry of Health (MOH) Community Based Distributor (CBD) manual and guidelines. The MOH uses these guidelines (curriculum) to train all MOH-approved CBDs and prefers that BALANCED use these for training CBDs in Pangani District—as opposed to using the CBD TOT curriculum developed by the BALANCED Project (see IR1 section). The MOH agreed to include information on PHE integration along with their guidelines. A draft program of activities integrating PHE into the Tanzania MOH CBD guidelines was prepared for use in the CBD district-level training. A combined CBD training for the Mkwaja and Mkalamo Wards, Pangani district, is scheduled to take place the end of August. Initially BALANCED planned to hold the Mkwaja CBD training in Year 1 and the Mkalamo training in Year 2. However, scheduling conflicts with the Pangani FP/RH FP/RH coordinator required postponing the first training to Year 2. To save time and money, the decision was made to combine the Mkalamo and Mkwaja CBD trainings.

In addition to CBDs that will be trained as providers of PHE information and family planning services delivery, it was also decided to make family planning information and commodities, i.e. condoms, available through PHE providers who are kiosk owners and interested in selling FP commodities in the community. The BALANCED Project PHE coordinator trained eight PHE Providers in the Mkwaja ward. During a field visit to the country, PFPI followed up with the trained PHE providers and reported good progress on the promotion and sale of condoms—particularly among young, unmarried men.

Prior to initiating PHE integration, the BALANCED team planned to collect baseline data on behaviors and attitudes towards family planning, HIV and other PHE-related behaviors. To this end, a Behavior Monitoring Survey (BMS) from the Philippines survey was adapted for use in Tanzania to enable comparative analysis of behavioral trends across the two sites. From May 24, 2009 to June 6, 2009, Dr. Enrique Hernandez, Olivia Sison and Dr. Elin Torell traveled to Dar es Salaam, Tanzania to transfer know-how to TCMP in the BMS methodology and process. The questionnaire was translated in Swahili, pretested in

the coastal village of Mlingotini (Bagamoyo District) and revised accordingly. The pre-selected enumerators were then trained in the BMS sampling methodology, encoding process and interview methods. The survey was fielded in two villages in Pangani District surrounding the Saadani National Park with members of the technical team providing field supervision support. The survey was finalized and all the data encoded by the end of June 2009. A total of 437 surveys were conducted in eight villages (of which two were control villages situated adjacent to the Saadani National Park, but in the Bagamoyo District). Once analyzed, the data will constitute a baseline from which to measure behavior changes that result from BALANCED interventions.

BALANCED staff also identified key stakeholders and potential PHE allies and advocated for PHE integration and the BALANCED Project activities. To this end, PFPI and CRC staff held several consultation meetings with National Government officials, PHE-related NGOs, Pangani District officials and leaders. At the national level, the team met with:

- John Wanchanya, the Population Services International (PSI) HIV/AIDS Director, regarding PSI's support to PHE providers in Pangani District through provision of commodities such as condoms to be sold by trained PHE Providers in the Project sites in Pangani District. A letter was sent to PSI detailing the request and as a result the following commitment was made—subsequent training assistance during the PHE providers training, provision of condoms to trained PHE providers, and continuing support to the BALANCED Project.
- Tim Manchester, the founder of PSI in Tanzania, on issues and challenges in establishing a CBD program, insights on family planning commodities distribution and information about other potential key stakeholders and allies in Tanzania and in Pangani District.
- Nelson Keyonzo, Tanzania country representative, and Dr. Pasiens Mapuda, Deputy Country representative, of Pathfinder International, who provided historical information about the CBD system in Tanzania, shared practical experiences in establishing CBDs, and offered valuable insights on both program and financial issues in CBD program implementation.
- Dr. Calista Simabakalia, Head of Healthscope, who previously led the Reproductive and Child Health section of the MOH and is a PHE advocate. Dr. Simabakalia suggested meeting with Dr. Mbando, Director of Preventive Services of Health, to inform him about the BALANCED Project and integration of PHE into the MOH CBD curriculum.
- Dr. Donan Mbando, Director of Preventive Services of the Ministry of Health, to seek his support for training CBDs using the existing MOH CBD training curriculum, but with the added inclusion of modules on PHE. The purpose of this would be to provide CBDs with the skills to also deliver integrated PHE messages. Dr. Mbando expressed his gratitude, citing the need to increase the low contraceptive prevalence rate in Tanzania. A letter to introduce the BALANCED Project was prepared and delivered, as instructed, by Dr. Mbando to the Permanent Secretary.

At the District Level, the BALANCED team met with the following key stakeholders:

- Josephat Mkombe, the Pangani District Medical Officer (DMO), who expressed appreciation for the BALANCED Project support—particularly in the light of decreased family planning coverage. He provided relevant information in conducting the planned social mobilization and CBD training activities in Pangani.
- Mr. Chomaka, the National Resources Officer, who is also supportive of the BALANCED Project.

Other key activities that took place during this reporting period include:

- Continued to build the capacity of the PHE Coordinator at TCMP to facilitate implementation of the PHE activities both at the national and district level.
- Held discussions about mapping out geographic and thematic areas for scale-up and integration with the PFPI and CRC BALANCED teams. Based on the discussions, the decision was made to expand the BALANCED PHE activities to Bagamoyo or another district adjacent to Pangani.
- TCMP explored whether BALANCED activities could be integrated into the current memorandum of understanding (MOU) with the local government.
- BALANCED staff participated in the SANAPA workshop to draft a park management plan.

Results from Activity 3.1 include:

- 8 PHE providers trained on CBD systems
- Module prepared for use in training PHE Providers
- Behavior Monitoring Survey developed for use by TCMP in site monitoring

3.2 Scale-up PHE activities in the Philippines

The Philippines PHE network consists of active and dynamic organizations that have demonstrated significant PHE results on the ground. Building on these proven successes, BALANCED Project partners PFPI and CI designed and plan to implement a two-tiered approach to scaling-up PHE in the Philippines. PFPI will scale-up its field-based approach in new areas with its cost share funds. Through BALANCED funds it will assess and monitor activities and document lessons learned. In collaboration with PHE network partners in the Philippines, CI and PFPI will work to scale-up existing PHE initiatives and to increase the resources for new PHE projects.

Just as BALANCED identified complementary activities to link it to the SUCCESS Program in Tanzania, in the Philippines it has used a BMS to link it to PFPI's Poverty-Population-Environment (PPE) project sites/work. Funded by the David and Lucile Packard Foundation, the PPE project works with local stakeholders in selected municipalities and biological hotspot areas in the Philippines to adapt and scale-up the integrated population and coastal resource management (IPOPCORM) approach to food security. The focus is on three imperiled eco-regions—the Danajon Bank, the Verde Island

Passage and the Mt. Capotoan-Mt. Cabalantian Watershed Complex—that are hotspots ranked as high priority areas for biodiversity conservation and that are home to approximately 1,538,715 people. In the last six months, the PPE project mobilized, trained and upgraded the skills and knowledge of government health personnel in Rural Health Units (RHU) who provide technical oversight, monitoring and referral services for the project. In turn, the trained health personnel identified and trained 173 CBD outlets and 42 CPEs in the project sites. The CPEs, RHU personnel and the CBDs have helped to expand access to FP services in the project sites where 2,769 new users of family planning were served by the project during the reporting period.

The BALANCED BMS was designed to assess PHE links such as food security, climate change and poverty. The PFPI team developed and pre-tested the BMS survey instrument among a sample of coastal residents and refined the questionnaire based on the results of the pretest. A total of 900 respondents in 18 villages from three municipalities in three provinces were surveyed. Analysis of the baseline data is underway and a draft report will be available in the first quarter of Year 2.

In addition, the PTAL and Conservation International Philippines (CIP) presented the BALANCED Project to members of the Philippines PHE network executive committee in March and April 2009. The network committee expressed concern over the lack of a role for the PHE network in the BALANCED Project. During meetings, network members and BALANCED staff discuss the capacities of the PHE network and also explored how specific activities and knowledge from the network could potentially contribute to the knowledge management component of BALANCED. One suggestion was to update the PHE Philippines website to advertise the 2010 Fourth PHE conference and link with efforts by the BALANCED Project to help advertise that same event. BALANCED staff noted that the Project could provide only limited funds to the network to carry out this or other mutually agreed upon synergistic activities. Thus, with the recognition that BALANCED can provide only very limited funds to support PHE network activities, the executive committee agreed to undertake a strategic planning exercise to explore other funding opportunities that could help the network build the skills and capacity of its members.

The PFPI BALANCED team initiated a meeting with CIP, particularly with those involved in PHE and the Coral Triangle activities. The meeting focused on: 1) an orientation to the BALANCED Project; 2) sharing of organizational scopes of work with the BALANCED Project; 3) discussion of activities conducted by both organizations in the Verde Passage; and 4) assessing next steps for PFPI and CIP collaboration. Discussions focused on sharing each organization's experiences working in the Verde Passage area. Both groups later identified the provincial local government in the Province of Oriental Mindoro as the focal point for coordinating the activities of both organizations in the Verde Passage. The CIP-CTI staff person also shared updates on the National Plan of Action (NPOA) for CTI, including noting that: 1) PHE is not explicitly mentioned or included in the NPOA and, 2) it would be a challenge to have the Department of Environment and Natural Resources (DENR) as the lead organization since the Secretary of DENR has publicly denounced

family planning. It was agreed that since USAID contributes to the NPOA, the possible entry point for continued discussions would be through USAID.

CIP began developing a model for how to take the PHE approach it used in Baggao and replicate it in the CI marine sites. In June 2009, CIP staff from the previous forest-based PHE project in northern Luzon (Baggao) produced a concept paper entitled “*PHE at the Center of Marine Biodiversity*”. The paper outlines the benefits of the PHE approach and possible interventions in existing CIP marine sites, such as the Verde Island passage along the Batangas coast. Recognizing that a long term partnership is needed to ensure implementation of a marine-based PHE model, CIP drafted a proposal called “*Conservation Investments in the Verde Island Passage: Partnership in Starting PHE.*” The draft proposal will be finalized and socialized in the next reporting period.

As part of the planned training and advocacy for PHE within the organization, CIP staff began promoting the BALANCED Project to CIP marine staff and presented the Project’s objectives and expected results. The CIP PHE staff also began drafting a four-page advocacy brief entitled “*Well-being of People and their Environment in the Verde Island Passage*”, which will be finalized in the next reporting period.

Results from Activity 3.2 include:

- PHE projects in Danajon eco-region Verde Island corridor and the Mt. Capotoan-Mt Cabalantian watershed complex scaled-up

3.3 Secure funding for PHE expansion or scale-up for at least two countries for Year 2

The majority of funds for field-based PHE activities will come from cost share, leveraged funds, and Mission or Bureau buy-ins. The BALANCED Project will mainly seek opportunities to expand and support PHE field activities through funding from USAID entities, and non-United States government (USG) organizations. During this reporting period, the Project continued to advocate for support for PHE activities in scale-up and new Project sites.

In an effort to build USG support for PHE activities in the Coral Triangle (CT) region, PFPI initiated discussions with the Regional Environment Program Specialist (REPS)/Coral Triangle Initiative USAID Regional Development Mission for Asia, Bangkok to explore possible integration of PHE into the US-supported Coral Triangle initiative. Discussions were held on various occasions by PFPI staff including during the USAID meeting on Asia’s Future organized by the Wilson Center and held in Bangkok, Thailand on March 30-31, 2009.

The USAID-supported CTI program is a regional effort of six country governments to conserve vital marine resources in a unique and threatened ecosystem namely—Indonesia, Philippines, Malaysia, Timor Leste, Papua New Guinea, and the Solomon Islands. The overall goal is to improve management of biologically and economically important coastal-

marine resources and associated ecosystems that support livelihoods of peoples in the Coral Triangle.

The favorable responses to PHE received during these meetings led the BALANCED team to prepare and provide a document on the Coral Triangle Initiative (CTI) and the Role of the BALANCED Project for the REPS who shared it with the US CTI Integration Program. There were no comments received regarding the documents shared. However, during further discussions and meetings with REPS and key participants from the USAID *Asia's Future* meeting, possible entry points in the US supported CTI were identified. These include:

- Integration of PHE into country-specific development plans
- A Regional Exchange program in support of CTI to be conducted through the Program Integrator for US Support to CTI in collaboration with the Fisheries Improved for Sustainable Harvest (FISH) Project in the Philippines. This will include a field visit to IPOPCORM “learning areas“ for PHE in the Danajon eco-region—specifically, the coastal municipalities of Ubay and Talibon in Bohol Province
- A US CTI Integration and Coordination workshop to discuss integration and coordination issues in the Coral Triangle areas
- A potential PHE managers’ training involving government leaders, such as coastal mayors and representatives from NGOs in the CTI region (the PHE Program Design Manual was shared with the REPS for review/comments)
- Engagement of other UN agencies, such as UNFPA, in discussions about PHE in CTI and the exploration of possibilities for resource leveraging to support country-specific demonstration projects
- A collaborative with TNC’s CTI-Global Learning Center (TNC-CTI-GLC), based in Bali, to integrate a module on PHE Program Design into its training workshops on Conservation Action Planning (CAP) for program managers from CTI countries

During this reporting period, the BALANCED Project also refined its resource mobilization strategy and implementation plan that will help galvanize funding for PHE field activities (see Appendix 1). Criteria were developed and used to identify where the BALANCED Project would focus its resource mobilization efforts. These criteria include, but are not limited to, USAID Missions, non-USG agencies, NGOs and/or local governments with PHE interest and/or experience and who work in areas with high unmet needs for family planning, high biodiversity values, and with the socio-economic and cultural factors and other enabling conditions necessary for PHE implementation. Based on these criteria, the resource mobilization strategy has three objectives:

1. Obtain Mission Buy-ins (FP, NRM, or other sources) for new and scaled-up field-based PHE activities in USAID family planning focus countries (including First Tier and Second Tier countries) that also have biodiversity conservation priorities. These funds would support conservation NGOs operating in biodiversity-rich areas of a country and interested in the PHE approach to integrate community-based family planning services into their conservation activities.

2. Leverage funds from conservation and health NGOs and/or government agencies working in environment, health, agriculture, energy or rural development sectors to support new or scaled-up field-based PHE activities in priority biodiversity conservation areas in USAID family planning focus First Tier Intensive and First Tier countries.
3. Mobilize non-USG resources to support field-based PHE activities in USAID family planning focus countries with biodiversity conservation priorities.

In coordination with the BALANCED Project COTR and Technical Advisor, BALANCED Project staff held discussions with Missions in Madagascar, Tanzania and the CT region regarding scale-up of PHE in their countries or regions. As per June 30, 2009, the team was in continued discussions with the Madagascar Mission through the USAID Technical Advisor regarding their interest in providing field support funds for PHE scale-up there. During meetings with USAID/Tanzania, the Mission expressed interest in the BALANCED Project and is waiting to see results of the Project's activities before considering potential buy-in. BALANCED staff is working on opportunities to showcase PHE scale-up in a CT country—which may lead to further USG support.

Results for Activity 3.3 include:

- \$ 218,093 leveraged for PHE scale-up in the Philippines
- \$ 28,709 leveraged from USAID/Tanzania for PHE activities in Tanzania

IR 3 Priorities for next period (January 1 to June 30, 2009)

BALANCED priorities for the next reporting period are:

In general

- Develop guidelines and forms for the BALANCED Project Seed Grant Program. This includes criteria for the selection of seed grant recipients, award guidelines, subgrant agreements and monitoring instruments.
- Administer the seed grant to the Ethiopian Wetlands and Natural Resources Association (EWNRA) and provide technical assistance (TA) as needed and in accordance with the BALANCED Project guidelines for TA to seed grant recipients.
- Spearhead efforts to advocate for the integration of PHE activities in the US-supported Coral Triangle Initiative (CTI)—specifically, the regional exchange activity for the six CTI countries, the US CTI Integration and Coordination workshop, and the country-specific activities for CTI in the Philippines, etc.
- Implement the resource mobilization strategy in coordination with USAID Technical Advisor and mobilize funds for PHE activities in Tanzania, Ethiopia, and Haiti.
- Continue to revise and update the resource mobilization strategy per discussions with the USAID Technical Advisor, USAID Missions and other donors.

Tanzania

- Train TCMP and other BALANCED Project partners on PHE messages and IEC materials development (carried over from Year 1, see IR1, Activity 1.1).
- Further refine draft IEC materials developed in the IEC workshop and translate, pretest, revise and distribute integrated IEC materials.
- Provide continuing technical oversight for the integration of family planning into the on-going USAID/Tanzania funded TCMP project in Tanzania.
- Conduct CBD/PE training for the Mkwaja and Mkalamo ward (Mkwaja training carried over from Year 1).
- Build the capacity of supervisors to monitor and support CBDs and CPEs in the Mkwaja and Mkalamo wards.
- Conduct monthly monitoring and mentoring visits with CBDs/PEs in the Mkwaja and Mkalamo wards.
- Hold consultation meetings with MOH, Pangani District officials and village leaders.
- Develop an MOU between MOH and TCMP for provision of FP commodities to CBDs.
- Hold Project launch and social mobilization workshops for district officials and villagers.
- Analyze BMS data and draft case study on the results.
- Establish family planning referral system with District health center.

The Philippines

- Continue implementation of the scale-up of the PHE model in Danajon Double Barrier Eco-region, the Verde Island corridor and the Mt. Capotoan-Mt Cabalantian watershed complex.
- Analyze results of the Philippine BMS survey, draft a report on lessons learned, and conduct dissemination activities to Project sites.

Status of PMP Indicators for IR 3

INDICATOR	YR 1 TARGET
SO2 Dollar value of funds leveraged from USAID Missions and non-USG sources to support PHE implementation and scale-ups (in millions US\$) (PRH 1.2)	0. 247
1.1 Number of individuals trained by BALANCED in PHE know-how and SOTA (State of the Art) practices using 21st century learning tools	8
3.1 Number of PHE tools, methodologies, and actionable findings replicated in new countries and geographic areas	2

III. Key Management Tasks

Accomplishments

- Several BALANCED Project team members who were more experienced in natural resources management/biodiversity conservation and/or family planning and less experienced in integrated PHE approach, gained significant insights, understanding, and skills in PHE in the short nine between the start of the Project and the end of this reporting period.
- The BALANCED team—comprised on many individuals who had no or little experience working together on other projects—came together as a unified team with a common vision and commitment to the overarching goals of the Project and a clearer understanding of each individual's singular and team roles and responsibilities. This has been facilitated by increased communication via skype calls, and additional meetings and opportunities for the team to meet and work together.
- Drafted the BALANCED Year 2 workplan and budget, which was approved by USAID

Challenges

- Negotiation with the MOH in Tanzania to consider a new/expanded model for CBD training was a challenge (but one that was successfully met and for which a compromise was achieved)
- As the political situation in Madagascar became more volatile and as it became more likely that USAID could withdraw its financial support for all activities except those directed at humanitarian aid, this threatened what had been—until recently—the real potential to secure USAID Madagascar Mission support for continued PHE interventions for that country, including through the BALANCED Project
- Although there were several BALANCED Project team meetings in the first year, the very full agendas of those meetings, resulting in there being no hands-on training in the branding of required of USAID funded publications and in making these 508 compliant. This has increased the time and effort that has gone into after-the-fact efforts to bring publications into compliance. This is being remedied by additional hands-on training when CRC staff is with BALANCED partners.
- While in the long-run linking the PHE website to the K4H website is a very positive move that should result in very professional and beneficial results to the users, the modest delays in the design, construction, and launching of the K4H site have also delayed the same for the PHE portal to that site. Again, in the long-run, however, the result may be better served by this more thorough design/launch
- While PFPI, CI, and CRC each had some of the protocols and procedures for recipients of seed grants, there was no one consistent or overarching set of these to

apply for the BALANCED seed grant recipients. This will be resolved in the next reporting period and used consistently thereafter.

- Moving from a rental to a long-term lease agreement of office space for the BALANCED Project in the PRB-occupied building has been long and detailed through the URI system. This short-term rental vs. long-term lease situation will be resolved early in the next reporting period.

Priorities for next reporting period

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

- All BALANCED Project staff are trained in branding and 508 compliance
- Seed grant guidelines and protocols are finalized and applied
- BALANCED office space in the PRB-occupied building is secured via a lease agreement with URI

IV. Performance Management and Reporting Plan

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

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

The BALANCED Project Indicators and Progress towards Targets

INDICATOR	Year 1				Comments
	July-Dec	Jan-June	Total	Target	
SO-1: Number of target organizations incorporating PHE tools, protocols, etc. into their work (PRH 1.1)	0	0	0	0	
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)	0.33	0.247	0.280	0.5	Target not met, but anticipate Madagascar award early in Year Two
1.1 Number of individuals trained by BALANCED in PHE know-how and SOTA using 21st century learning tools	0	21	21	61	Target not met, because of delays in trainings in Tanzania. Trainings will be held in the first quarter of Year Two

INDICATOR	Year 1				Comments
	July-Dec	Jan-June	Total	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	0	0	0	0	
1.3 Number of new and/or strengthened partnerships established and actively involved in advancing and supporting wider use of PHE approaches as a result of BALANCED capacity-building intervention (PRH 1.3)	0	0	0	0	
1.4 Number of technical support interventions provided by BALANCED to Missions and to organizations to implement PHE within their programs (PRH 3.2)	1	1	2	2	On 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)	0	0	0	3	Target not met. IEC job aid and CBD manual and curricula have been drafted and will be published in Year Two
2.2 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)	1	3	4	2	Above Target
3.1 Number of PHE tools, methodologies, and actionable findings replicated in new countries and geographic areas (PRH 3.1)	0	2	2	1	Above Target. PFPI CBD TOT manual and BMS tool adjusted and replicated in Tanzania.
3.2 Number PHE programs scaled up (PRH 3.4)	0	1	1	2	Philippines scale up to Danajon Double Barrier Eco-region, Verde Island corridor and the Mt. Capotoan-Mt Cabalantian watershed complex. Tanzania scale up will be counted after the PHE CBDs are up and running.
3.3 Number of BALANCED field site activities that produce results that can feed into KM activities (development of tools and success stories)	0	0	0	2	Target not met

Field Indicator Report

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

In this report are reported only progress on indicators where BALANCED in some way is contributing towards the result. This means that no reporting on biodiversity, HIV/AIDS, water and sanitation, or economic growth indicators from Tanzania. Once the PHE activities have become better integrated in Tanzania, it may be more appropriate to report on those indicators as well.

INDICATOR	Year 1		
	Philippines	Tanzania	Total
General			
Number of individuals trained (disaggregated by population (P), health (H), and environment (E) topic-specific training, integrated trainings, and gender)	381	8	389
Leveraged funding			
Family Planning and Reproductive Health			
Number of new users	2,769		2,769
Number of counseling visits for family planning/reproductive health (FP/RH) as a result of USG assistance			
Number of USG-assisted service delivery points providing FP counseling or services	276		276
Average household distance/time to access family planning commodities			
Biodiversity			
Number of hectares in areas of biological significance showing improved biophysical conditions for selected parameter(s)			
Number of sustainable natural resource management and conservation policies, strategies, and guidelines implemented			
Number of hectares with improved natural resource management, including biologically significant areas, watersheds, forest areas, and sustainable agricultural lands			

INDICATOR	Year 1		
	Philippines	Tanzania	Total
Economic growth			
Number of full time jobs in excess of two weeks created			
HIV/AIDS prevention			
Number of targeted condom service outlets			
Number of individuals reached through community outreach that promotes HIV/AIDS prevention through other behavior change beyond abstinence and/or being faithful			
Number of local organizations provided with technical assistance for HIV-related policy development			
Water and sanitation			
Number of people in target areas with access to improved drinking water supply			
Number of people in target areas with access to improved sanitation facilities			
Maternal and Child Health			
Number of antenatal care visits by skilled providers from USG-assisted programs			
Number of deliveries with a skilled birth attendant in USG-assisted programs			
Integrated indicators			
Number of PHE intersectoral committees formed			
Number of population, health, environment organizations addressing non-traditional audiences			
Number of local ordinances enacted that integrate PHE			