

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

**Semi-Annual Results Report #4
For Period January 1 - June 30, 2010**

August 13, 2010

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

Implemented by:

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

For more information contact: Linda Bruce, Project Director
Email: Linda.Bruce@crc.uri.edu



Table of Contents

ACRONYMS.....	4
I. INTRODUCTION.....	7
II. PROJECT RESULTS.....	7
IR1 CAPACITY BUILT FOR INTEGRATED PHE IMPLEMENTATION	10
1.1 Conduct training on how to develop integrated PHE IEC materials in Tanzania.....	11
1.2 Provide on-going support to BALANCED trainees and PHE practitioners	12
1.3 Conduct South-to-South exchange visit with decision-makers and policy-makers	17
1.4 Build capacity of NGOs from Coral Triangle (CT) countries on PHE program design.....	18
1.5 Integrate PHE into TNC-CTC Global Learning Center	19
IR1 Priorities for Next Reporting Period (July 1 to December 31, 2010).....	21
IR2 PHE KNOWLEDGE AND TOOLS DEVELOPED, SYNTHESIZED, AND SHARED.....	21
2.1 Identify, document, and synthesize knowledge.....	22
2.2 Organize existing and new knowledge for PHE website.....	24
2.3 Share knowledge within the PHE and broader community	25
IR2 Priorities for next period (July 1 to December 31, 2010).....	28
IR3 RESULTS-ORIENTED PHE FIELD ACTIVITIES IMPLEMENTED IN AREAS OF HIGH BIODIVERSITY.....	29
3.1 Scale-up PHE activities in Tanzania	30
3.2 Scale-up PHE activities in the Philippines	34
3.3 Scale-up PHE activities in Madagascar	37
3.4 Provide one seed grant to one conservation NGO in Ethiopia.....	37
3.5 Support PHE activities in CT countries.....	40
3.6 Secure funding for PHE expansion or scale-up in at least two countries for Years 2 and 3	41
IR3 Priorities for next period (July 1 to December 31, 2010).....	42
.....	42
III. KEY MANAGEMENT TASKS.....	44
ACCOMPLISHMENTS	44
CHALLENGES	45
PRIORITIES FOR NEXT REPORTING PERIOD.....	45
IV. PERFORMANCE MANAGEMENT AND REPORTING PLAN (PMP).....	45
ANNEX 1: BALANCED COMMUNICATIONS/DISSEMINATION ACTIVITIES	50
ANNEX 2: BALANCED PROJECT COMMUNICATIONS – NEWS ITEMS.....	53

Acronyms

ADA	Amara Development Association
AOTR	Agreement Officer's Technical Representative
AWF	African Wildlife Foundation
BALANCED	Building Actors and Leaders for Advancing Community Excellence in Development
BHC	Barangay Health Center
BHW	Barangay Health Worker
BNS	Barangay Nutrition Scholars
BMS	Behavioral Monitoring Survey
CAP	Conservation Action Planning
CBD	Community-based Distributors
CBFP	Community-based Family Planning
CDM	Camp, Dresser, & McKee
CI	Conservation International
CIP	Conservation International Philippines
COMACO	Community Markets for Conservation
CPE	Couple Peer Educators
CRC	Coastal Resources Center
CDRA	Christian Relief and Development Association
CRM	Coastal Resources Management
CTI	Coral Triangle Initiative
COTR	Contracting Officer's Technical Representative
CTSP	Coral Triangle Support Partnership
DCB	Dual Capacity Building
DENR	Department of Environment and Natural Resources
DIP	Detailed Implementation Plan
DMO	District Medical Officer
EH	Environmental Health
ECSP	Environmental Security and Change Project
EWNRA	Ethiopian Wetlands and Natural Resources Association
FHI	Family Health International
FISH	Fisheries Improved for Sustainable Harvests
FON	Friends of the Nation
FP	Family Planning
GH	Global Health
GH/HIDN/ID	Global Health/Health, Infectious Diseases, and Nutrition/Infectious Diseases
GLC	Global Learning Center
GPSDO	Guraghe People's Self-help Development Organization
GTZ	German Technical Cooperation Agency
ICFG	Integrated Coastal and Fisheries Governance (project)
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
K4Health	Knowledge for Health
KM	Knowledge Management
ME&L	Monitoring, Evaluation and Learning
MOH	Ministry of Health
MOU	Memorandum of Understanding
MPA	Marine Protected Area
NCSE	National Conference on Science and Environment
NGO	Non-Governmental Organization
NOAA	National Oceanic and Atmospheric Administration
NPOA	National Plan of Action
ODA	Oromia Development Association
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
RDMA	Regional Development Mission/Asia
REPS	Regional Environment Program Specialist
RH	Reproductive Health
RHU	Rural Health Units
SANAPA	Saadani National Park
SID	Summit Institute for Development
SO	Strategic Objective
SOTA	State of the Art
SSE-PHE	South-South Exchange on PHE
SUCCESS	Sustainable Coastal Communities and Ecosystems
TA	Technical Assistance
TCMP	Tanzania Coastal Management Partnership
TNC	The Nature Conservancy
TNC CTC	The Nature Conservancy Coral Triangle Center
TOT	Training of Trainers
TRG	Training Resource Group
UNFPA	United Nations Population Fund

URI University of Rhode Island
USAID United States Agency for International Development
USG United States Government
UZIkwASA Tanzanian Health Organization
VIP Verde Island Passage
VIPCMP Verde Island Passage Marine Corridor Management Plan
WWC Woodrow Wilson Center
WWF World Wildlife Fund

I. Introduction

On September 17, 2008, the United States Agency for International Development Bureau for Global Health (USAID/GH) awarded the new Population, Health and Environment (PHE) technical leadership Cooperative Agreement, *Building Actors and Leaders for Advancing Community Excellence in Development* (BALANCED), to the Coastal Resources Center (CRC) at the University of Rhode Island (URI) and its highly qualified team of international partners, PATH Foundation Philippines, Inc. (PFPI) and Conservation International (CI). The five-year BALANCED Project has a ceiling of \$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 objective is to advance and support wider use of effective PHE approaches worldwide. To accomplish this, BALANCED has three Intermediate Results (IRs).

IR1 – Capacity built for integrated PHE implementation

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

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

II. Project Results

Introduction to Semi-annual report (merging of the three IRs)

This semi-annual report covers the period from January 1, 2010 to June 30, 2010. During this reporting period, BALANCED advanced its vision of "Building cadres of competent PHE champions and practitioners from Africa and Asia to: (a) promote the comparative advantage of approaches that simultaneously support family planning and conservation; (b) work collaboratively with other groups GLOBALLY to apply PHE knowledge and State of the Art (SOTA) practices in remote biodiversity-rich areas; and (c) document and share evidence of added-value and better practices of PHE using 21st century knowledge management and learning tools."

The summary below provides illustrative examples of how the BALANCED Project team has accomplished integration and maximized linkages across the IRs during this reporting cycle. Some activities are so interlinked across IRs, they could logically fit under multiple IRs. To avoid unnecessary repetition, we have reported such activities under the primary IR heading under which they are listed in the workplan.

The Project continues to *build cadres of competent PHE champions and practitioners through its capacity building activities*. During this reporting period, we:

- Provided 181 (44% women) individuals with training and mentoring on the key components of PHE project implementation with a focus on PHE integration, message development, community-based family planning (CBFP) and development of information, education and communication (IEC) materials. (IR1)
- Provided remote (via e-mail) and hands-on post-training support (during in-country visits) to 30 BALANCED trainees/PHE practitioners (from 18 different

organizations/governments) through 20 technical assistance (TA) interventions in seven BALANCED priority countries. (IR1 and IR3)

- Hosted the South-South Learning Exchange on PHE (SSE-PHE) for nine country representatives from six African and two Asian countries. The exchange included visits to PFPI PHE learning sites and a marine protected area (MPA) in the Philippines. Representatives included three government officials (from Ethiopia, Tanzania and Philippines) and six key nongovernmental organization (NGO) decision-makers from conservation groups implementing health and family planning in their environmental work. (IR1)
- Finalized a report on the SSE-PHE and distributed it to over 500 individuals in the PHE community and to other interested parties. (IR1 and IR2)
- Finalized the PHE community-based distribution (CBD) and peer education training materials and reference guide, which will be made available to the PHE community and NGOs interested in mainstreaming community-based family planning into their conservation activities once approved by USAID. (IR1 and IR2)
- Continued to make curricula and materials developed by other PHE practitioners available to the broader PHE community via the PHE Toolkit on the Knowledge for Health (K4Health) website hosted by John Hopkins University/Center for Communications Programs (JHU/CCP). (IR2)
- Provided funding support to PHE Ethiopia to translate into Amharic and adapt to the Ethiopian context the *Designing and Implementing Integrated Approaches to Population, Health, and Environment (PHE) – Participant’s Manual* for use in follow-up training on PHE Program Design (IR 2 in preparation for IR1 activity in Year 3).

BALANCED also supported new and existing PHE champions and practitioners to *promote the comparative advantages of approaches that simultaneously support family planning and conservation*. To this end, the Project:

- Provided technical support to the Ethio-Wetlands and Natural Resource Association (EWNRA), a BALANCED seed grant recipient, on integrated message and IEC materials development. (IR1 and IR3)
- As a follow-up to his enthusiastic interest in PHE during our August 2009 IEC workshop, David Mutekanga—Assistant Director of the Ruaha Landscape Program—promoted PHE to upper management of the Wildlife Conservation Society (WCS). This paved the way for BALANCED to provide hands-on technical mentoring on the WCS IEC materials and assist WCS to develop a plan for integrating health and family planning into their Ruaha Landscape Program. (IR1 and IR3)
- In response to the cautious interest of Dale Lewis—WCS/Zambia Country Director—in integrating family planning into the WCS/Zambia Community Markets for Conservation (COMACO) program and in response also to a reference to needing help with their IEC materials, BALANCED recognized and seized the opportunity to galvanize the support of this potential PHE champion. BALANCED began providing remote technical assistance to WCS/Zambia by reviewing the family planning (FP) contents of their “*Better Life*”

- Expanded PHE activities to Mkalamo (Pangani district) in Tanzania and explored ways to replicate the current PHE model and/or test new models in selected CRC's *Pwani* project sites based on available service delivery entry points. (IR3)
- Showcased two PHE champions—one in Tanzania and another in Ethiopia—in the first BALANCED newsletter that was distributed to 2,300 people in the conservation, family planning and PHE community. (IR2)

BALANCED continues to *work in partnership with other PHE practitioners and champions globally to share information and SOTA practices, facilitate dialogue and provide technical support to PHE activities*, which includes:

- BALANCED led a working session on monitoring and evaluation (M&E) and PHE indicators with 16 representatives from eight organizations that are implementing PHE in Ethiopia. During the session, BALANCED provided an overview of integrated indicators and how to use them for monitoring PHE activities. It also helped participants identify and rank the indicators for which their organizations could collect data and which would collectively demonstrate the results of PHE activities in Ethiopia as a whole. A proceedings from the working session with completed definitions of the integrated indicators selected was drafted and sent to the participating organizations. (IR1, IR2 and IR3)
- A PHE champion and PFPI/BALANCED team member presented at the 2010 *Health Parks Healthy People* conference in Melbourne to share SOTA practices and lessons learned from PHE activities in the Philippines that helped to preserve the environment while simultaneously improving health and food security. (IR2)
- In collaboration with World Wildlife Fund (WWF), Blue Ventures, Conservation Through Public Health (CTPH) and PFPI, produced a newsletter sent to over 2,000 readers highlighting PHE approaches in Kenya, Madagascar, Uganda and the Philippines, and highlighting champions' efforts in Ethiopia and Tanzania. (IR2)
- Continued to work extensively with PHE partners to identify the information, tools, and materials that need to be accessible on the PHE Toolkit; encourage promotion of the Toolkit by the wider PHE community; and to solicit proactive contributions of the “best of”, most useful, and “of greatest relevance” materials from a wide range of PHE projects and approaches funded by a diversity of donors. (IR2)

As part of our efforts to *document and share evidence of added-value and better practices of PHE using 21st century knowledge management and learning tools*, BALANCED:

- Continued collaboration between the JHU/CCP/K4Health Project and the BALANCED Project on the K4Health website and PHE Toolkit, with emphasis on improving access to information and preparing for the still-under-development “PHE Gateway” feature—a feature that provides additional topic “indexing”/“searching” capabilities and thus allows for quicker and more efficient retrieval of information by site users. (IR2)
- Provided financial support to two national PHE networks for PHE activities in their respective countries and globally. This included helping the Philippines PHE network to organize a one-day PHE Program Design training as part of the PHE Conference scheduled for the next reporting period and supporting PHE Ethiopia to translate into Amharic the *Designing and Implementing Integrated Approaches to Population, Health, and Environment (PHE) – Participant’s Manual* for use by PHE practitioners in refresher (and new) training. (IR1 and IR2)
- During the Coastal Society Conference, as part of a presentation on the CRC *Sustainable Coastal Communities and Ecosystems* (SUCCESS) project, showcased the PHE network of practice for areas of high biodiversity and high population density in Tanzania. (IR2)
- New PHE champions in Ethiopia trained in-country volunteers on PHE peer education using the new dual capacity building methodology, which involves workshop participants learning PHE training delivery while simultaneously learning PHE content – a training approach that is gaining momentum among BALANCED trainees. (IR1 and IR3)
- Updated, on a continuous basis, the BALANCED website with news from the field and conferences. (IR2)
- Conducted research on the benefits of PHE approaches in the Philippines—research results that will be finalized during the next reporting period. (IR2)

The following sections of this report describe in more detail the progress achieved on the activities summarized above as well as others that contribute to the Project’s vision and overall goal of promoting wider adoption and use of “effective” PHE approaches globally. Each section on the individual intermediate results (IRs) describes: activities implemented during this reporting period; performance monitoring data; and a list of priorities for the next six-months. Again, activities are reported on by IR but have strong synergies, are closely linked to each other, and contribute collectively to the Project’s overarching vision and goal. The final sections include management opportunities and challenges, the comprehensive PMP table and annexes.

IR1 Capacity built for integrated PHE implementation

The BALANCED Project’s overall capacity building goal is to increase the number of health and environment organizations adopting and implementing PHE approaches globally.

Accomplishments

During the last six months of Year 2, the BALANCED Project continued to build the capacity of NGOs, local governments, and PHE champions in East Africa and Asia to implement PHE activities. Training, follow-up, and hands-on mentoring were provided on PHE program design,

how to develop integrated messages and IEC materials, integrate community-based family planning (CBFP) into on-going conservation activities and develop integrated indicators for monitoring PHE activities.

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

In August 2009, BALANCED conducted a workshop on how to develop integrated PHE messages and IEC materials for the Tanzania Coastal Management Partnership (TCMP), its partners and other organizations implementing integrated activities in East Africa. In preparation for the IEC workshop, BALANCED developed a handout/job aid entitled *Developing Integrated PHE IEC Materials: A Job Aid for PHE Practitioners* on how to develop an IEC strategy and integrated IEC materials. A draft Facilitator’s Guide was also developed prior to and revised during and after the workshop to incorporate training activities that worked best for developing integrated PHE messages.

In June 2010, sections of the Facilitator’s Guide were tested as PFPI worked with three representatives from Family Health International (FHI) and the Green Belt Movement (GBM) to develop integrated PHE messages and an IEC strategy for the FHI-Greenbelt Movement PHE Project in Kenya (See Activity 1.2). Based on this testing, the related sections of the Guide will be revised and then re-tested during the first half of Year 3. Currently, we plan to incorporate these instructions on how to develop IEC materials into *the Designing for Behavior Change* curriculum, which will be adapted for the PHE context after the September 2010 workshop.

Results from Activity 1.1

None

Status of PMP Results for Activity 1.1

INDICATOR	REPORTING PERIOD	YTD	Y2 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	0	18 (IEC workshop)	18
1.4 Number of technical interventions provided by BALANCED to Missions and organizations to implement PHE within their programs (PRH 3.2)	0	1 (TA to TCMP on IEC materials)	1
3.1 Number of PHE tools, methodologies, and actionable findings replicated in new countries and geographic areas (PRH 3.1)	0	0 (Draft IEC job aid not published)	1

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

Post-learning support to BALANCED trainees is a critical element of the BALANCED Project's capacity building strategy. It covers the period of time between the end of a person's (or project's) formal training with BALANCED and the end of their/its professional involvement with BALANCED.

During this reporting period, BALANCED staff provided remote (via email) and in-person (during in-country visits) post-training support to 30 BALANCED trainees/PHE practitioners from 18 different organizations/governments in seven BALANCED priority countries. Below is a salient list of the BALANCED post-training support.

Follow-up to the 2008 PHE Program Design and MEASURE workshops in Ethiopia:

- Dr. Elin Torell, BALANCED M&E and Learning Specialist, led a one and a half day working session for PHE Ethiopia Network members on monitoring, evaluation and PHE indicators. The June 2010 working session was attended by 16 participants from eight organizations (participants from six of these organizations attended the 2008 MEASURE workshop). Many of these organizations received PHE grants from the David and Lucile Packard Foundation after the MEASURE workshop, which is why these organizations reported needing help to identify value-added and integrated indicators. During the working session, participants identified and ranked indicators for which their organizations could collect data.
- Dr. Torell also held a short session on drafting success stories, where she shared several formats for writing success stories—one based on the USAID “Telling our Story” template and one based on a format used by PFPI.
- Torell drafted a report on the results of the working session that included a full description of the PHE indicators selected and the templates for drafting success stories. The report was forwarded to participants for use in their projects.
- BALANCED provided funding to the PHE Ethiopia consortium to translate into Amharic the *Designing and Implementing Integrated Approaches to Population, Health, and Environment (PHE) – Participant's Manual*. The translation included adapting the language to the Ethiopia context as many of the PHE concepts were difficult to translate.

Follow-up to BALANCED Community-based Distributor and Peer Educator Training of Trainer (TOT) workshops

- For Tanzanian participants—PFPI worked with the Tanzania Coastal Management Partnership (TCMP) PHE Coordinator and trainer to monitor the trained PHE providers, peer educators and community-based distributors (CBDs) in Pangani and mentored the PHE Coordinator on how to improve the PHE Provider and CBD training in the future.
- For Ethiopia participants—PFPI revised the PHE CBD and Peer Education TOT curriculum and reference materials (from the November 2009 TOT workshop) and forwarded these to workshop participants for use in training their local PHE CBDs and Peer Educators.

Follow-up to 2009 East Africa IEC workshop

- Ethiopia—BALANCED provided remote technical input on EWNRA’s draft IEC materials that are being developed for their PHE activities.
- Tanzania (TCMP)—BALANCED provided continuous remote technical assistance as TCMP pretested and finalized posters with PHE messages and leaflets on family planning for PHE Providers to distribute.
- Tanzania (African Wildlife Foundation/AWF)—BALANCED assisted Dr. Steven Kiruswa Maasai Steppe, AWF’s Heartland Director, who had developed draft PHE IEC messages and a poster during the IEC workshop. Upon return to his project site, Kiruswa pre-tested these. During an April 2010 visit to Tanzania, a BALANCED team member reviewed the pre-test results and made suggestions for further improving the messages and the IEC materials.
- Tanzania WCS—As a result of the IEC workshop, WCS Tanzania developed draft PHE IEC materials for water and sanitation activities to reach the local communities in their project sites. During a technical assistance visit in April, BALANCED provided input on these draft materials so as to better align them with the new PHE project goals of reduced human wildlife conflict, conserved wildlife, improved livelihood, and expanded access to health and family planning services, which BALANCED also helped them to incorporate into their Ruaha Landscape Program.

Follow-up to South-to-South Exchange PHE (SSE-PHE) participants:

- Ethiopia—During the M&E working session held in Ethiopia (see previous page), BALANCED also followed up with Awed Jibril Muhtaff of the Oromia Development Association (ODA), who had attended the SSE-PHE in the Philippines. After returning to Ethiopia following the exchange, Muhtaff mentored his junior staff in PHE and has helped integrate PHE in his organization’s work in the Oromia region. Muhtaff has also worked to increase ODA’s focus on environmental issues, and as a result, the ODA now supports activities to decrease deforestation and prevent soil erosion and siltation of nearby lakes.
- Ghana—CRC is implementing a five-year USAID/Ghana-funded Integrated Coastal and Fisheries Governance (ICFG) project in the Western Region of Ghana. To build PHE capacity within the ICFG, Mr. Randolph Kwesi Johnson of Friends of the Nation (FoN), a local environmental and community development NGO and a CRC partner in the ICFG, participated in the SSE-PHE. Subsequently, a BALANCED consultant traveled to Ghana to identify opportunities for incorporating family planning and health activities into the ICFG project as part of an integrated approach to improving quality-of-life while stemming biodiversity loss and overfishing. During the visit, this consultant further strengthened Johnson’s capacity in PHE program design and based on a visit to the field sites, assisted FoN to revise their conceptual frameworks.
- Kenya—The FHI *PROGRESS* project is implementing a PHE operations research activity with the Green Belt Movement (GBM) in Kenya to assess how an integrated approach can increase access and utilization of family planning services for the women involved in tree planting with the goal of enhancing women’s health while at the same time

contributing to environmental sustainability in selected GBM project areas. Caroline Mackenzie, an FHI Research Associate, attended the SSE-PHE and subsequently requested additional technical support from BALANCED. The PFPI team traveled to Kenya in June 2010 to assist FHI-GBM and its partners with developing integrated family planning messages and an IEC strategy for the FHI-GBM PHE Project in Kenya.

- Philippines—Mr. Felimon Romero, coordinator for the WWF Coral Triangle Support Partnership (CTSP) in Tawi-Tawi, Philippines, and responsible for the overall implementation of KKPFPI's five-year European Union (EU)-funded *Integrating PHE in Autonomous Region of Muslim Mindanao* (ARMM) project, participated in the SSE-PHE. Following the exchange, Mr. Romero requested information on PHE Program Design and logistics. PFPI provided this information and continued discussions with Mr. Romero that resulted in a plan for providing additional BALANCED technical support in Year 3.
- Tanzania—BALANCED provided support to Mr. Zuberi, an SSE-PHE participant and the District Integrated Coastal Management Facilitator for the Pangani District, on how to incorporate integrated activities into district development plans as a way to institutionalize and appropriate local budgets for sustainability. Following the SSE, Mr. Zuberi also initiated the training of PHE peer educators in the Pangani District.

Follow-up to new, emerging PHE Practitioners

- Zambia—During this reporting period, BALANCED started providing remote technical assistance to WCS/Zambia by reviewing the family planning contents of their "*Better Life*" book (an IEC material) and by providing the latest guidance on family planning norms and ways to improve the effectiveness of family planning messages. Subsequently, BALANCED provided in-country technical assistance to help WCS/Zambia assess entry points for PHE and develop a plan for integrating family planning information and service delivery into the WCS/Zambia Community Markets for Conservation (COMACO) program. COMACO provides sustainable sources of alternative incomes and other incentives for conservation to families living around Zambia's national parks in the Luangwa Valley. They work through producer groups—cooperatives that facilitate business efficiencies and galvanize community commitment to conserve their natural resources. During the visit, a BALANCED team member conducted a rapid assessment in-country, facilitated development of COMACO's PHE conceptual framework, helped identify strategies and activities for PHE integration, and provided additional input on the learning pages of COMACO's *Better Life* book.

Based on the interest of WCS in integrating health and family planning into their livelihood project and their need for modest funding support to do so, BALANCED decided to provide them with a seed grant in Year 3 to help with the training of area extension officers, community health workers and peer educators; the translation, pretesting and distribution of IEC materials; and the collection of baseline data and information. As part of the seed grant, BALANCED will continue providing WCS with technical assistance on how to integrate into their on-going projects culturally sensitive PHE activities that emphasize ways to sustain household incomes without reliance on large families to achieve that end.

- Uganda—In June, Dr. Joan Castro conducted a one-day workshop entitled “Integrated Approaches to Family Planning, Health and Natural Resource Management Workshop“ for WCS staff, with a focus on the Wild Programme and its partners. Those attending the workshop had not participated in any previous BALANCED-led activities, but were interested in PHE and/or wanted to gain additional information about it. The workshop was attended by 15 representatives from various organizations—WCS, Jane Goodall Institute, Conservation through Public Health (CTPH), Straight Talk and FHI Uganda—attended. Participants came with different backgrounds and varying levels of understanding of PHE.

The meeting identified two areas—policy-making and capacity building—in which BALANCED and/or other organizations could better support PHE. The existing PHE Working Group can support the former by advocating for national or sub-national PHE policy reforms and direction, while BALANCED can support “capacity building” by providing training and technical assistance to members of the PHE working group as needed and upon request.

Results from Activity 1.2

- 3 organizations are now incorporating PHE IEC strategy and materials development into their PHE activities (Indicator SO1)
- 19 technical interventions provided to 18 organizations (16 of which are new organizations receiving BALANCED technical assistance) in 7 BALANCED focus countries (Indicators 1.4a and 14.b)
- 2 SSE-PHE participants have trained others in their respective countries on PHE interventions
- Designing and Implementing Integrated Approaches to Population, Health, and Environment (PHE) – Participant’s Manual translated into Amharic and adapted to the Ethiopian context (Indicator 2.1)
- WCS Tanzania replicating BALANCED PHE model in Iringa (Indicator 3.1)
- FHI/GBM implementing PHE IEC strategy (Indicator 3.1)
-

Status of PMP Results for Activity 1.2

INDICATOR	REPORTING PERIOD	YTD	Y2 TARGET
SO1: Number of target organizations incorporating PHE tools, protocols, etc. into their work (PRH 1.1)	3 (FHI and GBM Kenya; WCS Tanzania)	5	0

INDICATOR	REPORTING PERIOD	YTD	Y2 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	15 (Introduction to PHE training workshop held in Uganda)	15	0
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 (Awed and Zuberi)	5	2
1.4a. Number of technical interventions provided by BALANCED to Missions and organizations to implement PHE within their programs (PRH 3.2)	19 interventions (3 interventions provided to 2 "previous" organizations, EWNRA and TCMP; and 16 interventions provided to new organizations — see below)	22 interventions to 19 different organizations, including the 16 organizations listed below + GPSDO, EWNRA, and TCMP	4
1.4b. Number of new organizations receiving TA by BALANCED	16 new organizations (1- PHE Ethiopia; 1- CCRDA 1- MELCA 1- ODA 1. REST 1- LEM Ethiopia 1- The David and Lucile Packard Foundation 1- WCS TZ; 1- AWF TZ; 1- FoN Ghana; 1- FHI 1- GBM; 1- WWF/Phil; 1- WCS/Zambia; 1- WCS Uganda 1- Pangani Gov)		

INDICATOR	REPORTING PERIOD	YTD	Y2 TARGET
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 (PRH IR2.1)	1 (PHE Program Design – PM in Amharic)	1	1
3.1 Number of PHE tools, methodologies, and actionable findings replicated in new countries and geographic areas (PRH 3.1)	2 (FHI/Kenya & WCS/Tanzania)	2	0

1.3 Conduct South-to-South exchange visit with decision-makers and policy-makers

In February 2010, PATH Foundation Philippines hosted nine country representatives from six African and two Asian countries that spent eight days visiting three PFPI PHE learning sites and a marine protected area (MPA) in the Philippines. The SSE-PHE was designed as a cross-institutional learning opportunity for government officials (GO) and executives of relevant NGOs in East Africa and Asia nations who are interested in pursuing integrated programming in conservation, health and family planning.

Participants were selected based on the position they hold in their organization and their ability to make decisions about resource allocation, site selection and program implementation for PHE activities in their own settings. Participants were likewise selected for their ability to foster and implement PHE approaches and strategies. Representatives came from Ethiopia, Ghana, Indonesia, Kenya, Tanzania, and the Philippines. Dr. Elin Torell also attended the SSE-PHE. During the visit, participants reported that they had a much better understanding of how PFPI addresses population pressures in the broader conservation context through mechanisms such as CBDs of contraceptives, PHE peer educators and local and regional government officials who promote integrated approaches to coastal conservation that support family planning as a way to help reduce fishing efforts and improve food security.

As part of the program, each country team developed a country action plan for PHE, drawing upon experiences and lessons learned from the exchange and using a template that required them to think through their plan. Each plan included a list of potential opportunities for mutual collaboration and a list of potential needs for technical support and assistance from the BALANCED Project. Results of the post-SSE-PHE evaluation survey indicated that all participants found the exchange gave them a better understanding and appreciation of PHE integrated approaches and how community-based and integrated PHE systems and service delivery mechanisms function. Participants also mentioned the experience had better prepared them to serve as leaders and advocates of PHE in their own organizations and countries.

BALANCED drafted a report on the SSE-PHE that includes the participants' action plans and distributed it to over 500 individuals in the PHE community and to other interested parties.

Results from Activity 1.3

- 9 representatives from NGOs and/or government officials participated in the SSE-PHE capacity building visit (Indicator 1.1)
- Report on SSE-PHE developed and disseminated to PHE community (Indicator 2.2)

Status of PMP Results for Activity 1.3

INDICATOR	REPORTING PERIOD	YTD	Y 2 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	9 (SSE-PHE)	9	8
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 IR2.2)	1 (Report on SSE-PHE)	1	0

1.4 Build capacity of NGOs from Coral Triangle (CT) countries on PHE program design

The Philippines, a CT country, has a number of conservation and development organizations that may benefit from a PHE Program Design workshop. During the previous reporting period, BALANCED provided planning, financial, and organizational support to the Philippines PHE Network (SIGUE) and worked with them to organize the Fourth PHE Conference. During this reporting period, PFPI participated actively in the planning of this conference. Originally scheduled for May 2010 in the Mindanao, it is now rescheduled for November 2010 in General Santos City—the change of date and venue was necessitated by on-going political unrest in Mindanao. BALANCED is adapting the five-day PHE Program Design workshop to a shorter, one-day training for NGOs interested and able to implement this approach in the CT region. This one-day training will be offered as a pre-conference activity.

In Indonesia, another CT country, BALANCED initiated discussions with the United Nations Population Fund (UNFPA) about supporting a PHE managers' training in collaboration with a local NGO, Summit Institute for Development (SID), during the first part of BALANCED Year 2. Next, PFPI linked SID to UNFPA/Indonesia and prepared a concept paper with SID to request UNFPA support. During this reporting period, UNFPA approved SID's application for

designation as an UNFPA-accredited NGO. This now qualifies SID to apply for UNFPA funding support for training. PFPI continued to dialogue with SID to explore their interest in training and BALANCED technical support.

At the beginning of Year 2, PFPI also initiated discussions with the National Oceanic and Atmospheric Administration (NOAA) about the potential to integrate PHE dimensions into the agency’s coastal resources management (CRM) training curriculum and activities in the CT region. NOAA’s Anne Walton was receptive to the idea, and received funding from USAID Indonesia. However, NOAA remains in the planning stage and a decision on PHE integration has yet to be made.

PFPI likewise continued informing the USAID Regional Development Mission for Asia (RDM/A) about ongoing PHE activities and identifying opportunities for PHE integration in CT countries.

Results from Activity 1.4

None

Status of PMP Results for Activity 1.4

INDICATOR	REPORTING PERIOD	YTD	Y 2 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	0	0	10
1.4 Number of technical interventions provided by BALANCED to Missions and organizations to implement PHE within their programs (PRH 3.2)	0	0	1
3.1 Number of PHE tools, methodologies, and actionable findings replicated in new countries and geographic areas (PRH 3.1)	0	0	1 (PHE program design curriculum)

1.5 Integrate PHE into TNC-CTC Global Learning Center

Since 2009, PFPI initiated discussions with key personnel of The Nature Conservancy (TNC) about areas of mutual collaboration in the CT region. The Coral Triangle Center (CTC), operated by the TNC Indonesia and based in Bali, conducts training on planning and management of MPAs as an effective management tool for marine biodiversity conservation and sustainable use

of marine resources. Their training program builds the capacity of conservation practitioners in effective natural resources planning, management and evaluation of MPAs in Indonesia and beyond. As there may be opportunity to integrate PHE into CTC's existing training curriculum, PFPI invited Hesti Widodo, a TNC Indonesia conservation specialist in the Indonesia Marine Program in Bali, to participate in the SSE-PHE. PFPI continues to dialogue with the TNC-CTC to strengthen the links between BALANCED and the Bali Center and explore potential areas of collaboration in the region.

Results from Activity 1.4:

None

Status of PMP Results for IR1

INDICATOR	REPORTING PERIOD	YTD	Y 2 TARGET
SO1: Number of target organizations incorporating PHE tools, protocols, etc. into their work (PRH 1.1)	0	0	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	0	0	3
1.4 Number of technical interventions provided by BALANCED to Missions and organizations to implement PHE within their programs (PRH 3.2)	0	0	1
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 (PRH IR2.1)	0	0	1
3.1 Number of PHE tools, methodologies, and actionable findings replicated in new countries and geographic areas (PRH 3.1)	0	0	1

IR1 Priorities for Next Reporting Period (July 1 to December 31, 2010)

The BALANCED staff person in bold is the lead person responsible for bringing the activity to completion. Supporting team members follow. This is the best estimate at the writing of this report. Leads may change depending on staff availability and other factors.

- Plan and conduct “Designing for Behavior Change” (DBC) workshop for WWF, TCMP and other interested conservation groups (**Ricky**, Linda as back stop)
- Revise the “Designing for Behavior Change” curriculum for the PHE context (**Linda**, Ricky)
- Test revised sections of the Facilitator’s Guide for the IEC workshop during post-training activity in Uganda, and incorporate instructions into the DCB curriculum (**Joan and Linda**)
- Assist SIGUE in the planning of the PHE Conference and organize and 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 for conference attendees (**Joan**, Ronald)
- Adapt one-day curriculum on PHE Program Design for the above-mentioned workshop (**Joan**)
- Pending UNFPA support to SID, conduct a Designing and Implementing Integrated Approaches to PHE: Workshop for Planners and Managers for SID and provide post-training support (**Joan**)
- Adapt PFPI’s curriculum on Youth Peer Education to the African context (**Joan**, Ronald)
- Conduct East Africa TOT on youth peer education and revise curriculum accordingly (**Ronald**, Ricky and Joan)
- Incorporate youth indicators into BALANCED PMP and field indicators (**Elin**, Ronald)
- Continue to request that all BALANCED workshop trainees develop action plans for how they intend to use the new knowledge and skills acquired and identify specific needs for continuing technical support (**Joan**, all members of BALANCED team)
- Provide on-going post-training technical support and mentoring to BALANCED trainees, SSE-PHE participants and PHE practitioners in Africa and Asia (**Joan** and Ricky)
- Distribute SSE report and other training documents more widely to the family planning and health community (**Janet**, Linda)

IR2 PHE knowledge and tools developed, synthesized, and shared

The knowledge management (KM) element of the BALANCED Project lies at the nexus of IR1, *Capacity built for integrated PHE implementation* and IR3, *Results-oriented PHE field activities implemented in areas of high biodiversity*. It draws out the “best of” information and experience generated from Project activities and from other individuals and organizations practicing PHE

and synthesizes and disseminates this to trainers, training participants, PHE implementers in the field, the larger PHE community of practice and donors. The focus is on three key activity areas:

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

Accomplishments

This reporting period, we helped advance development of the PHE Toolkit; conducted field research on the benefits of PHE; and promoted the PHE approach and raised awareness of the BALANCED Project. Accomplishments by key activity area follow.

2.1 Identify, document, and synthesize knowledge

Key accomplishments under this activity were: 1) a draft report on the initial mapping of the PHE community of practice; 2) completion of field-based research of sites in the Philippines to assess the benefits of the integrated PHE approach; and 3) acceptance of the IPOPCORM paper by a peer-reviewed journal. In more detail, these and other achievements include:

- Prepared a draft technical report “Practice, Harvest, and Exchange: exploring and mapping the global Population-Health-Environment approach (PHE) network of practice” (currently being edited and slated for review by the BALANCED Technical Advisor and then disseminated in the first half of Year 3). This document details BALANCED analysis of the PHE community of practice and implications for how communications flow across the network.
- Completed field research on and data collected in 52 integrated PHE and non-integrated sites in the Philippines—interviewing over 2,000 individuals on numerous reproductive health/family planning and environmental variables and then collating, coding, and analyzing this data before assembling into a preliminary draft report.
- While further analysis will be conducted before a final report is developed and disseminated, some preliminary findings are worth noting. While initial analysis of some variables indicated no significant difference between integrated and non-integrated sites, others revealed significant difference by gender and by which organization conducted the PHE activities. Preliminary analysis also shows that the relationships between project efforts and outcomes are extremely complex and when there are different implementers and different social groups in the project region, extreme care is needed in interpreting the analysis. Further, complicated multivariate analyses (various types of regression, analysis of variance) and transformations of variables are required to determine the individual and combined effects of various contextual and project variables on performance of PHE versus non-PHE sites. Due to the substantial size and complexity of the data set collected, full analysis of the information will require more time. Data sets from 12 different questionnaires (based on type of respondent) are being merged and a number of data transformations of selected variables are underway. A full analysis and report is expected by the end of September.

- Implemented several recommendations of the BALANCED Advisory Committee—e.g., 1) the content management team for the PHE Toolkit continued its efforts to identify and populate the site with materials from and/or of interest to the academic community¹; 2) the team tapped the voices and experiences of PHE practitioners in the field as described in more detail in other sections of this report; and 3) drafted several other success stories (now ready for review by the USAID PHE Technical Advisor and slated for dissemination early in Year 3).
- Prepared a draft technical report, “*Potential Needs and Opportunities for PHE Approaches in Tanzania: a Screening Exercise*”, which includes a related GIS data set that fed development of maps showing overlap between areas of high population growth, access to services, and areas of high biodiversity for use in identifying areas for PHE replication and/or scale-up.
- Assisted in responding to questions from the Environmental Conservation Journal regarding the article entitled “Integrated Management of Coastal Resources and Human Health Yields Added-Value: Evidence from a Comparative Study in Palawan, Philippines”, which received the journal’s invitation/approval to be published.
- Periodically engaged with individual Advisory Committee members on specific issues—e.g., worked with Jason Bremner to review content placement on the PHE Toolkit and make recommended changes; worked with Lynne Gaffikin on BALANCED support to PHE activities in Uganda; sought advice from Nancy Harris to ensure collaboration with JSI activities in Ghana and Tanzania; worked with Judy Oglethorpe on the PHE 101 bibliography; and engaged Geoff Dabelko and staff of the Environmental Change and Security Program (ECSP) on ways to promote the PHE Toolkit. We also provided Advisory Committee members with a six month update on actions taken on key recommendations they had provided during the 2009 Advisory Committee meeting.

Results from Activity 2.1:

- IPOPCORM paper accepted for publication (but not yet published)

¹ To date, these efforts have resulted in identifying some 2,700 journal articles and other academic-oriented materials that are potential candidates for upload. However, before a selection of the best and most relevant of these is uploaded, a review with the larger content management team, select Advisory Committee members and the USAID PHE Technical Advisor is necessary. This will occur early in Year 3.

Status of PMP results for Activity 2.1

INDICATOR	REPORTING PERIOD	YTD	Y 2 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 IR2.2)	0	0	
2.2b Number of peer reviewed articles and research studies	0		2 (two research reports)

2.2 Organize existing and new knowledge for PHE website

We continued working closely with K4Health site developers and other Toolkit developers to improve the site’s functionality and features, ease of use, and accessibility to materials. The content management team also worked to increase the quantity of the various types and categories of PHE and PHE-related resources available on the PHE Toolkit. Specifically, we:

- Prepared a comprehensive set of edits and updates to PHE Toolkit based on input from the content management team, other BALANCED team members, and users including but not limited to:
 - Eliminated one ambiguous tab
 - Reorganized documents into alternate tab structures
 - Renamed sub-tabs to clarify the types of information housed within each tab
- In preparation for Year 3 enhancements to the PHE Toolkit, developed draft list of websites containing PHE information—sites now included in the still-under-development “PHE Gateway” feature—a feature being developed by the K4Health team that provides additional topic “indexing”/“searching” capabilities and thus allows for quicker and more efficient retrieval of information by site users. The K4Health team expects to finalize and begin promoting this feature to the public in the upcoming months.
- Continued working with the PHE Toolkit content management team to identify quality resource materials and tools that meet the criteria established at the inception of the site, with a resulting in-house bibliography of 3,373 items of gray literature and 2,708 academic journal articles and books (as noted in the footnote on the previous page, the latter will be reviewed and vetted in Year 3 prior to uploading a selection thereof).
- Edited an article on the process used in developing the topic map for the PHE Toolkit, entitled, “Topic Mapping for Organizing Document Collections Online: The Example of the Population, Health, and Environment (PHE) Approach” (for final edit and review by USAID PHE Technical Advisor in the first half of Year 3).

- Continued using the BALANCED website as yet another mechanism for directing and linking interested site visitors to the PHE Toolkit.

Results for Activity 2.2 include:

- PHE Toolkit uploaded with new materials and features and functionality improved (Indicator 2.1)
- BALANCED Project website maintained and expanded

Status of PMP results for Activity 2.2

INDICATOR	REPORTING PERIOD	YTD	Y 2 TARGET
2.1 Number of tools, protocols, procedures, systems, methodologies, guides, curricula, or indices with demonstrated thematic contexts (PRH IR2.1)	0	1 (PHE Toolkit)	1 ²

2.3 Share knowledge within the PHE and broader community

As the Project’s capacity building and field-based activities have increased, we have been able to disseminate more news and PHE information to existing and new audiences. In May and June 2010, this included disseminating updates on BALANCED technical assistance workshops in Zambia, Uganda and Kenya to promote PHE. Two team members also made presentations on PHE and BALANCED at international conferences. Specifically we:

- In April 2010, produced and disseminated to over 2,300 people the first issue of the BALANCED newsletter (see Annex 1 for dissemination details), which included two PHE champion profiles from Ethiopia and Tanzania and four articles from PHE implementing organizations—WWF Kenya, Blue Ventures in Madagascar, PFPI in the Philippines, and Conservation Through Public Health in Uganda. The newsletter’s second issue is scheduled for the fall of 2010
- Disseminated four messages about BALANCED activities through the PHE and other topical listservs such as the Family Planning Community listserv and Africa Biodiversity Collaborative Group.
- To promote PHE writ large, collaborated with external partners, including Population Reference Bureau (PRB), WWF, PFPI, and the Woodrow Wilson Center Environmental Change and Security Project (ECSP), to reach new audiences with messages on PHE and

² The original year 2 target included the PHE toolkit and the BALANCED website. After discussions with the USAID PHE Technical Advisor, we determined that the BALANCED website should not be counted under this indicator and the target was reduced to one tool.

the BALANCED Project's efforts in PHE. This included sending out news items on the PHE listserv as a way to reach members' contacts and listservs such as those managed by PRB, WWF's family network, and ECSP (for example, on the latter, Geoff Dabelko tweets to many of his contacts and via that mechanism could potentially distribute some of our news items even further).

- To promote the PHE Toolkit, we met and had discussions with the ECSP, PRB, and JHU (their marketing person) on ways to encourage use of the overall K4Health site and its many individual Toolkits. We made a limited distribution of pen drives with a “snapshot” of the PHE Toolkit contents³; developed an extensive checklist of actions BALANCED can take and products it can use to promote the PHE Toolkit specifically (to be implemented in Year 3); and designed a “postcard” that promotes the Toolkit (in final production at printing company; for distribution early in Year 3).
- Highlighted nine news items on the BALANCED website and posted resources mentioned in these news pieces to the PHE Toolkit (see Annex 2 for listing).
- As part of the February 2010 SSE-PHE, PFPI crafted four press releases/articles that were distributed in local newspapers highlighting the success of the exchange. These releases/articles were included as an annex in the SSE-PHE report, which was disseminated on the PHE Toolkit, the BALANCED website, the PHE and other listservs and to the BALANCED Advisory Committee members as part of their update:
 - January 27, no title
 - February 24, “*International delegates commends PHE integration initiatives in Bohol*”
 - February 25, “*International delegates impressed with PHE integration initiatives in Bohol*”
 - March 7, “*Foreign delegates impressed with PHE integration efforts in Bohol*”
- Contributed a blog post based on Dr. Elin Torell's experience (BALANCED/CRC staff and SSE PHE participant) for the Wilson Center's ECSP security beat blog in May 2010.
- To increase implementing and funding agency awareness of PHE approaches, we reached out to donors with the BALANCED Project brochure and news items. This included sharing BALANCED Project information with new donors interested in PHE and included target audiences in the BALANCED communications strategy—e.g., the MacArthur Foundation, Disney Friends for Change Program, Equator Initiative at the UNFPA, the Reproductive Health Funders Network and CI's Women in Conservation Forum.
- Presented at international conferences involving new partners and potential donors. PFPI presented at the international, multi-sectoral Healthy Parks, Healthy People Congress 2010 in April in Melbourne, Australia (participants came from the health, environment, tourism, and education sectors). The conference explored how nature contributes to human well-being and broader societal benefits and looked at the challenges of finding

³ A delivery of such pen drives to CRC from JHU was delayed by several months and upon arrival at least 50% or more were found defective; CRC is working with JHU to correct this, but these pen drives could be a useful marketing tool for the site and its various Toolkits moving forward

balance between development and human needs for environmental services. PFPI’s presentation was entitled “*Integrating Reproductive Health and Coastal Resource Management Towards Achieving Food Security for Healthy People and Communities*”. In June, CRC made a presentation entitled “*Concerted Action for Successful Coastal Communities in Tanzania: Perspectives And Lessons From The Tanzania Coastal Management Partnership, 2006-2009*” at the Coastal Society Conference in Wilmington, NC, which incorporated materials developed by BALANCED that look at nexus of the PHE network of practice, and areas of high biodiversity and high population density in Tanzania.

Results for Activity 2.3:

- 1 newsletter posted to 4 listservs reaching more than 2,300 people (Indicator 2.2)
- 4 newspaper articles on the South-South Exchange disseminated (Indicator 2.2)
- 1 article on the Wilson Center ESCP’s blog (Indicator 2.2)
- 2 international conference presentations (one in Australia; one in Wilmington NC) (Indicator 2.2)
- \$2,780 leveraged for PFPI presentation at Australia conference (Indicator SO1)
- 9 items on PHE news and outreach-specific content disseminated on BALANCED Project website
- At least 4 new documents and/or tools uploaded to PHE website by PHE community and practitioners

Status of PMP results for Activity 2.3

INDICATOR	REPORTING PERIOD	YTD	Y2 TARGET
SO2: Dollar value of funds leveraged from USAID Missions and non-USG sources to support PHE implementation and scale-up	\$2,780 (contributions to costs of Quintana participation in Australia Conference	\$2,780	No 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 Newsletter (1); newspaper press releases/articles (4); blog on Wilson Center (1); conference presentations (2)	13	6

IR2 Priorities for next period (July 1 to December 31, 2010)

The BALANCED staff person in bold is the lead person responsible for bringing the activity to completion. Supporting team members follow. This is the best estimate at the writing of this report. Leads may change depending on staff availability and other factors.

- Complete the analysis of the Philippines-based field research on value-added of PHE and produce the final report on findings from that analysis. (**Brian**, Richard Pollnac).
- Prepare a presentation based on the Philippines research findings and report in consultation with USAID, for presentation (if USAID is in agreement) in the second half of Year 3 at venues such as the Woodrow Wilson Center, USAID Biodiversity team brownbag seminar and/or Population Environment Research Network (PERN) forum. (**Richard Pollnac**, Brian).
- Conduct a scoping trip to Nepal for field research that follows the same model as for the Philippines (with the addition that in Nepal, the team will also collect data collected on facets of climate change impacts on population, health and the environment) (**Richard Pollnac**, Brian).
- Begin the process of identifying different PHE concept and implementation models used in different countries/contexts. This will take the form of literature reviews and first person interviews and is the first step in developing an article (eventually for a peer-reviewed journal) that compares and contrasts the various models (**Don**).
- Draft a report on a cross-country comparison of the Philippines and Tanzania behavior monitoring surveys (BMS) (**Elin**, Richard Pollnac).
- Refine common indicators collected in BALANCED field sites to include both value-added and youth indicators and provide technical assistance on these indicators for new field sites in the Philippines, Zambia and Ghana. (**Elin**, Joan)
- Continue to engage with members of the Advisory Committee for their input on specific areas of expertise and provide periodic updates to all members on regular basis. (**Linda**, all)
- Produce four facts sheets on PHE and cross-cutting topical issues such as PHE and climate change, PHE and unmet need for family planning, PHE and gender, etc. (carry-over from Year 2) (**Linda**, Lesley, Janet).
- Continue to work with members of the PHE Toolkit content management team to refine and enhance the Toolkit overall. This includes identifying new resources to be uploaded, managing content to be uploaded, developing abstracts for documents, and making the uploads. (**Don**, Janet, Bob)
- Work with the content management team and the USAID PHE Technical Advisor to review and vet the bibliography of journal articles and other academic-oriented PHE materials for selection of those that will best add value to the Toolkit under the (“Why PHE” tab). Also continue to work with key PHE academics to enhance the tab on “For Educators and Researchers” sub tab. (**Don**, Janet, Bob)

- Refine our strategy for promoting the PHE Toolkit and work with the K4Health team, PHE partners and health and family planning cooperative agreements to promote the site. (**Linda**, Janet, and Lesley)
- Once the K4Health team activates its system for assessing the site's usage, analyze this usage information to refine and or redirect efforts to promote the PHE Toolkit specifically. (**Bob**, Don, Janet)
- Solicit input from PHE Toolkit users and/or others in the PHE community of practice to assess their satisfaction with the site content, utility, accessibility and features; to identify gaps in information and features they would like to see included on the site; and suggestions for making these improvements (**Don**, Linda, Lesley)
- Continue providing technical assistance to PHE Ethiopia to adjust their website architecture to accommodate interactivity with the PHE Toolkit site and vice versa (**Bob**, Lesley, Linda).
- Continue using the PHE Toolkit and the BALANCED newsletter to showcase NGOs and websites that implement PHE, thereby promoting integrated approaches. (**Janet**, others).
- Produce and disseminate the second issue of the BALANCED electronic newsletter. (**Janet**, Lesley, Bob, Don).
- Continue to identify and refine PHE approaches and tools needed to build PHE capacity in the field. (all members of BALANCED team).
- Increase implementing and funding agency awareness of PHE approaches and success stories through development and dissemination of tailored PHE factsheets and briefing materials. (**Linda**, Janet, Lesley, Joan).
- 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.) (**Linda**, all BALANCED team members).

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

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

Accomplishments

Building on the activities implemented during the first half of Year 2, the BALANCED Project continued to facilitate the replication of results-oriented PHE field-based activities in Tanzania, Ethiopia and the Philippines. During this reporting period, we strengthened the capacity of TCMP staff and BALANCED partners in Tanzania to implement integrated PHE projects in the Mkwaja and Mkalamo wards, provided funding and technical support to our seed grant recipient

in Ethiopia to mainstream family planning into their on-going conservation activities; and initiated the start-up of new PHE activities with WCS in Tanzania and Zambia. Scale-up activities in the Philippines came to a close in April when the PFPI Population, Poverty and Environment (PPE) project ended. Details for these activities follow.

3.1 Scale-up PHE activities in Tanzania

In Tanzania, BALANCED is supporting the integration of family planning into CRC's on-going work through TCMP and the *Pwani* Project. *Pwani* integrates activities oriented toward improving the health of both humans and the environment in villages surrounding the Saadani National Park area. These efforts are supported by Mission PEPFAR (President's Emergency Plan for AIDS Relief) and biodiversity conservation earmark funds. BALANCED is also providing modest funding to support the integration of community-based family planning into TCMP's integrated activities.

In February 2010, BALANCED conducted community mobilization activities in the Mkwaja and Mkalamo wards to increase the awareness of and interest in the PHE approach among opinion leaders and the community. Community social mobilization meetings were held in all six villages. Pamphlets on the PHE approach, translated to Swahili, were distributed and theater groups performed a role-play about family planning/reproductive health issues. The CBDs trained in PHE in November 2009 were introduced to the community and their roles and responsibilities were explained. Currently these CBDs are providing:

- integrated PHE communication that includes family planning, health, economic growth, and environment messages, and
- free-of-charge family planning services and other selected reproductive health services including referrals within the catchments area.

Sixty-two PHE peer educators (31 each from the Mkwaja and Mkalamo wards) were trained by BALANCED in March 2010. As mentioned in the section 1.2 of this report, Zuberi Ramadhani initiated the training—triggered by his learning through the SSE about the PHE peer education system and witnessing its positive effects in the Philippines. The PHE peer educators come from different community groups, including community-led savings and credit associations, pastoralists, tour guides, traditional dancers, breads makers, fishermen, beekeepers, and seaweed farmers and were trained to:

- Educate community members about the benefits of family planning; and distribute integrated IEC materials on family planning, reproductive health, environment, and economic growth
- Inform community members about the range of contraceptive options—particularly oral contraceptive pills, condoms, DMPA, IUD, implants and vasectomy
- Clarify myths and misconceptions about the side effects of modern family planning methods
- Refer individuals and couples to the CBD and PHE provider outlet or health center for supplies of contraceptives, in-depth counseling and other reproductive health concerns



PHE Peer educators in training

The CBDs, PHE peer educators, and previously trained PHE providers all deliver integrated messages in Mkalamo and Mkwaja villages. An illustration is Abdalah, a 35-year old PHE provider. When people visit his shop, where he sells condoms and refers individuals for other family planning commodities, Abdallah takes the opportunity to explain the connection between population growth, health, poverty, and environmental degradation. Because deforestation is a particular problem in the area where Abdallah lives and works, he promotes the use of fuel-efficient stoves, which use only one-third the volume of wood used in traditional stoves. At the same time, he reminds villagers that when they plan their families they help keep mothers and children healthy. Healthier families also tend to put fewer pressures on—and thus keep healthier—the very natural resources they depend on for food and income. A one-page story about Abdallah was developed to post on BALANCED website and is awaiting USAID review.

From a family planning perspective, the CBDs have been particularly helpful in improving the quality of reproductive health services at the community level as there is a shortage of health staff at the dispensaries and most villages lack a primary health care facility. From January until the end of June 2010, the 30 CBDs in the Mkwaja and Mkalamo wards distributed over 11,000 condoms, 705 cycles of pills, provided 514 counseling sessions for family planning, and conducted 95 antenatal care visits. In addition to providing family planning services, the CBDs, PHE peer educators, and PHE providers spoke to their fellow villagers about the linkages between population, health, and environment, and promoting environmentally-friendly activities such as fuel-efficient stoves.

A Memorandum of Understanding (MOU) was developed between TCMP and the Trustees of the Tanzania National Parks (TANAPA) for the provision of integrated conservation and health activities to take place surrounding the Saadani National Park (SANAPA). A similar MOU was developed between TCMP and the Pangani District. Both MOUs are still awaiting signatures.

In June 2010, TCMP’s PHE coordinator participated in a workshop called “*Population, Health, and Environment: Communicating Information and Effective PHE Interventions to Policy Makers*”. The workshop, organized by Kenya National Coordinating Agency for Population and Development and the PRB under the USAID funded BRIDGE Project, was held in Nairobi, Kenya from June 21 to June 26.

Lastly, we finalized the report from the 2009 behavior monitoring survey (BMS) conducted in Pangani. This BMS baseline, which was a collaboration between BALANCED and the SUCCESS Tanzania Project, contains socio-demographic, health, coastal conservation and climate change-related data as well as data related to opinion statements on population-environment and poverty linkages. The report will be available on the PHE Toolkit and BALANCED website after it has been reviewed by USAID.

Results from Activity 3.1

- 62 PHE peer educators from the Mkwaja and Mkalamo Wards trained (Indicator 1.1)
- 514 counseling sessions for family planning conducted (field indicator)
- 341 new family planning acceptors in place (field indicator)
- 2 MOUs — one with TANAPA, one with the Pangani District developed and awaiting MOH and TANAPA signatures (Indicator 1.3)
- Tanzania BMS report finalized

Status of PMP Indicators for Activity 3.1

INDICATOR	REPORTING PERIOD	YTD	Y2 TARGET
SO1: Number of target organizations incorporating PHE tools, protocols, etc. into their work (PRH 1.1)	1 Pangani District Council (PE protocol)	2	0
1.1 Number of individuals trained by BALANCED in PHE know-how and SOTA (State of the Art) practices using 21st century learning tools	62 (PHE peer educators)	141	13
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)	0 (Robadue’s Coastal Society paper and presentation-reported under Activity 2.3)	0	0
3.1 Number of PHE tools, methodologies, and actionable	1 (Peer education in Pangani)	1	1

INDICATOR	REPORTING PERIOD	YTD	Y2 TARGET
findings replicated in new countries and geographic areas			
3.2 Number PHE programs scaled-up (PRH 3.4)	0	1	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 (BMS baseline survey)	1	1

Tanzania PMP field Data Summary

INDICATOR	January to June 2010	Cumulative Results Years 1 and 2	Comments
General			
Number of individuals trained	62	170	These individuals are also reported under the BALANCED global indicators
Family Planning and Reproductive Health			
Number of new users	341	341	
Number of counseling visits for family planning/reproductive health (FP/RH) as a result of USG assistance	514	520	
Number of USG-assisted service delivery points providing FP counseling or services		30	CBDs trained in November 2009
Average household distance/time to access family planning commodities		Distance to PHE providers and CBDs is now less than one kilometer.	Before the PHE providers were established, the distance to access FP commodities from the dispensaries ranged from 0 to 25 kilometers, with an average distance of 7.8 kilometers

INDICATOR	January to June 2010	Cumulative Results Years 1 and 2	Comments
Integrated indicators			
Number of population, health, environment organizations addressing non-traditional audiences		1	TCMP, an organization formerly focusing only on environment and health (HIV AIDS), now addressing FP needs and audiences

3.2 Scale-up PHE activities in the Philippines

PPE/PFPI

As noted earlier, the 24-month PPE Project supported by David and Lucile Packard Foundation ended April 30, 2010. However, in the last four months of project implementation, PFPI continued to provide implementation and technical assistance to local government units (LGU) to enable sustainability of the gains of the community-based family planning/reproductive health systems and services established in the project sites.⁴ Results of program monitoring indicate that the project outcomes and targets were achieved.

For this reporting period, the PPE project's trained government health personnel identified and facilitated the training of an additional 32 CBDs resulting in a total of 387 trained CBDs in the project sites. The trained government health personnel also continued to monitor activities of these CBDs, which included provision of FP/RH information and referral services to couples and distribution and social marketing of non-clinical methods of FP (pills, condoms). The peer educators that were trained under the program continued to function as change agents for responsible parenthood, safer sex practice and environmental conservation. The peer educators, Ministry of Health (MOH) Reproductive Health Unit (RHU) personnel and the CBDs also helped expand access to FP services in the project sites, which resulted in 2,839 new users of modern family planning methods in these sites over the first three months of 2010.

Program monitoring data indicate an increasing trend in family planning acceptance and use of family planning methods in the project sites since the introduction of these CBFP activities. This indicates there is a high level of latent demand for family planning services in biodiversity hotspot areas and also points to the appropriateness of CBFP systems to bridge gaps in service delivery and access to FP/RH information and methods. PFPI's policy advocacy communication inputs under the PPE project generated substantial political commitment and support for integrated approaches to poverty alleviation. For this reporting period, there was one Executive Order passed by one local government unit (LGU) partner in support of the PPE project activities.

⁴ Danajon Bank (Central Visayas), the Verde Island Passage (between Luzon and Mindoro) and the Mt. Capotoan-Mt. Cabalantian Watershed Complex (Western Samar).

The value of cash and in-kind resources from the David and Lucile Packard Foundation, PFPI, and municipal and barangay LGUs totaled an estimated US\$ 111,812 from January-June 30, 2010.

Conservation International Philippines

Conservation International /Philippines (CI/P) finalized an eight-page advocacy brief entitled “*Wellbeing of People and their Environment in the Verde Island Passage*” based on existing projects in the Verde Island Passage (VIP), and highlighting the benefits of the PHE approach and possible interventions in existing VIP marine sites such as along the Batangas coast. CI/P also sponsored three seminars on human well-being and environment in the VIP, focusing on the links between human health and marine conservation there. More than 120 participants attended, including local government leaders from the municipalities of Batangas, Mindoro Occidental, and Mindoro Oriental; and officers and key staff from the Department of Health and the Department of Natural Resources and Environment, the Department of Education and academic institutions.

In the VIP, CI/P is working with different stakeholders than is PFPI. As a result, these seminars reached new audiences for the BALANCED Project. Two thousand copies of the advocacy brief were disseminated to government officials and multi-sectoral partners in the VIP area. To ensure the brief also reached the grassroots level, it was translated into the local language and distributed to community-level leaders and lower level staff from the same government departments and organizations.

CI/P also promoted PHE (both the PHE Network and the BALANCED Project) in a Research Forum on February 23, 2010. Participants from health, environment and development NGOs participated in the forum to discuss PHE Network activities and plans and also recognize the links between marine conservation and climate change. As a participant in global climate change negotiations and meetings, CI/P staff gave an update on international and national climate change initiatives to encourage PHE network members to explore opportunities to engage in climate change adaptation and mitigation. In addition, the PHE advocacy brief was used to provide input into socio-economic data collection for the CI/P Vulnerability Assessment being conducted by CI/P’s marine unit. This integration of PHE data into biogeochemical studies was a positive result of the CI/P collaboration in the VIP.

At the conclusion of these activities, CI/P’s formal participation in the BALANCED Project ended on March 31, 2010. However, CI/P will continue to promote PHE in the Philippines and to contribute to the PHE Network activities. For example, it is helping organize the Fourth National PHE Conference and CI/P staff is conducting two major conference sessions on “*Mainstreaming PHE in Climate Change Adaptation across Ecosystems and Sectors*”.

Results from Activity 3.2

- US\$ 111,812 in match funding from the David and Lucile Packard Foundation, PFPI, and municipal and barangay LGUs—as this funding was reported as match, it is not reported under indicator SO1

- 32 CBDs trained (Indicator 1.1)
- 2,839 new family planning acceptors (Field indicator)
- Distance to access FP commodities reduced from an average of 1 - 5 kilometers to less than one kilometer (Field indicator)
- 1 local ordinance/policy enacted that integrates PHE (Field indicator)

Status of PMP Indicators for Activity 3.2

INDICATOR	REPORTING PERIOD	YTD	Y 2 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	32	32	No target
3.2 Number PHE programs scaled-up (PRH 3.4)	0	1 (Danjanon Bank)	1
3.3 Number of BALANCED field site activities that produce results that can feed into KM activities (development of tools and success stories)	0	1(BMS feeding into research report)	1

Philippines PMP Field Data Summary

INDICATOR	January to June 2010	Cumulative Results Years 1 and 2	Comments
General			
Number of individuals trained	32 (29 females and 3 males)	568	
Family Planning and Reproductive Health			
Number of new users	2,839	8,150	
Number of counseling visits for family planning/reproductive health (FP/RH) as a result of USG assistance	0	0	Counseling visits were not collected by PFPI at the project level; partner health units collect the numbers

INDICATOR	January to June 2010	Cumulative Results Years 1 and 2	Comments
Number of USG-assisted service delivery points providing FP counseling or services	32	411	
Average household distance/time to access family planning commodities	Less than 1 km		Health centers were main source of FP commodities in the villages estimated at more than 1 km to 5 km and were not open everyday; with CBDs, access to FP commodities is daily, can be anytime in some areas and in the neighborhood less than 1 km away
Integrated indicators			
Number of population, health, environment organizations addressing non-traditional audiences		49 (In YR 1 report, PFPI failed to count 38 organizations addressing non-traditional audiences)	Dr. Torell provided PFPI with M&E training and was able to gather additional data from Year 1 activities that was not recorded, but is included in cumulative total
Number of enabling local ordinances/policies enacted that integrate PHE	1	2	The LGU of Baco is the first municipality in the Province of Oriental Mindoro to issue an Executive Order for the organization of the Integrated Family Planning, Reproductive Health and Coastal Resource Management Council

3.3 Scale-up PHE activities in Madagascar

In July 2009, the US State Department issued a suspension decision memo instructing all US-based NGOs to cease non-humanitarian activities in Madagascar by August 14, 2009 and to initiate close-out procedures. As a result, there are no activities to report in this period.

3.4 Provide one seed grant to one conservation NGO in Ethiopia

During the first part of Year 2, BALANCED issued a two-year seed grant to EWNRA to mainstream family planning services into its ongoing landscape-based “*Integrated Wetland and Watershed Management project* in the Agelo Shenkora and Wichi watersheds in 10 kebeles within the Metu Woreda, Ilu Aba Bora Zone, Oromia region (south west Ethiopia). The area contains some of the last remnant intact wetlands and forest ecosystems of the country. The

project works towards implementing a PHE approach to tackle environmental, health and population problems in an integrated and cost-effective manner.

In November 2009, ENWRA organized and PFPI conducted the PHE Provider and Peer Education TOT for EWNRA and its partners. Shortly after the training, ENWRA conducted PHE orientation sessions with the micro-watershed committees

During this reporting period, EWNRA trained 63 adult peer educators from the Wichi and Agelo-Shenkora watersheds. These volunteers now provide services in the community. Both trainings were carried out by facilitators who were trained during the BALANCED TOT in Jima last November. EWNRA also executed agreements with the local MOHs (Metu Woreda and Illu Aba Bora zone Health Offices) on providing family planning service delivery.

In collaboration with the micro-watershed committees, ENWRA collected information on the number of women of reproductive age, the number of family planning acceptors from the health office, and the number of health extension workers. ENWRA also established linkages with DKT Ethiopia for family planning commodities to supply the PHE providers in the project sites.

In addition to the TA provided described under Activity 1.4, BALANCED provided hands-on technical support on project management.

Results from Activity 3.4

- 70 adult peer educators and 28 PHE Providers from Agelo Shenkora and Wichi watersheds trained (Indicator 1.1)
- 4 BALANCED-trained EWNRA project personnel and Ethiopian Government personnel conducted local Adult Peer Educators and PHE Providers training workshops (Indicator 1.2)
- 1 MOU developed between the MOH and EWNRA to supply family planning methods in the community (Indicator 1.3)
- Technical assistance provided on project implementation (Indicator 1.4)

Status of PMP Indicators for Activity 3.4

INDICATOR	REPORTING PERIOD	YTD	Y 2 TARGET
SO1: Number of target organizations incorporating PHE tools, protocols, etc. into their work (PRH 1.1)	1 (EWNRA)	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	98	98	15

INDICATOR	REPORTING PERIOD	YTD	Y 2 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	4	4	No 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)	2 (MOU with Woreda MOH and Regional MOH)	2	No target
1.4a Number of technical interventions provided by BALANCED to Missions and organizations to implement PHE within their programs (PRH 3.2)	1 (TA on project implementation)	1 (Target met by the 2 TAs described in Activity 1.4)	2
3.1 Number of PHE tools, methodologies, and actionable findings replicated in new countries and geographic areas	2 (Peer education and community-based distribution)	2	1
3.2 Number PHE programs scaled-up (PRH 3.4)	0	0	1

Ethiopia PMP Field Data Summary

INDICATOR	January to June 2010	Cumulative Results Years 1 and 2	Comments
General			
Number of individuals trained (disaggregated by population (P), health (H), and environment (E) topic-specific training, integrated trainings, and gender)	98	98	The trained individuals include 70 peer educators and 28 PHE providers. The CBD TOT is not included in the field data report, because it is not connected to a specific field site.

Family Planning and Reproductive Health			
Number of USG-assisted service delivery points providing FP counseling or services	28	28	PHE providers that are receiving supplies from DKT
Average household distance/time to access family planning commodities	Less than 3 Kilometers		The new PHE providers have reduced the distance to access FP commodities from maximum 8 kilometers to between 50 meters and 3 kilometers

3.5 Support PHE activities in CT countries

In Year 2, BALANCED sought opportunities to support the introduction and/or expansion of PHE in CT countries. To this end, the BALANCED developed demographic profiles and population projections for CT countries in the last reporting period. At that time, PFPI also participated in a three-day US CTI workshop in Indonesia. Participants included the three region-wide implementing partners—the CTSP, the Program Integrator (PI) and NOAA. Others included bilateral partners in the Philippines, Indonesia and PFPI from the BALANCED Project. During this reporting period, PFPI collaborated with the USAID/Philippines Office of Energy and Environment (OEE), the Regional Environment Program Specialist from the RMDA, the CTSP, WWF-P and CI/P to identify participants from the CT region to attend the BALANCED SSE-PHE. PFPI also invited the USAID Office of Health, USAID/Indonesia Office of Environment, David and Lucile Packard Foundation and UNFPA/Philippines. As a result, two participants from the Philippines and one from Indonesia joined the SSE-PHE.

In addition to inviting representatives from CT countries to the SSE-PHE, BALANCED had planned to support one of these participants to integrate family planning into their conservation efforts and serve as another “learning site” in the region through the provision of a small seed grant. BALANCED identified WWF/KKPFI as a potential seed grant recipient because Mr. Felimon Romero—the coordinator for the WWF’s CTSP in Tawi-Tawi, Philippines and a participant in the SSE-PHE—had requested technical support from BALANCED for their new five-year EU-funded project, “*Integrating PHE in Autonomous Region of Muslim Mindanao (ARMM)*”. However, after numerous discussions with Mr. Romero, the decision was made to continue providing post-training support but postpone to a later date the decision on a seed grant, based on whether or not WWF/KKPFI would like to scale-up their PHE project to another area. Due to this postponement, BALANCED will look for another seed grant recipient in the CT region during Year 3.

Results from Activity 3.4

- 3 representatives from 3 conservation groups participated in the SSE-PHE (reported under Activity 1.3)

Status of PMP Indicators for Activity 3.4

INDICATOR	REPORTING PERIOD	YTD	Y 2 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	0	0	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 intervention (PRH 1.3)	0	0	1
1.4 Number of technical interventions provided by BALANCED to Missions and organizations to implement PHE within their programs (PRH 3.2)	0	0	2

3.6 Secure funding for PHE expansion or scale-up in at least two countries for Years 2 and 3

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 continuously seeks opportunities to expand and support PHE field activities through funding from USAID entities, and non-USG organizations. The Project’s resource mobilization strategy has three objectives. During this reporting period, the following resource mobilization efforts were pursued under each objective:

Objective 1: Obtain Mission buy-ins (from 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.

- The BALANCED program technical assistance lead (PTAL) successfully promoted PHE and the BALANCED project to USAID/Philippines, especially as part of the SSE-PHE. As a result, USAID/Philippines has agreed to award BALANCED a buy-in to scale up PHE in the Philippines for Years 3 and 4 of the Project.

- The BALANCED Project Director and M&E and Learning Specialist discussed the possibility of funding from USAID/Tanzania to help support replication of PHE activities with WCS, AWF and other conservation groups in Tanzania. The Mission continues to express interest in the PHE approach, but would like to see results from a proven community-based approach to FP before lending any support to the effort.

Objective 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.

- Leveraged US\$10,747 from municipal and barangay LGUs (part of the US\$111,812 reported under Activity 3.2)

Objective 3: Mobilize non-USG resources to support field-based PHE activities in USAID family planning focus countries with biodiversity conservation priorities.

Results for Activity 3.6 include:

- \$500,000 in buy-ins from USAID/Philippines to scale-up the PHE approach in areas of high biodiversity and unmet need for family planning
- Disney Friends for Change – CI is an official nominator for this Program and asked PFPI to submit a concept paper for consideration. The concept was selected as a potential candidate for this award. PFPI forwarded a more detailed paper on “*Young Eco Warriors Combat Illegal and Destructive Fishing in the Philippines*” for a possible award ranging from \$25,000 to 100,000. The award will be announced in August 2010.

Status of PMP Indicators for Activity 3.6

INDICATOR	REPORTING PERIOD	YTD	Y 2 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)	\$ 500,000 (committed, but no formal agreement signed)	1,595,603	350,000

IR3 Priorities for next period (July 1 to December 31, 2010)

The BALANCED staff person in bold is the lead person responsible for bringing the activity to completion. Supporting team members follow. This is the best estimate at the writing of this report. Leads may change depending on staff availability and other factors.

General

- Continue to work with the USAID PHE Technical Advisor and key senior BALANCED staff to approach Missions in Tanzania, Ghana and Zambia regarding buy-in opportunities for scaling-up PHE in these countries. (**Linda**)
- Following the February 2010 SSE, continue to engage USAID-CTI on leveraging resources for integrating CBFP into conservation programs in the CT region. (**Joan**)
- Identify a third seed grant recipient from Asia or the CT region. (**Linda** and Joan)

Tanzania

- Provide continuing technical oversight for the integration (and replication) of CBFP planning into the on-going USAID/Tanzania-funded *Pwani* project in Tanzania. (**Elin, Juma, Ricky**)
- Continue to explore Bagamoyo, Zanzibar or other biodiversity-rich areas with high unmet need for family planning as potential sites to integrate CBFP through TCMP's new *Pwani* project, and test new PHE models in these areas; expansion in Year 3. (**Elin, Juma, Ricky**)
- Support CBD supervisors to monitor and support CBDs and adult peer educators in the Mkwaja and Mkalamo wards. (**Juma**)
- Conduct monthly monitoring and mentoring visits with CBDs/PEs in the Mkwaja and Mkalamo wards. (**Juma**)
- Provide refresher training for CBDs, PHE Providers and peer educators. (**Juma**)
- Develop/adapt integrated IEC materials for adults and youth based on new audience research conducted after the DCB workshop. (**Juma, Elin, Ricky**)
- Facilitate the signing of MOUs between SANAPA and the Pangani District and TCMP for PHE integration. (**Juma, Elin**)

The Philippines and CT region

- Develop Project Design and Year 1 workplan for Philippines Mission buy-in. (**Joan, Linda**)
- Implement Philippines Mission buy-in activities. (**Joan, Ronald**)
- Disseminate the baseline BMS findings in Danajon and Verde to local stakeholders. (**Joan, Ronald, Ricky**)
- Continue to advocate for the integration of PHE activities in the CTI, especially as follow-up to the SSE-PHE participants from the CT region. (**Joan**)

Ethiopia

- Follow-up with EWNRA and provide technical support as needed. (**Joan, Ricky**)
- Conduct TOT on Youth peer education for EWNRA and its partners. (**Ronald**)
- EWNRA to train youth peer educators. (**Joan, Ricky**)

Zambia

- Develop seed grant with WCS/Zambia and provide technical support as needed. (**Joan** and Ricky)

Asia/Africa

- Identify and work with potential seed grant recipient to develop a proposal and detailed implementation plan, and build capacity of the seed grant recipient to integrate CBFP into organization's conservation/health activities. (**Linda**, Joan)

III. Key Management Tasks

Accomplishments

- Held a strategic visioning and planning meeting for the team's key staff in January 2010. Key strategies for Project implementation resulting from this meeting were:
 - Defining four BALANCED "legacy" areas (useful tools for existing and emerging PHE practitioners, capacity built among PHE providers; PHE Toolkit, and value-added research)
 - Defining our four "80% effort" countries (Tanzania, Ethiopia, Ghana and CT region) and as well as the three "15% effort" (Kenya, Zambia, Senegal), which may become one of the 80% countries, and the decision not to dilute our efforts in other countries unless promising opportunities present themselves, i.e. Mozambique
 - Decisions about support staff and consultants, and the agreement to employ an East Africa Consultant, who will be deployed in August and stationed in Tanzania (thus addressing one of our management challenges expressed in previous report)
 - Refinement of our resource mobilization strategy
- Strengthened the communications and overall working relationship amongst the members of this Project's virtual team, through scheduled Skype calls, posting of all team meeting minutes on the Forum, meeting more frequently with PFPI staff during technical assistance visits, conferences, meetings, etc.
- Drafted a publications review checklist to move our KM publications efficiently to completion, including the USAID review.
- Continued to articulate integration during team meetings and across the IRs as noted in the introductory section of this report.
- Made significant progress reaching out to conservation groups and family planning organizations not actively involved in PHE and galvanizing their interest in incorporating health and family planning into their agendas and projects, e.g. WCS (Tanzania, Zambia, Uganda). TNC, Engenderhealth, and Pathfinder, JHU, new CRC projects such as the ICFG in Ghana.

Challenges

- The Project has significantly accelerated its pace, thus necessitating effective communication between BALANCED partners. While communications across team members has improved, it remains a challenge that we continue to work on, including testing new systems and approaches for running an effective virtual team.
- Conducting a Year3 workplanning meeting and drafting a workplan without knowing the actual Year 3 funding that would be awarded was difficult and left the team feeling it was not an efficient process. If USAID could extend the deadline for the Year 4 workplan the BALANCED management team believes we could engage in a much more efficient and effective workplanning process and avoid what feels like significant amount of “guesswork” in the beginning and then “re-work” once the new year’s budget figure is finalized.
- A USAID Philippines Mission buy-in appears imminent for Year 4 and 5, and we acknowledge and appreciate the role played by our AOTR and Technical Advisor in helping with the initial discussions that allowed that to happen. In Year 3, we would welcome receiving similar support and assistance from the AOTR and Technical Advisor in also securing buy-ins from Missions and/or Bureaus in/for Africa as well.
- Based on the Philippines buy-in and in anticipation that similar could be possible from Africa Missions and Bureaus, the team recognizes this would bring significant staffing implications. That, however, would be perceived as a “good” problem and there is already consideration of how to address this should such awards become a reality.

Priorities for next reporting period

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

- Taking steps to ensure an accelerated burn rate during the first half of Year 3
- Planning a follow-up to our strategic planning meeting for Years 4 and 5
- Working assertively to galvanize field support for our African programs

IV. Performance Management and Reporting Plan (PMP)

The primary goal of the PMP is to build an evidence base for the value-added of an integrated PHE model—i.e., tracking indicators that will demonstrate that integrated projects are more cost efficient, take less time to implement, and are perceived to increase the overall perception of well-being and environmental quality among local communities. A secondary goal of the M&E effort is to report results to USAID, addressing the Results Framework and indicators of both USAID/GH/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 2				Year 1-2 Cumulative Results	Year 1-2 Targets	Comments
	July-Dec	Jan-June	Total	Target			
SO-1: Number of target organizations incorporating PHE tools, protocols, etc. into their work (PRH 1.1)	3	5	8	2	8	2	Over target
SO-2: Dollar value of funds leveraged from USAID Missions and non-USG sources to support PHE implementation and scale-ups (million dollars) (PRH 1.2)	1,095,603	502,780	1,598,383	350,000	1,627,092	850,000	Over target
1.1 Number of individuals trained by BALANCED in PHE know-how and SOTA using 21st century learning tools	113	216	329	72	350	133	Over 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	3	6	9	2	9	2	Over target
1.3 Number of new and/or strengthened partnerships established and actively involved in advancing and supporting wider use of PHE approaches as a result of BALANCED capacity-building intervention (PRH 1.3)	0	2	2	2	2	2	Under target. This will be a focus for year 3.
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	20	23	9	25	11	Over target
1.4b. Number of new organizations receiving TA by BALANCED	2	16	18	9	18	9	No target set for this sub-indicator

2.1 Tools, protocols, procedures, systems, methodologies, guides, curricula, or indices with demonstrated programmatic value developed or adapted for country and/or thematic contexts (PRH IR 2.1)	1	1	2	4	2	7	Under target. Several tools are in the final stages of revisions and/or review.
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)	4	9	13	5	17	7	Over target
2.2b. Number of peer reviewed articles and research studies		0	0	No target	0	No target	No target.
3.1 Number of PHE tools, methodologies, and actionable findings replicated in new countries and geographic areas (PRH 3.1)	1	4	5	2	7	3	Over target
3.2 Number PHE programs scaled up (PRH 3.4)	2	0	2	1	3	3	On target
3.3 Number of BALANCED field site activities that produce results that can feed into KM activities (development of tools and success stories)	1	1	2	1	2	3	Under target

Field Indicator Report

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

This report includes only progress on indicators where BALANCED in some way is contributing towards the result. For example, this means there is 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 2				Year 1 and 2 Cumulative Results			
	Philippines	Tanzania	Ethiopia	Total	Philippines	Tanzania	Ethiopia	Total
Number of individuals trained (disaggregated by population (P), health (H), and environment (E) topic-specific training, integrated trainings, and gender) * <i>Note</i> : these numbers do not include trainees from TOT	187	141	98	426	568	149	98	827
Number of new users	5,381	341	0	5,722	8,150	341	0	8,491
Number of counseling visits for family planning/reproductive health (FP/RH) as a result of USG assistance	0	520	0	520	0	520	0	520
Number of USG-assisted service delivery points providing FP counseling or services	135	30	28	133	411	30	28	469
Average household distance/time to access family planning commodities	Less than one kilometer	Less than one kilometer	Less than 3 km		Less than one kilometer	Less than one km	No data	

INDICATOR	Year 2				Year 1 and 2 Cumulative Results			
	Philippines	Tanzania	Ethiopia	Total	Philippines	Tanzania	Ethiopia	Total
Number of population, health, environment organizations addressing non-traditional audiences	38	1	1	40	49	2	1	52
Number of local ordinances enacted that integrate PHE	1	0	0	1	2	0	0	2

Annex 1: BALANCED Communications/Dissemination Activities

BALANCED Newsletter -April and May 2010

Audience	Date Sent	Person Responsible	Number of People Reached
PHE Listserv	April 9, 2010	Janet	514
USAID AOTR et al.	April 9, 2010	Linda	3
FP Community Listserv	April 12, 2010	Janet	450
Africa Biodiversity Collaborative Group (ABCG) Listserv	April 12, 2010	Janet	330
PHE network member and League Of Municipal Mayors of the Philippines	April 28	Ronald	62
BALANCED Advisory Committee members	May 7, 2010	Bob	7
PHE Ethiopia website	May 2010	Negash posted it	Unknown
SSE-PHE Participants	April 16, 2010	Joan	15
CI CTI staff, plus staff in Philippines, Madagascar, South Africa	April 16, 2010	Janet	14
MacArthur Foundation: Elizabeth Chadri and Erin Sines	April 23, 2010	Janet	2
Anonymous CI donor	May 2010	Janet	1
East Africa PHE Network update	May 2010	Jason Bremner	170
Tweet to Geoff's contacts	April 9, 2010	Geoff Dabelko	427
Tweet to Population Institute members	April 10, 2010	Population Institute	367
USAID PHE Champions	April 10, 2010	Linda	6
Estimated total people reached			2,368

South-to South PHE Exchange Report – June 29, 2010

Audience	Date Sent	Person Responsible	Number of People Reached
PHE Listserv	June 29, 2010	Janet	514
USAID AOTR et al	June 2010	Linda	3
BALANCED Advisory Committee members	June 25, 2010	Linda	7
SSE-PHE Participants	June 2010	Joan	15
CI CTI staff, plus staff in Philippines, Madagascar, South Africa	June 24, 2010	Janet	14
East Africa PHE Network update	June 2010	Jason Bremner	Update will appear next reporting period
Reproductive Health Funders Network	June 30, 2010	Janet	1
League of Mayors in the Philippines website (document shared April 30 and was uploaded to LMP website ⁵ June 24,2010	June 24, 2010	Ronald	Potential to reach close to 1,500 local chief executives
RDMA and CTSP	July 16, 2010	Joan	2
USAID Philippines	July 16, 2010	Joan	4
Estimated total			2,060

BALANCED Project Helps WCS Integrate FP - Friday, June 25, 2010

Audience	Date Sent	Person Responsible	Number of People Reached
PHE Listserv	June 25, 2010	Janet	514
FP Community Listserv	June 30, 2010	Janet	Completed in next reporting period
Africa Biodiversity Collaborative Group (ABCG) Listserv	June 30, 2010	Janet	330
BALANCED Advisory Committee members	June 25, 2010	Linda	7
East Africa PHE Network update	June 2010	Jason Bremner	Will appear in next reporting period
Estimated total			851

⁵ <http://www.lmp.org.ph/>

Requests to post PHE Resources on PHE Toolkit - June 30, 2010

Audience	Date Sent ⁶	Person Responsible	Number of People Reached
PHE Policy and Practice monthly meetings	January 2010 February 2010 March 2010	Janet	Approximately 60
PHE Listserv	June 30, 2010	Janet	514
East Africa PHE Network update	June 2010	Jason Bremner	Will appear in next reporting period
Estimated total			574

⁶These requests were made in person vs. electronically

Annex 2: BALANCED Project Communications – News Items

As part of the BALANCED Project communications strategy, the Project updated BALANCED news items on a regular (monthly) basis. Nine news items posted in this reporting period include:

- BALANCED Project Requests PHE Resources for PHE Toolkit - June 30, 2010
- BALANCED Project Helps WCS/Zambia Integrate Family Planning Into Their Livelihoods and Conservation Initiative - June 25, 2010
- BALANCED South-to-South Exchange Promotes PHE Based on Philippines Success - June 24, 2010
- BALANCED Staff Blog on Reflections from PHE South-to-South Exchange in the Philippines- May 5, 2010
- BALANCED Project Launches Newsletter Showcasing PHE Approaches and Highlighting East Africa Champions --April 9, 2010
- Wilson Center Session Highlights Role of PHE in International Family Planning – March 2010
- Review of Family Planning and Global Environment Linkages Highlights PHE Contributions to Human Well-being - March 2010
- BALANCED Study Tour Showcases PHE Successes in the Philippines – February 2010
- UNFPA Highlights Women’s Roles in PHE Projects in the Philippines – February 2010