

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

**Semi-Annual Results Report #5
For Period July 1 - December, 2010**

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Acronyms

ADA	Amara Development Association
ADDO	Accredited Drug Dispensary Outlets
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
DBC	Designing for Behavior Change
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
TMRDF	Tawitawi Marine Research and Development Foundation
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 almost \$7.5 million in core funding from the USAID/GH Office of Population and Reproductive Health (OPRH), which includes potential Mission Buy-ins from all accounts.

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

IR1 – Capacity built for integrated PHE implementation

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

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

II. Project Results

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

This semi-annual report covers the period from July 1, 2010 to December 31, 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 279 individuals (166 men and 113 women) with training and mentoring on the key components of PHE project implementation with a focus on PHE integration, PHE program design, community-based family planning (CBFP), peer education, youth peer education (YPE) and assessing P, H, and E behaviors through the designing for behavior change (DBC) methodology (IR1 and IR3)
- Provided targeted post-training support remotely (via e-mail) and hands-on (during in-country visits) to six BALANCED trainees/PHE practitioners (from six different

organizations/governments) that have the funds and political will to integrate CBFP into their conservation program through seven technical assistance (TA) interventions in three BALANCED priority countries. (IR1 and IR3)

- Incorporated input from USAID and 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 nongovernmental organizations (NGOs) interested in mainstreaming CBFP into their conservation activities once approved by USAID. (IR1 and IR2)
- Continued to make curricula and materials developed by BALANCED and 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)

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), BALANCED seed grant recipient, on addressing challenges to incorporating family planning into their conservation activities and collecting monitoring and evaluation data (IR1 and IR3)
- Following up with David Mutekanga—Wildlife Conservation Society (WCS) Assistant Director —provided technical assistance to develop PHE oriented goals and objectives for their Ruaha Landscape Program and other WCS programs. WCS staff was also trained in DBC and YPE, paving the way for WCS to begin using these tools for their integrated activities. (IR1 and IR3)
- Following up with WCS/Zambia Country Director, who expressed interest in integrating family planning into WCS/Zambia Community Markets for Conservation (COMACO) program, provided technical support to design their PHE activity in preparation for a seed grant from the BALANCED Project and conducted a PHE community-based distribution and peer education (CBD/PE) training to take advantage of the dry season when trainers could identify and train CBDs and PE before the rainy season prohibits transportation around the national parks in the Luwanga Valley (IR1 and IR3).
- Provided technical support to Tanzania Coastal Management Partnership (TCMP) to fine-tune their PHE activities in Pangani District and incorporate PHE into their new *Pwani* Project, thus expanding and testing new PHE models in Bagamoyo. In addition, trained TCMP and its TCMP partners, including the Pangani District Ministry of Health, on DBC and YPE. Simultaneously, expanded PHE activities to three additional wards in Pangani, training MoH CBDs on PHE and gathering local champion stories that have been drafted and distributed to the global PHE community. (IR1, IR2, and IR3)
- Showcased four PHE champions—one from Tanzania and one from the Democratic Republic of the Congo, which are highlighted on the USAID Family Planning/Population and Environment webpage; and two from Colombia, which are highlighted in the second

issue of the BALANCED newsletter distributed in December 2010 to almost 1,260 people in the conservation, family planning and PHE community. (IR3 and 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:

- During e-mail communication with Conservation Through Public Health (CTPH) about the results of their November advocacy workshop, we offered to showcase any PHE stories from Uganda, if they would send them to CRC. CTPH was most responsive and sent us two champion stories, which we edited and formatted into a nice template for distribution to the global PHE community in early 2011. (IR3 and IR2)
- In collaboration with Hardee Associates LLC, the Population Reference Bureau, World Wildlife Fund-US, CI, Battelle Memorial Institute, EWNRA and the PHE Ethiopia Consortium, produced and disseminated to approximately 1,500 individuals the second issue of the BALANCED newsletter on the climate change and the opportunities for PHE projects to incorporate considerations of climate change and vice versa. (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)
- Held a meeting on the initial findings of the BALANCED PHE benefits research in the Philippines at the Policy and Practice meeting in October 2010. Dialogue with some of the meeting participants and PHE practitioners lead us to reanalyze some of the data. Results of the additional analysis will be shared with key PHE leaders in Washington, DC during the next quarter (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/Knowledge for Health (K4Health) Project and the BALANCED Project on the K4Health website and PHE Toolkit, with emphasis on improving access to information and refining the “PHE Gateway” feature (allows for additional topic “indexing”/“searching” capabilities and thus allows for quicker and more efficient retrieval of information by site users). (IR2)
- Efforts to step up the sharing of the PHE resources and promoting PHE through the K4Health website, resulted in a four-fold increase in the number of users accessing the PHE Toolkit (IR1 and IR2).
- Provided technical 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 assisting PHE Ethiopia to assess capacity needs of the PHE Ethiopia members. (IR1 and IR3)

- Continuously updated 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 first six months of Year 3, 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, on how to integrate CBFP into on-going conservation activities and on YPE. Post training mentoring and follow-up was primarily provided to conservation groups and local government entities that are interested in PHE and that have the funds and political will to implement PHE activities. Below is a description of the capacity building activities implemented by the BALANCED Project during this reporting period.

1.1 Build capacity of NGOs from the coral triangle region on PHE program design

The BALANCED PFPI team worked closely with the Philippines PHE Network (SIGUE) to organize the Fourth PHE Conference. Postponed several times for various reasons, it is now scheduled to occur during February 27-March 1, 2011¹ at General Santos City, Philippines. The conference theme is “*Changing World, Changing Climate: Exploring Population, Health and Environment Link for Effective Governance.*” The day before the start of the conference, BALANCED will facilitate a one-day workshop on PHE program design for selected participants from NGOs and government organizations (GO) attending the conference, particularly those interested in PHE and able to implement the PHE approach. PFPI prepared an activity brief, which was presented to the PHE conference program committee and posted at the PHE conference website.

¹ At the time of this report submission, the conference has been postponed and no new date set.

The PFPI team also initiated discussions with the Coral Triangle Support Partnership (CTSP) to explore integration of PHE into their existing strategies and activities. As a result of on-going discussions, CTSP expressed interest in partnering with BALANCED to advance PHE in the six countries in the Coral Triangle (CT)/CT6 region and to support the development and implementation of PHE strategies and activities. Subsequently, in September 2010, BALANCED submitted a concept paper to CTSP suggesting collaboration on a three-day PHE Program Design workshop for selected CT6 NGOs after which BALANCED would provide seed grants and technical support to one to two selected workshop participants.

In November 2010, the BALANCED PHE Technical Assistance Lead (PTAL) and the USAID PHE Technical Advisor traveled to Bangkok, Thailand and met with various players in the CT region to explore further opportunities for PHE integration in that area and to share PHE information and resources. The USAID Regional Development Mission/Asia, the US CTI Program Integrator and the Asia Pacific Alliance for Sexual and Reproductive Health Rights (APA) encouraged BALANCED to continue to share PHE information and updates, particularly those related to the CT, that they can post in their respective websites and newsletters. Shortly after the meeting, a write-up on the PHE Toolkit and a link to the site was posted in the APA Update #20 December 2010. The PTAL and the USAID PHE Technical Advisor also explored an opportunity to collaborate in the upcoming CTI local government alliance meeting in March 2011. The objectives would be two-fold: to orient the CTI local governance network to PHE; and to gain APA support. BALANCED will continue to follow up with CTSP on these opportunities during the next reporting period.

To date, there has been no communication from the United Nations Family Planning Association (UNFPA) on the proposed PHE Program Design Workshop for the Summit Institute for Development (SID) in Indonesia. PFPI continues, however, to periodically contact them.

Results from Activity 1.1

None

Status of PMP Results for Activity 1.1

INDICATOR	Reporting Period	Year 3 Target
SO-1: Number of target organizations incorporating PHE tools, protocols, etc. into their work (PRH 1.1)	0	2
SO-2: Dollar value of funds leveraged from USAID Missions and non-USG sources to support PHE implementation and scale up (PRH 1.2)	0	\$ leveraged from NGO
1.1. Number of individuals trained by BALANCED in PHE know-how and SOTA using 21 st century learning tools	0	15
1.2 Number of participants who received BALANCED training and/or mentoring that are now providing training or TA to others on PHE implementation	0	2
1.3 Number of new and strengthened partnerships established and actively involved in advancing and supporting wider use of PHE	0	1

approaches as a result of BALANCED capacity-building interventions		
1.4 Number of technical support interventions provided by BALANCED to Missions and to organizations to implement PHE within their programs	0	2
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 IR 2.1)	0	1
3.1 Number of PHE tools, methodologies, and actionable findings replicated in new countries and geographic areas (PRH 3.1)	0	1

1.2 Conduct training-of-trainers on PHE YPE in East Africa

During this reporting period, BALANCED adapted PFPI's PHE YPE training manual to the African context, incorporating a section on natural resources management and strengthening wording on PHE linkages. Dr. Enrique Hernandez, the BALANCED Project East Africa Consultant (EAC), and Dr. Ronald Quintana, PFPI staff, conducted a YPE train-the-trainer (TOT) workshop in Dar es Salaam, Tanzania on December 6-10, 2010. The objective was to build the capacity of NGO participants working on PHE activities to train volunteer YPEs how to talk to their peers about adolescent and reproductive health and PHE linkages and to promote good health practices and pro-environment behaviors.

Sixteen participants (12 men and 4 women) from the following organizations in Tanzania and Ethiopia attended the training: Packard Foundation in Ethiopia; Jane Goodall Institute (JGI); Wildlife Conservation Society (WCS); African Wildlife Foundation (AWF); partner organization Longido Community Integrated Program (LOOCIP); DSW partner 4H Organisation; Comunita Volontari per il Mondo-AIDS Partnership with Africa (CVM-APA); Pangani District Health Office; Pangani District Hospital; Bagamoyo District Hospital; and the Tanzanian Coastal Management Partnership (TCMP).

Thamar Debede was funded by the David and Lucile Packard Foundation to participate in the workshop in preparation for her to co-facilitate the March 2011 YPE TOT in Ethiopia with Dr. Hernandez, a step toward building in-country capacity to facilitate PHE training workshops. During the next reporting period, BALANCED will test the YPE TOT curriculum one more time during the YPE TOT in Ethiopia, finalize the curriculum, and disseminate it widely including making it available on the PHE Toolkit.

During this reporting period, BALANCED also revised the youth indicators in the performance monitoring plan (PMP) and the field indicators in order to better capture youth-related information.

Results from Activity 1.2

- 16 representatives (12 men and 4 women) from NGOs and local governments were trained on YPE and on how to train YPEs for their PHE activities. (Indicator 1.1)

Status of PMP Results for Activity 1.2

INDICATOR	Reporting Period	Year 3 Target
1.1. Number of individuals trained by BALANCED in PHE know-how and SOTA using 21 st century learning tools	16	15
1.2 Number of participants who received BALANCED training and/or mentoring that are now providing training or TA to others on PHE implementation	0	4
2.1 Number of tools, protocols, procedures, systems, methodologies, guides, curricula, or indices with demonstrated programmatic value developed or adapted for country and/or thematic contexts (PRH IR 2.1)	0	1
3.1 Number of PHE tools, methodologies, and actionable findings replicated in new countries and geographic areas	0	1

1.3 Build the capacity of Wildlife Conservation Society on PHE program design

During Year 2, BALANCED staff initiated discussions with and provided technical support to WCS—a key conservation organization working in African countries with high population density—with the goal of incorporating family planning into WCS activities. Previously, various technical support and assistance had been extended to WCS Zambia, WCS Uganda and WCS Tanzania in response to requests from these country offices.

During this reporting period, WCS Tanzania requested BALANCED assistance in linking PHE into their proposed integrated PHE project—the Wetlands Conservation and Community Outreach Project, which is intended to enhance the WCS Ruaha Landscape Program. The BALANCED EAC provided virtual inputs. Further discussions followed when Dr. Muketanga participated in the BALANCED-led Designing for Behavior Change workshop at Bagamoyo, Tanzania. Also, the BALANCED EAC traveled to WCS Tanzania in Iringa from October 11 to 15, 2010 to help WCS to: a) develop an implementation plan for integrating CBFP services into their ongoing conservation activities; b) update the PHE conceptual framework and objectives, and c) identify strategies to incorporate family planning (FP) into WCS’ new wetlands conservation project. In November, the BALANCED EAC also traveled to WCS in Zambia to help them incorporate CBFP into their livelihoods project there. This activity is explained in more detail under Activity 3.4.

In November 2010, the BALANCED Project Director visited WCS headquarters in New York and spoke to them about their interest in PHE and how BALANCED could provide additional advocacy and/or training to their staff. They suggested that BALANCED hold a session on PHE for staff of the WCS headquarters. Subsequent to the meeting, the BALANCED Project Director met with Lisa Gaylord, a strong PHE advocate from WCS Madagascar who is currently living in Washington, DC. Lisa offered to help organize a session on PHE for WCS headquarters staff, which will be organized during the next reporting period.

Results from Activity 1.3

- Technical support provided to WCS Tanzania and Zambia

Status of PMP Results for Activity 1.3

INDICATOR	Reporting Period	Year 3 Target
SO-1: Number of target organizations incorporating PHE tools, protocols, etc. into their work (PRH 1.1)	0	1
SO-2: Dollar value of funds leveraged from USAID Missions and non-USG sources to support PHE implementation and scale up (PRH 1.2)	0	\$ leveraged from WCS
1.1. Number of individuals trained by BALANCED in PHE know-how and SOTA using 21 st century learning tools	0	10
1.4 Number of technical support interventions provided by BALANCED to Missions and to organizations to implement PHE within their programs	1 (WCS TZ)	1

1.4 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 six hands-on post-training support interventions to five BALANCED trainees/PHE practitioners from three BALANCED priority countries. Below is an explanation of the kinds of support provided. The post-training support was primarily focused on groups that have the resources and the political will to implement PHE activities. (*Note*: this list is shorter than in the previous report due to the fact that several of the organizations that previously received support are now under IR 3.)

- **African Wildlife Foundation (AWF)**—BALANCED continues to provide technical assistance to AWF as they seek to integrate family planning into their conservation activities. From October 3-9, 2010, the BALANCED EAC facilitated a four-day training for five AWF staff and three representatives from AWF partner organizations (total of 7 men and 1 woman) in Arusha, Tanzania. The training included an introduction to the BALANCED Project and to PHE and provided them with assistance in developing a PHE conceptual framework and a PHE goal, objectives and strategies for the AWF programs and projects. The BALANCED EAC also accompanied AWF on a field visit to the Burunge Wildlife Management Area, which comprises 10 villages and a potential PHE project site (Burunge Lake lies in the corridor between the Terangire and Manyara national parks).

A final PHE conceptual framework and project design were developed based on input from the field, inputs from AWF on its organizational direction with respect to PHE, and with consideration of the resources available. AWF expressed interest in having BALANCED/CRC enter into a memorandum of understanding/agreement (MOU/A) with them to define roles of each party for a PHE partnership and technical support. A subsequent teaming agreement between BALANCED/CRC and AWF was drafted and submitted to AWF for their review.

- **TCMP**—The BALANCED EAC provided technical assistance to the Pwani Project and the PHE activities implemented in the Pangani District, as described in section 3.1. The technical assistance included field monitoring of CBDs, peer educators, and PHE providers, during which the EAC collected materials and quotes for the Abdalah champion story <http://www.k4health.org/toolkits/phe/adbalah-overcomes-odds-the-success-phe-provider-educating-muslim-community>. In the field, the EAC also helped negotiate a revised MOU between TCMP and the Pangani District Council. Signing of this MOU remains pending.

The EAC also participated in the annual planning workshop for the Pwani Project, helped assess potential PHE sites for scaling-up in Pwani Project sites in Bagamoyo, and helped facilitate the design of PHE integration in the villages of Sadaani and Mkange in Bagamoyo. In 2011, the Pwani Project will train members of community-led savings and credit associations and champions of fuel-efficient stoves to become PHE peer educators.

The EAC also provided input on the development of the Designing for Behavior Change (DBC) questionnaire, assisted with analyzing the data from 120 surveys and with developing draft IEC messages based on survey results. He helped TCMP coordinate the logistical arrangements for the YPE TOT, including identifying local organizations with youth programs that should be invited to the workshop. Post training, the EAC and the TCMP PHE Coordinator drafted a concept note for how to establish a youth PHE program in Pangani and met with district officials to vet these ideas.

- **Kabang Kalikasan ng Pilipinas Foundation Inc. (KKPFI)/ WWF Philippines (WWFP)** – BALANCED is providing technical support to KKPFI's five-year European Union (EU)-funded *Integrating PHE in Autonomous Region of Muslim Mindanao (ARMM)* project. This support was the direct result of the participation of Mr. Filemon Romero, project manager for the KKPFI, in the BALANCED South-South Exchange PHE (SSE-PHE). We developed a terms of reference outlining the roles and responsibilities of each party, which included having BALANCED provide KKPFI with the following technical support:
 - Conducted a five-day training/workshop on PHE and Community-based Reproductive Health (CB-RH) with 44 participants (22 males and 22 females). The participants came from the Department of Health-ARMM; the Department of Environment and Natural Resources-ARMM; the Bureau of Fisheries and Aquatic Resources; the Department of Social Welfare and Development; the Department of Education; the Integrated Provincial Health Office; Rural Health Units, the Provincial Planning and Development Office; the Municipal Fisheries and Aquatic Resources Management Committee; Mindanao State University; provincial, municipal and barangay local government units; mothers' clubs;

youth groups; media; People's Organizations (POs), Tawi-tawi Marine Research and Development Foundation (TMRDF) and WWF-P/KKPFI. The workshop covered the topics of what is PHE, the benefits of linking PHE while addressing development issues, the role of the various sectors in helping achieve the project goals and objectives, and how to identify other indigenous and potential key PHE leaders. Workshop participants developed municipality-specific integrated PHE action plans for implementation by the different participating municipalities.

- Facilitated a partnership between KKPFI and DKT Philippines, Inc. to ensure the supply of family planning commodities.
- Conducted a five-day TOT on PHE CBD/PE with a total of 23 participants (14 females and 9 males). Participants came from the Department of Health-ARMM, Department of Environment and Natural Resources-ARMM, Bureau of Fisheries and Aquatic Resources (BFAR), Department of Social Welfare and Development (DSWD), Department of Education (DepEd), Integrated Provincial Health Office, Rural Health Units, Municipal Fisheries and Aquatic Resources Management Committee (MFARMC), youth organizations, Mindanao State University, people's organizations (PO), the Tawitawi Marine Research and Development Foundation (TMRDF) and WWF-P/KKPFI.
- **PHE Ethiopia**—BALANCED supported a meeting with PHE practitioners from the PHE Ethiopia network to discuss progress on their PHE activities and to assess the needs for additional BALANCED Project technical assistance to PHE Ethiopia members. In collaboration with the PHE Ethiopia Director, the EAC prepared a program that aimed to: 1) share the PHE experience in the Philippines, Tanzania and Ethiopia (EWNRA) and 2) identify members' needs that were within the BALANCED Project's mandate and realm of support. Unfortunately, the meeting was too short to adequately gather sufficient information on the needs of these PHE practitioners. However, during the meeting, some practitioners mentioned the desire to replicate existing work as well as the need for additional funds for integration and further capacity building. In December, the Project Director also met with PHE Ethiopia to discuss capacity-building needs. Three activities were decided upon for the next reporting period: 1) assist PHE Ethiopia to adequately assess the knowledge and skill gaps of its members; 2) invite appropriate members of PHE Ethiopia to the March 2011 YPE TOT, and 3) provide technical assistance to help construct an electronic document library on the PHE-Ethiopia website that provides a Really Simple Syndication (RSS) feed of new material loaded into the library that is linked to the PHE Toolkit. Further technical assistance needs will be defined during the Project Director's visit to Ethiopia in March.

Follow-up to new, emerging PHE Practitioners

- **Pathfinder International and The Nature Conservancy Tanzania**—Pathfinder International is developing an initiative to launch a PHE project in the Mahale Mountains Conservation Zone with The Nature Conservancy (TNC)/Africa based in Arusha, Tanzania. Sono Aibe from Pathfinder requested BALANCED technical assistance in helping TNC and Pathfinder staff review the PHE assessment survey instruments, frameworks, and monitoring and evaluation tools, as well as discuss other issues related to initiating a PHE

activity. In November 2010, a Terms of Reference was developed with Pathfinder, after which the BALANCED EAC traveled to Arusha to facilitate a one-day activity to introduce PHE, review relevant PHE instruments, share existing PHE frameworks and tools and PHE learning. During the next reporting period, BALANCED will meet with TNC and Pathfinder staff and local stakeholders to assist in drafting a PHE program design that includes a PHE framework, goals, objectives, strategies, activities and an implementation plan.

Results from Activity 1.4

- One organization incorporating the PHE CBD/PE system into their conservation work (Indicator SO1)
- Five new or strengthened partnerships established and actively involved in advancing and supporting wider use of PHE approaches
- 75 (38 men and 37 women) participants trained in PHE and/or CBD/PE
- Six technical interventions provided to five organizations in three BALANCED focus countries (Indicators 1.4a and 14.b)
- Two individuals (from Ghana and Uganda) that have been trained by BALANCED are now providing training or technical assistance to others on PHE implementation

Status of PMP Results for Activity 1.4

INDICATOR	Reporting Period	YR 3 TARGET
SO1: Number of target organizations incorporating PHE tools, protocols, etc. into their work (PRH 1.1)	1 (KKPFI)	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	75 (67 from WWF and partners; 8 from AWF TA visit)	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	3
1.3 Number of new and strengthened partnerships established and actively involved in advancing and supporting wider use of PHE approaches as a result of BALANCED capacity-building interventions	5 (agreement between KKPFI & DKT, teaming agreements between BALANCED and TNC, AWF, WSC, and KKPFI)	1

INDICATOR	Reporting Period	YR 3 TARGET
1.4a. Number of technical interventions provided by BALANCED to Missions and organizations to implement PHE within their programs (PRH 3.2)	6 interventions (AWF, TCMP, KKFPI (2), TNC/Pathfinder, PHE Ethiopia)	12
1.4b. Number of new organizations receiving TA by BALANCED	1 new organization (TNC TZ)	0
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
3.1 Number of PHE tools, methodologies, and actionable findings replicated in new countries and geographic areas (PRH 3.1)	3 (AWF/TZ; CBD in WWF/Phil; YPE in WWF/Phil)	0
3.2b Number of geographical areas replicating PHE (PRH 3.4)	1 (Tawi-Tawi)	0

1.5 Finalize IEC training materials and manual

After the June 2010 BALANCED technical support visit to the PHE activity being implemented by Family Health International (FHI), the BALANCED team revised the Trainer's Guide on how to develop integrated PHE messages and IEC materials. The plan was to re-test the revised Trainer's Guide during a PHE message development workshop for WCS Uganda and its partners. However, WCS Uganda postponed the workshop due to a lack of funds. Hence, the last time the Guide was field tested was at the initial August 2009 workshop.

However, in the next reporting period, BALANCED will pretest the Trainers Guide and its accompanying handouts/materials during technical support to FHI in Kenya. It is still anticipated that the guide and accompanying handouts/materials will be completed by June 30, 2011. The Trainers Guide will also reference the DBC curriculum described in the next activity.

Results from Activity 1.5

None

Status of PMP Results for Activity 1.5

INDICATOR	Reporting Period	Year 3 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))	0	2

1.6 Conduct a Designing for Behavior Change workshop (Activity approved by USAID, and will be included in revised Year 3 workplan)

In order to monitor whether the target audience was adopting the health and pro-environment behaviors promoted through its SUCCESS (now Pwani) and BALANCED Projects, USAID approved the BALANCED Project to conduct a DBC workshop in collaboration with WWF-US. This training taught participants how to use a simple questionnaire to assess both the barriers to and facilitating factors for desired health and conservation behaviors. Participants then had a chance to engage in a practicum where they designed DBC surveys, implemented them in the field and analyzed the results. The workshop also helped participants to identify/refine the projects' IEC messages and fine-tune project interventions to address these factors. This is exactly what TCMP did following the workshop—i.e., it conducted DBC surveys in Pangani, analyzed the results, and used the findings to fine-tune its PHE IEC activities. (See Activity 3.1)

BALANCED worked with WWF/US and a WWF consultant/workshop facilitator to design and conduct the workshop, taking an existing child-survival-oriented DBC curriculum and adapting it to the PHE context. The workshop was conducted in Bagamoyo, Tanzania on September 13 – 17, 2010. WWF/US and BALANCED shared the workshop costs—WWF/US paying for the DBC workshop facilitator and the WWF/Kenya participants, and BALANCED paying for the workshop venue and participants' hotel and per diem costs. BALANCED EAC, Ricky Hernandez, contributed his valuable skills and experience in PHE to the workshop by serving as a co-facilitator. Workshop objectives were to:

- Build the capacity of participants to plan, implement, monitor and evaluate effective behavior change strategies;
- Provide an introduction to the tools necessary for identifying key factors that influence behavior change to ensure that behavior change activities are selected based on their potential ability to address these key factors and to effect long-term, sustainable behavior change within the shortest time period possible; and
- Increase levels of comfort with planning behavior change strategies.

Thirteen individuals (11 men and 2 women) from conservation groups in Tanzania participated in the workshop (four from TCMP; two from AWF; one from WCS; two from the Pangani government—one of whom had participated in the 2009 BALANCED SSE-PHE; two from WWF-Kenya; and one from the Conservation Through Public Health (CTPH) program in Uganda).

Lessons learned from the Tanzania workshop will be used to revise the DBC workshop curriculum, which will then be disseminated to the PHE community. The curriculum and the Trainers Guide on how to develop integrated PHE messages and IEC materials will reference each other.

It should be noted that the DBC methodology is designed to assess vertical interventions and messages that address very specific behavior problems that a project is promoting, i.e. use of mosquito nets, breastfeeding, family planning, tree planting, use of cooking stoves, etc. As such, the DBC is very helpful in identifying barriers to these specific behaviors and fine-tuning project interventions and IEC messages that address these barriers. The DBC survey methodology can be relevant to specific target audiences where a homogenous strategy and activities are implemented, thus, it cannot be used to assess people's understanding of PHE linkages, nor can it help generate integrated PHE messages *unless* the respondents are so knowledgeable that they mention it as the value-added for doing a specific behaviour. For example, respondents may say that the advantage of practicing family planning is that it conserves natural resources. However, for this to be considered a powerful determinant, a high percentage of doers must mention it as well as some non-doers. Given these limitations, some other methodologies may be better for monitoring or evaluating integrated PHE messages and activities.

Results from Activity 1.6

- 13 (11 men and 2 women) participants from 7 NGOs trained in DBC methodology

Status of PMP Results for Activity 1.6

INDICATOR	Reporting Period
1.1 Number of individuals trained by BALANCED in PHE know-how and SOTA (State of the Art) practices using 21st century learning tools	13
1.4a. Number of technical interventions provided by BALANCED to Missions and organizations to implement PHE within their programs (PRH 3.2)	1 (TCMP)
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

Note: Because it was an “extra” activity, no targets were set for this activity.

IR1 Priorities for Next Reporting Period (January 1 to June 30, 2011)

The BALANCED staff person in bold is the lead/individual 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.

- Continue discussions with CTSP regarding the conduct of a PHE Program Design workshop for NGOs in the CT region. (**Joan**)

- Continue contacting UNFPA and TCN-CTC to encourage the conduct of a PHE Program Design workshop in Indonesia. **(Joan)**
- Test the YPE curriculum during YPE TOT in Ethiopia, revise and disseminate to PHE community. **(Ricky)**
- Design training on PHE for WCS headquarters' staff. **(Linda)**.
- Provide on-going, hands-on technical support and mentoring to BALANCED trainees, SSE-PHE participants, and new PHE practitioners in Africa and Asia. **(Joan and Ricky)**
- Revise the “Designing for Behavior Change” curriculum for the PHE context in collaboration with WWF/US. **(Linda and Ricky)**
- Test revised sections of the Trainers Guide on how to develop integrated PHE messages and IEC materials in Kenya and another country, revise and disseminate. **(Ricky, Joan, Linda)**
- Organize and conduct a tailored version of the PHE Program Design workshop for NGOs who attend the February 2011 PHE conference and² who are working on or interested in implementing PHE activities in the Philippines and selected other CT countries. **(Joan, Ronald)**
- Adapt the one-day curriculum on PHE Program Design for the above-mentioned workshop³. **(Joan)**
- Revise and finalize YPE training curriculum to the African context following the February 2011 YPE TOT in Ethiopia. **(Joan, Ronald)**
- Incorporate youth indicators into the BALANCED PMP and field indicators into the YPE TOT activities. **(Ricky)**
- Continue to provide on-going post-training technical support and mentoring to BALANCED trainees, SSE-PHE participants, and PHE practitioners in Africa and Asia that are interested in PHE and that have the funds and political will to incorporate CBFP into their conservation activities. **(Ricky, Joan, Elin)**

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)

² This was the intent as of December 31, 2010; at the time of submission of this report, the conference is postponed

³ See note above

Accomplishments

During this reporting period, the Project worked diligently to promote PHE knowledge, information and success stories coming out of the broad PHE community of practice. Throughout this reporting period, we worked with PHE colleagues to advance development of the PHE Toolkit; produced drafts of various technical reports including synthesized and developed a preliminary report on findings from the benefits of PHE research conducted in the Philippines, promoted the PHE approach and its champions in the field through various media (newsletter, champion stories, blogs, etc); and continued to share BALANCED accomplishments through the BALANCED Project website. Reporting period accomplishments by key activity area follow.

2.1 Identify, document, and synthesize knowledge

In this reporting period, we continued to identify credible and value-adding resources and tools and subsequently promoted these resources via the PHE Toolkit. In line with BALANCED Project priorities, we presented preliminary findings from the value-added benefits research in the Philippines and continued to identify PHE champions and documented their stories. We continued to use our Advisory Committee members strategically, soliciting input on activities and technical questions as appropriate. In more detail, we:

- Published and disseminated the PHE 101 Bibliography in December 2010, as suggested by the USAID PHE Technical Advisor in the previous reporting period. This bibliography provides an overview of basic PHE documents and resources that new audiences to PHE could use as an introduction to the PHE community of practice. Identified as one of the BALANCED Project's potential legacy documents, the PHE bibliography and its associated resources are posted on the PHE Toolkit.
- Developed a survey to identify gaps between the PHE community's stated need for PHE capacity building and learning tools and resources and those that are available on the PHE Toolkit. The survey will be sent out to key PHE contacts during the beginning of the next reporting period and the results used to fine tune Year 4 activities.
- Completed a first draft preliminary report on initial data analysis from field research conducted in 52 integrated PHE and non-integrated sites in the Philippines. Presented these preliminary findings at a session of the PHE Policy and Practice Group in October 2010 in Washington DC (to be followed with additional data analysis, presentation, and a refined report in the second half of Year 3).
- Nepal value-added research activity was canceled after discussions with USAID PHE Technical Advisor. Funds for this activity will be redirected toward completing the Philippines value-added research analysis and conducting a Behavior Monitoring Survey as part of the BALANCED-Philippines field support activities.
- Completed revisions to the technical report, *“Practice, Harvest, and Exchange: exploring and mapping the global Population-Health-Environment approach (PHE) network of*

practice”. This document provides an analysis of the PHE community of practice and implications for how communications flow across the network. The draft will be sent to USAID PHE Technical Advisor, for review in early 2011.

- Continued editing of 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 the 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 (slated for finalization in second half of Year 3).
- Developed the outline and concept paper for a proposed six-country comparison of the different PHE concept models and implementation strategies. The concept paper is under review and will be socialized with the BALANCED Project staff and USAID PHE Technical Advisor in the next reporting period.
- Developed and finalized the Tanzania BMS report, which was sent to the USAID PHE Technical Advisor for review. This report will be published and disseminated in the next reporting period. Once this is completed, BALANCED staff will produce the cross-country comparison of BMS data from Tanzania and the Philippines in the next reporting period.
- Incorporated refined common indicators that are collected in BALANCED field sites to include youth indicators into BALANCED field-based performance monitoring plan (PMP). These are used to document field impacts and benefits of PHE approaches among BALANCED activities (See IR 3 section of this report). The Project began research and informal consultation on potential value-added indicators, but did not finalize a set of usable indicators. This activity will continue in the next reporting period.
- Provided technical assistance to the development of field-based indicators for the USAID/Philippines Buy-in.
- Based on conversations with BALANCED key staff and other partners, developed and produced four short videos explaining PHE approaches, their benefits and offering up-close images of PHE projects in the Philippines and Tanzania. The videos include footage from the February 2010 SSE-PHE and the Pwani Project. The videos will be finalized, to include input received from the USAID PHE Technical Advisor, and will be disseminated early in 2011.
- Identified four PHE champions in the field from Tanzania, Democratic Republic of Congo (DRC) and Colombia and documented their stories. These PHE champion profiles were disseminated through the BALANCED newsletter, individual postings on the BALANCED Project website and PHE Toolkit site (Tanzania and DRC), and through various listserv notices such as the Family Planning listserv and the Africa Biodiversity Collaborative Group listserv. In the next reporting period, the Woodrow Wilson Center Environmental Change and Security (ECSP) blog will feature these profiles as well.
- Drafted one fact sheet on the links between climate change and PHE approaches, based upon the December 2010 newsletter on the same topic. The draft is under technical review, and the fact sheet will be published and disseminated in the next reporting period.

- In response to recommendations by the USAID PHE Technical Advisor, drafted an ecology module as an essential component of the CBD/PE TOT and YPE training manuals. The module was reviewed by PHE experts and was incorporated into the above-mentioned manuals that will be finalized in the next reporting period.
- Periodically engaged with individual Advisory Committee members on specific issues—e.g., worked with Geoff Dabelko and Judy Oglethorpe as part of a DC-based meeting on the definition of scale-up in PHE; with Geoff and Jason Bremner as part of the Toolkit's Content Management Team, members of which suggest materials to upload to the PHE Toolkit and review suggestions from the BALANCED team; Lynne Gaffikin regarding potential PHE activities in Uganda and Tanzania; Nancy Harris regarding PHE activities in Tanzania; and Geoff to discuss potential ways to collaborate between the BALANCED project and the Wilson Center's new USAID-funded HELPS project.

Results from Activity 2.1:

- Produced and widely disseminated stories of four PHE champions (Abdallah, Tanzania; Lokasola, DRC; Osorio and Andrade, Colombia)
- Article by BALANCED partner PFPI entitled "*Integrated Management of Coastal Resources and Human Health Yields Added-Value: Evidence from a Comparative Study in Palawan, Philippines*" was published on November 22, 2010 by the peer-reviewed Environmental Conservation Journal, issue 4, vol 37).
- Field site youth PMP indicators finalized and ready for use in field site activities in Tanzania, Philippines, and Ethiopia

Status of PMP results for Activity 2.1

INDICATOR	Reporting Period	Year 3 Target
2.1 Number of tools, protocols, procedures, systems, methodologies, guides, curricula, or indices with demonstrated thematic contexts (PRH IR2.1)	1 (PHE 101 bibliography)	4
2.2a. Number of success stories, peer review articles, conference papers, research studies documenting key actionable findings about the PHE approaches, their lessons extracted, and value-added (PRH IR2.2)	2 (DRC and Colombia champions (2 profiled in one story) pieces, Tanzania champion profile reported under 3.1)	6
2.2b Number of peer reviewed articles and research studies	1 (L.D' Agnes paper)	2 (two research reports)

2.2 Organize existing and new knowledge for PHE

BALANCED staff continued to work closely with K4Health and its other Toolkit developers to improve the site's functionality and features, ease of use, and accessibility to materials. Our PHE Toolkit content management team (CMT) also worked to increase the number of PHE and PHE-related resources available on the PHE Toolkit and to develop tools to assess client usage and satisfaction with the PHE Toolkit. Specifically, we:

- Completed and loaded onto the PHE Toolkit an article on the process used in developing the topic map for the PHE Toolkit. This article, "*Topic Mapping for Organizing Document Collections Online: An example of the population, health and environment (PHE) approach and the Knowledge for Health platform*," was also forwarded to the K4Health toolkit development team for inclusion in documentation provided to other parties who may develop toolkits. The document was disseminated to more than 1,000 people via the PHE listserv and the FP listserv in December 2010.
- Instituted enhancements to the PHE Toolkit that included installing a searchable "PHE Gateway" feature on the Toolkit that generates and maintains an index of material on the websites of a pre-selected list of organizations and document libraries. The K4Health team expects to finalize and begin promoting this feature to the public in the upcoming months. This will also include an information page on the PHE Toolkit that lists the organizational websites and document libraries that are included in the Gateway.
- Conducted the first formal meeting of the full PHE Toolkit content management team (CMT) on November 23, 2010 in Washington, DC. In attendance were CMT members, representing six PHE collaborating agencies, BALANCED staff and a representative from JHU/K4Health. The group agreed upon next steps for continuing to identify quality resource materials and tools that meet the site criteria. Several CMT members said they liked the BALANCED Project's proposed review process, in which staff compiles a table with suggested resources and the CMT then reviews and enters feedback. CMT members reported they have time to

review the table, but limited time to upload documents. Jason Bremner cautioned that timeliness is an issue, and that BALANCED should occasionally add documents that are clearly good PHE resources without consulting with the CMT. For example, Jason and Geoff Dabelko mentioned several recent population and climate change pieces, by Brian O’Neill, Scott Moreland and David Wheeler. (Acting on that suggestion, BALANCED staff posted these resources during the December Cancun climate meetings.) The CMT team also vetted a number of academic journal articles for inclusion in the Toolkit during the second half of Year 3. Several members of the CMT suggested features to improve navigation around the site. TJ Moyer of JHU/CCP reported that K4Health is planning a discussion in the next reporting period on toolkit enhancements for phase 2 of the K4Health toolkits writ large, and she offered to bring CMT ideas back to that discussion. For example, she could suggest a resource button for toolkit managers to use to solicit suggestions.

- During the CMT meeting, identified several potential future features for the PHE Gateway under development. ECSP and other collaborators agreed to help BALANCED Project staff think through and implement a potential news aggregation function for the PHE Toolkit, which could pull news items from PHE collaborators sites such as the Wilson Center. In response to concern about duplicating efforts, Bob explained the PHE Toolkit could link practitioners to ECSP and news items through the PHE Gateway and RSS feeds. This collaboration will be explored in the next reporting period.
- Received limited information from the K4Health toolkit managers about usage of the PHE Toolkit. K4Health’s Toolkit tracking system was implemented in May 2010, but the system does not provide the level of detail BALANCED would need to answer questions about who specifically who is using the PHE Toolkit and for what purposes. That said, the tracking system does provide data on the number of visits and the resources most often downloaded See Annex 1 PHE Toolkit statistics (See Annex 1).
- Promoted the PHE Toolkit through a variety of channels, including: seven news postings to the PHE listserv referring people to the PHE Toolkit; personal emails and conversations with PHE partners; encouraging PHE partners to put links to the PHE Toolkit on their websites, including the USAID site; distribution of more than 750 PHE Toolkit postcards to PHE partners and new audiences; and informal discussions with PHE partners and new audiences at meetings in DC. As a result, the number of PHE toolkit visitors quadrupled in November and December 2010 (see Annex 1 and Activity 2.2 below). In the remainder of Year 3, BALANCED will also engage with the K4Health communications staff to promote the PHE Toolkit through blogs, potential virtual fora and other opportunities.
- Drafted the content of an informal survey asking members of the PHE community if they use the PHE Toolkit, how often they use it, what they more frequently download, their thoughts on the organization of the site, its utility, ease of use, etc. The survey will be conducted at the beginning of 2011 and the results compiled and sent to the full BALANCED team and the Project’s Technical Advisor. The information will be used to inform ongoing discussions with K4Health and the CMT about increasing the PHE Toolkit utility.
- PFPI leveraged funds from the Leadership Development Mechanism of the Institute for International Education (LDM/IIIE) with support from Packard Foundation to develop a documentary in the Verde Island Passage entitled: *“PHE Leadership as a Way of Life in All*

Walks of Life: A Video Documentary". PFPI also produced a write up of PHE Champions – Local Leaders for the World: Documentation in the PHE learning sites in Ubay, Bohol, Philippines. The written documentary described the stories of three PHE leaders in the community in pursuit of better quality of life for the people in Ubay, a PHE learning site. The stories will be disseminated in a leadership summit at the Asian Institute for Management on February 10-11, 2011 organized by LDM/IIE. These products will be counted in the PMP in the next reporting period.

- Continued use of the BALANCED website as yet another mechanism for directing and linking interested site visitors to the PHE Toolkit.
- Began planning a trip to link the PHE Ethiopia website to the PHE Toolkit home page, acknowledging that this only serves two objectives: 1) to drive traffic to the PHE Network website and 2) to showcase the PHE Network website and its contents on the PHE Toolkit. It was agreed during a meeting with USAID PHE Technical Advisor that this "model" might not be replicable in other countries with less-sophisticated websites and/or network. Nor does this achieve the larger vision of connecting a community of unorganized NGOs (organizations) and individuals interested in PHE to a space where they can share ideas, materials, discourse, etc. on PHE. However, BALANCED will continue to strive to find/create that space.

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	Year 3 Target
2.1 Number of tools, protocols, procedures, systems, methodologies, guides, curricula, or indices with demonstrated thematic contexts (PRH IR2.1)	1 (Robadue topic mapping)	4

2.3 Share knowledge within the PHE and broader community

During Year 3, the BALANCED Project continued to promote PHE approaches and success stories through our updated Project Communications Strategy, which aims first and foremost to raise awareness of and support for PHE writ large. In this reporting period, the Project disseminated a total of eight PHE news items, including posts on the December 2010 Project newsletter, three publications, and three champion stories. These posts reached on average more than 2,000 PHE practitioners and interested health, development and conservation professionals. These items were disseminated on the PHE Toolkit, PHE listserv, Family Planning listserv, Africa Biodiversity Collaborative Group listserv, ESCP blog and BALANCED website—helping to increase the visibility of PHE and BALANCED and other projects’ PHE activities in the field.

In line with the Year 3 workplan, specific accomplishments this reporting period included:

- Based on discussion JHU/K4Health, ECSP, other CAs and BALANCED staff, updated the Year 3 BALANCED Project communications plan in October 2010, and crafted up-to-date messages and news items based on BALANCED Project activities. The revised communications plan includes a broader list of Year 3 activities to promote global PHE initiatives to key PHE partners via the PHE Toolkit and other media. The implementation of the revised communication strategy resulted in a 400 per cent increase in visitors to the PHE Toolkit (see Annex 1).
- In line with the revised BALANCED Project Communications Strategy
 - Shared knowledge about and promoted PHE by disseminating eight messages about new PHE resources, events and accomplishments as well as BALANCED activities posted to the PHE listserv, the Family Planning Community listserv and Africa Biodiversity Collaborative Group (see Annex 2).
 - Collaborated with external partners, i.e. the Population Reference Bureau (PRB) and its East Africa PHE Network, WWF, the Kokolopori-Falls Church Sister Cities Partnership and the Woodrow Wilson Center's ECSP to reach new audiences by disseminating new items, PHE champion stories, the BALANCED newsletter, etc. on their blogs and listservs. During this period, we increased our outreach through posts on the USAID blog (undetermined number of people reached) and the Kokolopuri group listserv (560 members).
 - Highlighted six news items on the BALANCED website and posted resources mentioned in these news pieces to the PHE Toolkit, which reached on average 1,200 people.
- In December, produced and disseminated to 1,260 individuals the second BALANCED Project newsletter, which included a profile of two PHE champions from Colombia (see Annex 3). Karen Hardee, formerly at Population Action International (PAI) and now at PRB, served as theme editor. Hardee and the BALANCED newsletter team began planning this second edition in August 2010 with a target publication date of October 2010. Delays in receipt of authors' responses to their articles pushed the publication date to December 2010. Several PHE partners extended kudos on the newsletter. The theme of the next issue is on PHE and livelihoods and is scheduled for release in spring 2010.
- In order to increase implementing and funding agency awareness of PHE approaches, BALANCED reached out to donors with the Project newsletter and news items; and delivered BALANCED Project information to new donors such as Disney Friends for Change Program, the International Union for Conservation of Nature (IUCN) and other donors such as the MacArthur Foundation, Equator Initiative at the U.N. Development Program, and Friends of U.N. Population Fund (UNFPA). These donors are interested in PHE and are target audiences in the BALANCED Project communications strategy.
- Responded to the CMT recommendation that the BALANCED Project maintain primary responsibility for uploading new resources to the PHE Toolkit (See Activity 2.2 above).

Although the Project hoped to encourage PHE community participation in uploading at least four new documents and/or tools to PHE website, this expectation was not met because the non-BALANCED members of the CMT clearly stated in the November 2010 meeting that the expectation was not realistic. Hence, the BALANCED members of the CMT will continue to solicit recommendations for new resources from the extended CMT and PHE community, but will be solely responsible for uploading the resources.

Results for Activity 2.3 include:

- Eight information feeds on PHE resources, such as the PHE 101 bibliography and USAID/Philippines Buy-in to the BALANCED Project disseminated to selected outlets (e.g., PHE listserv, FP Community listserv, ABCG listserv, PRB’s East Africa PHE Network updates), reaching on average 2,000 people
- One electronic newsletter finalized and disseminated in December 2010
- One presentation by Joan Castro, PHE Technical Lead, at the December 2010 ECSP panel discussion entitled "*Integrated Development in Population, Health, and Environment: Updates From Ethiopia and the Philippines*"
- 13 new resources uploaded to the PHE Toolkit

Status of PMP results for Activity 2.3

INDICATOR	Reporting Period	Year 3 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)	2 (Newsletter (1);- Presentations (1) PTAL/PFPI presentation at WWC December 2010)	6

IR2 Priorities for next period (January 1 to June 30, 2011)

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.

- Prepare and deliver a second presentation based on the initial and expanded analysis of the Philippines research findings for select members of the PHE community of practice based in Washington DC and begin contact with peer-reviewed journals for publication of the report in Year 4. (**Richard**, Brian)
- Craft a research brief and communications plan for the BALANCED Philippines research findings, ensuring peer review from PHE partners, such as WWF, PRB, PAI, and ECSP. (**Brian**, Richard)

- In lieu of Nepal research, conduct baseline behavior monitoring survey research in BALANCED-Philippines project sites. Findings will contribute to baseline knowledge of family planning and select CRM behaviors in field support sites and contribute to the findings from the 2009 BMS baseline study conducted in the Danajon Bank, Philippines. **(Brian, Joan)**
- Produce BALANCED technical report on cross-country comparison of baseline BMS studies conducted in Tanzania and the Philippines. **(Elin)**
- Finalize research papers in preparation for dissemination: "Practice, Harvest, and Exchange: Exploring and Mapping the Global PHE Network of Practice;" "Six-country Comparison of PHE Models: What Works, Where, When, and Why;" and "Potential Needs and Opportunities for PHE approaches in Tanzania: a screening exercise." **(Don)**
- Finalize and disseminate the four short PHE videos to the PHE community and new audiences. **(Elin, Janet)**
- Finalize and disseminate at least two facts sheets, one on PHE and climate change, and the other TBD. (carry-over from Year 2) **(Linda, Lesley, Janet)**
- Continue to work with the K4Health team and its Toolkit managers on improving the functionality, utility, and user-friendly features of the site and to provide Toolkit managers with improved collection and reporting of statistics on usage of the Toolkits. **(Bob)**
- Produce and disseminate the third issue of the BALANCED electronic newsletter on the theme of PHE and Livelihoods. **(Janet, Lesley, Bob, Don)**
- With members of the CMT, continue to refine and enhance the PHE Toolkit by identifying and uploading an increased volume of high quality information, publications, training materials, tools, etc.; this effort will be informed by results of the Year 3 survey asking users what resources they need and comparing those against what is available on the Toolkit; continued special attention will be give to identifying materials that are academic-oriented. **(Don, Janet, Bob)**
- In partnership with the K4Health team, PHE partners, and other USAID-funded health and family planning cooperative agreements—and using input from the informal telephone survey conducted in Year 3 to assess usage and user satisfaction with the resources available on the site—continue to refine and implement the strategy to promote the K4Health site and the PHE Toolkit. **(Lesley, Don, Janet)**
- Assist PHE Ethiopia to link its website to the PHE Toolkit home page and monitor the PHE Ethiopia "restructured" site to informally assess how well it accommodates interactivity with the PHE Toolkit site and vice versa. **(Bob, Lesley, Linda)**
- Continue using the PHE Toolkit, BALANCED newsletter, Wilson Center's ECSP blog, and other electronic sites and listservs to highlight resources, individuals and organizations and their websites that implement PHE, thereby promoting integrated approaches. **(Janet, others)**

- Continue to collaborate with ECSP in order to disseminate PHE messages to new audiences not reached through the BALANCED communications strategy (such as those inferred by the above bullet) and leverage opportunities for panel presentations (**Janet, Linda**)
- Develop or refine PHE approaches and tools needed to build PHE capacity in the field based on survey results. (all members of BALANCED team).
- Increase implementing and funding agency awareness of PHE approaches and success stories through development and dissemination of tailored PHE fact sheets 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**).
- Continue to engage with Advisory Committee members for their input on specific areas of expertise; provide periodic updates to all Committee members on a regular basis; and solicit member input to the next advisory committee meeting in the first quarter of Year 4. (**Linda, all**)

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

The BALANCED Project supports PHE scale-up, replication and start-up activities in countries through a small amount of USAID central funds and additional financing from a mix of USAID Mission and Bureau Buy-ins, leveraged funds from non-US Government donors, and cost share from BALANCED Project partners. The PHE interventions focus mainly on delivery of 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 and achievements from 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 conduct DBC surveys and YPE training. Further, we expanded PHE activities to three new wards in Pangani and incorporated CBFP into the Pwani Project activities in Bagamoyo. As part of a Philippines Mission Buy-in, we finalized the Year 1 workplan and Project Design paper. BALANCED-Philippines activities will commence once funding is made available from USAID. Further, BALANCED team members provided technical support to our seed grant recipient in Ethiopia and initiated a seed grant proposal with WCS Zambia. Also, we initiated PHE activities into CRC's USAID Ghana-funded, four-year ICFG Project. 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 its Pwani Project, which implements integrated PHE environment

activities in villages surrounding Saadani National Park. These efforts are supported by the USAID Tanzania Mission with PEPFAR (President's Emergency Plan for AIDS Relief) and biodiversity conservation earmark funds. BALANCED provides modest funding to support the integration of CBFP into TCMP's integrated activities—specifically by supporting CBDs, PHE PEs, and PHE providers. In the first two years, the BALANCED activities were concentrated in the Mkwaja and Mkalamo wards.

Expanding the PHE-CBD network

In the first half of Year 3, BALANCED expanded the PHE-CBD network to three new wards—Mwera, Mikinguni, and Kipumbwi—which already had Ministry of Health/MoH-certified CBDs. Before training these certified MOH CBDs on PHE, BALANCED staff met with local government executives and dispensary staff from these wards to introduce the PHE concept and discuss the need for PHE in their area. The meeting participants maintained that it is important to implement PHE in their communities, because they face insufficient access to family planning commodities, lack of latrines, which leads to using the beaches as toilets, and clear cutting of forests for fuel wood and charcoal making—all issues that need integrated solutions.

In August 2010, a total of twenty (8 men and 12 women) MOH certified CBDs from Mwera, Mikinguni, and Kipumbwi wards were trained in PHE. The general objective of the training was to introduce the concept of PHE and give the participants practical advice on how to integrate PHE messages into their provision of health services. The training was conducted in collaboration with the Pangani District MoH and included refresher updates on contraceptive methods, prevention of pregnancy and gossip and rumors related to the use of FP methods. It also introduced why it is important to include integrated PHE messages into the service delivery. After the training, the CBDs began providing the following services:

- Integrated PHE communication messages that include FP, health, economic growth, and environment messages
- Free-of-charge family planning services and other selected reproductive health services including referrals within the catchment area

Strengthening existing PEs

In Mkjara and Mkalamo wards, where BALANCED already has been implementing PHE activities, an assessment of the CBDs, PEs, and PHE providers found that these volunteers were still unsure how to integrate PHE. Further, some of them reported that it was difficult to remain motivated, in part because dispensary staff are not providing as much mentoring as the volunteers would like and feel they need. The CBDs have also complained about their difficult working environment, with households located far from each other and many being hard to reach. Many CBDs also reported having difficulties finding transport to the dispensaries in order to deliver reports and pick up FP commodities on a regular basis.

To encourage and strengthen the capacity of these volunteers in Mkjara and Mkalamo, BALANCED conducted refresher trainings for 30 CBDs (14 men and 16 women), 51 PHE providers (33 men and 18 women), and 47 PEs (23 men and 24 women). While these two-day

trainings included refresher updates on FP methods, the greater focus was on how to talk to the community about PHE issues and messages, use IEC materials and messages, use proper counseling techniques, refer clients to MoH, and address challenges that they are facing.

In addition, the BALANCED in-country coordinator, Juma Dyegula, worked with village leaders and dispensary staff to help them understand the important role played by the CBDs and the reasons why leaders and dispensary staff should support their work. The results of these discussions revealed the importance of involving PHE volunteers not only in FP activities and counseling, but in order to sustain their interest and keep them feeling good about their work, they should be integrated into other conservation, health, and/or livelihood activities. Building on this lesson learned, BALANCED recruited the CBDs and PEs to showcase fuel-efficient stove technologies. Further, future PHE PEs will be recruited among savings and credit associations (SACCOs) and HIV/AIDS committees supported by the Pwani Project. Some of the most successful volunteers are individuals that are spearheading several initiatives in their communities. For example, there is a very active PE in Mkwaja, who is also a restaurant owner and who uses a fuel-efficient stove.

Another active peer educator is Rukia. She is an example of BALANCED new strategy for volunteers and demonstrates how doing a few simple things can improve a family's life and protect the environment. At age 36, she is a mother of three girls, ages 14, 12, and one and a half. Rukia and her husband, Seif Ramadhani, are taking measures to plan their family. Rukia used pills before they decided to have their last daughter. Now they are using condoms as a back-up while Rukia is breastfeeding the baby. She told Juma and BALANCED East Africa Consultant, Dr. Ricky Hernandez, *"I talk to my peers about planning their families so we have enough natural resources to meet the needs of the villagers who depend on these resources."* She added, *"Also, when you plan your family, you will get more time to perform other activities."*



Rukia cooking on one of her fuel-efficient stoves
(Photo by Juma Dyegula)

An active member of SACCOS, where she also acts as the accountant, Rukia is a living proof of this last statement. Through savings and loans, Rukia has diversified her income by buying a sewing machine and a fuel-efficient oven. Today, she generates income from cow and poultry husbandry, tailoring, bread-making, selling soft drinks, and constructing fuel-efficient stoves. With this increased income, Rukia and her husband have been able to put an iron sheet roof on their house and send their first born daughter to secondary school—a great achievement in a country where only 5% of women stay in school beyond the primary level. Through her work,

Rukia meets and talks to many people every day. She discusses family planning and if someone is interested, she refers them to community-based distributors and the dispensary for family planning services.

Rukia demonstrates her two fuel-efficient stoves. One is a metal oven that she uses for baking breads and cakes. The other is a simple mud stove that she uses for cooking. The mud stove, which costs less than U.S. \$2 to build, is getting increasingly popular in the community. It saves fuel wood, prevents fires, produces less smoke (a serious health hazard), and cooks the food faster! *“I can even wear my best clothes and put on some lip shine when I use this stove, because it does not foul up the air,”* Rukia explains with a laugh. Seeing the benefits of the fuel-efficient stoves, Rukia has inspired the ten community-based distributors and five village leaders to join the team of individuals showcasing the fuel-efficient technologies.

Rukia is a perfect example of practicing what one preaches. She is improving her own life, helping others learn to do the same, and protecting the very natural resources upon which almost everyone in Mkalamo depends.

DBC survey

In collaboration with the World Wildlife Fund-US, BALANCED conducted the DBC workshop in Bagamoyo, Tanzania on September 13 – 17, 2010. Thirteen participants from conservation groups in Tanzania, Kenya and Uganda attended the training led by a WWF-US trainer and Ricky Hernandez as co-facilitator. (See Activity 1.6)

Subsequent to the workshop, TCMP staff developed a survey to assess four behavior problems with different target audiences:

- For family planning: Sexually-active women 15-49 years old using modern methods of family planning
- For fuel-efficient stove: Women 15-60 years old using fuel-efficient stoves for cooking
- For sexually-active youth: Sexually-active youth 15 -24 years old using something to protect against getting pregnant every time they have sex
- For SACCOs: Men and Women 18-60 years old joining SACCOS

Three people from TCMP (Juma Dyegula, Gratian Luhikula and Jumanne Mohamed) traveled to Pangani to conduct the DBC survey and to learn and better understand the factors that influence these behaviors and what types of messages that might encourage behavior change. Each behavior statement was asked of 20 “doers” and 20 “non-doers” in Mkwaja, Mikocheni, Sange and Mkalamo villages. Findings from the 160 surveys are presented in the table below.

Table 1: Results of DBC survey

Desired behavior	Key factor working against adoption of method	Potential IEC messages
Sexually active adult women using modern FP methods.	<p>Social norms: Married women should not use FP.</p> <p>Susceptibility: Not all sexually active women become pregnant. You can use traditional methods.</p> <p>Severity of problem: Unplanned pregnancies are not a big deal.</p>	<ol style="list-style-type: none"> 1. Sexually active women should be responsible and protect themselves against unplanned pregnancies by using modern FP. 2. All sexually active women are at risk of having unplanned pregnancies if they do not use modern FP methods. 3. The consequences of unplanned pregnancies are serious.
Adult women using fuel-efficient stoves for cooking.	<p>Perception: It is difficult to use fuel-efficient stoves.</p> <p>Reason for use: There are no real benefit of using fuel-efficient stoves.</p> <p>Severity of problem: There are no problems with the old stoves.</p>	<ol style="list-style-type: none"> 1. It is not difficult to use fuel-efficient stoves. 2. Fuel-efficient stoves save trees and prevent fires and respiratory diseases. 3. Fires, respiratory diseases, and forest clearing can cause suffering.
Adult men and women joining SACCOs.	<p>Perception: People don't know how SACCOs work.</p> <p>Reason for use: People don't know what the positive benefits are.</p>	<ol style="list-style-type: none"> 1. It is simple and easy to join a SACCO. 2. Joining a SACCO can enable you to send your children to school. 3. Many opportunities are lost by not joining SACCOs. Don't let this happen to you!
Condom use among sexually active youth to prevent pregnancy and HIV infection.	<p>Information: Youth do not know how to protect themselves.</p> <p>Social norms: It is not necessary to protect yourself every time you have sex.</p>	<ol style="list-style-type: none"> 1. Sexually active youth should protect themselves against unwanted pregnancy every time they have sex. 2. It is normal for sexually active youth to use protection every time they have sex.

A review of the survey results revealed that the three most important determinants⁴ of behavior related to sexually-active women 15-49 years old using modern methods of family planning are: 1) the perception that people important to them think they should use modern methods of family planning (perceived social norms); 2) the perception of how vulnerable they feel (perceived

⁴ The most powerful determinants are those which yield the biggest difference in percentage of the doers and the non-doers who responded similarly in relation to their perception

susceptibility); and 3) the belief that the problem is serious (perceived severity). For women 15-60 years old and who are using fuel-efficient stoves for cooking, the most powerful determinants are the belief that they can use fuel-efficient stoves (perceived self-efficacy), and what they think are the positive results of using fuel-efficient stoves (perceived positive consequences). Among sexually-active youth 15 -24 years old the most important determinants are: using something to protect against pregnancy every time they have sex; perceived self efficacy; perceived social norms; and whether or not they can remember to use something to protect against pregnancy each time they have sex (cues for action). Further, among men and women 18-60 years old and considering joining a SACCO, the three most powerful determinants are perceived self-efficacy, the perceived positive consequences, and perceived susceptibility.

Based on these findings, the IEC messages will include the following:

- Use fuel-efficient stoves for cooking.
 - It is not difficult.
 - It conserves trees.
 - It prevents fires and respiratory diseases.
- Use modern family planning methods (condom, pills and injection).
 - All sexually active women are at risk of having unplanned pregnancies.
 - The consequences of unplanned pregnancies are serious.
 - All sexually active women should be responsible and protect themselves.
- Join SACCOs
 - Don't miss the opportunity.
 - It is simple and easy to join.
 - You can send your children to school.
- Use protection every time you have sex.
 - It's being responsible.
 - It's cool.

The concepts/messages will first be articulated in Swahili and pre-tested with target audiences. Then they will be translated into English in order to validate the accuracy of the messages.

As mentioned under Activity 1.6, the DBC methodology is designed to assess vertical interventions and messages that address very specific behavior that a project is promoting, i.e. use of mosquito nets, breastfeeding, family planning, tree planting, use of cooking stoves, etc. As such, the DBC is very helpful in identifying barriers to these specific behaviors and fine-tuning project interventions and IEC messages that address these barriers. The DBC survey methodology can be relevant to specific target audiences where a homogenous strategy and activities are implemented, thus, it cannot be used to assess people's understanding of PHE linkages, nor can it help generate integrated PHE messages *unless* the respondents are so knowledgeable that they mention it as the value-added for doing a specific behavior. For

example, respondents may say that the advantage of practicing family planning is that it conserves natural resources. However, for this to be considered a powerful determinant, a high percentage of doers must mention it as well as some non-doers. Given these limitations, some other methodologies may be better for monitoring or evaluating integrated PHE messages and activities.

For the context of Tanzania, it was decided to develop an overarching integrated theme such as *"For a healthy and wealthy family/community, plan your family and protect the natural resources that provide you food and income."* Individual messages, in support of this integrated theme, would then include specific, behavior oriented "calls to action" for family planning, livelihoods development, and natural resources conservation and management. While the DBC survey did not help with assessing the overarching integrated theme, it did help in refining the specific "calls to action."

YPE TOT

Lastly, a YPE TOT workshop was conducted in December 2010 (see Activity 1.2). Plans for training YPEs in the Pwani field sites are underway, but contingent upon identifying active youth groups with which to work and the MoH's plan to develop a youth center.

Results from Activity 3.1

- 20 CBDs (8 men and 12 women) in three new wards in Pangani trained in PHE and community based education and peer education.
- 128 CBDs, peer educators and PHE providers (70 men and 58 women) given refresher training on FP methods, counseling, etc.
- 20 new FP service delivery points established
- 756 cycles of pills distributed
- 430 new users of family planning
- 207 current users of FP services that visited a CBD to renew their supply of pills
- 520 counseling visits for family planning/reproductive health
- 99 clients referred by PEs and PHE providers to CBDs for FP methods
- Nine CBDs showcasing fuel-efficient stoves and one CBD joined a SACCO
- Over 1,500 IEC materials distributed (family planning poster and leaflets)
- 311 individuals counseled on HIV/AIDS prevention and over 10,000 condoms distributed

Status of PMP Indicators for Activity 3.1

INDICATOR	Reporting Period	Year 3 Target
SO1: Number of target organizations incorporating PHE tools, protocols, etc. into their work (PRH 1.1)	1 (TCMP incorporating DBC tool)	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	148	115
1.2 Number of participants who received BALANCED training and/or mentoring that are now providing training or TA to others on PHE implementation	0	2
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 interventions (PRH 1.3)	0	1
1.4 Number of technical support interventions provided by BALANCED to Missions and to organizations to implement PHE within their programs (PRH 3.2)	1 (DBC survey development)	5
2.2 Number of success stories, peer review articles, conference papers, research studies documenting key actionable findings about the PHE approaches, their lessons extracted and value-added (PRH IR 2.2)	2 (Champion story and climate change article published in BALANCED newsletter)	3
3.2a Number PHE programs replicated (PRH 3.4)	1 (CBD method replicated in three new wards)	1
3.3 Number of BALANCED field site activities that produce results that can feed into KM activities (development of tools and success stories)	2 (DBC tool; adult peer educators and PHE providers feed into champion stories)	1

Tanzania PMP field Data Summary

INDICATOR	July to December, 2010	Comments
General		
Number of individuals trained	148	New CBD training, and refresher trainings for old CBDs, PEs, and PHE providers
Family Planning and Reproductive Health		
Number of new users	430	New users of pills served by the CBDs
Number of counseling visits for family planning/reproductive health (FP/RH)	530	Individuals counseled by the CBDs
Number of USG-assisted service delivery points providing FP counseling or services	20	New CBDs
Average household distance/time to access family planning commodities	Less than 500 meters	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

3.2 Scale-up PHE activities in the Philippines

USAID/Office of Health (USAID/OH) Philippines is providing a US\$500,000 Buy-in to the BALANCED Project to support results-oriented population-health-environment (PHE) field activities in biodiversity-rich bioregions of the Philippines over a period of 22 months (December 2010 – September 2012). CRC-URI will backstop PFPI as the lead implementing agent for the BALANCED-Philippines project.

BALANCED prepared and submitted a project design paper and Year 1 work plan to USAID/OH to “*meet unmet need for family planning services in targeted marine bioregions where population is identified as a threat to sustainable resource management.*” The program goal will be achieved through three intermediate results (IRs).

IR1- Improved access to family planning/reproductive health services in key bioregions

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

IR3 – Increased policy makers' commitment to promote/support FP/RH services and integrated approaches

BALANCED-Philippines will build on the PHE experience in the Philippines and scale-up best practices and lessons learned as it reaches out to additional new communities living in the Philippines South Sea and Visayan Bioregions. BALANCED-Philippines will also maintain PHE initiatives established by PFPI in previous PHE projects in the same two bioregions. The project will assist between 31-41 municipal governments to establish/strengthen community-based service delivery mechanisms that would serve more than 1.1 million people and reach an estimated 125,000 under-served women (15-49 years) with FP methods and PHE information in three sites (new, maintenance and rider sites) as described below.

New Sites

These are nine coastal municipalities in the South Sea bioregion that are “new” to PHE⁵ but that have ongoing LGU coastal resource/fisheries management activities and where there live an estimated 41,797 women with unmet FP needs. In the “new” sites, BALANCED will provide the full packet of PHE services (PHE advocacy; CBD system; PE system; contraceptive supply chain; IEC; and monitoring) and in the process replicate the public-private PHE model (LGU CBD and social marketing of FP methods and PHE concepts) that was developed and refined under a previous Population-Poverty-Environment (PPE) project⁶.

Maintenance Sites

These cover 20 coastal municipalities in both the South Sea and Visayan bioregions where PFPI worked through previous PHE projects. Here, BALANCED-Philippines will strengthen/maintain existing CBD systems and extend tailored technical assistance and will provide monitoring and mentoring support to increase coverage and ensure sustainability.

Rider Sites

These are municipalities where other donors such as the Asia Development Bank (ADB) are supporting integrated coastal resource management project (ICRMP) activities implemented by provincial and local government units. ICRMP works in 68 coastal towns of five provinces⁷ where resources are earmarked for population-environment advocacy and information, education, and IEC campaigns during 2009-2013. These campaigns are expected to create demand for population management (among LGU staff) and family planning (among the general public). BALANCED could capitalize upon this demand and extend technical assistance to enlightened LGU officials that want to establish a CBD system in their municipality. Because BALANCED could theoretically “ride” on ADB’s investment, these areas of PHE scale-up are referred to as “Rider Sites.”

A copy of the Philippines field support Year 1 workplan is included in Annex 4.

⁵ Meaning that neither PFPI or other agency has introduced PHE activities into these sites

⁶ During Apr 2008-Mar 2010 PFPI worked with 22 LGUs to develop/refine this public-private sector PHE model.

⁷ ICRMP is working in the provinces of Cagayan, Masbate, Siquijor, Cebu , Davao Oriental and Zambales

Status of PMP Indicators for Activity 3.2

Indicator reporting for Activity 3.2 will be included in the BALANCED Report to USAID Philippines and provided as an annex to BALANCED semi-annual report for core activities.

3.3 Provide one seed grant to one conservation NGO in Ethiopia

In October 2009, PFPI executed a two-year seed grant with EWNRA to mainstream FP services into its ongoing landscape-based “*Integrated Wetland and Watershed Management*” project in the Agelo Shenkora and Wichi watersheds, which is working in ten kebeles within Metu Woreda, Ilu Aba Bora Zone, Oromia region (South west Ethiopia). After a year of implementation, PFPI provided the second year’s tranche of funds to EWNRA and issued three modifications to its seed grant. These were to: 1) provide additional funds in support of a BALANCED-led YPE training of facilitators for EWNRA and its partners; 2) instituted a revised reporting form; and 3) issued revised reporting dates so that seed grant reports would coincide with the BALANCED reporting schedule for USAID.

In Year two of the BALANCED Project, a team of four trainers from EWNRA and the Woreda Health Office trained a total of 63 PHE Adult PEs from amongst members of watershed committees. The training focused on teaching the PEs how to talk to their communities about PHE and family planning. EWNRA also trained 28 PHE providers in how to not only sell selected FP commodities but to provide their communities with information on family planning and its linkages with the environment. To support the community PHE volunteers awareness-raising efforts, EWNRA developed, reproduced and distributed 570 copies of posters with integrated messages that convey to their priority target audiences the importance of family planning in improving household wellbeing and in promoting environmental sustainability. These posters were pre-tested several times to ensure the messages would be clearly understood.

During this reporting period, an additional nine adult PEs and eight PHE providers were trained (17 men). Eighteen PHE providers were established and operating in Wichi and 14 PHE providers now function in Agelo Shenkora. DKT Ethiopia provided 672 packs of emergency pills, 672 packs of combined oral contraceptives/choice and 3,600 packs of condoms to the trained PHE providers, out of which 246 pieces of contraceptives were sold to the community. Table 2 shows the type and number of FP commodities distributed per site.

Table 2: Type and number of FP commodities sold by EWNRA PHE Providers

Activity	Unit	Distributed to PHE providers	Contraceptives sold by PHE providers
FP products sold by PHE Providers			
Wichi			
- Emergency pills	Pack	461	5
- COC/choice	Pack	384	12
- Condoms	Pack	1500	94
Agelo shenkora			
- Emergency pills	Pack	210	12
- COC/choice	Pack	180	7
- Condoms	Pack	600	116

The BALANCED EAC also travelled to the EWNRA project site in Metu to monitor the seed grant activities and provide technical assistance as needed. Various issues were discussed with the EWNRA project team related to project reporting, BALANCED requests for information, size of the seed grant, PHE network politics, excessive workload of EWNRA project staff and the Memorandum of Understanding, which has yet to be signed by DKT Ethiopia. While resolution was reached on many of the issues discussed, the EAC identified several ENWRA concerns that may influence the success of its seed grant. These concerns are the relatively small size of the project and the limited capacity of the implementing organization. Also, EWNRA does not normally conduct training, provide outreach, supervise field staff, or monitor and evaluate their on-going conservation activities. However, they are required to do this for the BALANCED seed grant activities, putting a new/additional demand on them. Finally, the amount of seed funding provided to EWNRA may not be sufficient to meet the implementation and reporting requirements for the seed grant activities. Based on these discussions and observations, BALANCED may need to consider building capacity in project management and systems development for EWNRA and possibly other grantees. Partners/managers may need additional knowledge and skills building before they can full appreciate the importance and significance of data collection and health management systems, especially as related to safety and medical precautions such as screening.

During the next reporting period, BALANCED will conduct a YPE TOT for EWNRA and its partners. After the workshop, EWNRA will recruit and train YPEs for its activities. PHE PEs and PHE providers will also receive refresher training and EWNRA will explore conducting community theatre with PHE messages for youth.

Results from Activity 3.3

- EWNRA incorporating PHE community-based distribution into their work (SO-1)
- Nine additional PEs and eight PHE providers trained (17 men)
- Three EWNRA staff providing training to others on PHE implementation
- Technical assistance provided on project implementation (Indicator 1.4)

Status of PMP Indicators for Activity 3.3

INDICATOR	Reporting Period	Year 3 Target
SO1: Number of target organizations incorporating PHE tools, protocols, etc. into their work (PRH 1.1)	2 (EWNRA and Metu District Government)	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	17	111
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	5
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
3.1 Number of PHE tools, methodologies, and actionable findings replicated in new countries and geographic areas	0	1

Ethiopia PMP Field Data Summary

INDICATOR	July to December	Cumulative Results Years 1 to 3	Comments
General			
Number of individuals trained (disaggregated by population (P), health (H), and environment (E) topic-specific training, integrated trainings, and gender)	13	111	
Family Planning and Reproductive Health			
Number of USG-assisted service delivery points providing FP counseling or services	4	32	
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

3.4 Provide seed grant and technical support to WCS Zambia

WCS is a conservation organization founded in 1895 with the mission to save wildlife and wild places across the globe by addressing four issues facing wildlife health and human health— climate change, natural resource exploitation, the connection between wildlife health and human health, and the sustainable development of human livelihoods. In Zambia, WCS implements the Community Markets for Conservation Co-op (COMACO) program, which provides sustainable sources of alternative incomes and other incentives for conservation to families living around Zambia’s national parks in the Luangwa Valley. WCS recognizes that integrating family planning information and services into WCS/Zambia’s livelihood and wildlife/natural resource conservation program can contribute to better life for the nearly 50,000 families they reach.

In Year 2, BALANCED provided technical assistance to WCS/Zambia reviewing the FP 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 FP messages. PFPI also provided in-country technical assistance to assess entry points for PHE and help develop a plan for integrating FP information and service delivery into the COMACO program.

During this reporting period, the EAC facilitated a five-day PHE CBD/PE TOT course for 10 individuals—nine extension officers and one nurse from the nearby health center. The EAC also assessed the WCS Zambia financial system and finalized the seed grant proposal, which will help build the capacity of WCS/COMACO staff to deliver FP/RH information and services using peer-mediated approaches, CBD strategies and improved referral mechanisms that can create demand for, and increase access to FP/RH products among couples and sexually active youth (12-24 years) in the COMACO Project area. The seed grant will be finalized and executed as soon as the budget details have been finalized.

Results from Activity 3.4

- 10 (10 men) WCS Zambia, local MoH staff trained on CBD/PE systems

Status of PMP Indicators for Activity 3.4

INDICATOR	Reporting Period	Year 3 Target
SO1: Number of target organizations incorporating PHE tools, protocols, etc. into their work (PRH 1.1)	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	10	60
1.2 Number of participants who received BALANCED training and/or mentoring that are now providing training or TA to others on PHE implementation	0	2
1.4 Number of technical interventions provided by BALANCED to Missions and organizations to implement PHE within their programs (PRH 3.2)	1	1

3.5 Provide one seed and technical support to one conservation NGO

During Year 3, BALANCED worked to identify another conservation organization that would be interested in integrating health and family planning into their programs and could benefit from some financial and technical support to achieve this objective. To date, we have explored potential seed grant opportunities for the CRC Ghana program, conservation groups in Uganda, the Gorongosa National Park in Mozambique, and in Senegal. Currently, the CRC Ghana project does not need seed grant funding; BALANCED has conducted discussions but not identified a suitable Ugandan NGO; in the Gorongosa National Park, activities cannot begin until the USAID bilateral funding is secured; and CRC still awaits final award from USAID Senegal for its program there. For the next reporting period, BALANCED will follow-up with Gorongosa National Park and initiate discussion with the Tree Kangaroo Conservation Program in Papua New Guinea. It will also continue discussions with an NGO in Tanzania that is eager to initiate PHE activities, but that lacks the funding to do so. Further, BALANCED will contact its Advisory Committee members and other key PHE leaders to help identify a good candidate for this seed grant.

Results from Activity 3.5

- None

Status of PMP Indicators for Activity 3.5

INDICATOR	Reporting Period	Year 3 Target
SO-1: Number of target organizations incorporating PHE tools, protocols, etc. into their work (PRH 1.1)	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	10
1.2 Number of participants who received BALANCED training and/or mentoring that are now providing training or TA to others on PHE implementation	0	2
1.3 Number of new and/or strengthened partnerships established and actively involved in advancing and supporting wider use of PHE approaches as a result of BALANCED capacity-building activities	0	1
1.4 Number of technical interventions provided by BALANCED to Missions and organizations to implement PHE in their programs (PRH 3.2)	0	1

3.6 Provide technical support to PHE activities in Ghana

The USAID/Ghana Mission recently awarded URI-CRC the four-year ICFG project, which is seen as part of a longer-term investment in fisheries reform. ICFG will use an integrated CRM approach to address declining fish stocks and food security in Ghana's Western region and to

build the capacity of local and national government to support fisheries reforms. This approach is similar to the interventions used by the IPOPCORM Program in the Philippines. The ICFG Project is targeting six districts in the Western region—Ahanta West, Sekondi-Takoradi, Nzema East, Jomoro, Ellembele, and Shama. BALANCED is providing technical support to integrate CBFP into two of these ICFG sites.

In June, a BALANCED consultant visited ICFG sites and assessed how and where CBFP could best be integrated into the ICFG project and helped with fine tuning the Friends of the Nation (FoN)'s conceptual framework upon which the PHE activities would be based. During this reporting period, BALANCED provided long-distance support to FoN on the finalization of the PHE implementation plan in Ellembele and Shama districts. In Ellembele, FoN will train nursing students from the Esiamia Training Institute for Community Health Nurses to do PHE outreach, to serve as YPEs and promoters of reproductive health and pro-environment messages, and to refer youth to the local Ghana Health services for contraception. In Shama district, FoN will work with a USAID funded Health Keepers Network (HKN) to promote FP through their commissioned sales agents that distribute a basket of public health commodities including contraceptives (condoms and pills), oral rehydration salts, water purification tablets, malaria nets, etc. FoN has already oriented its partner, the Central and Western Fishmongers Improvement Association (CEWEFIA), the local Ghana Health Service (MoH), and community stakeholders (village chiefs and elders) about PHE and the PHE activities that will take place within the ICFG project. FoN has requested BALANCED technical assistance with YPE training and IEC activities, which PFPI will provide in March or April 2011.

3.7 Implement recommendations from the Glacier Melt Study

The BALANCED Project received funds from the Asia Near East (ANE) Bureau to address some of the recommendations from the *Changing Glaciers and Hydrology in Asia: Addressing Vulnerabilities to Glacier Melt Impacts* report. Following the completion of this report, the BALANCED Project Director and Deputy Director (Edmond) attended the November 16, 2010 ESCP presentation on the study findings. Subsequently, BALANCED submitted to the USAID PHE Technical Advisor and Mary Melnyk of the Asia Bureau a concept paper that proposed using the Asia Bureau funds to implement a series of data collection and consensus-building activities to further identify the countries/areas that are at highest risk of health and livelihood vulnerabilities due to glacier melt, describe those vulnerabilities, and propose areas where USAID can utilize integrated health and conservation funding strategies to synergistically address these vulnerabilities. We proposed to assist the Asia Bureau and its Mission staff to identify targeted, integrated multi-sectoral programming options to address the vulnerabilities identified from climate change and glacier melt. BALANCED will revise the proposal and proposed activities based on input from USAID. In early 2011, BALANCED, working with input from Melnyk and the USAID PHE Technical Advisor will identify and secure a consultant to conduct the desktop research that will be needed to draft this follow-on report.

Results from Activity 3.7

- Results will be identified once the proposal is approved by USAID

Status of PMP Indicators for Activity 3.7

The PMP table for this activity will be developed when the proposal for this activity is approved by USAID.

3.8 Secure funding for PHE expansion or scale-up in at least two countries for Years 3 and 4

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 FP 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 CBFP services into their conservation activities.

- In October 2010, the BALANCED EAC, together with Negash Teklu, Director of the PHE Ethiopia Network, met with Daniel Moore, USAID/Ethiopia Office Chief, Business, Environment, Agriculture and Trade (EGAT) and Premila Bartlett, USAID Ethiopia Senior Reproductive Health and Family Planning Advisor, to debrief them on BALANCED and other activities in Ethiopia. Moore was interested in knowing about the PHE activities in Ethiopia and explained that currently USAID Ethiopia is revising its NRM strategy to include food security as a major theme. He mentioned he would explore how integrated approaches such as PHE could be incorporated into the strategy. Bartlett explained that if integrated approaches were in the EGAT strategy, then the USAID Health, Population and Nutrition division would also support it. Moore expressed interest in visiting the EWNRA site. The EAC invited Moore to the planned February 2011 YPE TOT and to visit the workshop and the EWNRA site at that time as well. The BALANCED Project Director will follow up with Moore and Bartlett during her March 2011 trip to Tanzania and Ethiopia.
- The BALANCED EAC visited the Tanzania Mission several times during his four-month stay in Tanzania. The EAC briefed Tim Manchester, the Mission's Senior Family Planning & Reproductive Health Advisor, on BALANCED activities. Manchester continues to express interest in what BALANCED is doing viz-a-viz CBFP and is eager to see how the integrated models are working. The EAC also invited Manchester to the December 2010 YPE TOT. The BALANCED Project and the EAC will visit Manchester in March 2011 to further debrief him on results of BALANCED activities, on BALANCED support to the accredited drug dispensary outlets/ADDOS (Manchester is very interested), on potential funding opportunities for scaling-up PHE in Tanzania, and on the potential for a Mission Buy-in to support the PHE activities in Tanzania.

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 FP focus First Tier Intensive and First Tier countries.

- Leveraged US\$12,890 from conservation groups who paid their own way to BALANCED DBC and YPE workshops; from AWF and WCS contributions towards PHE activities implemented during the EAC field visits; and from PFPI.

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:

- Disney Friends for Change – Disney offers limited opportunities to select partners to highlight innovative field conservation programs and CI is one of Disney's partners in this effort. As an official nominator for this Program, CI asked PFPI to submit a concept paper for consideration. The concept was selected as a potential candidate for this award ranging from \$25,000 to 100,000. PFPI forwarded a more detailed paper on “Young Eco-Warriors Combat Illegal and Destructive Fishing in the Philippines” and CI worked with PFPI staff to finalize the proposal and submit to Friends for Change on PFPI’s behalf. Unfortunately, PFPI pulled their submission via CI before completion of the proposal. PFPI submitted the concept paper independently to Disney, and in September 2010 the proposal was turned down for further consideration.
- CI also promoted the BALANCED Project to IUCN and anonymous individual CI donors as well as disseminated fundraising opportunities to BALANCED Project partners and followed up on strategic partnership opportunities for PHE projects.

Status of PMP Indicators for Activity 3.8

INDICATOR	Reporting Period	Year 3 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)	\$12,890	\$600,000

IR3 Priorities for next period (January 1 to June 30, 2011)

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 and Ethiopia regarding Buy-in opportunities for scaling-up PHE in these countries. (**Linda**)

Tanzania

- Provide continuing technical oversight for the integration (and replication) of CBFP into the on-going USAID/Tanzania-funded *Pwani* project in the Bagamoyo District, Tanzania. (**Elin, Juma, Ricky**)
- Explore 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. (**Elin, Juma, Ricky**)
- Support CBD supervisors to monitor and support CBDs and adult peer educators in the Mkwaja, Mkalamo, Mwera, Mikinguni, and Kipumbwi wards. (**Juma**)
- Conduct monthly monitoring and mentoring visits with CBDs/PEs/PHE Providers in the Mkwaja, Mkalamo, Mwera, Mikinguni, and Kipumbwi wards. (**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**)
- Facilitate the signing of an MOU between the MOH and TCMP for youth activities in Pangani. (**Juma, Elin**)
- Train YPEs from groups that are organized by the local government in Pangani District. (**Juma**)
- Assess the potential for working with ADDOs in Pangani and/or Bagamoyo. (**Ricky, Juma, Linda**)
- Produce at least one champion story. (**Juma, Elin**)

The Philippines

- Implement BALANCED-Philippines activities. (**Ronald, Joan**)
- Identify CRM behaviors that BALANCED-Philippines activities will address in the IEC materials. (**Ronald, Joan, Brian**)
- Conduct baseline BMS findings in selected BALANCED-Philippines sites. (**Joan, Brian**)

Ethiopia

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

- EWNRA to develop youth IEC materials or activities. **(Ricky)**

Zambia

- Execute the seed grant. **(Joan)**
- Provide technical support to WCS Zambia to develop their detailed implementation plan and initiate Year 1 seed grant activities. **(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)**

Ghana

- Provide technical support to PHE activities. **(Joan, Ricky)**
- Conduct YPE TOT. **(Joan, Ricky)**

III. Key Management Tasks

Accomplishments

- Held a strategic review and planning meeting for the team's key staff and the USAID PHE Technical Advisor from December 8-10, 2010 to review accomplishments to date for Year 3 tasks and deliverables and begin planning for the Year 4 budget request.
- Strengthened the communications and overall working relationship amongst the members of this Project's virtual team through scheduled Skype calls, posting of key team meeting minutes on the BALANCED Project Forum, meeting more frequently with PFPI staff during technical assistance visits, conferences, meetings, etc.
- Continued to articulate integration across IRs during team meetings and to emphasize this integration during the planning and actual implementation of Project activities.
- Spending has been on target since July 2010, and the burn rate is where it should be.

Challenges

- The process for developing the Philippines Buy-in program statement and Year 1 workplan was inefficient and problematic. Too often, CRC engagement in discussions and decisions made with the Mission were secondary to that of PFPI and USAID PHE Technical Advisor. In the case of any future/additional Buy-in opportunities, CRC would require a greater first-hand involvement. CRC, as lead for the BALANCED cooperative agreement, needs to be intimately involved from the start in the design and development of the program and the negotiation of the terms of any Buy-in. This said, we appreciate the assistance provided to the team by the USAID PHE Technical Advisor in helping

with the initial and follow-on discussions that played an instrumental role in the final award of this first Buy-in.

- Many months after funding from the Philippines Mission was transferred to USAID Washington, an administrative hold-up delayed the actual award to URI. This confounds the Mission's desire to have work on-the-ground underway as of several months ago. While CRC and PFPI have been ready, able and willing to begin activities, their start up has been and continues to be delayed due to lack of funds. We understand that this was beyond the control of USAID/GH but feel we need to point out that this holdup may influence what the activity can achieve within the designated time frame.
- With the addition of the Philippines Buy-in and the possibility that there could be others, the team recognizes these Buy-ins bring significant staffing implications. As noted in the bullet above, any situations of delayed funding for any Buy-in confounds the Project's ability to hire and secure new staff in a timely fashion, placing additional stress and burden on existing staff.
- Regarding the point of additional Buys-in, we are fast approaching a point where accepting any would be impossible for sheer reasons of insufficient time/years remaining in the core Cooperative Agreement. Approaching the end of its third year, the BALANCED Project has only two years remaining, a timeframe that is the minimum (if less than ideal) for implementing meaningful activities on the ground and tracking and achieving results. BALANCED staff is visiting Missions as frequently as possible to debrief them on BALANCED activities and suggest how a Buy-in would complement and support one or more of the Missions' goals and strategies. The BALANCED Project Director will visit Tanzania and Ethiopia Missions in March 2011, but could use follow-up support from USAID PHE Technical Advisor and AOTR.
- The process for reviewing, vetting, and receiving the approval of the Project Director and the USAID PHE Technical Advisor for drafts of technical documents has been time consuming and inefficient. However, efforts have been stepped up to improve the review process within BALANCED. Nonetheless, receiving input from USAID on publications and the resulting rewrites remains a challenge. That said, we understand that USAID faces the same challenge as BALANCED staff in terms of time available to review documents. We shall continue dialoguing with USAID to alert them of upcoming publications that need USAID review and discuss deadlines as needed.

Priorities for next reporting period

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

- Completing final USAID review of five training curricula so that they can be finalized and distributed
- Taking steps to ensure the burn rate during the second half of Year 3 closely approximately our target burn rate
- Working assertively to galvanize field support for our African programs
- Designing and conducting a meeting for developing the Year 4 workplan

- Beginning logistics planning and preparations for the advisory committee meeting early in Year 4

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 it is successful in meeting its goals and targets.

The BALANCED Project Indicators and Progress towards Targets

INDICATOR	Year 3 to date (Jul-Dec)	Year 3 Targets	Cumulative Results to date	Year 1-3 Cumulative target from program description	LOP Target	Comments
SO-1: Number of target organizations incorporating PHE tools, protocols, etc. into their work (PRH 1.1)	4	7	12	12	24	On 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)	12,890	600,000	1,639,982	1,500,000	3,000,000	\$500,000 Philippine project activity counted in Year 2, although funding was not final until Year 3.
1.1 Number of individuals trained by BALANCED in PHE know-how and SOTA using 21st century learning tools	279	351	629	120	200	On target for year 3
1.2 Number of participants who received BALANCED training and/or mentoring that are now providing training or TA to others on PHE implementation	5	21	14	15	45	Under target. We might have missed some individuals and will investigate further in the next reporting period.
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)	5	4	7	8	16	Over target

1.4a. Number of technical support interventions provided by BALANCED to Missions and to organizations to implement PHE within their programs (PRH 3.2)	11	24	36	15	30	On target
1.4b. Number of new organizations receiving TA by BALANCED	1	12	19	No cumulative target	30	Under target
2.1 Tools, protocols, procedures, systems, methodologies, guides, curricula, or indices with demonstrated programmatic value developed or adapted for country and/or thematic contexts (PRH IR 2.1)	2	4	4	15	25	On 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)	7	12	24	6	12	On target
2.2b. Number of peer reviewed articles and research studies	1	1	1	No target	No target	On target
3.1 Number of PHE tools, methodologies, and actionable findings replicated in new countries and geographic areas (PRH 3.1)	4	4	11	6	9	On target
3.2a Number PHE programs scaled up (PRH 3.4)	1	1	2	4	6	Tawi-Tawi scale up implemented by WWF with TA from BALANCED
3.2b Number of geographical areas replicating PHE (PRH 3.4)	1	No target	No target	No target	No target	Tanzania replication

3.3 Number of BALANCED field site activities that produce results that can feed into KM activities (development of tools and success stories)	3	1	5	4	8	Over target for Year 3. On target for cumulative target
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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 3 July-December				Cumulative Results			
	Phil	Tanz	Ethiopia	Total	Phil	Tanz	Ethiopia	Total
General								
Number of individuals trained (disaggregated by population (P), health (H), and environment (E) topic-specific training, integrated trainings, and gender)	0	148	13	161	568	297	98	963
Family Planning and Reproductive Health								
Number of new users	0	430		430	8,150	771	0	8,921
Number of counseling visits for family planning/reproductive health (FP/RH) as a result of USG assistance	0	530	0	530	0	1,050	0	1,050
Number of USG-assisted service delivery points providing FP counseling or services	0	20	4	24	411	50	28	489
Average household distance/time to access family planning commodities	No change	No change	No change		Less than one km	Less than one km	between 50 m and 3 km	

Annex 1: PHE Toolkit Statistics

PHE Toolkit Unique Visitors July 1 to Dec 31, 2010

1-Jul-10	31-Jul-10	108
1-Aug-10	31-Aug	83
1-Sep-10	30-Sep-10	118
1-Oct-10	31-Oct-10	236
1-Nov-10	30-Nov-10	1066
1-Dec-10	31-Dec-10	1021
total unique visitors		2632

Top 10 PHE Document Downloads

#	Resource	Organization	Downloads
1	HIV/AIDS and the Environment: Impacts of HIV/AIDS and Ways to Reduce Them	WWF	302
2	Healthy People, Healthy Ecosystems: A Manual on Integrating Health and Family Planning into Conservation Projects	WWF	228
3	Population, Health, and Environment Issues in the Philippines: A Profile of Calabarzon (Region 4-A)	PRB	227
4	Plan & Conserve: A Source Book on Linking Population and Environmental Services in Communities	PAI	227
5	An Ounce of Prevention: Making the Link Between Health and Conservation	Biodiversity Support Program's Global Exploration Series	225
6	Population, Health, and Environment Issues in the Philippines: A Profile of Cagayan Valley (Reg. 2)	PRB	223
7	Population, Health and Environment Monitoring and Evaluation (M&E) Training Toolkit	Carolina Population Center at UNC at Chapel Hill	217
8	Scaling Up Integrated Population, Health and Environment Approaches in the Philippines	PRB	216
9	Population, Health, and Environment Issues in the Philippines: A Profile of Central Visayas (Region 7)	PRB	215
10	Issue Brief: Healthy People in a Healthy Environment in Madagascar: Better Results Through Integration	USAID	214

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. Six news items posted in this reporting period include:

- BALANCED Project Launches New Initiative to Integrate FP into Marine Conservation in the Philippines – December 23, 2010
- New PHE 101 Bibliography Available on PHE Toolkit – December 22, 2010
- BALANCED Newsletter on PHE Approaches and Climate Change – December 18, 2010
- BALANCED and WWF Co-Host Designing for Behavior Change Workshop in Tanzania – November 17, 2010
- BALANCED Assists the PROGRESS Project with PHE Activity in Kenya – July 14, 2010
- BALANCED and the World Conservation Society/Uganda Explore PHE Approaches – July 14, 2010

The Project also posted five of the items above and three additional items to the PHE listserv promoting PHE partners and champions, including:

- Two new PHE Champion Profiles on the PHE Toolkit – Abdalah in Tanzania and Albert in DRC- December 21, 2010
- New BALANCED Project Document – Creating the PHE Toolkit Framework – December 20, 2010
- BEAHRs Environmental Leadership Program Announcement – December 9, 2010
- BALANCED Project Launches New Initiative to Integrate FP into Marine Conservation in the Philippines – December 23, 2010
- New PHE 101 Bibliography Available on PHE Toolkit – December 22, 2010
- BALANCED Newsletter on PHE Approaches and Climate Change – December 18, 2010
- BALANCED Assists the PROGRESS Project with PHE Activity in Kenya – July 14, 2010
- BALANCED and the World Conservation Society/Uganda Explore PHE Approaches – July 14, 2010

In addition, several partners helped disseminate news items in July and August 2010, which the Project had originally disseminated in the previous reporting period. These items include:

- BALANCED South-to-South Exchange Promotes PHE Based on Philippines Success – June 24, 2010

- BALANCED Project working with WCS Zambia and COMACO Initiative – June 25, 2010

Annex 3: BALANCED Communications/Dissemination Activities

BALANCED Project Launches New Initiative to Integrate FP into Marine Conservation in the Philippines – December 23, 2010 (correction sent December 31, 2010)

Audience	Date Sent	Person Responsible	Number of People Reached
PHE listserv	December 23, 2010	Janet Edmond	572
FP Community listserv	December 21, 2010	Janet Edmond	450
Total			1,022

New PHE 101 Bibliography on the PHE Toolkit – December 22, 2010

Audience	Date Sent	Person Responsible	Number of People Reached
PHE Listserv	December 22, 2010	Janet Edmond	572
FP Community listserv	December 22, 2010	Janet Edmond	450
Africa Biodiversity Collaborative Group (ABCG) listserv	December 22, 2010	Janet Edmond	Will occur in next reporting period
Total			1,022

Two new PHE Champion Profiles on the PHE Toolkit – Abdalah in Tanzania and Albert in DRC- December 21, 2010

Audience	Date Sent	Person Responsible	Number of People Reached
PHE Listserv	December 21, 2010	Janet Edmond	572
USAID FP webpage and blog	December 22, 2010	Sandra Jordan, USAID communications person	TBD
FP Community listserv	December 22, 2010	Janet Edmond	450
Ingrid Kokolopuri listserv – DRC champion story	December 29, 2010	Ingrid Schulze	560
Estimated total			1,582

New BALANCED Project Document – Creating the PHE Toolkit Framework – December 20, 2010

Audience	Date Sent	Person Responsible	Number of People Reached
PHE listserv	December 20, 2010	Janet Edmond	572
FP Community listserv	December 20, 2010	Janet Edmond	450
Total			1,022

BALANCED Newsletter on PHE Approaches and Climate Change – December 18, 2010

Audience	Date Sent	Person Responsible	Number of People Reached
Authors of articles	December 7-11, 2010	Janet Edmond	12
PHE listserv	December 18, 2010	Janet Edmond	572
CI Climate Change Working group – HQ and field	December 18, 2010	Janet Edmond	50
FP Community Listserv	December 21, 2010	Janet Edmond	450
CI CTI staff, plus staff in Philippines, Madagascar, South Africa	December 20, 2010	Janet Edmond	14
MacArthur Foundation: Erin Sines	December 20, 2010	Janet Edmond	1
Anonymous CI donor	December 20, 2010	Janet Edmond	1
East Africa PHE Network update	December 22, 2010	Jason Edmond and Jason Bremner	170
Estimated total people reached			1,260

Other Outreach Items

Audience	Date Sent	Person Responsible	Number of People Reached
a. BEAHRs Environmental Leadership Program Announcement – December 9, 2010			
PHE Listserv	December 9, 2010	Janet Edmond	572
b. Video featuring PHE in the Philippines – October 20, 2010			
PHE Listserv	October 20, 2010	Linda Bruce	572

c. BALANCED Project Report on South-to-South Study Exchange on Population, Health and Environment – June 30, 2010			
FP Community Listserv	July 13, 2010	Janet Edmond	450
East Africa PHE Network update	July 28, 2010	Jason Bremner	170
d. BALANCED Project and the World Conservation Society/Uganda Explore PHE Approaches – July 24, 2010			
PHE Listserv	July 24, 2010	Janet Edmond	572
Africa Biodiversity Collaborative Group (ABCG) Listserv		Janet Edmond	
East Africa PHE Network update	July 28, 2010	Jason Bremner	170
e. BALANCED Project working with WCS Zambia and COMACO Initiative – June 25, 2010			
East Africa PHE Network update	July 28, 2010	Jason Bremner	170
f. BALANCED Project Assists the PROGRESS Project with PHE Activity in Kenya – July 26, 2010			
East Africa PHE Network update	July 28, 2010	Jason Bremner	170

Annex 4. BALANCED-Philippines Year 1 Workplan



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

**BALANCED-Philippines Project Overview and
Year 1 Workplan**

December 1, 2010 – September 30, 2011

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

Implemented by:

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

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Acronyms List

ADB	Asian Development Bank
BALANCED	Building Actors and Leaders for Advancing Community Excellence in Development
BHWs	Barangay Health Workers
BMS	Behavioral Monitoring Survey
CA	Collaborating Agency
CBD	Community Based Distributors
CBFP	Community-based family planning
CI	Conservation International
CRC	Coastal Resources Center
CRM	Coastal Resource Management
CT	Coral Triangle
CTI	Coral Triangle Initiative
CTSP	Coral Triangle Support Partnership
CYP	Couple Year Protection
DOH	Department of Health
FISH	Fisheries Improved For Sustainable Harvest
FP	Family Planning
GH	Global Health
GH/OPRH	Global Health/Office of Population and Reproductive Health
ICM	Integrated Coastal Management
ICRMP	Integrated Coastal Resource Management Program
IEC	Information, Education and Communication
IPC	Interpersonal Communication
IPOPCORM	Integrated Population and Coastal Resources Management
LGU	Local Government Units
ME&L	Monitoring, Evaluation and Learning
MOA	Memorandum of Agreement
MPA	Marine Protected Areas
NGO	Non-Governmental Organization
NRM	Natural Resources Management
OEE	Office of Environment and Energy
OH	Office of Health
PE	Peer Educator
PFPI	PATH Foundation Philippines Inc.
PHE	Population, Health and Environment
PMP	Performance Monitoring Plan
PPE	Poverty, Population, Environment
PTAL	PHE Technical Assistance Lead
RH	Reproductive Health
RH/FP	Reproductive Health/Family Planning
RHU	Rural Health Unit
SIGUE	Philippines PHE Network
STI	Sexually-transmitted infections

TOT	Training of Trainers
URI	University of Rhode Island
US	United States
USAID	United States Agency for International Development
WRA	Women of Reproductive Age
YPE	Youth Peer Educator

Project Summary

The United States Agency for International Development (USAID) Philippines is providing a 22 month—December , 2010 through September 30, 2012—US\$500,000 Buy-in to the BALANCED (*Building Actors and Leaders for Advancing Community Excellence in Development*) Project to support results-oriented population, health, environment (PHE) field activities in biodiversity-rich marine areas of the Philippines. The Coastal Resources Center (CRC) at the University of Rhode Island (URI), with PATH Foundation Philippines Inc. (PFPI) at the lead, are the implementing agents for the BALANCED-Philippines project.

BALANCED-Philippines will use the integrated PHE strategy to advance family planning (FP) activities in selected key bioregions within the country where demographic factors threaten the diversity and productivity of marine ecosystems and the sustainability of conservation gains. As a Buy-in, the BALANCED-Philippines project furthers the overall BALANCED Project goal to advance and support PHE approaches on the ground as an effective development strategy.

During the next two years, strategic activities are planned to help achieve the goal of BALANCED-Philippines “*to meet unmet need for family planning services in targeted marine bioregions where population is identified as a threat to sustainable resource management.*” Our vision is that at the end of project, communities in the target marine bioregions will be empowered to meet their expressed needs for voluntary family planning services and information and will understand the underlying linkages between reducing population pressure and improving coastal resources management. Based on our experience with successful integrated PHE projects, we also aspire to create an enabling environment among policymakers at all levels of government (from the barangay to provincial levels) that promotes the integration of PHE into governmental plans and budgets. This vision and these goals are reflected in the first year workplan activities as outlined starting on page 11 of this document.

The program goal will be achieved through three intermediate results (IRs).

IR1- Improved access to family planning/reproductive health services in key bioregions

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

IR3 – Increased policy makers' commitment to promote/support FP/RH services and integrated approaches

Within 22 months of working in the three types of sites described below, we estimate that BALANCED will assist between 31-41 municipal governments to establish/strengthen community-based service delivery mechanisms that would serve more than 1.1 million people and reach an estimated 125,000 under-served women (15-49 years) with FP methods and PHE information in a cost-effective and sustainable manner. The map entitled *Geographic Location of the Various Scale-Up Sites* (see page 10) shows the geographic location of the various scale-up sites (new, maintenance and rider) and the populations to be served in each bioregion.

Geographic Scope

These results will be achieved by working with and through local government units (LGUs), conservation and health groups, Peoples Organizations (PO) and other local institutions in two biographic regions: 1) South Sea Bioregion covering Verde Island Passage and 2) Visayan Bioregion covering Danajon Bay and the Camotes Sea. In these regions USAID Philippines, the USAID Coral Triangle Support Partnership (CTSP) and others are programming investments for fisheries and coastal resources management by building the capacity of these local institutions to develop and sustain community-based mechanisms for the delivery of FP services and PHE information and education to marine-dependent communities.

The project will build upon the lessons and best practices of prior PHE projects funded by USAID and the David and Lucile Packard Foundation and implemented by PFPI in the Danajon Bank (FISH-Reproductive Health Project/FISH-RH, Alternative Advocacy Project/AAP, and the Integrated Population and Coastal Resource Management Initiative /IPOPCORM) , and in the Verde Island Passage (the Poverty-Population-Environment/PPE project). Over 2.8 million Filipinos reside in these two bioregions of which an estimated 250,000 are women (15-49 years) with unmet need for FP or with a need for more use-effective methods of contraception. Verde Island Passage is the global epicenter of marine biodiversity and a focal area for USAID's CTSP Project, which also endorses the PHE approach. The Danajon Bank has regional significance being one of only three double-barriers reefs in Indo-Pacific. Under the FISH-RH and IPOPCORM initiative, demonstration sites were established in this bioregion and these continue to serve as PHE "learning areas". By building upon the groundwork, networks and institutions fostered under previous projects and by dovetailing the BALANCED Project with current and planned coastal resources management (CRM) programs of USAID, the Asian Development Bank (ADB), local governments and others in the Philippines, this project will be able to achieve a scale of PHE effort that otherwise would not be attainable if BALANCED were to deliver the services independently.

Project Strategy

Building on the PHE experience in the Philippines, BALANCED-Philippines will scale-up best practices and lessons learned reaching additional new communities living in municipalities and areas where coastal/fisheries management activities are ongoing in the South Sea and Visayan Bioregions. BALANCED-Philippines will also maintain PHE initiatives established by PFPI in previous PHE projects in the same two bioregions. To be able to reach more communities, and cover other important bioregions, the project will conduct cross-site exchanges for local government and nongovernment executives from other bioregions where ongoing CRM/fisheries activities are supported by other donors and stakeholders (herein called rider sites) in year 2. Over the next two years of project implementation, a complement of PHE activities is planned for the new, maintenance, and rider sites as follows:

A. New Sites

The bulk of the project's funds will be invested in nine coastal municipalities in the South Sea bioregion that are "new" to PHE⁸ but have ongoing LGU coastal resource/fisheries management activities (see Map 1 entitled *Network of MPAs in Batangas*) and contain 231 barangays where

⁸ Meaning that neither PFPI or other agency has introduced PHE activities into these sites

an estimated 41,797 women with unmet FP need reside (see Table 1: *Scale-up Coverage per Bioregion*). In the “*new*” sites, BALANCED will provide the full packet of PHE services (PHE advocacy; community-based distribution (CBD) system; peer education (PE) system; contraceptive supply chain; information, education, and communication (IEC); and monitoring), replicating the public-private PHE model (LGU community-based distribution and social marketing of FP methods and PHE concepts) that was developed and refined under a previous Population-Poverty-Environment (PPE) project⁹.

B. Maintenance Sites

The project will invest moderate resources in activities to strengthen the functionality and sustainability of existing CBD operations and systems in 20 coastal municipalities located in both the South Sea and Visayan bioregions. Those CBD systems, which were established in the private sector under previous PHE projects, were designed to serve 511 barangays where 57,979 WRA are estimated to have unmet FP needs (Table 1- *Scale-up coverage per Bioregion*). Some of the CBD agents, however, have discontinued their operations while others potentially could serve larger numbers of clients. BALANCED will conduct a CBD needs assessment in these municipalities, herein referred to as “maintenance sites,” and extend tailored technical assistance (based on assessment findings) and periodic monitoring and mentoring support. In these sites, we will reorient the ongoing PHE model (NGO community-based distribution) by involving more LGUs to increase coverage and ensure sustainability as observed from previous PHE projects. Building a public-private-partnership in these sites will enable a larger scale of PHE effort that otherwise could not be achieved solely through private sector involvement.

C. Rider Sites

Minimal investment will be made in areas where other donors such as ADB are supporting integrated coastal resource management project (ICRMP) activities implemented by provincial and local government units. ICRMP works in 68 coastal towns of five provinces¹⁰ where resources are earmarked for population-environment advocacy and information, education, and IEC campaigns during 2009-2013. These campaigns are expected to create demand for population management (among LGU staff) and family planning (among the general public). BALANCED could capitalize upon this demand and extend technical assistance to enlightened LGU officials that want to establish a CBD system in their municipality. Because BALANCED could theoretically “ride” on ADB’s investment, these areas of PHE scale-up are referred to as “Rider Sites.”

The provinces of Cebu and Siquijor offer interesting opportunities for dovetailing ICRMP and BALANCED resources, particularly given Cebu’s jurisdiction over the Danajon and given Siquijor’s proximity to the same bioregion. Masbate in the Central Bioregion offers similar potential. Approximately 285,500 people could be served if BALANCED were to enable 12 ICRMP municipalities to establish CBD systems in the same towns where ADB is supporting population-environment IEC and advocacy efforts. This can, however, be done if PFPI was to be chosen as the partner to implement the PHE IEC activities in the ICRMP sites.

⁹ During Apr 2008-Mar 2010 PFPI worked with 22 LGUs to develop/refine this public-private sector PHE model .

¹⁰ ICRMP is working in the provinces of Cagayan, Masbate, Siquijor, Cebu , Davao Oriental and Zambales

Year 1 activities—outlined in the workplan starting on page 11 of this document, will focus on developing a functional CBD and PE system capable of effectively and rapidly providing family planning and reproductive health (FP/RH) information and services to the target marine bioregions as well as promote the linkages of health-seeking and pro-environment behaviors in improving health, food security and availability of natural resources for the future. We will also begin galvanizing LGUs to support FP/RH services and integrated PHE approaches. Table 2 below summarizes the activities planned for the new, maintenance and rider sites over the next two years. The document outlines the workplan for the first 12-months of PHE activity of the BALANCED-Philippines project.

As can be seen from Map 2 (page 10) the “new” sites and the “rider” sites are clustered around the 22 “maintenance” sites, which will not only will facilitate project savings in terms of transportation and monitoring expenditures but will also provide opportunities for cross-fertilization of experience between veteran LGU executives and those that are novices in terms of PHE awareness and experience.

Table 1: Scale-up Coverage per Bioregion

Biogeographic Representation	Province	Municipality (clusters)	New (# brgs)	Maintenance (# brgs)	Rider (# brgs)	Population 2007	Unmet FP Need	Unmet FP Need	Unmet FP Need	Unmet FP Need
							(# WRA ¹¹)	New Sites	Maintenance Sites	Rider Sites
South Sea Bioregion: Verde Island Passage (VIP)	Batangas	Batangas City/ Isla Verde		6		5,876	514		514	
		Calatagan	25			51,544	4,510	4,510		
		Tingloy	15			18,548	1,623	1,623		
		Lobo	36			37,798	3,307	3,307		
		Mabini	34			40,629	3,555	3,555		
		Nasugbu	42			113,926	9,969	9,969		
		San Juan	42			87,276	7,637	7,637		
	Oriental Mindoro	Puerto Galera		14		28,025	2,452	2,452	2,452	
		San Teodoro		8		1,5039	1,316	1,316		
		Baco		27		34,127	2,986	2,986		
	Occidental Mindoro	Abra de Ilog		9		25,152	2,201		2,201	
		Paluan	12			13,718	1,200	1,200		
		Looc	9			11,310	990	770		
		Lubang	16			28,267	2,473	2,473		
Visayan Bioregion: Danajon Bay and Camotes Sea	Bohol	Bien Unido		15		23,412	2,049		2,049	
		Buenavista		35		26,443	2,314		2,314	
		Clarin		24		18,871	1,651		1,651	
		Getafe		24		27,852	2,437		2,437	
		Inabanga		50		43,331	3,791		3,791	
		CP Garcia		23		25,118	2,198		2,198	
		Trinidad		20		27,580	2,413		2,413	
		Talibon		25		59,274	5,186		5,186	

¹¹ WRA - women of reproductive age

Biogeographic Representation	Province	Municipality (clusters)	New (# brgs)	Maintenance (# brgs)	Rider (# brgs)	Population 2007	Unmet FP Need	Unmet FP Need	Unmet FP Need	Unmet FP Need
							(# WRA ¹¹)	New Sites	Maintenance Sites	Rider Sites
		Tubigon		34		44,434	3,888		3,888	
		Ubay		44		65,900	5,766		5,766	
	Leyte	Bato		32		33,930	2,969		2,969	
		Hilongos		51		53,911	4,717		4,717	
		Hindang		20		19,927	1,744		1,744	
		Matalom		30		31,055	2,717		2,717	
		Inopacan		20		19,276	1,687		8,971	
	Cebu	Cordova			13	45,066	3,943			4,000
		Daanbantayan			20	73,254	6,410			6,410
Central Bioregion: San Miguel	Siquijor & Masbate	10 Towns			200	285,500			24,981	
TOTAL	8 provinces	41 towns	231	511	233	1,149,869	125,595	41,797	57,979	35,391

Table 2: Strategies and Activities per IR per Site

Site Type	Yr 1 Activities (Jan 2011 – Sept/2011)	Yr 2 Activities (Oct 2011 – Sept 2012)
	IR 1: Improved access to FP/RH services in key bioregions	
	<ul style="list-style-type: none"> • Conduct Training of Trainers (TOTs) on CBD and PHE Peer Educators (PEs) systems. <ul style="list-style-type: none"> - 3 trainings and 60 LGU/NGO (health & Environment) personnel trained • Trainers recruit and train/updated CBDs <ul style="list-style-type: none"> - 246 CBDs trained in new sites • Establish social marketing arrangements at each municipality <ul style="list-style-type: none"> - 9 social marketing arrangements established in new sites • Train RHU staff on FP/RH information and services and CBD systems <ul style="list-style-type: none"> - 110 RHU staff trained • Provide monthly monitoring/ support to LGUs, CBDs 	<ul style="list-style-type: none"> • Provide monthly monitoring/mentoring support to LGU, CBDs (on CBD reporting , CBD service quality assessment, etc) • Train RHU staff on FP/RH information and services and CBD systems <ul style="list-style-type: none"> - 110 RHU staff trained
New 9 coastal municipalities, 231 barangays	IR 2: Increased awareness and support of FP and conservation in key bioregions	
	<ul style="list-style-type: none"> • LGU trainers recruit and train adult PEs <ul style="list-style-type: none"> - At least 155 PEs trained by LGU/NGO trainers • Adult PEs conduct IPCs <ul style="list-style-type: none"> - At least 4,000 IPCs conducted • Develop/adapt and implement PHE IEC package and monitoring <ul style="list-style-type: none"> - Existing PHE, FP/RH, CRM IEC materials collected, assessed, reprinted/disseminated - PHE messages and IEC materials developed, pretested and disseminated, as needed - IEC Monitored planned and adjusted • Provide monthly monitoring/mentoring for adult PEs and LGUs 	<ul style="list-style-type: none"> • Conduct adult PE training <ul style="list-style-type: none"> - At least 155 adult PEs trained by LGU/NGO trainers • Adult PEs conduct IPCs <ul style="list-style-type: none"> - At least 10,000 IPCs conducted • Implement community level IEC activities <ul style="list-style-type: none"> - At least 10 community IEC activities conducted(1 per LGU) - IEC materials disseminated - IEC activities monitored <p>Monthly monitoring/ mentoring for adult PEs and LGUs</p>
	IR 3: Increased policymakers commitment to integrated PHE Policies in key bioregions	
<ul style="list-style-type: none"> • Conduct LGU PHE orientation • Establish MOAs with LGUs <ul style="list-style-type: none"> - At least 5 MOAs executed 	<ul style="list-style-type: none"> • Advocate for PHE activities /budgets to be integrated into LGU policies (CRM, development plans, investment plans, etc.) 	

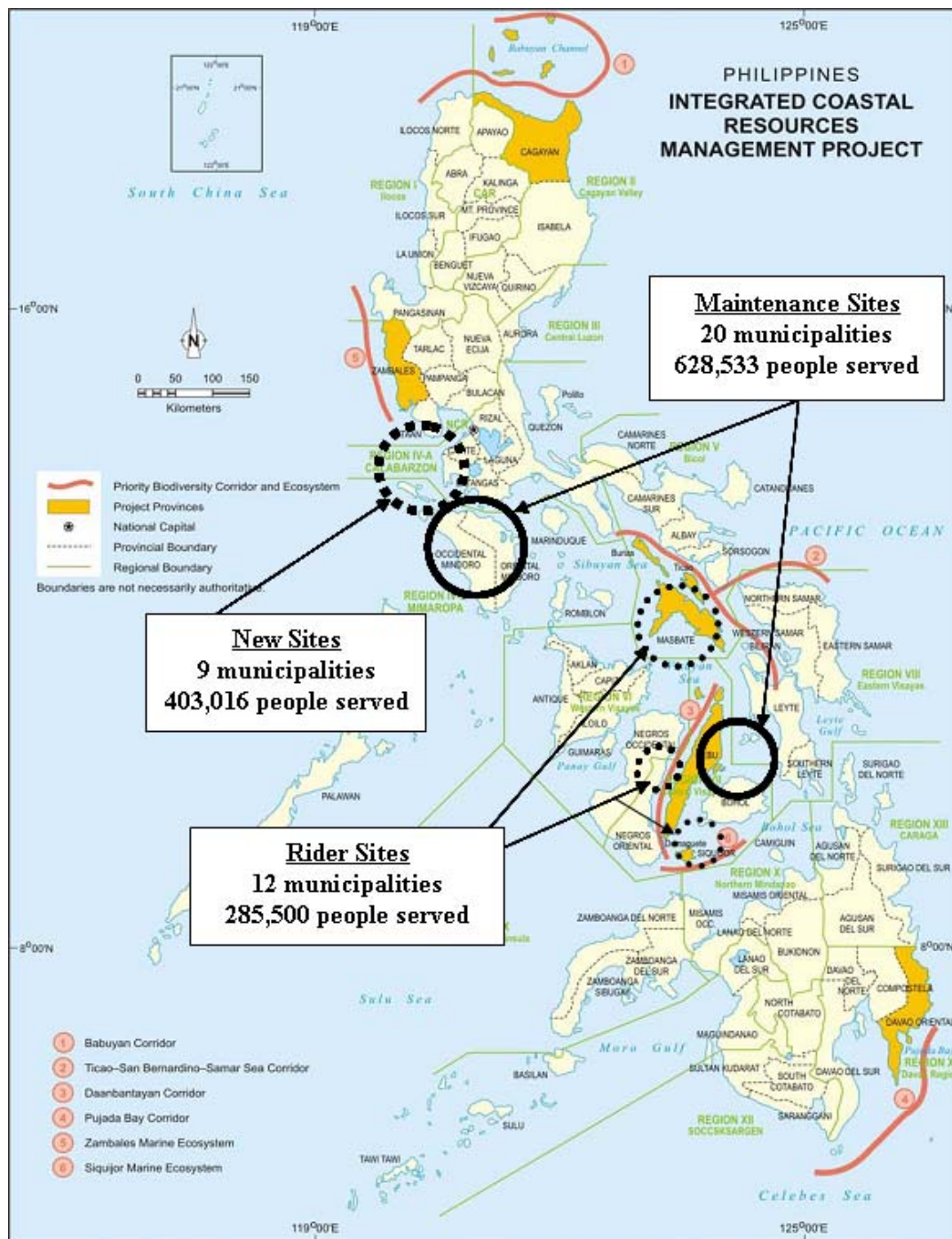
	<ul style="list-style-type: none"> • Advocate for PHE activities/budgets to be integrated into LGU policies (CRM, development plans, investment plans, etc. <ul style="list-style-type: none"> - At least 10 integrated policy reforms/plans initiated 	<ul style="list-style-type: none"> • Regularly monitor/support MOA compliance and PHE integration in LGU CRM/ development plans
Maintenance 15 coastal municipalities, 510 barangays	IR 1: Improved access to FP/RH services in key bioregions	
	<ul style="list-style-type: none"> • Capacity assessment of existing LGU, RHU, CBD, and social marketing franchises in each municipality • CBD and RHU refresher training <ul style="list-style-type: none"> - 249 CBDs receive refresher training - 48 RHUs trained on FP/RH and CBD systems • Establish social marketing arrangements at each municipality <ul style="list-style-type: none"> - 10 social marketing arrangements assessed and functioning - Monthly monitoring/ support to LGUs, CBDs 	<ul style="list-style-type: none"> • CBD and RHU refresher training <ul style="list-style-type: none"> - 248 CBDs receive refresher training - 47 RHUs trained on FP/RH and CBD systems - At least 300 CBDs active and functioning • Monthly monitoring/support to LGU and CBDs
	IR 2: Increased awareness and support of FP and conservation in key bioregions	
<ul style="list-style-type: none"> • Adult PEs recruited and trained by LGU/NGO trainers <ul style="list-style-type: none"> - At least 249 adult PEs trained by LGUs • Adult PEs conduct IPCs <ul style="list-style-type: none"> - At least 6,000 IPCs conducted • PHE IEC activities and materials developed, pretested & implemented <ul style="list-style-type: none"> - Existing PHE, FP/RH, CRM IEC materials collected , assessed , reprinted/disseminated - PHE messages and IEC materials developed, pretested and regularly disseminated - Community IEC activities implemented (at least 5) • Monthly monitoring/ mentoring for adult PEs & LGUs 	<ul style="list-style-type: none"> • Adult PEs recruited and trained by LGU/NGO trainers <ul style="list-style-type: none"> - At least 248 adult PEs trained by LGU/NGO trainers • Adult PEs conduct IPCs <ul style="list-style-type: none"> - At least 16,000 IPCs conducted • Community level IEC activities implemented <ul style="list-style-type: none"> - At least 10 IEC activities (1 per municipality) - IEC materials disseminated • Monthly monitoring/mentoring for adult PEs & LGUs 	

	IR 3: Increased policymakers commitment to integrated PHE Policies in key bioregions	
	<ul style="list-style-type: none"> • LGU PHE orientation • MOAs reviewed/established LGU <ul style="list-style-type: none"> - At least 5 MOAs executed • Advocacy for PHE activities /budgets to be integrated into LGU policies (CRM, dev. plans, investment plans, etc.) 	<ul style="list-style-type: none"> • Advocacy for PHE activities /budgets to be integrated into LGU policies (CRM, development plans, investment plans, etc.) • Monitoring on MOA compliance and/or PHE policy reforms
Rider Sites 12 coastal municipalities, 33 barangays	IR 2: Increased awareness and support of FP and conservation (ONLY funded by ADB if ICRMP awards project to PFPI)	
	<ul style="list-style-type: none"> • PHE IEC traditional and non-traditional campaigns developed • PHE IEC campaigns implemented 	<ul style="list-style-type: none"> • PHE IEC campaigns implemented and scaled up
	IR 3: Increased policymakers commitment to integrated PHE Policies (funded by BALANCED-Philippines)	
	<ul style="list-style-type: none"> • 1 LGU Study Tour to successful BALANCED-Philippines sites <ul style="list-style-type: none"> - At least 5 PHE Action plans developed by LGUs 	<ul style="list-style-type: none"> • TA to LGUs to implement PHE action plans developed during study tour

Map 1: Network of MPA in Batangas Province



Map 2: Geographic Location of the Various Scale-Up Sites



Year 1 Workplan

D. Start-up Activities

During the first quarter of the BALANCED–Philippines project, start-up activities will include hiring project staff, working with USAID Philippines to refine site selection, and meeting with USAID Philippines strategic objective 3 (SO3) collaborating agencies (CAs), as well as other local partners in target sites—e.g., LGUs, rural health units (RHUs), health and conservation NGOs/civil society, community-based organizations (CBOs), and others to galvanize their interest in PHE approaches and develop partnerships with them to initiate project activities. BALANCED Philippines will also gather necessary baseline information (e.g., current level of contraceptive prevalence, number of FP acceptors, MPAs established and planned) that is essential to monitor progress during the duration of the project. As management, financial, and administrative systems are already in place as part of the global BALANCED Project, non-programmatic start-up needs will be minimal. That, as well as PFPI’s established track record in PHE in the Philippines, and the fact that some IEC materials and resources for capacity building in PHE are already developed and tested allow for a rapid start to BALANCED-Philippines programmatic activities as outlined in this workplan.

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

Total Year 1 IR 1 Activities

- 1.1 Conduct Training-of-Trainers on PHE CBD and adult PE systems
 - 1.2 Recruit and train non-clinical, non-pharmaceutical outlets, PO members, deputized wardens BHWs and other community members to serve as CBD outlets and promote family planning and PHE linkages
 - 1.3 Develop or strengthen the system for supplying FP methods to CBD outlets
 - 1.4 Strengthen LGU and RHU personnel knowledge and skills on FP/RH , PHE linkages and managing CBD systems
-

A whole complement of capacity building activities will be conducted in all the “*new*” project sites. A team of trainers per municipality will be trained, mentored and supervised to establish a PHE CBD system in each of the villages in their own municipalities. In “*maintenance*” sites, we will scale up reach and coverage by assessing, upgrading and realigning the existing CBD system to provide coverage for every barangay and by ensuring that FP commodities are easily accessible

During Year 1, BALANCED-Philippines will expand access to FP information and methods to poor marginalized women living around target bioregions and help increase their understanding of the benefits that a PHE approach can bring to people’s quality of life and to the marine environment. A focus will be on new sites with high population and high-unmet need, i.e. those with limited or no access to FP/RH information and services.

To achieve this goal, we will develop a network of CBD outlets and strengthen the RHU referral systems. We will build the capacity of the local governments involving the various line agencies, i.e., environment, RHU, and development planning CBOs and/or POs, such as fish wardens, women's groups, fisheries and aquatic resource management councils; and non-clinical/non-pharmaceutical outlets to deliver FP and PHE information, to make referrals, and to serve as the CBD outlets. We will also build the skills of RHU health personnel to effectively counsel women referred to them on FP/RH as well as serve as CBDs when private-sector CBD outlets are not possible in the target area. Further, we will work with private sources of FP supplies such as DKT Philippines, Alphamed and PRISM 2 to establish franchisee and other arrangements that can help ensure there is a continuous supply of contraceptive products to the CBDs and RHUs trained under the project.

In the “*new*” sites, BALANCED Philippines will work towards replicating the public-private PHE model (LGU-social marketing organization-CBD) developed and refined under the previous PPE project. For the “*maintenance*” sites we will upgrade the ongoing PHE model, which was more private sector centered (NGO-community-based distribution) towards becoming a public-private model of PHE service delivery. This modification will enable broader coverage and ensure sustainability of the CBD systems beyond the project.

i) 1.1 Conduct training of trainers on PHE CBD and adult peer education system

This activity will take place in the new sites only—as maintenance sites have already received these trainings under previous projects. *In the new sites*, a five-day training of trainers (TOT) will be conducted for a selected team of at least five LGU/nongovernmental organization (NGO) staff per targeted municipality. The training will build their knowledge and skills in the local relationships between population dynamics, family planning and reproductive health, fisheries and coastal environments and poverty and/or food security (hereafter referred to as “PHE linkages”), interpersonal communications (IPC) techniques on PHE linkages, and facilitation skills—all to strengthen their ability to train local PHE CBDs and PHE Adult PEs in selected sites and bioregions. All information provided about family planning and reproductive health will emphasize the importance of informed choice and volunteerism. These TOT participants will be responsible for developing a training plan and conducting the local workshops for PHE CBDs and adult PEs (see IR2) in their community. They will also regularly supervise them and monitor their activities. Building a cadre of LGU/NGO trainers and making them responsible for the training, supervision and monitoring will also ensure sustainability of efforts within the local institutions.

At least five participants per municipality from both the health and environment line agencies of the LGU will be selected for the TOT. If possible and present in the project site, NGOs will also be invited to become trainers. BALANCED-Philippines staff will work closely with LGUs and local leaders and other influential people to identify and select TOT participants.

PFPI will use the BALANCED Project’s PHE CBD and PE training and reference materials adapted from those developed by PFPI as part of its IPOPCORM project and updated under the BALANCED Project. These training modules and reference materials also promote informed

choice and voluntarism. The training will use a participatory, dual capacity building learning methodology that enables participants to acquire skills in PHE training delivery at the same time they acquire knowledge on PHE content (as noted above). All training materials and resources developed and/or identified for use will be cleared with USAID Philippines prior to use in training activities.

(1) Organizations Involved

- Collaborative Partners: LGU, RHUs, NGOs and relevant USAID SO3 CAs

(2) Key Expected Results

- At least 60 selected LGU/NGO staff trained as PHE CBD and adult PE training facilitators in 9 municipalities.
- PHE CBD training and reference materials made available to newly trained TOT participants

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

In new sites, those that have participated in the TOT outlined in activity 1.1 will develop a plan for training PHE CBDs. Subsequently, they will go out into the project sites and, in consultation with the local community leaders, RHU staff, and other stakeholders, identify and recruit potential CBDs. CBDs will be chosen from target groups such as non-clinical/non-pharmaceutical outlet owners, Barangay Health Workers (BHWs), representatives from POs engaged in fisheries and/or coastal protected area management, and cooperative members. In cases where these private sector or community groups are not available to act as CBDs or are not sufficient in number, RHU personnel or barangay health workers (BHWs) will also be trained as CBDs. Next, those identified and interested to become active volunteer CBDs of the project will be trained on the social marketing of FP products (pills and condoms) and the provision of information on PHE linkages, family planning, and relevant site-specific fisheries conservation. They will then serve as CBD outlets for pills and condoms, deliver information on FP PHE linkages to the community, and refer clients to the RHU health center for other RH/FP needs. In the new sites, the project will train at least one CBD for each village/barangay in each municipality covered by the project.

In the maintenance sites—where CBDs were recruited, trained, and deployed by local NGOs under previous PHE projects—BALANCED Philippines will assess the status of the CBDs to determine if they are still active, have adequate and reliable supplies of FP commodities and the capacity to serve a larger catchment area. The assessment, which will be performed in collaboration with RHU personnel, will also afford an opportunity for forging an alliance between the government and private-sector CBD agents. For active CBDs, the project will conduct refresher trainings that will upgrade their capacity to deliver quality FP/RH services, referral information and PHE education, and their understanding of the joint effort and collaborative relationship with the RHU.

In barangays where there are no active CBDs, the project will conduct new trainings for CBD candidates identified in consultation with local leaders. To the extent possible, PFPI will utilize

LGU personnel that were developed under previous projects as master trainers to facilitate the above trainings. Approximately one CBD per barangay will receive a refresher or new training in all 511 maintenance barangays.

(1) Organizations Involved

- Collaborative Partners: LGUs, POs, RHUs, non-clinical/non pharmaceutical outlet owners, POs, deputized wardens, local USAID SO3 CAs

(2) Key Expected Results

- At least 495 non clinical/non pharmaceutical outlet owners, POs, deputized wardens, etc. trained/updated to be PHE CBDs (246 newly trained CBDs in new sites and 249 CBDs in maintenance sites skills updated)
- PHE CBD training and reference materials made available to newly trained and existing and updated CBDs

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

The PHE CBD system needs a cost-recovery mechanism that makes FP supplies readily available and helps ensure their distribution is sustained over the long term. Toward this end *in the new sites*, BALANCED-Philippines will work with private sector FP suppliers such as the Global Development Alliance partner Alphamed, DKT Philippines, and PRISM 2 to establish franchisee and other arrangements that keep an uninterrupted supply of affordable, quality contraceptive products flowing to the RHUs and the CBDs that are trained under the project not just for the short term but after the project ends in 2012. This will be necessary if they are to maintain and sustain the CBD social marketing activities initiated by BALANCED-Philippines. In the *maintenance sites*, BALANCED Philippines will assess existing social marketing franchisee or other current arrangements and will work with FP suppliers to improve existing systems if necessary.

(1) Organizations Involved

- Collaborative Partners: RHU partners, DKT Philippines, Alphamed, PRISM 2 and/or other private sector sources of family planning supplies

(2) Key Expected Results

- Cost recovery supply system for community-based distribution of FP supplies established or strengthened in 19 new and maintenance municipalities
- Partnership with private sources of FP supplies established and CBDs linked to sources to ensure continuous FP supply

1.4 Strengthen LGU and Rural Health Unit (RHU) staff knowledge and skills on FP/RH, PHE linkages, and managing CBD systems

CBDs and community volunteers will be referring community members to public RHUs for FP methods and RH services not available at CBD outlets. However, most RHU personnel in rural areas of the country have not received FP/RH refresher training over the past 10 to 15 years, and many have misconceptions and out-of-date information about contraceptives and consequently misinform potential acceptors. *In new sites*, LGU and RHU personnel will be oriented on PHE

and provided with the current updates on FP/RH. *In maintenance sites*, BALANCED-Philippines will provide refresher training to RHU staff on the most up-to-date FP/RH information and methods, the reporting systems to link CBD-generated data to the RHU, and PHE linkages. This training will strengthen RHU capacity in new and maintenance sites to deliver quality FP and PHE information and services to both men and women clients referred by CBDs and peer educators—particularly persons seeking intrauterine devices, surgical methods of contraception, treatment for sexually transmitted diseases, and other RH/FP services. BALANCED-Philippines will also work closely with RHU staff to develop and/or strengthen the referral system for women who are seeking FP methods that are not available at the CBD outlets. LGU/RHUs will manage and supervise the CBDs, ensure they are resupplied with commodities, and collect and collate service statistics.

(3) Organizations Involved

Collaborative Partners: LGUs, RHUs, relevant USAID SO3 CAs

(4) Key Expected Results

- At least 158 RHU public health personnel trained/updated and providing information on PHE links and family planning (110 RHUs trained in new sites and 48 RHUs trained in maintenance sites);
- At least 15 RHUs serving as referral points for other FP/RH services by clients referred by project CBDs and PEs in both new and maintenance sites.

SUMMARY OF IR1 EXPECTED RESULTS AND INDICATORS

- At least 60 master trainers able to deliver RH/FP and PHE training to community volunteers (PHE CBDs and PEs) in new sites
- At least 495 CBDs in new and maintenance sites trained/updated, active /established and functional
- At least 158 RHU public health personnel trained/updated in new sites and maintenance sites
- At least 15 RHUs serving as referral points
- At least 15% of FP users obtaining their method from project-trained CBDs
- Community-based distribution system for continuous supply of FP methods to CBDs established in 19 municipalities
- LGUs with training and skills on PHE that demonstrate the commitment to assume management/supervision of CBDs and private sector commodity supply chain by the project end

INDICATOR	YR 1 TARGET
Number of couple years protection (USAID/PH/FP-PE1)	17,160
Number of people counseled in RH/FP as a result of USAID assistance (USAID/OH/PE-2)	22,000

INDICATOR	YR 1 TARGET
Number of New Users of Family Planning	9,900
Number of people trained in FP/RH with USG funds (USAID/OH + BALANCED 1.1) (New sites: CBD-246, TOT-60, RHU-110 = 416) (Maintenance sites: CBD-249, RHU-48 = 297)	713
Number of participants who received BALANCED training and/or mentoring that are now providing training or TA to others on PHE (BALANCED 1.2)	60
Percent of FP users of modern methods obtaining supplies and services from private sectors sources (CBDs, etc.)(USAID/PH/FP)	15%
Number of USG-assisted service delivery points providing FP services (BALANCED field indicator) (New sites: 246 CBDs (Maintenance sites: 249 CBDs)	495
Number of target organizations incorporating PHE tools, protocols, etc. into their work (BALANCED SO-1)	15 LGUs

F. IR 2: Increased community awareness and support of family planning and conservation as a means to improved health, food security and natural resources in key bioregions

Year 1 IR 2 Activities

2.1 Recruit, train and deploy PHE adult peer educators

2.2 Develop and implement PHE IEC strategy

To promote pro-health and pro-environment behaviors, we will also develop a network of PHE adult PEs chosen from among the communities' indigenous leaders and/or individuals living in key bioregions who might be members of CBOs or POs engaged in fisheries conservation and MPA management. This approach is based on past experience under previous PHE projects that demonstrate the effectiveness of community volunteers in promoting health-seeking and pro-environment behaviours.

The project will work within the Department of Health's (DOH) family planning communications framework linking PHE IEC strategies and activities geared toward a variety of audiences, with special emphasis on fishers and coastal resource users, both men and women, as the target groups. In developing the PHE IEC strategy, the project will consider existing IEC materials on integrated PHE, FP/RH, and CRM and fisheries in the Philippines to enrich the strategy. IEC materials developed and/or identified for use will be cleared with USAID Philippines prior to re-printing/printing and distribution. PFPI and partners may also gather additional data from other NGOs, SO3 CAs, collaborators (health and environment sector) and beneficiaries to refine appropriate messages and materials relevant for certain target areas.

The IEC strategy will primarily focus on IPC by the adult PEs, CBDs, and LGUs tailored to specific target communities such as fishers and policymakers to encourage positive behavior change. Whenever possible, BALANCED-Philippines will build upon existing LGU IEC

strategies to incorporate traditional (i.e. group discussions, display of posters, calendars, etc.) and non-traditional (e.g., street drama) IEC activities. Integrated IEC messages will emphasize the interrelationships between people and the marine environment to change individual behaviors around family planning and fisheries conservation.

iv) 2.1 Recruit, train, and deploy PHE Adult Peer Educators

To increase demand for family planning and promote pro-environment behaviour, BALANCED-Philippines will develop a network of volunteer PHE adult PEs (male and female) ages 15-49 years old in *both new and maintenance sites*. As was the process for identifying the CBDs, the TOT participants (from Activity 1.1) will develop a plan for training adult PEs and subsequently meet with local officials, indigenous leaders and other influential individuals, stakeholders and communities to identify peer educators. They will use a set of selection criteria/guidelines to identify and recruit representatives from POs engaged in fisheries and/or protected area management, deputized fish wardens, and other indigenous community leaders living in the selected key bioregions to serve as adult PEs. At least one adult per barangay will be chosen and trained as a PE. Additional PEs will be selected particularly in areas where there are existing MPAs and where organized fisher organizations/MPA management committees exist. These PEs will then receive a two-day training on PHE linkages, family planning and referral system—including the importance of informed choice and volunteerism—fisheries conservation, IPC, and on educating their peers on the benefits of family planning and protecting their coastal and fisheries resources.

Working together, the trained LGU/NGO staff, adult PEs and CBDs will use their newly gained information and experience to conduct peer outreach to educate fishers, women and men on modern FP methods. Each peer educator will be expected to conduct at least two new or repeat contacts with their peers per week.

Throughout, the BALANCED-Philippines team will assist supervise, monitor FP compliance and mentor the TOT participants in each municipality as they conduct the local adult PE training. They will also provide technical support and backstopping as they monitor and supervise the CBDs and adult PEs. Regular supervision, mentoring and monitoring will likewise be provided by the field-based coordinators who will be strategically placed in key target sites to provide monitor project activities and provide technical support as needed.

(1) Organizations Involved

- Collaborative partners: LGUs, RHUs, NGO, POs, relevant USAID SO3 CAs

(2) Key expected Results

- At least 155 in new and 249 in maintenance adult peer educators recruited and trained
- At least 400 adult peer educators actively providing community outreach and information on PHE links, FP/RH and referrals to CBDs and RHUs

v) 2.2 Develop and implement IEC strategy

A key strategy in implementing PHE projects is to develop strong, persuasive IEC messages and activities that build awareness of the linkages between family planning and fisheries and marine conservation and how cross sectoral linkages work in tandem to improve human health, food

security and the health of natural resources. For example, IPOPCORM developed targeted IEC messages that encouraged youth to become “stewards of their sexuality and the environment.” For communities, the preferred message was “IPOPCORM fits with our life style.”

During Year 1, BALANCED-Philippines will prepare a PHE IEC package framed within the DOH Family Planning framework. It will include communications objectives, integrated PHE messages, a package of PHE activities and IEC materials geared toward a variety of audiences but targeting fishers, other coastal resource users and policy makers in the BALANCED-Philippines project sites. BALANCED-Philippines will also draw on the best IEC materials and activities from past PHE activities and will collect, assess, reprint these materials for use in project activities, as well as develop a limited number of new materials based on the IEC strategy. The IEC materials and activities will seek to promote and monitor positive behavior change both in the health and fisheries/CRM areas and will be geared toward a variety of target communities, especially fishers and LGU policy makers.

In order to achieve impact in changing individual fisheries or CRM behaviors, it will be important to tailor these IEC materials and messages to the specific environmental behaviors that need to be changed, for example stopping all fishing in MPAs, reporting illegal fishermen and poachers, or participating in coastal clean-ups. BALANCED-Philippines will coordinate with the implementing partners of the follow-on FISH project to better understand and link key IEC messages. In the event of further funding, this activity could be strengthened and expanded to specifically target key fisheries and coastal management behaviors for each bioregion.

Normally the BALANCED Project would also gather qualitative information via Focus Group Discussions (FGDs) and other qualitative methods to inform IEC strategy and message development. However, we are restricted by the limited funds available under this project. As such, existing IEC materials developed under previous PHE project and existing FP/RH materials developed by the DOH will have to suffice for Yr 1 implementation. However, BALANCED Philippines would be able to conduct qualitative research among representatives of the main target groups in order to refine the IEC strategy and materials should USAID consider incremental resources during Yr 2.

(1) Organizations Involved

- Collaborative partners: LGUs, FISH follow on implementing partners, DOH, relevant USAID SO3 CAs

(2) Key Expected Results

- PHE IEC communications and monitoring plan
- Printed IEC materials
- Traditional and non-traditional IEC activities implemented in each municipality

SUMMARY OF IR2 EXPECTED RESULTS AND INDICATORS

- At least 400 adult peer educators trained in new and maintenance sites educating the community on the benefits of family planning and conservation measures and making referrals
- IEC materials and activities with integrated messages reprinted/developed and distributed

- At least 75,000 individuals having seen or heard specific FP/RH message(s)

INDICATOR	YR 1 TARGET
Number of people trained in FP/RH with USG funds (USAID/OH + BALANCED 1.1)	404
Number of people who have seen or heard a specific FP/RH message (USAID/OH)	75,000

G. IR 3: Increased policy makers commitment to FP/RH services and integrated PHE policies

Year 1 IR 3 Activities

3.1 Conduct PHE orientation and planning with LGUs, NGOs, POs and project stakeholders

3.2 Advocate and provide support for local Development/Environment/CRM/Fisheries plans and leverage resources for PHE into local policies and agenda

The BALANCED-Philippines project will capitalize on PFPI's PHE experience in the Philippines to galvanize acceptance and support for integrated approaches among local policymakers. Existing sites and areas with successful PHE programs will serve as learning sites for the local policymakers from the new BALANCED-Philippines project sites (where PHE integration will be implemented and/or scaled-up). While achieving policy reforms takes time and entails a process embroiled in the local governance process, the project will also build on existing collaboration and partnership with existing PHE leaders and champions. It will also build on the existing Memoranda of Agreement (MOA) with the League of Municipalities in the Philippines to gain support and a commitment to the PHE integrated approach. During Year 1 *in the new sites*, PFPI will conduct various group and one-on-one meetings, such as courtesy calls, project orientations to the local chief executives, LGU PHE orientations, planning, regular project briefing and updates, with local policy-makers and other local stakeholders to increase support and commitment for integrated PHE policy reforms and to advocate for the allocation of a local budget for family planning and for the conservation of important natural resources. Key activities during year one includes:

vi) 3.1 Conduct PHE orientation and planning with LGU, NGO, PO and project stakeholders

At the start of the BALANCED-Philippines, project staff will conduct courtesy calls to local chief executives and officials in target sites to introduce them to the project, galvanize their support and help establish a partnership and mutual collaboration. PHE orientation meetings will be conducted for municipal and barangay officials in *both new and maintenance sites*. This one-day PHE orientation for relevant stakeholders, such as those from the Executive and Legislative offices and line agencies, will be organized collaboratively with the local chief executive's office. Participants will include representatives from the LGUs (municipal and barangay leaders), executives of local NGOs and POs—such as representatives of fisher folk organizations—and management councils. The purpose of the PHE orientation meeting is to: a) stimulate dialogue about the PHE dynamics in the bioregions and the main threats to human and ecosystem health and wellbeing in their respective municipality; b) share information about ongoing programs/projects (NRM, conservation, FP, micro-credit etc. implemented by different stakeholders; c) identify gaps in services and resources; and d) mobilize participation across the sectors (public, private and commercial) and disciplines (family planning, environment, health, governance etc.) for a coordinated response to redress the FP unmet needs and achieve LGU fisheries objectives. This and other advocacy activities will be used to ensure LGU support for project activities and ensure sustainability by developing a municipal-specific integrated PHE action plan.

BALANCED Philippines will follow up on the progress of the site-specific action plans developed during these consultations for the duration of the project. Staff will also work to help ensure compliance and integration into local policies such as through MOAs, investment plans, development plans, etc

(1) Organizations Involved

- Collaborative partners: LGUs, NGOs, POs

(2) Key expected Results

- At least 15 site-specific PHE action plans (one per municipality new and maintenance)
- NGO, PO, LGU representatives participating in the PHE orientation

vii) 3.2 Advocate and provide support for local development environment, CRM and/or fisheries plans and leverage resources for PHE into local policies and agenda

Building on the support generated by various advocacy activities—including the one-on-one advocacy meetings—and on LGU involvement in the various community-based project activities, BALANCED-Philippines will also work towards integrating both fisheries/CRM and FP/RH activities into municipality’s planning processes as a development approach to food security and/or poverty alleviation. These efforts will initiate the process towards institutionalizing PHE and the long-term sustainability of the PHE approach and ensuring the gains achieved by the project are not lost. The process may entail a series of consultations and meetings to assess existing plan/s such as fisheries or coastal management plans and/or municipal medium term development plans to identify entry points for PHE interventions; and outline specific FP/RH or CRM activities and the corresponding budgetary implications for those activities.

During Year 1, the project will work with local development councils and support municipal planning activities to ensure the integration of PHE perspectives and to assist with identifying realistic budgets to implement PHE activities.

(1) Organizations Involved

- Collaborative partners: LGUs, Municipal Planning and Development Office, Environment/CRM Office, RHUs, Barangay Development Council, Municipal Development Council

(2) Key Expected Results

- At least 10 Local Development/Environment/CRM/Fisheries plans with PHE and FP/RH activities initiated
- Funds leveraged for PHE activities

SUMMARY OF IR3 EXPECTED RESULTS AND INDICATORS

- At least U\$15,000 leveraged from local sources (cash and in-kind)

- At least 10 local Development/Environment/CRM/Fisheries plans with PHE and FP/RH activities initiated

INDICATOR	YR 1 TARGET
Amount of in-country public and private financial resources leveraged by USG programs for FP/RH (USAID/OH + BALANCED)	At least US \$15,000
Number of local policy reforms/plans with integrated PHE	10

Project Management

PFPI and CRC-URI will assemble a team of experts with technical and management skills in integrating population, health and environment to address the needs and the challenges of the project. The team will be supported by consultants and institutions that are established in the field of PHE integration. The expertise offered by the staff and consultants include project management, monitoring and evaluation, training, behavior change communication, policy advocacy in health and environment both in the Philippines and internationally. All staff and consultants will be obligated to take USAID’s Family Planning E-Learning course (at <http://www.globalhealthlearning.org>). Those who took the training at the start of the BALANCED Project will repeat the course as refresher training.

The project manager will be based in Manila, but will travel extensively with the support of the deputy project manager. The BALANCED PHE Technical Assistance Lead (PTAL) will also provide technical and field support as needed. The team also includes an RH training specialist who will help train and provide hands-on support to the LGU and to the field coordinators in the key bioregions who will be assisting with implementation of BALANCED-Philippines PHE activities. The field coordinators will be responsible in helping plan, organize and coordinate technical and logistics support of the various training/workshops and meetings with LGUs, the community and other key stakeholders. They will also help monitor the compliance of site action plans, identify gaps and opportunities for scale-up and relevant support activities.

CRC-URI as the prime contractor will backstop the project and will conduct an end-of-Year 1 assessment to determine the success of the scale-up approach implemented by the BALANCED-Philippines project and, as such, inform and discuss with USAID any needed re-design or adjustments in Year 2 project activities, targets, etc. that would help ensure that the intended goals for the life-of the project have the greatest chance of being achieved. As well, there will be an end-of-project evaluation to: 1) encourage continued learning and adaptations to the PHE approach/model, 2) promote the sharing of best practices for PHE on-the-ground implementation, 3) and to document those factors that encourage or challenge long-term sustainability of the PHE approach and its benefits to the individuals, communities, and countries that adopt this integrated strategy.

Project implementation key staff includes:

Project Manager: Ronaldo Quintana, MD is a Senior Program Officer of PFPI. Dr. Quintana played an instrumental role in PFPI's PHE projects funded by the David and Lucile Packard Foundation and United Nations Population Fund. His expertise is in capacity building, health behavior change communications, integrated PHE, family planning, STI/HIV/AIDS prevention programs, and reproductive health. He provides PFPI Programs with leadership and technical support for reproductive health, integrated PHE and behavior change activities. Dr. Quintana collaborates with local partners to mobilize communities and develop practical, gender-sensitive approaches to involve key stakeholders in integrated PHE programs. He has over nine years of experience designing and implementing PHE approaches under the IPOPCORM Initiative, the expanded IPOPCORM Project and the Integrated FISH-RH project in the Philippines. He has completed certificate courses on disaster risk reduction and climate change from the World Bank Institute and Earthquakes Megacities, Inc. Before joining PFPI, he was a medical officer and program manager at ReachOut Foundation.

Deputy Project Manager: Francis Magbanua worked as a program officer in the IPOPCORM Project from 2004-2006. He is the proposed Deputy Project Manager for this initiative. His technical areas of expertise are capacity building, research, integrated CRM-FP/RH and participatory resource monitoring and assessment. Mr. Magbanua is an expert on integration given his role and experience with IPOPCORM. He had a Masters of Science in Environmental Science and recently completed his PhD studies in zoology at the University of Otago, Dunedin, New Zealand. His previous professional experiences includes serving as technical staff to the Office of the Secretary, Department of Agriculture; and as Technical Assistant for Monitoring & Evaluation with the World Bank and the Department of Finance's Community-based Resource Management Project (CBRMP). Mr. Magbanua brings important skills in conservation as well as government work experience that rounds out the project team.

Technical Support Lead: Joan L. Castro, MD is the Executive Vice-President of PFPI and PHE Technical Assistance Lead of the BALANCED Project, which is advocating for and expanding PHE approaches worldwide. Dr. Castro has 10 years of experience designing and implementing PHE approaches under the IPOPCORM Initiative (2001-2007), the expanded IPOPCORM Project (2005-2007), and the Integrated RH-FISH project (2004-2008) in the Philippines and the BALANCED Project (2008-present). Dr. Castro is a medical physician and a fellow of the International Family Planning Leadership Program in Santa Cruz, California, USA.

CRC Lead: Linda Bruce as BALANCED Project Director has overall responsibility under BALANCED for ensuring that the results expected of this Buy-in are achieved. Ms. Bruce has over 20 years experience in capacity building, behavior change communication, and designing, implementing and managing reproductive health and family planning programs in Asia, Africa and Latin America.

Additional technical support will be provided by the following individuals:

Leona D'Agnes has over 20 years of international health experience in Southeast Asia. Her technical expertise is in capacity building, family planning, food security, health policy, health behavior change communications, HIV/AIDS prevention, integrated population programming,

policy development, reproductive health, organizational development, program management, reproductive health, and training. Prior to PFPI, Ms. D'Agnes was Country Director for the Program for Appropriate Technology (PATH) Philippines and Indonesia offices. She established PATH's presence in the Philippines, developed and managed PATH's program in Indonesia and served as an advisor to the Population and Development Association of Thailand.

Enrique Hernandez, MD, MPH is a Senior Policy Consultant/Reproductive Health for PFPI. His technical expertise is in capacity building, health behavior change communications, HIV/AIDS prevention programs, HIV/AIDS care and support, multi-sectoral approaches to HIV/AIDS, operations research, reproductive health, STD programs, training, voluntary counseling and testing, and youth/adolescent health. He managed the Tetra-Tech/USAID supported Fisheries for Improved Sustainable Harvest – RH Component. He worked as an expert in training and communication for the HIV/AIDS Prevention Project at Brown University, USA and provided technical assistance, developed training curricula, and conducted training sessions for Philippine-based HIV/AIDS NGOs. Dr. Hernandez was the first program manager for the Philippines' Department of Health's National AIDS/STD Program.

Brian Crawford, PhD, is the Director of International Programs at CRC. He has over 25 years of experience working in coastal and fisheries management projects and managing large scale long-term USAID projects. Brian lived for four years in the Philippines during his previous Peace Corps experience there and has continued to be involved with CRC initiatives in that country and the region over the past decade. He has limited local language capability in Tagalog and Ilocano

Elin Torell, PhD, is the BALANCED Project's Monitoring, Evaluation and Learning Specialist. She has over 10 years experience designing and coordinating monitoring, evaluation, and learning initiatives in South East Asia, East Africa and Latin America. Through her work in East Africa, she has pioneered the integration of HIV/AIDS and population and gender issues into coastal and marine conservation initiatives. She brings extensive expertise in monitoring and evaluation, HIV/AIDS prevention, gender mainstreaming, and the design and implementation of USAID performance management plans.

General roles and Responsibilities of Project Personnel

Project Manager (100% FTE): Dr. Ronald Quintana

Reports to Joan Castro, PFPI Executive Vice President and BALANCED Project PHE Technical Assistance Lead

- Provides overall technical management, supervision and implementation of the project
- Responsible for coordination with USAID Philippines, LGUs, NGOs, DOH, Bureau of Fisheries and Aquatic Resources (BFAR), Department of Environment and Natural Resources (DENR) and other key stakeholders
- Monitors family planning compliance
- Ensures efficient project implementation and team synergy
- Supervises Deputy Project Manager
- Responsible for collecting PMP data for Philippines activities and reporting to CRC
- Prepares all project reports for USAID on the BALANCED-Philippines project (for this activity), subcontracts, scopes of work for consultants and other related documents

<ul style="list-style-type: none"> • Submits any revised training materials, narrative, and financial reports and other documents that go to USAID Philippines for CRC for review and approval
<p>Deputy Project Manager (50% Year 1): Francis Magbanua, PhD candidate <i>Reports to PM Ronald Quintana</i></p> <ul style="list-style-type: none"> • Supports the Project Manager in all aspects of technical and management aspects of the project implementation • Responsible for supervising selected technical consultants and monitoring of administrative staff
<p>RH Training Specialist (100%): Dr Luz Escubil, MD, MPH <i>Reports to PM Ronald Quintana</i></p> <ul style="list-style-type: none"> • Conducts training needs assessment and use the findings to draft a training plan. • Assesses knowledge and skills for LGU/RHU TOT trainings and CBD refresher courses or those not covered in BALANCED CBD/PE and other training materials. • Develops additional PHE training modules, manuals and materials, as needed. • Facilitates training and capacity building activities in the project sites. • Identifies other capacity building inputs that may be required to enable the partners to adequately support the trained PHE service providers in the field • Supervises and monitor training activities conducted in the field • Coordinates and conducts post-training monitoring and evaluation activities and assess transfer of learning. • Collects data on training activities and develop/maintain a training database in coordination with CRC
<p>4 Field Coordinators Officers (100% LOE): TBA <i>Reports to PM Ronald Quintana</i></p> <ul style="list-style-type: none"> • Based in selected bioregions, their main function is to coordinate activities working closely with the LCE and the respective lines of agencies to establish a functional CBD • Liaises with local partners and local stakeholders • Monitors all field activities with the LGU, identify opportunities ,gaps and assist in resolving issues • Coordinates all activities with local government with the executive and legislative to help the LGU identify and train CBDs and PEs and assist in all field activities • Helps facilitate local advocacy activities
<p>PHE Technical Assistance Lead (3.5% per year LOE): Dr. Joan Castro <i>Reports to Linda Bruce, BALANCED Project Director</i></p> <ul style="list-style-type: none"> • Provides overall strategic vision, technical leadership and oversight • Assists in the implementation of the Project • Supervises Project Manager and Deputy Project Manager • Provides financial oversight for management of buy-in budget • Liaises with USAID Philippines Mission for and on behalf of the BALANCED-Philippines regarding the technical and strategic directions of the project • Communicates with CRC on project activities, challenges, etc. • Serves as a member of the larger BALANCED cross-portfolio learning initiatives

International Travel

Elin Torell – Year 1 - to assist with project monitoring, assess lessons learned from Year one activities, help with Year 2 workplanning, and provide technical support on PMP reporting – Mission field support

Brian Crawford – Year 1 (end of) – to provide technical guidance on CRM integration and conduct Year 1 assessment – BALANCED Core funds

Linda Bruce – Year 2 – to monitor project activities, assess lessons learned and assist with project reports, etc. – BALANCED Core funds

Project Monitoring and Performance Monitoring Plan

The level of funding for this 22-month initiative is insufficient to support the development and implementation of a behavioral change monitoring (BMS) system in the project sites, which would entail primary data collection and the fielding of trained enumerators as well as expenditures for data management and analysis. Instead, we will conduct basic program monitoring in both the *new and maintenance sites utilizing* secondary information from various sources (e.g., the Municipal Health Office, Rural Health Units, Municipal Planning and Development Offices, etc.) to monitor the levels of family planning practice (e.g., contraceptive prevalence rate) and protected area management (number and size of MPAs under improved management) in the project sites. PFPI has already developed and applied this simplified program monitoring approach in the 22 municipalities where it implemented the PPE project, and the LGUs have continued to report data to PFPI from the system even through the project has been completed.

During the first month of BALANCED-Philippine and every six months thereafter, the field coordinators will gather information pertaining to the IR Indicators (see PMP table below) from LGUs (provincial, municipal and local), CBD agents and other sources. This data will provide some insights as to whether the anticipated outputs of the project have been achieved. The CYP data that will be gathered and collated from the RHUs will reveal trends in contraceptive use among WRA over the 22-month period of the project which, theoretically, could be attributed in part to the project's inputs. Although not ideal, this simple program monitoring method will, nonetheless, generate the information needed to meet more of the IR data requirements.

Intermediate Results	Indicator	Expected Year 1 Results
IR1: Improved access to RH/FP services in key mKBAs	1.1 Number of couple years protection (USAID/PH/FP-PE1)	17,160
	1.2 Number of people counseled in RH/FP as a result of USAID assistance (USAID/OH/PE-2)	22,000
	1.3 Number of New Users of Family Planning	9,900
	1.4 Number of people trained in RH/FP with USG funds	713
	1.5 Number of participants who received BALANCED training and/or mentoring that are now providing training or TA to others on PHE (BALANCED 1.2)	60
	1.6 Percent of FP users (new and current) of modern methods obtaining supplies and services from private sector sources (CBDs, etc) (Surrogate BALANCED field indicator)	15% ¹²

¹² % computed from baseline data in non clinic based service points (CBDs, etc.)

Intermediate Results	Indicator	Expected Year 1 Results
	1.7 Number of USG-assisted service delivery points providing FP services (BALANCED field indicator)	495
	1.8 Number of target organizations incorporating PHE tools, protocols, etc. into their work (BALANCED SO-1)	15
IR2: Increased community awareness of family planning and conservation as a means to improved health, food security and natural resources	2.1 Number of people who have seen or heard a specific RH/FP message (USAID/OH)	75,000
	2.2 Number of people trained in RH/FP with USG funds	404
IR 3: Increased LGU Policymakers commitment to RH/FP services and integrated PHE policies	3.1 Amount of in-country public and private financial resources leveraged by USG programs for RH/FP (USAID/OH + BALANCED)	At least US\$15,000
	3.2 Number of local policy reforms/plans with integrated PHE (BALANCED field indicator) initiated	10

Annex 1: Year 1 Timeline

Activities	Q1	Q2	Q3	Q4
Preparatory Phase				
Hiring, staff project orientation and planning , meetings with relevant CAs, private sector, etc.				
Field site visit: Meet with LGUs, etc introduce project,				
Prepare PHE IEC strategy				
Implementation Phase				
PHE Orientation/planning with municipal LGUs, NGOs, POs and project stakeholders				
Conduct Training of Trainers on PHE CBD and PE System				
Local partners recruit and train PHE Community Based Distributors				
Local partners recruit and train PHE Adult Peer Educators				
Train public health personnel on integrated PHE and CBD system				
Implement PHE IEC strategy to include development/ reproduction and distribution of PHE IEC materials and related materials ,LGU advocacy, etc				
Study tour/cross site visit				
Monitoring/Evaluation Phase				
Field project monitoring				
Prepare and submit project reports				
End of Year 1 Assessment				

Annex 2: Indicator Definitions

Indicators and definitions

1.1 Number of couple years protection: The estimated protection provided by family planning services during a one-year period, based upon the volume of all contraceptives provided to clients during that period, including sales of contraceptives and services for non-supply FP methods.

1.2 Number of people counseled in RH/FP as a result of USAID assistance: Number of individuals counseled on FP by trained clinic-based or itinerant health service providers, community workers/volunteers, and peer educators through USG-assisted programs. Note that “counseling visits” include one-on-one and small group discussions with 2-10 participants.

1.3 Number of new users of family planning: A user is a person using any modern contraceptive method for the first time in his or her life within the last year. Modern contraceptive methods include IUDs, the pill, injections, condoms, NFP, LAM, tubal ligation, and vasectomy.

1.4 Number of people trained in RH/FP with USG funds: Number of people (health professionals, primary health care workers, community health workers, volunteers, non-health personnel) trained in FP/RH (including in-service delivery, communication, policy and systems, research, etc.). For the BALANCED-Philippines Project, this indicator tracks the number of individuals (gender disaggregated) that are trained by the project. All trainings in RH/FP and PHE-know how (knowledge and skills on how to design, implement, and promote PHE) and state-of-the-art (SOTA) (the highest level and most successful) procedures, processes, techniques to implement and assess the impacts of PHE interventions conducted by BALANCED-Philippines will be reported under this indicator. It will measure participation in a broad range of training activities, including classroom trainings, workshops, and one-on-one mentoring.

1.5 Number of participants who received BALANCED-Philippines training and/or mentoring that are now providing training or TA to others on PHE implementation: This indicator measures the number of individuals that have been trained and/or mentored by BALANCED-Philippines that are now providing training or technical assistance on PHE to others. We expect that most of the individuals will provide training or TA within their own organizations. Disaggregated by gender.

1.6 Percent of FP users of modern methods obtaining supplies and services from private sectors sources (CBDs, etc.): This indicator measures the percentage of new and current FP users who are obtaining FP supplies from private sources such as CBDs, etc. It will be computed from baseline data in non-clinic based service points such as CBDs, etc.

1.7 Number of USG-assisted service delivery points providing FP services: A service delivery point must either offer a range of modern contraceptive methods. Modern contraceptive methods include IUDs, the pill, implants, injections, condoms, spermicides, diaphragms, tubal

ligation, and vasectomy. A facility must offer more than condoms to count. However, facilities that only offer condoms count if they provide referrals for other modern contraceptives.

1.8 Number of target organizations incorporating PHE tools, protocols, etc. into their work: This indicator measures evidence that target organizations and projects incorporate PHE tools, protocols, procedures, systems, methodologies, guides, curricula, indices, and/or key actionable findings etc. promoted by BALANCED-Philippines capacity building and initiatives. Target organizations include organizations new to PHE, donors, USAID Missions, local governments. Projects that have already started to implement PHE activities can also be counted if they incorporate BALANCED tools, protocols, etc to improve their PHE implementation. Disaggregated by type of tool and organization.

2.1 Number of people who have seen or heard a specific RH/FP message: Size of target population that has seen or heard a specific USG-supported FP/RH message in USG-assisted sites through mass media, group orientation/discussion/IEC activities with more than 10 participants and interpersonal communication.

3.1 Amount of in-country public and private financial resources leveraged by USG programs for RH/FP: Dollar value of monetary contributions, staff time, and in-kind contributions. It counts funding leveraged by our partners to implement activities that complements or directly contribute to BALANCED-Philippines. The leveraged funding can come from local sources, LGUs, NGOs, private sectors and other donor agencies which includes but is not limited to volunteer time (CBD, PE, etc.) computed as % per daily wage established per region to participate in project activities, office space, LGU time, allocation from investment funds, etc

3.2 Number of local policy reforms/plans with integrated PHE: An enabling policy refers to a policy that promotes integrated municipal and/or regional plans linking human and ecosystem health. This could be on a variety of topics or technical areas involving forests or marine ecosystems and different issues that enhance the quality of human life. Achieving this is a strong indication that elements in local government are supportive of PHE integration. For BALANCED-Philippines project, this includes plans with integrated PHE.