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

Year 3 Workplan

July 1, 2010 – June 30, 2011

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

Implemented by:

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

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Acronyms List

ADRA	Adventist Development and Relief Agency
AMREF	African Medical and Research Foundation
ANE	Asia and Near East
ARD	Associates for Rural Development
AOTR	Agreement Officer's Technical Representative
ARSH	Adolescent Sexual and Reproductive Health
AWF	Africa Wildlife Foundation
BALANCED	Building Actors and Leaders for Advancing Community Excellence in Development
BMS	Behavioral Monitoring Survey
CBD	Community Based Distributors
CBFP	Community-based family planning
CCP	Center for Communication Programs
CFUG	Community Forest User Groups
CI	Conservation International
CIESIN	Center for International Earth Science Information Network
COMACO	Community Markets for Conservation Coop
CRC	Coastal Resources Center
CRM	Coastal Resource Management
CT	Coral Triangle
CTI	Coral Triangle Initiative
CTSP	Coral Triangle Support Partnership
DKT	DKT International
DSW	German Foundation for World Population
ECSP	Environmental Change and Security Project
EH	Environmental Health
EU	European Union
EWNRA	Ethio Wetlands and Natural Resources Association
FHI	Family Health International
FISH	Linking Reproductive Health and Fisheries Management Project
FoN	Friends of the Nation
FP	Family Planning
GH	Global Health
GH/OPRH	Global Health/Office of Population and Reproductive Health
GTZ	German Technical Cooperation (Deutsche Gesellschaft für Technische Zusammenarbeit)
ICM	Integrated Coastal Management
ICFG	Integrated Coastal and Fisheries Governance
IEC	Information, Education and Communication

IQC	Indefinite Quantity Contract
IR	Intermediate Result
IPOPCORM	Integrated Population and Coastal Resources Management
JGI	Jane Goodall Institute
JHU	John Hopkins University
JSI	John Snow International
K4Health	Knowledge for Health
KKPFI	Kabang Kalikasan ng Pilipinas Foundation Inc
KM	Knowledge Management
LGU	Local Government Units
ME&L	Monitoring, Evaluation and Learning
MOH	Ministry of Health
MPA	Marine Protected Areas
NGO	Non-Governmental Organization
NOAA	National Oceanic and Atmospheric Association
NORAD	Norwegian Agency for Development
NRM	Natural Resources Management
OEE	Office of Environment and Energy
OPRH	Office of Population and Reproductive Health
PE	Peer Educator
PEPFAR	President's Emergency Plan for AIDS Relief
PFPI	PATH Foundation Philippines Inc.
PHE	Population, Health and Environment
PHN	Population, Health and Nutrition
PI	Program Integrator
PMP	Performance Monitoring Plan
P&P	Policy and Practice
PPE	Poverty, Population, Environment
PRB	Population Reference Bureau
PSI	Population Services International
PTAL	PHE Technical Assistance Lead
RH	Reproductive Health
RH/FP	Reproductive Health/Family Planning
RIMS	Resource Identification and Management Society Nepal
RDMA	Regional Development Mission for Asia
RHU	Rural Health Unit
SACCOS	Savings and Credit Cooperative
SID	Summit Institute for Development
SIDA	Swedish International Development Agency
SIGUE	Philippines PHE Network
SO	Strategic Objective

SANAPA	Saadani National Park
SOTA	State-Of-The-Art
SSE	South-to-South Exchange
STI	Sexually-transmitted infections
SUCCESS	Sustainable Coastal Communities and Ecosystems
TCMP	Tanzania Coastal Management Partnership
TNC	The Nature Conservancy
TNC-CTC	The Nature Conservancy's Coral Triangle Center
TOT	Training of Trainers
TRG	Training Resource Group
UNFPA	United Nations Population Fund
URI	University of Rhode Island
US	United States
USAID	United States Agency for International Development
USG	United States Government
WCS	Wildlife Conservation Society
WWC	Woodrow Wilson Center
WWF	World Wildlife Fund
YPE	Youth Peer Educator

Overview – Core Workplan Funding

ACTIVITIES YEAR 3: July 1, 2010 to June 30, 2011

IR1	<p>1.1 Build capacity of NGOs from Coral Triangle (CT) region on PHE program design</p> <p>1.2 Conduct training of trainers on PHE youth peer education in East Africa</p> <p>1.3 Build capacity of Wildlife Conservation Society staff on PHE Program Design</p> <p>1.4 Provide on-going support to BALANCED trainees and PHE practitioners</p> <p>1.5 Finalize IEC training materials and manual</p>	Point person: Linda Bruce	PRH	\$331,204
IR 2	<p>2.1 Identify, document and synthesize knowledge</p> <p>2.2 Organize existing and new knowledge for PHE website</p> <p>2.3 Share knowledge within the PHE and broader community</p>	Point person: Lesley Squillante	PRH	\$402,027
IR 3	<p>3.1 Scale-up PHE activities in Tanzania</p> <p>3.2 Scale-up PHE activities in the Philippines (Mission Buy-in)</p> <p>3.3 Provide seed grant and technical support to ENWRA in Ethiopia</p> <p>3.4 Provide seed grant and technical support to WCS in Zambia</p> <p>3.5 Provide seed grant and technical support to one conservation group</p> <p>3.6 Provide technical support to PHE activities in Ghana</p> <p>3.7 Implement recommendations from Glacial Melt Study</p> <p>3.8 Secure funds for PHE expansion, scale-up for at least two countries for Year 3</p>	Point Person: Joan Castro	PRH ¹ ANE Buy-In	\$672,452

¹ Excludes anticipated mission buy-in from Philippines

Budget Allocation by Intermediate Result

By Intermediate Result:	PRH ²	Cost Share	Buy-In	Total
IR 1. Capacity built for PHE implementation	\$ 331,204	\$ 27,129		\$358,333
IR 2. PHE knowledge and tools developed, synthesized, shared	402,027	86,871		\$488,898
IR 3. Results-oriented PHE field activities implemented in areas of high biodiversity	390,714	170,775	281,738	\$843,227
Total by IR	\$1,123,945	\$284,774	\$ 281,738	\$1,690,458

Budget Allocation by Object Class Category

By Object Class Category	PRH	Cost Share	Buy-In ³	Total
Personnel	227,877	66,413		294,290
Fringe	101,164	14,438		115,602
Consultants	24,211			24,211
Students	12,000			12,000
Other direct costs	50,657			50,657
Subcontracts	479,356	170,775		650,131
Travel	70,950			70,950
Total Direct Costs	966,215	251,626	281,738	1,499,579
Indirect	157,730	33,149		190,879
Total by Object Class Category	\$1,123,945	\$284,775	\$281,738	\$1,690,458

² Year 3 anticipated obligation of \$1,025,000 plus pipeline of \$98,945

³ ANE Glacial Melt buy-in. Scope of work to be determined

Project Summary

As part of its efforts to support and expand Population, Health, and Environment (PHE) programs worldwide, the USAID Bureau for Global Health (USAID/GH) awarded the new PHE technical leadership Cooperative Agreement, *Building Actors and Leaders for Advancing Community Excellence in Development (BALANCED)* to the Coastal Resources Center (CRC) at the University of Rhode Island (URI) on September 17, 2008. The BALANCED Project is supported by a highly qualified team of international partners that in addition to URI-CRC includes PATH Foundation Philippines, Inc. (PFPI) and Conservation International (CI). The five-year BALANCED Project has \$5 million in core funding from the USAID/GH Office of Population and Reproductive Health (OPRH) and a potential additional \$2.5 million budget for Mission Buy-ins.

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

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

During Year 3, the BALANCED Project will continue to expand USAID's global leadership in integrated PHE activities by building capacity to design, implement and assess effective PHE activities at a global level. To this end, the Project will provide on-going technical support to individuals and organizations who have participated in BALANCED capacity building events and to the partner nongovernmental organizations (NGOs), government agencies, and PHE Networks with whom we have worked since the beginning of the Project. We will also work with new conservation and health NGOs and government agencies in East Africa and the Coral Triangle (CT) area to implement conceptually linked and operationally coordinated PHE activities.

The BALANCED Project has completed its research on how end users of PHE information look for and use information on the topic, how this information is most effectively and efficiently shared, and through which type of media. Research findings helped frame recommendations for reorganizing the PHE website (now known as the PHE Toolkit), maintaining the BALANCED website, and developing new or adapting existing tools and systems to capture the "best of" PHE information and knowledge. During Year 3, BALANCED will build on Year 2 momentum and continue to enhance the PHE Toolkit site to ensure its greater use by and value to the PHE community of practice. Further, we plan to build upon the interest of both the broader Knowledge for Health (K4Health) website team and the BALANCED PHE Toolkit team to work with PHE networks in developing countries/regions to adjust the structure and content management format of their websites to more efficiently "speak to" and share information, tools, and content with the PHE Toolkit and vice versa. A journal article on our Year 2 research in the Philippines will be submitted to a peer reviewed journal and we will replicate the research in Nepal.

We will also conduct other research that includes documenting the different ways in which PHE is/can be implemented—to demonstrate the range of models available—and exploring linkages between PHE and issues such as gender equity, climate change impacts, and HIV/AIDS prevalence.

In Year 2, we advanced our efforts to expand the adoption of effective PHE interventions in the field. As a result, in Tanzania, BALANCED will scale-up PHE activities in Pangani District as part of CRC's new USAID-funded *Pwani* project, help integrate community-based family planning (CBFP) into the Wildlife Conservation Society (WCS) conservation sites in Iringa, and work with other NGOs and national parks to start up PHE in areas of high population density surrounding critical biodiversity-rich habitat. The Project is also expanding PHE activities in the CT region, in Ghana as part of CRC's Integrated Coastal and Fisheries Governance (ICFG) project, and in Zambia through the WCS Community Market and Coop (COMACO) project, which reaches more than 30,000 families living around Zambia's national parks in the Luangwa Valley.

With funding from two USAID Mission Buy-ins, one from the Asia Bureau and the other from USAID/Philippines, BALANCED will: 1) help implement recommendations from the USAID Asia and Near East Bureau (ANE) glacial melt study; and 2) scale-up PHE activities in the Philippines. The latter activity will seek to build local capacity in the Philippines to implement integrated approaches to address unmet need for family planning (FP), conservation and climate change adaptation measures. This effort will build on the successful Integrated Population and Coastal Resource Management (IPOPORM) and Population, Poverty and Environment (PPE) projects implemented by PFPI in biodiversity-rich sites characterized by high population density and/or growth. BALANCED will also expand implementation of PHE in the field by providing modest seed grants—one to WCS Zambia and another to a yet-to-be identified NGO working in the CT region.

IR 1: Capacity built for integrated PHE implementation

Total Year 3 IR 1 Activities	\$ 331,204
1.1 Build capacity of NGOs from the Coral Triangle Region on PHE Program Design	
1.2 Conduct Training of Trainers on PHE Youth Peer Education in East Africa	
1.3 Build capacity of Wildlife Conservation Society staff on PHE Program Design	
1.4 Provide on-going support to BALANCED trainees and PHE practitioners	
1.5 Finalize IEC training materials and manual	

During Year 3, the BALANCED Project will continue building the capacity of NGOs implementing PHE or new to PHE as well as provide support for PHE implementation in at least six focus countries where the BALANCED Project has entry points identified and initiated in Years 1 and 2—namely Tanzania, Kenya, Rwanda, Ethiopia, Zambia, and CT countries such as Indonesia and the Philippines.

In the CT region, BALANCED—in collaboration with USAID Philippines and other partners—will conduct a PHE Program Design workshop for organizations that are implementing conservation, family planning/health or rural development activities and who are interested in developing integrated approaches to PHE. The Project will also provide support to the Philippines PHE Network for their upcoming PHE conference in November 2010. As well, BALANCED will continue to identify and explore NGO training programs, curricula and other institutions that are implementing conservation work where PHE dimensions could be linked. This includes discussions with The Nature Conservancy (TNC) about incorporating PHE into one or more of the curricula offered by their Coral Triangle Center (CTC) and similar discussions with the National Oceanic and Atmospheric Administration (NOAA) regarding their coastal resources management (CRM) training in the region.

In East Africa, BALANCED will conduct a “training of trainers” (TOT) on youth peer education for organizations in Tanzania and East Africa that are already implementing PHE projects or activities and are interested in incorporating a youth component. BALANCED will adapt the IPOPCORM Youth Peer Education program for the East Africa context. The training will develop a core of trainers who will facilitate community-based youth peer educator (PE) trainings in their respective countries. The trainers, trained youth peer educators (YPEs) and project staff will also identify and develop PHE youth leaders who have the potential to influence other youth to become stewards of the environment and their sexual health.

BALANCED will provide continuing technical support and mentoring to WCS programs in Tanzania, Uganda and Zambia with the objective of strengthening the PHE elements of those programs. In Year 3, BALANCED will continue to explore the possibility of training other WCS offices in Africa that have *not* yet received BALANCED support on PHE Program Design—in an effort to help establish PHE within the WCS organization. The

activity aims to institutionalize PHE into another large conservation organization, such as CI and World Wildlife Fund have done.

BALANCED will continue to build the capacity of individuals from Asia and Africa who received training from the Project in Years 1 and 2. The post-learning support will include but is not limited to email support, hands-on mentoring, supervision, refresher training, and/or new innovative learning techniques. BALANCED will tap these trainees to serve as co-facilitators in Project-led capacity building events. In order to strengthen our efforts in the field, BALANCED will post a full-time East Africa consultant in Tanzania to more efficiently address the capacity building and post-training need for technical support.

In Year 3, BALANCED will finalize the *Developing Integrated PHE IEC Materials: A Job Aid for PHE Practitioners*. BALANCED uses this job aid to help participants develop integrated PHE messages and IEC materials for use in educating the community and mobilizing them to protect their natural resources, health and family. The Project will also draft and vet an accompanying training guide for distribution to other groups interested in learning how to develop integrated PHE messages and IEC materials.

1.1 Build capacity of NGOs from the Coral Triangle region on PHE program design

Delayed activity from Year 2	Activity leader: Joan Castro
Activity Start Date: July 1, 2010	Activity End Date: June 30, 2011

RATIONALE FOR ACTIVITY

The first workshop on *Designing and Implementing Integrated Approaches to Population, Health and Environment* (herein referred to as the PHE Program Design workshop) was conducted in Ethiopia in November 2008. It sought to build the capacity of managers and planners working on conservation and rural development projects to design effective PHE integrated projects. Participants learned about different PHE models, how to formulate and use a conceptual model and results chain for their project, select appropriate PHE indicators and develop a monitoring plan. The David and Lucile Packard Foundation and the BALANCED Project funded several of the NGOs who attended the workshop to use what they learned in the training to then integrate PHE approaches into their on-going conservation activities. Unfortunately, some workshop participants lacked such funding and were unable to implement what they had learned. This led BALANCED to decide that future PHE Program Design workshops should include only NGOs that have adequate funding to use what was learned and implement the action plans developed in the training.

The Philippines, a CT country, has a number of conservation and development organizations that may benefit from a PHE Program Design workshop. During Year 2, BALANCED provided planning, financial (\$1,000) and organizational support to the Philippines PHE Network (SIGUE) and worked with them to organize the Fourth PHE Conference. We also planned for a limited amount of funds (\$4,000) to be used for a one-day training on PHE Program Design for NGOs attending the PHE conference who were interested and able to implement this approach. The conference, originally scheduled for

May 2010, was postponed to November 2010 due to political unrest in the original venue site in Mindanao.

In Indonesia, another CT country, BALANCED initiated discussions with the United Nations Population Fund (UNFPA) about support to a PHE managers' training in collaboration with a local NGO, Summit Institute for Development (SID). Next, BALANCED linked SID to UNFPA Indonesia and prepared a concept paper with SID to request UNFPA support. Recently, UNFPA approved the SID application to be designated as an UNFPA-accredited NGO, which qualifies SID to apply for UNFPA funding support for training.

During Year 2, BALANCED staff held preliminary discussions with TNC about areas of mutual collaboration in the CT region. TNC operates the Coral Triangle Center (CTC)—a unique global learning center based in Bali, Indonesia that provides training on planning and management of marine protected areas (MPAs) as an effective management tool for marine biodiversity conservation and sustainable use of marine resources. Their training program builds the capacity of conservation practitioners in effective natural resources planning, management and evaluation of MPAs in Indonesia and beyond. In Year 2, one TNC staff person attended the BALANCED Project's South-to-South (SSE) PHE exchange in the Philippines. The activity further strengthened the links between BALANCED and the Bali Center, subsequently furthering discussions on areas of collaboration for the CT region.

Beside the limited amount of financial support to SIGUE, BALANCED was not able to carry out the above-mentioned capacity building activities during Year 2. As part of Year 3, BALANCED will continue to follow-up with SIQUE, UNFPA, SID, and TNC-CTC as well as act on other opportunities to build the interest and strengthen the capacity of existing and/or new NGOs—including conservation NGOs—in the Philippines and other CT countries to implement PHE activities.

ACTIVITY SUMMARY

Following up on potential opportunities identified during Year 2, BALANCED plans to conduct one or more PHE Program Design workshops for at least 15 senior-level staff members of organizations in the CT region that are implementing conservation, family planning/health or rural development activities and are new to but interested in developing integrated approaches to PHE and implementing these after the workshop. The training will use the *Designing and Implementing Integrated Approaches to PHE: Workshop for Planners and Managers—Training Guide* developed by CDM and pretested in Ethiopia, or an adapted version thereof. To this end, BALANCED will continue discussions with SIGUE, UNFPA, SID, TNC-CTC to build opportunities to train these organizations on PHE Program Design.

If the PHE conference moves ahead in Year 3, BALANCED will provide the Philippines PHE Network with a small amount (\$4,000 carry-over from Year 2) of financial support to hold a one-day workshop on PHE Program Design training. This workshop will help build the skills of NGOs that are attending the PHE conference and are either already

implementing or interested in implementing PHE interventions in the Philippines or CT countries. This one-day workshop will be conducted either as a pre- or post-conference activity for the selected participants. When funding from UNFPA becomes available, BALANCED will provide technical support to SID to conduct a PHE Program Design workshop for the Indonesian organization, which will include post-training support and mentoring for workshop participants. When TNC-CTC is ready for the PHE Program Design training-of-trainers, BALANCED will also provide the technical support for this activity. Carry-over Year 2 funds will fund these activities.

BALANCED staff, in coordination with the USAID PHE Technical Advisor, will further discussions with Coral Triangle Support Program (CTSP) Philippines organizations—World Wildlife Fund (WWF) and CI, the CTSP Secretariat, the USAID Regional Development Mission for Asia (RDMA), and the USAID Office of Environment and Energy (OEE)-funded Fisheries Improved for Sustainable Harvest (FISH) 2 project—on promoting PHE in the CT region, on CTSP support to NGOs to implement PHE approaches, and on identifying potential participants for the PHE Program Design workshop. Any capacity building efforts will aim to complement the USAID Philippines Mission Buy-in activities aimed at scaling-up of PHE activities in that country.

Specific activities will include:

- Conduct a workshop on *Designing and Implementing Integrated Approaches to PHE: Workshop for Planners and Managers* for NGOs from the Philippines and the CT region to implement/scale-up PHE there.
- Adapt a one-day PHE Program Design training for participants attending the PHE Conference (carry-over activity from Year 2).
- Pending UNFPA support to SID, conduct a *Designing and Implementing Integrated Approaches to PHE: Workshop for Planners and Managers* for SID and provide post-training support.

ORGANIZATIONS INVOLVED

Funded partners: PFPI, CRC, CI

Collaborative partners: SIGUE, USAID Philippines, USAID RDMA, CTSP, WWF/P, CI/P, SID, UNFPA

KEY OUTPUTS

- Adapted PHE Program Design Trainer's Guide/workshop agenda for NGO and/or TNC-CTC
- Reports on PHE Program Design workshops with participants' action plans
- CT NGO facilitators trained on how to use the PHE module

EXPECTED RESULTS AND INDICATORS

Expected results:

- Two CT NGOs incorporating PHE tools, protocols, etc. into their work (SO-1 and 1.3)
- Funds leveraged from UNFPA, TNC, and/or CTSP in support of PHE activities (SO-2)
- At least 15 representatives from NGOs implementing or new to PHE activities have strengthened skills in PHE Program Design (1.1)
- At least one MOU or letter of agreement with partner on capacity building activities (1.3)
- Post-training support provided to two PHE Program Design workshop participants, as appropriate (1.4)
- At least two CT NGOs training others on PHE Program Design (1.2)
- PHE Program Design curriculum adapted for TNC-CTC (2.1 and 3.1)

INDICATOR	YR 3 TARGET
SO-1: Number of target organizations incorporating PHE tools, protocols, etc. into their work (PRH 1.1)	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)	\$ leveraged from NGO
1.1. Number of individuals trained by BALANCED in PHE know-how and SOTA using 21 st century learning tools	15
1.2 Number of participants who received BALANCED training and/or mentoring that are now providing training or TA to others on PHE implementation	2
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	1
1.4 Number of technical support interventions provided by BALANCED to Missions and to organizations to implement PHE within their programs	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)	1
3.1 Number of PHE tools, methodologies, and actionable findings replicated in new countries and geographic areas (PRH 3.1)	1

1.2 Conduct training of trainers on PHE youth peer education in East Africa

New	Activity leader: Joan Castro
Activity Start: July 1, 2010	Activity End: March 31, 2011

RATIONALE FOR ACTIVITY

In Africa, 20 percent of the population is comprised of youth between the ages of 15 to 24 years. In this continent, young women are vulnerable to unintended pregnancies that can negatively affect their health, education, and life goals. Complications from pregnancy,

childbirth, and unsafe abortions are the major causes of morbidity and mortality for young women. In some East African countries, youth have among the world's highest rates of HIV infection. Key findings of a Guttmacher Institute study in selected countries in Africa⁴ indicated that teens are concerned about and want to protect themselves from both unplanned pregnancy and HIV, but that misinformation about sex and its consequences is common and many adolescents do not receive the education and services they need.

In Tanzania, over 40 percent of the population is under 14 years of age and the average age of marriage is under 18 years. When interviewed about the needs in their community, many elders in Pangani, where BALANCED is implementing integrated PHE activities, commented on the number of youth becoming pregnant before marriage. In fact, 40 percent of sexually active, adolescent unmarried women in Tanzania indicated they have an unmet need for family planning, as do 22 percent of young married women.⁵ The Ministry of Health (MOH) strongly supports adolescent sexual and reproductive health (ASRH) activities, while village theater groups—composed mostly of youth—deliver community health education on HIV/AIDS in BALANCED Project sites. The government and villagers alike recognize the need to educate youth on reproductive health and how to protect themselves from unwanted pregnancies and sexually transmitted infections (STIs), including HIV.

The youth bulge in Kenya and Uganda is similar to that of Tanzania—where youth comprise 42 and 49 percent respectively of those countries' overall population. In Uganda, approximately 35 to 40 percent of young unmarried women report being sexually active. In Kenya, 24 percent of women report they have unmet needs for information on reproductive health and family planning, while in Uganda this figure is 41 percent. In neither country is there available data on the unmet need of youth for this same information.

While reproductive health and family planning programs and projects are in place in most East African countries, strategies and activities usually focus only on preventing unwanted pregnancy and HIV/AIDS. They do not address the population and environment linkages and are not directed at hard-to-reach youth such as those living in areas around rural, and often remote, national parks and conservation sites.

As part of the IPOPCORM project in the Philippines, PFPI developed youth peer education activities that focused on strategies and interventions that encouraged youth to become “stewards of the environment and their sexuality”—a message that went beyond the traditional “Just say no!” statement. Integrated messages were delivered through a youth peer education system where YPEs were identified and trained to motivate other youth to become future champions of the environment and be responsible for their sexuality and their families in the future. The IPOPCORM operations research showed that this intervention was very effective in reaching youth—with youth showing a significant

⁴ *Protecting the Next Generation: Preventing HIV and Unintended Pregnancy Among Adolescents in Sub-Saharan Africa* report on adolescents' knowledge, attitudes and behaviors in Burkina Faso, Ghana, Malawi and Uganda.

⁵ Shane Kahn and Vinod Mishra. 2008. “Youth Reproductive and Sexual Health,” DHS Comparative Reports No 19. Calverton, MD: ICF Macro.

increase in the use of family planning practices and a significant decline in their sexual activity. This was particularly the case among males ages 15 to 24.

BALANCED plans to build on lessons learned and best practices from integrated PHE activities that both PFPI and other East Africa organizations have implemented to reach youth with correct information on reproductive health and on where they can access family planning services, and to develop these youth as young champions of their environment and their lives.

ACTIVITY SUMMARY

During Year 3, BALANCED will conduct a training-of-trainers (TOT) on youth peer education for integrated PHE projects for organizations that are working in Tanzania and other East Africa countries on integrated PHE activities and that are interested in incorporating a youth component into their programs. These include, but are not limited to, the Tanzanian Coastal Management Partnership (TCMP), Pangani district MOH, Saadani National Park (SANAPA), WCS, African Wildlife Foundation (AWF), Jane Goodall Institute (JGI), WWF, UZIKWASA, German Foundation for World Population (DSW), Family Health International (FHI) in Kenya and other interested organizations. Participants in the TOT will learn how to train PHE YPEs to become youth leaders who, in turn, will influence other youth to become stewards of the environment and their sexual health. The workshop will also include some capacity building on how to gather simple baseline data on youth family planning and environmental conservation practices and develop indicators on youth activities to help participants measure the impact on youth. Training materials from the IPOPCORM Youth Peer Education program and PHE Program Design training materials (on data collection) will be adapted for this East Africa training—to reflect the African context—for distribution to workshop participants. Select participants attending this workshop will be used to help co-facilitate the youth training in Ethiopia (see Activity 3.3) as one step in helping to build PHE training capacity in Africa. In addition, we expect the Tanzanian TOT participants will train YPEs in the Pangani District, where PHE activities are being replicated and/or scaled-up (see Activity 3.1).

Specific activities will include:

- Conduct TOT on youth peer education for NGOs working on integrated PHE activities in East Africa; workshop to take place in Dar es Salaam in October 2010.
- Adapt existing IPOPCORM PHE youth peer education training materials and aids for the African context as well as incorporate information on collecting data on youth reproductive health/family planning and environmental conservation behaviors.
- Incorporate youth indicators into BALANCED PMP and field indicators

ORGANIZATIONS INVOLVED

Funded partners: PFPI, CRC,

Collaborative partners: TCMP, Pangani District MOH, JGI, WCS, WWF, DSW

KEY OUTPUTS

- At least 15 facilitators trained on PHE youth peer education
- PHE Youth Peer Education training manual adapted for the African context.

EXPECTED RESULTS AND INDICATORS

Expected results:

- At least 15 NGO representatives trained on how to develop and train others on PHE youth peer education (1.1)
- At least 4 TOT participants conducting youth peer education training in their PHE project sites (1.2)
- PHE Youth Peer Education curriculum adapted for the African context. (2.1 & 3.1)

INDICATOR	YR 3 TARGET
1.1. Number of individuals trained by BALANCED in PHE know-how and SOTA using 21 st century learning tools	15
1.2 Number of participants who received BALANCED training and/or mentoring that are now providing training or TA to others on PHE implementation	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)	1
3.1 Number of PHE tools, methodologies, and actionable findings replicated in new countries and geographic areas	1

1.3 Build capacity of the Wildlife Conservation Society staff on PHE Program Design

New	Activity leader: Linda Bruce
Activity Start: July 1, 2010	Activity End: June 30, 2011

RATIONALE FOR ACTIVITY

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 the organization’s activities. While WCS blazed the trail for implementing PHE into their Madagascar program, its other country offices have not followed suit. However, during the Year 2 East Africa workshop on information, education and communication (IEC) materials development, the participant from the WCS/Tanzania program expressed a strong interest in incorporating family planning into his health and conservation activities in Iringa. After several discussions with WCS headquarters in New York and the WCS/Tanzania Country Director, BALANCED visited WCS/Tanzania in March 2009 to train staff on the what,

why, and how of PHE and helped them develop a conceptual framework and design for integrating community-based family planning into their health and conservation project.

During meetings with WCS headquarters staff, the BALANCED Project Director met with the WCS country representative in Zambia, who became convinced of the benefits of PHE and the potential value of BALANCED support to WCS/Zambia to integrate family planning into their very successful livelihoods activities. In Year 2, BALANCED started providing remote technical assistance to WCS Zambia by reviewing the FP contents of their “Better Life” book and by providing the latest guidance on FP norms and ways to improve the effectiveness of the FP and health messages contained in this educational material. Subsequently, BALANCED provided in-country technical assistance to identify areas where FP information and services could be integrated into the existing activities of the WCS-Community Markets for Conservation Co-op initiative in Zambia—a project that has access to 35,000 people living in the areas surrounding Zambia’s national parks in the Luangwa Valley.

A visit to WCS/Uganda in November 2009 also led to WCS interest in PHE and BALANCED support for its program in Uganda. As a result of this visit and subsequent discussions with both WCS/Uganda and WCS/Headquarters, BALANCED will give a one-day workshop on PHE for WCS Uganda staff and their partners in June 2010.

ACTIVITY SUMMARY

Building on the positive momentum from Year 2, BALANCED will continue to provide technical support and capacity building to WCS in Tanzania (see Activity 3.1), Zambia (see Activity 3.4), and possibly Uganda, depending on the outcome of the June 2010 training.

The possibility of training WCS offices in Africa on PHE program design was discussed briefly with WCS Tanzania and headquarters staff in Year 2. Once the WCS programs in Tanzania, Zambia and Uganda are well underway, BALANCED will advocate within WCS to hold a PHE Program Design Workshop—or similar training—exclusively for WCS staff. This workshop would be leveraged with WCS—i.e. BALANCED would provide technical assistance only. WCS staff who participated in previous BALANCED TOT workshops might help co-facilitate this workshop in order to institutionalize capacity building expertise within WCS. Such training workshops are part of a broader capacity building strategy aimed at increasing the chances that PHE approaches can be sustained within organizations and in-country long after projects, including BALANCED, are ended.

Specific activities will include:

- Conduct a PHE Program Design Workshop, or similar workshop for WCS country and headquarter staff with leveraged support from WCS

ORGANIZATIONS INVOLVED

Funded partners: CRC, PFPI

Collaborative partners: WCS

KEY OUTPUTS

- PHE Program Design Workshop curricula adapted for WCS
- WCS participant action plans

EXPECTED RESULTS AND INDICATORS

Expected results:

- WCS incorporating PHE tools, protocols, etc. into their work (SO-1)
- Leveraged funds from WCS for training activities (SO-2)
- At least 10 WCS staff from Africa trained on PHE Program Design (1.1)
- Technical support and follow-up provided to WCS on PHE Program Design (not CBD, IEC and/or M&E training in activities 3.1 and 3.4) (1.4)

INDICATOR	YR 3 TARGET
SO-1: Number of target organizations incorporating PHE tools, protocols, etc. into their work (PRH 1.1)	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)	Leveraged \$ from WCS
1.1. Number of individuals trained by BALANCED in PHE know-how and SOTA using 21 st century learning tools	10
1.4 Number of technical support interventions provided by BALANCED to Missions and to organizations to implement PHE within their programs	1 (WCS)

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

On-going	Activity leader: Joan Castro/East Africa Consultant
Activity Start: July 1, 2010	Activity End: June 30, 2011

RATIONALE FOR ACTIVITY

The BALANCED Project uses a capacity-building *continuum* approach composed of pre-, intra- and post-learning periods. Post-learning support is the most critical element of the BALANCED Project’s capacity building approach. It covers the time when formal teaching ends through the end of a person’s (or project’s) professional involvement. Findings from recent assessments of health-related training activities show that this period is traditionally neglected and yet is the most responsible for poor post-training results and service delivery outcomes. Continuous repetition, learning, mentoring, and regular support—especially in remote locations—are what help constitute “gold standard” PHE models.

During Year 2, BALANCED team members provided hands-on and/or virtual post-training support to participants who attended the 2008 and 2009 TOT workshops on PHE community-based distribution and peer education system, and the 2009 IEC workshop—based on the post-training needs and gaps identified by workshop participants and trainers and the expressed needs of the partners. This support included sending to all trainees of the community-based distribution TOT copies of the revised training manuals and training materials, and providing hands-on support to TCMP and the district MOH in Tanzania. We also provided hands-on mentoring to four NGO representatives who participated in the East Africa IEC workshop. As a result of this post-training support, two NGOs developed and printed IEC materials for their integrated activities and another NGO revised their materials, which will soon be pretested and printed. Post-mentoring support has also been provided to four South-to-South Exchange PHE (SSE-PHE) study tour participants from Kenya, Tanzania, Ghana and the Philippines. BALANCED has developed a post-training tracking tool that is updated periodically and will be included in BALANCED semi-annual technical reports to USAID.

ACTIVITY SUMMARY

Depending on their capacity building needs and action plans, NGOs, SSE-PHE participants, seed grant recipients and PHE Networks participating in BALANCED Project capacity building activities will continue to receive post-learning support in the form of email support, hands-on mentoring, supervision, refresher training, and /or new innovative learning techniques. BALANCED trainees will also be considered as co-facilitators for selected Year 3 capacity building activities.

At the beginning of Year 3, CRC and PFPI will complete our post-training plan, including a timeline for the provision of the post-training support, as we organize our post-training activities with past and future BALANCED trainees. Post training activities will be identified based on trainees/NGOs' action plans developed during a workshop, their current capacity, assessments of need made during hands-on TA visits or e-mail correspondence, stage of PHE project implementation and other factors. However, in some cases BALANCED may not be able to provide this support because of circumstances/factors beyond the control or manageable interests of the Project. See Appendix 1 – Sample Year 3 Post-training Plan.

As in Year two, post-training support is usually coupled with existing TA visits in the field (those listed in the Year 3 travel schedule in this workplan). Additionally, when the East Africa consultant is placed in Tanzania, s/he will have a plan for providing training and post-training support to BALANCED trainees in Tanzania and other countries (Zambia, Kenya/Uganda, Ghana, etc.), which is also included in the travel schedule. BALANCED will submit regular cable concurrences for travel, as was done for Year 2 for the approved trips (in the Year 3 travel schedule). If additional trips are needed, BALANCED will contact USAID AOTR and PHE Technical Advisor, but every effort will be made to stick to the travel schedule to the extent possible.

BALANCED has developed a post-training management matrix that describes each workshop, participant post-training needs, BALANCED post-training provided and

evidence of the positive impact of the training/TA. This matrix is updated quarterly (and sometimes monthly during heavy travel periods) and discussed with the team to better plan our TA to BALANCED trainees. This tracking instrument was implemented during the second half of Year 2 and will be a guiding document in Year 3. An updated post-training matrix will be included in BALANCED semi-annual reports.

In order to most effectively provide the support that is needed for East African trainees and NGOs to strengthen, build and scale-up PHE activities, BALANCED will place an East Africa consultant full time in Tanzania for a period of six to nine months (exact period of time is dependent on both needs in the region and funds available to support the position). The East Africa consultant will be based in TCMP's office in Bagomoyo and provide both capacity building, post-training mentoring and virtual technical support to former and new BALANCED trainees and SSE-PHE participants in Tanzania, Kenya, Ethiopia, Uganda, Zambia, Ghana and/or other African country as well as the Ethiopia PHE network. Travel for this East Africa consultant is included in the Year 3 workplan travel schedule. If additional travel is needed, the BALANCED Project Director will seek guidance from the USAID AOTR and PHE Technical Advisor.

In Asia, PFPI will continue to provide post-training mentoring and virtual technical support to study tour participants, seed grant recipient, NGOs who attend Year 3 training activities, and PHE Network members. Post-training support to BALANCED trainees is included in the Post-training plan mentioned above. Staff has included anticipated travel for this support in our Year 3 travel schedule. However, if additional travel is needed, the BALANCED Project Director will seek guidance from the USAID AOTR and PHE Technical Advisor.

Specific activities will include, but are not limited to, providing post-training support to:

- PHE Ethiopia members on PHE indicators, PHE program design refresher, PHE community-based and peer education system, youth peer education, IEC materials development, etc.
- PHE Network members and/or other organizations in the Philippines on PHE Program Design
- Assist WCS Tanzania in Iringa to develop and implement their PHE activities by integrating community-based family planning information into their conservation project
- Individuals who have been trained by BALANCED on PHE community-based and peer education systems, IEC materials development, and monitoring and evaluation, youth peer education, and other topics from the following countries:
 - Ethiopia: at least seven
 - Tanzania: at least eight
 - Kenya and Uganda: at least two
 - Ghana: at least three
 - Zambia: at least two
 - Philippines: at least 3
 - Indonesia: at least 1
 - Other: e.g., Uganda, Mozambique, Senegal—TBD

ORGANIZATIONS INVOLVED

Funded partners: CRC, PFPI

Collaborative partners: PHE Ethiopia, TCMP, PHE Fellow

KEY OUTPUTS

- Trip reports from BALANCED team members on technical support provided
- Post-training tracking tool updated quarterly
- Progress reports from seed grant recipients

EXPECTED RESULTS AND INDICATORS

Expected results:

- At least 26 trainees from 15 or more NGOs/institutions who participated in BALANCED capacity building events receiving post-training support (1.4)
- At least three BALANCED trainees providing technical assistance to others in-country (1.2)
- MOU developed with WCS to implement PHE in their geographical area (1.3)

INDICATOR	YR 3 TARGET
1.2 Number of participants who received BALANCED training and/or mentoring that are now providing training or TA to others on PHE implementation	3
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)	1
1.4 Number of technical interventions provided by BALANCED to Missions and organizations to implement PHE within their programs (PRH 3.2)	12

1.5 Finalize IEC training materials and manual

On-going	Activity leader: Linda Bruce
Activity Start: July 1, 2010	Activity End: June 30, 2011

RATIONALE FOR ACTIVITY

In August 2009, BALANCED conducted an East Africa regional workshop on how to develop integrated PHE messages and IEC materials for use in educating the community and mobilizing them to protect their natural resources, health and family. The workshop took place in Dar es Salaam, Tanzania and included representatives from TCMP, UZIKWASA, Pangani District Hospital, and NGOs from Tanzania, Kenya and Ethiopia that are implementing integrated health and conservation projects. The purpose of the

training was to teach participants how to conceptually link their biodiversity conservation, water and sanitation, HIV and FP activities; develop integrated PHE messages based on these linkages; and draft and field test IEC material that they will use to inform and sensitize community members on PHE links and interventions in their project areas.

In preparation for the IEC workshop, BALANCED developed a handout/job aid entitled *Developing Integrated PHE IEC Materials: a Job Aid for PHE Practitioners* on how to develop an IEC strategy and integrated IEC materials. A Trainer's Guide was also developed prior to and revised during the workshop to incorporate training activities that worked best for developing integrated PHE messages. These materials will be revised in June 2010 and used, in whole or in part, for a similar workshop in Kenya.

ACTIVITY SUMMARY

The Trainer's Guide includes tested methodologies (and instructions) for training on IEC materials development. However, the methodology on how to design integrated PHE messages still needs to be tested and revised to ensure that the trainer's instructions are easy to use by non-BALANCED staff. Based on the June 2010 workshop in Kenya, BALANCED staff will revise the Trainer's Guide and add more training aids such as examples of effective integrated PHE messages and illustrations of successful IEC materials from PHE projects worldwide—including those developed by BALANCED trainees. Ideally, the revised Trainer's Guide should be tested in one more workshop (other than Kenya) before it is finalized and made available to the public. BALANCED will look for opportunities to use all or parts of the Trainer's Guide in another IEC training or during post-training support activities in the CT region, Ghana, or through a PHE network (either through BALANCED or other PHE partner). If no opportunities exist to test the training guide in the field, BALANCED will seek other ways to assess its content and ease of use prior to finalizing and disseminating.

Currently, the IEC workshop handout *Developing Integrated PHE IEC Materials: a Job Aid for PHE Practitioners* is a simple job aid for participants who participated in the IEC workshop. However, BALANCED would like to transform it into a more comprehensive manual with numerous examples of how to craft integrated PHE messages and develop an IEC strategy and materials—providing examples of successful and less successful materials to reinforce the instructions. The new job aid/manual can be used as a handout for the IEC workshop or as a stand-alone document. Once the final draft of the document is completed, it will be tested with members of the target audience as well as vetted with members of the PHE community before it is finalized. It does not require pretesting in a workshop. (Note, field testing the manual does not require a workshop. It can be tested while staff is in the field.) It is anticipated that these materials will be completed by March 2011, or earlier, if possible.

When completed, hard copies of the IEC training guide and manual will be provided to members of the PHE community and the electronic copy made available on the BALANCED and PHE toolkit websites. As with all of our publications, we will follow our communication strategy for disseminating information about the new tools. While we will endeavor to assess how many downloads of these tools are made, we may not be able to

measure exactly how many people are using these tools or how they are used in projects outside BALANCED manageable interests.

ORGANIZATIONS INVOLVED

Funded partners: CRC, PFPI, CI

Collaborative partners: WWF, JGI, FHI, WCS, AWF

KEY OUTPUTS

- Revised Trainer’s Guide on Developing Integrated PHE messages and IEC Materials finalized and disseminated by June 2011
- Revised manual—*Developing Integrated PHE IEC Materials: A Manual for PHE Practitioners* finalized, tested and disseminated by June 2011

EXPECTED RESULTS AND INDICATORS

Expected results:

- Trainer’s Guide on Developing Integrated PHE Messages and IEC Materials (2.1)
- *Developing Integrated PHE IEC Materials: A Manual for PHE Practitioners* (2.1)

INDICATOR	YR 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 IR 2.1)	2

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

Total Year 3 IR 2 Activities:	\$ 402,027
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2.1 Identify, document, and synthesize knowledge

2.2 Organize existing and new knowledge for PHE website

2.3 Share knowledge within the PHE and broader community

In Year 2, BALANCED helped promote PHE by cultivating PHE champions, providing access to PHE resources and reaching out to new audiences. Our ability to do this was important as URI-CRC is a new partner for the USAID Office of Population and Reproductive Health.

The BALANCED Communication strategy describes the various mechanisms to communicate with stakeholders and audiences about PHE. This included the April 2010 launch of the BALANCED newsletter, the first issue of which focused on increasing awareness of the range of PHE approaches used by PHE practitioners. In collaboration with Johns Hopkins University's Center for Communication Programs (JHU/CCP), BALANCED also launched the PHE Toolkit, which with its strategic location on the USAID-supported Knowledge for Health (K4Health) project website will help attract new audiences to PHE.

In addition to our newsletter, Project website, PHE Toolkit, reports and conference presentations, BALANCED communicates through the PHE listserv, the PHE Policy & Practice (P&P) monthly meetings, Africa Biodiversity Collaborative Group listserv and ORC Macro's Family Planning listserv. We also established electronic mailing list[s] for communicating with our Advisory Committee and with SSE-PHE participants to engage them in the PHE community of practice, provide post-training support/mentoring and solicit PHE input and information.

BALANCED engages both existing partners and new actors. As such, we invited the Center for International Earth Science Information Network (CIESIN) to serve as a member of the PHE Toolkit content management team. It also invited and won the agreement of the Population Reference Bureau to join the BALANCED Advisory Committee. In Year 3, the team will develop a plan for more strategic communication and interaction with Committee members on important PHE topics. The Project used the SSE-PHE study tour as yet another opportunity for engaging in dialogue with additional organizations new or relatively new to PHE.

In Year 2, BALANCED staff refined, edited, and reformatted PHE capacity building tools for dissemination via the PHE Toolkit. These are: 1) a PHE CBD, PHE Provider and Adult Peer Education System: Train-the-Trainer Guide; 2) a Guide for Training PHE Adult Peer Educators Working on Integrated PHE Activities; 3) a Guide for Training PHE Community-based Distributors and PHE Providers Working on Integrated PHE Activities; and 4) a Reference Guide for PHE Community-based Distributors, PHE Providers and

PHE Adult Peer Educators. We also conducted field research in the Philippines on the benefits of PHE as a development approach (a Year 2 report describes the research hypotheses, design, data and analysis, findings and recommendations). Further, the Project also contributed to the final analysis of findings from previous operations research on the IPOPCORM project and aims to see this published in 2010 in a peer-reviewed journal.

In Year 3, BALANCED will continue to cultivate promising PHE champions to take on leadership roles, build the inventory of PHE interventions, identify and distribute promising state-of-the-art (SOTA) practices and tools, as well as reach out to new audiences. We will increase our efforts to reach field-based PHE communities of practice, and work with them to link existing PHE networks to global PHE resources such as the PHE Toolkit. As we work to have our research report on PHE in the Philippines accepted for publication in a peer-reviewed publication, we will continue our PHE benefits research in Nepal in Year 3—using the same research design model as in the Philippines.

2.1 Identify, document, and synthesize knowledge

On-going	Activity leader: Lesley Squillante
Activity Start Date: July 1, 2010	Activity End Date: June 30, 2011

RATIONALE FOR ACTIVITY

Since Year 1, BALANCED has been compiling the names and affiliations of actors in the global PHE community into a database and creating a visual “map” of the PHE community of practice (3,240 individuals, to date)—data that also tracks the potential reach of BALANCED and other PHE project activities. This data is gleaned from PHE events, literature searches and direct contacts and has the potential to help identify potential new PHE networks, which can be one avenue for expanding the reach and breadth of PHE.

Similarly, the Project has created a database of over 6,000 PHE documents and publications cited by the authors of materials collected in the PHE Toolkit (see Activity 2.2) that includes author and citation, which will be used to identify additional documents needed by the PHE community and to create bibliographies of peer reviewed literature on different facets of PHE experience.

A key tool for outreach and communications on PHE is the PHE Toolkit. The BALANCED Advisory Committee made several recommendations for strengthening this tool including increasing the number and range of documents on the Toolkit of interest to two key audiences underrepresented on the site—i.e., academics and field practitioners. BALANCED is working proactively to identify and access resources that fall into these categories.

An important mandate for BALANCED is to provide evidence of the benefits of integrated PHE approaches. Toward this end, BALANCED conducted benefits research in the Philippines, and we plan to conduct field-based research in other countries and settings that have implemented or are implementing PHE. The goal is to analyze and synthesize the

research findings and disseminate these to the existing PHE community as well as to PHE newcomers. Other research includes documenting the different ways in which PHE is/can be implemented—to demonstrate the range of models available—and exploring linkages between PHE and issues such as gender equity, climate change impacts, and HIV/AIDS.

ACTIVITY SUMMARY

In Year 3, BALANCED will continue to promote new and existing resources for PHE information; disseminate results of applied field research on PHE benefits, comparative models, and linkages with other pressing global issues; and engage (virtually and in-person) with the BALANCED Advisory Committee and other PHE partners and audiences on these and other topics that can help inform BALANCED knowledge management (KM) efforts.

The BALANCED team will continue working with the PHE toolkit content management team to identify quality resource materials and tools that meet the criteria established at the inception of the site. This includes identifying more materials and resources of relevance and of interest to the academic world. Further, we will survey individuals with experience in PHE to identify other resource materials that are not currently, but should be, hosted on the site and then as soon as possible secure those resources and upload them to the site. At the same time, we will ask PHE community members what they need and want for PHE tools and resources (job aids, manuals, guides, etc) and identify where there are gaps between those stated needs and what is uploaded on the Toolkit. Based on the survey results, BALANCED will develop recommendations on what is needed by the field and how new tools might be developed. (Please refer to Activity 2.2 for information on determining the PHE toolkit usage.)

We will also continue to identify ways to better engage with PHE practitioners from the field—ensuring their “voices” and “stories” and materials are made available both to and from the field and that PHE “champions” are highlighted. The BALANCED team will continue to use several tools to achieve this latter goal. We will draw upon information that exists in its PHE community of practice database, and we will use word-of-mouth and other communication tools (P&P meetings, the BALANCED newsletter and website, and the PHE Toolkit) to spread the word that BALANCED is proactively seeking information and stories from and linkages with the field.

BALANCED will continue to implement our PHE research agenda while exploring opportunities to work collaboratively with and leverage existing partners’ research initiatives. In Year 3, the Project team will submit its final report on findings from the Year 2 Philippines field research for consideration by a peer reviewed journal such as the Journal of Coastal Management/Marine Policy, the Conservation and Society journal, and the Human Organization journal. We will also conduct similar field research in Nepal, using as its unit of analysis the Community Forest User Groups (CFUGs) sites that were part of PHE activities implemented by the Resource Identification and Management

Society Nepal (RIMS-Nepal) and WWF⁶. The Nepal research will, in addition, include a climate change component that draws on the same variables used in the behavior monitoring survey (BMS) data collected on climate change impacts in the Philippines and Tanzania. This should allow for cross-country comparisons between these three countries to be published in a technical report that could be submitted for peer review in Year 4 (See Appendix 2 for draft summary of proposed research). The research design will be developed in consultation with the USAID PHE Technical Advisor.

In addition, the team will produce a technical report that compares the BMS research results from Tanzania with those from the Philippines. This report will highlight the differences and similarities in how PHE was implemented in the two different countries, showcase the different behaviors related to PHE outcomes, and will explain the role of PHE in meeting health and conservation needs. The goal is to further the understanding of how different country/regional socio-economic and environmental contexts influence perceptions about the linkages between population, health and the environment (and where possible, gendered differences in perceptions of and approaches to PHE, perceptions about population and climate change impacts, and the impacts of population on food security). As with all technical reports, BALANCED will seek USAID review and input prior to publication.

Responding to the need for better qualitative information on PHE models, the final Year 3 research activity will analyze different “PHE Concept Models and Implementation Strategies.” This cross-country comparison will synthesize the different conceptual models for PHE and the conditions for success of each. This desktop review, which will be discussed with USAID prior to implementation, will cover approximately six countries that have implemented PHE and where secondary data and documents are available—e.g., Nepal, Philippines, Madagascar, Ethiopia, Cambodia, and Ecuador. The focus will be on identifying the necessary enabling conditions for PHE in each of these countries; a comparison of the process for starting and the conceptual models that drove the PHE projects in each; and a study of the approaches used for scaling-up PHE—i.e., moving it from being a pilot or demonstration to it being a mainstreamed strategy for integrated development in areas of high biodiversity and social need.

The team will also work to more strategically engage the BALANCED Project Advisory Committee. Toward this end, we will develop a plan that identifies discrete opportunities for such engagement and the lead person responsible and timetable for pursuing each. While the plan will serve as a guide, it will not preclude more informal interactions with individual Committee members on specific issues that present themselves.

Specific activities will include:

- Continue identifying credible and value-adding resources and tools that can be disseminated via the PHE Toolkit.

⁶ RIMS worked with 82 CFUGs in 9 Village Development Councils (VDC) of Dhading District; WWF worked with 32 CFUGs in 3 VDCs in Bardia District—a total population of 114 sites from which to draw a random sample

- Identify gaps between the PHE community’s stated need for PHE tools and resources and those that are available on the PHE Toolkit (using Survey Monkey or similar electronic survey tool for the gaps analysis) and develop recommendations for addressing these gaps.
- When the K4Health team activates its system for assessing site/K4 Health Toolkit usage, analyze usage information for the PHE Toolkit.
- Complete analysis of BALANCED value added research conducted in the Philippine field and produce final report on results for peer-reviewed journal(s) (Sept to Nov 2010).
- Conduct field research in Nepal (following research design and methodology used in Year 2 Philippines benefits research)—with additional data collected on facets of climate change impacts on population, health, and the environment—and with a manuscript drafted for submission in Year 4 to a peer reviewed journal (scoping mission — October-November 2010; field research — January-March 2011; data analysis and report writing—April-June 2011).
- Produce cross-country comparison of PHE concept models and implementation strategies in preparation for publication in Year 4 in a peer-reviewed journal.
- Produce BALANCED technical report on cross-county comparison of BMS data collected in Year 1 in the Philippines and Tanzania for dissemination via BALANCED website and PHE Toolkit (potential candidate for Year 4 submission to peer-reviewed journal).
- Refine common indicators collected in BALANCED field sites to include both value-added and youth indicators and, based on first two years of implementation, assess how they can document field impacts and the benefits of PHE approaches (includes support to our seed grant recipient Ethio-Wetlands and Natural Resource Association (EWNRA) to pilot a scaled-down BMS. A list of our field indicators, including potential new ones included with the PMP table.
- Provide technical assistance to the development of field site PMPs for new field sites in the Philippines and Ghana.
- Identify, then craft and publish stories that highlight successful PHE projects and/or “champions” from the field.
- Produce four fact sheets on the benefits of PHE (carry over from Year 2).
- Request, as appropriate, input and recommendations from individual BALANCED Advisory Committee members for specific input on their areas of expertise; and also refine our plan for engaging in systematic communications with the Committee writ large.

ORGANIZATIONS INVOLVED

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

Collaborative partners: WWF, JSI, JGI, Population Reference Bureau (PRB). Woodrow Wilson Center (WWC), JHU K4Health Project, ARD, RIMS, the University of Colorado Boulder and University of California Santa Barbara—others may be included for the operations research on the benefits of PHE and will be dependent on the sites selected for that research

KEY OUTPUTS

- Philippines benefits research report submitted to peer review journal for publication
- Research methodology/design for Nepal PHE research
- Published report on cross-county comparison of Philippines and Tanzania BMS data
- Technical reports (i.e., on Nepal research; cross-country BMS comparison; comparison of PHE models and implementation strategies) published on BALANCED and K4Health websites
- Four fact sheets on PHE related topics, e.g., PHE and family planning, PHE and climate change, PHE and livelihood/poverty reduction, etc.
- Success stories and profiles of PHE champions from the field produced for use in the BALANCED newsletter, presented at P&P meetings, submitted to the USAID Frontlines Magazine, etc.
- Field site PMP indicators finalized and ready for use in *new* field sites

EXPECTED RESULTS AND INDICATORS

Expected Results:

- Three research reports with findings of benefits research, including but not limited to Philippines research manuscript, technical report on PHE models and a cross country comparison on the BMS (2.2) (only Philippines research report to be submitted for peer review in Year 3)
- Four stories from the field (2.2)

INDICATOR	YR 3 TARGET
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)	3

2.2 Organize existing and new knowledge for PHE website

On-going	Activity leader: Lesley Squillante
Activity Start Date: July 1, 2010	Activity End Date: June 30, 2011

RATIONALE FOR ACTIVITY

In Year 2, the BALANCED Project worked closely with the JHU CCP team to design and implement the PHE Toolkit that is housed on the K4Health website. In preparing the Toolkit for launch, BALANCED staff collaborated with PRB, WWF, Wilson Center and other NGO representatives to identify key PHE resources for the Toolkit; prepare the first tranche of these PHE materials (119 documents) for the Toolkit (requirement of the K4Health website structure/system as designed); and then uploaded this material to the site.

In December 2009, BALANCED launched the PHE Toolkit at a PHE Policy & Practice meeting in Washington, DC attended by more than 22 PHE partners, collaborating agencies, K4Health Project Director and other key staff and USAID representatives, including the BALANCED Agreements Officer Technical Representative (AOTR), Liz Schoenecker and K4Health AOTR Madeleine Short.

Since the launch, the Project has continued to develop and refine the PHE inventory of documents (see activity 2.1), focusing on recommendations for enhancement made by Advisory Committee members at the September 2009 meeting. The team revised some document categories, reorganized selected tabs and subtabs—in response to feedback from PHE partners—and began to implement the discussion section of the Toolkit in order to garner recommendations for additional content. There was close collaboration with JHU to identify quirks in the functionality of the Toolkit and problem-solve several issues that resulted in improvements. From the launch to May 2010, the team added another 38 documents or resources to the Toolkit.

The BALANCED Project website will play a supporting role in raising awareness of the PHE approaches and tools and sharing information on the BALANCED Project and its accomplishments. The site will continue providing access to tools and documents developed by BALANCED and will provide important links to and from the PHE Toolkit. BALANCED staff continues to periodically add news items and BALANCED materials to the website.

ACTIVITY SUMMARY

The PHE Toolkit will continue to serve as the main source of information for PHE information. In the beginning of Year 3, BALANCED will conduct an assessment of the PHE toolkit and its usage by members of the PHE community. Based on this assessment, and discussions with the content management team, BALANCED will enhance the site to ensure greater use by and value to the PHE community of practice.

Further, we will build upon the interest of both BALANCED and the broader K4Health website team to work with PHE networks in developing countries/regions to adjust the structure and content management format of their websites to more efficiently “speak to” and share information, tools, and content with the PHE Toolkit and vice versa. To this end, BALANCED proposes working closely with the PHE Ethiopia Network and USAID PHE Fellow to help them improve the content and functionality of the PHE Network website and simultaneously link the website to the PHE toolkit. The PHE Ethiopia website would be coded in such a manner that documents loaded onto the site would automatically be listed on the PHE Toolkit site, thus linking the field to the PHE toolkit and toolkit users to the field. This would be a pilot activity for both the BALANCED and JHU/K4Health staff who are looking for ways to link more closely with the field. The results of this activity have the potential to transform how JHU/K4Health develops linkages with field sites, which other toolkits authors could benefit from. An illustrative scope of work for this activity is included as Appendix 3—a final scope of work would be developed in close collaboration with Negash Teklu, Executive Director of the PHE Ethiopia Network, Annie

Wallace, USAID PHE Fellow and the USAID PHE Technical Advisor prior to implementing the activity.

Specific activities will include:

- Assess usage of the PHE Toolkit—who is using it, and what resources are they most frequently accessing, etc. using data tracked and reported by the K4Health web system (this task is dependent on the K4Health team finalizing the feature/tool for collecting and reporting these statistics).
- Conduct survey of PHE community as another tool to assess usage, user satisfaction, and/or user ideas for improving the site's access and utility (via informal interviews with select members of the PHE community and/or Survey Monkey or other easy-to-use survey instrument).
- Summarize the findings from these assessments and surveys and make recommendations for improving usage in a brief report to USAID.
- Work with JHU/K4Health staff to make continued improvements to the features and functionality of the PHE Toolkit site, including establishing a PHE Gateway that would allow NGOs and others organizations engaged in PHE work to be directly indexed by the K4Health website for more rapid access to their activities and publications.
- Continue to collaborate with the content management team to identify and upload new and selected documents (vetted according to criteria) to the K4Health site (may need to be conducted in two phases—i.e., first uploaded to a private “workspace” and then to the public site).
- Encourage uploads to the site from the PHE community and practitioners in the field.
- Use blogs, listservs and social media to promote the Toolkit and increase its use by practitioners, researchers, and policymakers (BALANCED will collaborate with JHU/CCP on any such promotion). Promote PHE information and tools on the revised PHE Toolkit website and encourage uploads from the PHE community and practitioners in the field.
- Use information from the K4Health assessment tool (if finalized) and from the electronic survey to reach out to PHE partners at the country levels and continue to promote the Toolkit to the field in order to conquer the “digital divide.”
- In consultation with PHE Ethiopia Executive Director, USAID PHE Fellow and USAID PHE Technical Advisor, provide technical assistance to PHE Ethiopia to adjust their website's architecture to accommodate direct interactivity with the PHE Toolkit. This entails developing the model for and constructing the first pilot of a reconfigured field-based website that could “talk to” the PHE Toolkit (providing the model for a similar effort with other PHE Network websites in future Project years).
- Produce a written guide on the process for conducting the above task and the resultant structure of the website and its content for use by other Toolkit teams that might wish to follow suit.
- Maintain the BALANCED website.

ORGANIZATIONS INVOLVED

Funded partners: CRC, CI and PFPI

Collaborative partners: K4Health Project, PHE partners, e.g., WWF, JGI, WWC, PHE Ethiopia, CIESIN and regional and country networks for consultation on the site contents, accessibility, etc.

KEY OUTPUTS

- PHE Toolkit functioning with additional enhancements made based on usage assessment
- Enhanced content and increased inventory of PHE documents and resources
- PHE Ethiopia document library linked to K4Health PHE toolkit and functioning and accessible
- Written guidance document on how to link a website from the field with the PHE Toolkit
- BALANCED Project web page maintained and expanded

EXPECTED RESULTS AND INDICATORS

Expected results:

- Enhanced PHE toolkit (i.e., increased numbers of resources uploaded and increased audience usage)
- BALANCED Project website maintained and expanded

2.3 Share knowledge within the PHE and broader community

On-going	Activity leader: Janet Edmond
Activity Start Date: July 1, 2010	Activity End Date: June 30, 2011

RATIONALE FOR ACTIVITY

Throughout Year 2, BALANCED staff used its Communications Strategy to guide the Project's dissemination efforts. The team developed and targeted key PHE messages both to select audiences in the existing PHE community of practice and potential new PHE adopters and funders. The team uses a variety of vehicles to communicate—the PHE Toolkit, the BALANCED website, the BALANCED electronic newsletter, listservs, presentations at selected international conferences, and one-on-one meetings with selected donors. Messages draw from, but are not limited to, news, information, learning, etc. being generated as part of the BALANCED Project's capacity building and field support activities.

The Project's electronic newsletter—geared for PHE practitioners in the field—has received positive reviews and will continue to promote PHE; share news, resources, and tools of interest to the PHE community of practice; and highlight field-based PHE success

stories, case studies, and “champions”. During Year 3 we plan to develop and disseminate two issues of the newsletter.

ACTIVITY SUMMARY

The goal of the BALANCED Communications Strategy is two-fold. First is to raise awareness of and support for PHE writ large. Second is to promote the BALANCED Project’s learning, tools and stories from the field. In Year 3, the team will strengthen its outreach to the current PHE community as well as expand the strategy to target new strategic partners and audiences—including donors such as MacArthur Foundation and other European donors, such as the European Union (EU), Swedish International Development Agency (SIDA), Norwegian Agency for Development (NORAD), who are funding PHE in Africa and Asia. The team will accelerate its promotion of the PHE Toolkit and resources—in collaboration with the K4Health communications and marketing staff in order to leverage human and financial resources needed for the task. This is part of a broader campaign to encourage the PHE community of practice to become *active* participants in suggesting and uploading resources for the Toolkit and to engage in web-based dialogues on emerging PHE topics. BALANCED will continue to leverage resources from its PHE partners to promote PHE champions and field experiences, building on its success in Year 2 of presenting a panel on PHE at the Uganda Family Planning Conference and collaborating with the WWC’s Environmental Change and Security Program (ECSP) to post on their blog a first-person account from one of the SSE-PHE exchange participants. In Year 3, the team seeks similar outreach opportunities to promote PHE and the BALANCED Project using partner outlets (as well as its own) and then post these news/outreach pieces on the PHE Toolkit (linked to the original posting website).

BALANCED electronic newsletters are scheduled for October 2010 and April 2011. The first issue of Year 3 will focus on climate change and linkages to and impacts on P-H-E and include one or more mini-profiles of a PHE champion from the field. The topic for the second issue will be vetted with PHE partners to encourage the inclusion of new themes not covered by WWC, PRB, etc. Where possible, external theme editors will be brought in to help guide overall development of the theme issue and work closely with the contributing authors. BALANCED will also explore different formats for informing readers on PHE, such as a question and answer section, to keep the newsletter as engaging and participatory as possible. In tandem, the BALANCED team works on mini-profiles of PHE champions and ensures articles include significant “voices”, opinions, and stories from the field. Statistics are compiled monthly on the number of visitors that download the newsletter issues and individual articles and these are retained for twelve months at a time.

Specific activities will include:

- Continue to maintain regular dialogue with the PHE community to increase access to and promote PHE tools, knowledge, etc. for PHE practitioners (includes PHE program designers/planners) through targeted email and listserv announcements around the PHE and BALANCED websites.
- Disseminate two semi-annual electronic newsletters—with a focus on filling a niche not already filled by the Wilson Center, PRB, etc.

- Continue outreach to implementing and funding agencies to increase awareness of PHE approaches and success stories by developing and disseminating PHE fact sheets.
- Continue to engage in dialogue with PHE champions and promote them as spokespersons and technical resources (e.g. through the PHE Toolkit, listservs, word-of-mouth networking, the BALANCED newsletter, etc.)
- Present research results from the Philippines benefits research study at venues such as the Woodrow Wilson Center, USAID Biodiversity team brownbag seminar, and/or Population Environment Research Network (PERN) forum, per consultation with USAID.

ORGANIZATIONS INVOLVED

Funded partners: CI, CRC and PFPI

Collaborative partners: WWC, PHE Policy & Practice Group and other organizations and networks with active listservs; WWF, PRB, PERN, WCS, AWF, EWNRA, Engender Health and PHE networks and other organizations interested in PHE, K4Health Project

KEY OUTPUTS

- PHE and BALANCED related news and information feeds to selected outlets
- Two electronic newsletters published and disseminated

INDICATORS AND EXPECTED RESULTS

Expected Results:

- PHE news and outreach-specific content disseminated via PHE Toolkit and BALANCED Project websites⁷
- Two electronic newsletters developed and disseminated (2.2)
- At least four new documents and/or tools uploaded to PHE website by PHE community and practitioners (2.2)

INDICATOR	YR 3 TARGET
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)	6

⁷ We are reluctant to provide an expected result and indicators on this. The Toolkit teams have told JHU that they/we need/want this. But, K4Health team is yet to develop a system that can capture this info. So it is out of our control; if the K4H Toolkit system eventually collects and tracks this data, then we could provide these indicators.

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

Total Year 3 IR 3 Activities	\$ 672,452⁸
3.1 Scale-up PHE activities in Tanzania	
3.2 Scale-up PHE in the Philippines (Mission Buy-in)	
3.3 Provide seed grant and technical support to EWNRA in Ethiopia	
3.4 Provide seed grant and technical support to WCS Zambia	
3.5 Provide seed grant and technical support to one conservation organization	
3.6 Provide technical support to PHE activities in Ghana	
3.7 Implement recommendations from Glacial Melt study	
3.8 Secure funding for PHE expansion/scale-up for at least two countries for Year 3	

Building on the gains achieved in Years 1 and 2, the BALANCED Project continues to facilitate the scale-up of results-oriented PHE field-based activities in Tanzania, the Philippines and Ethiopia. During Year 2, BALANCED also generated interest and support for PHE integration in other focus countries in Africa—particularly in Ghana with CRC’s ICFG project and in Zambia with the WCS program. BALANCED built this interest through capacity building activities, in-country technical assistance, participation of representatives from these countries/projects in the SSE-PHE study tour and through continued mentoring, dialogue and advocacy. In Year 2, USAID/Philippines expressed interest in a Mission Buy-in to scale-up PHE in the Philippines through the BALANCED mechanism. Similarly, BALANCED initiated PHE support to CT countries and made progress in implementing specific PHE actions.

In Year 3, BALANCED will continue to support implementation and scale-up of PHE activities in Tanzania, particularly in the Pangani District. We will also provide follow-up support to BALANCED seed grant recipient, EWNRA, in Ethiopia to strengthen the family planning component of its PHE approach in the Wichi and Agelo Shenkora wetland-watershed region. For Ghana, BALANCED will identify and implement PHE capacity building, policy and field implementation activities as an added benefit to the ICFG project goal of addressing declining fish stocks and facilitating reforms in fisheries policy in Western Ghana. A new seed grant will be given to WCS/Zambia to build in-country/organizational capacity to implement community-based integrated PHE activities in their COMACO livelihood project. This support is in response to WCS/Zambia’s interest in and recognition of the benefits of PHE integration to the welfare of people in the communities.

As part of our support to the CT region, BALANCED will continue to build on activities that were started in Years 1 and 2. We will provide a CT-based NGO with a seed

⁸ Includes \$281,738 of ANE Buy-in

grant/technical support that has synergy with the NGO's existing program/activities. A potential candidate is WWF/KKPFI (Kabang Kalikasan ng Pilipinas Foundation Inc.) for its PHE monitoring and training activities. If the seed grant/support does not go to WWF/KKPFI, BALANCED will work with the USAID RDMA and CTSP to identify other NGO candidates from the CT countries. BALANCED will also develop a plan for implementing recommendations from the USAID Asia and the Near East (ANE) Bureau report on glacial melting in the region.

In addition to strengthening the capacity of NGOs in CT countries to implement sound PHE interventions, BALANCED will help to develop policies and allocate resources that support PHE efforts at the local level and that promote their sustainability over time.

3.1 Scale-up PHE activities in Tanzania

On-going	Activity leader: Elin Torell & Juma Dyegula
Activity Start: July 1, 2010	Activity End: June 30, 2011

RATIONALE FOR ACTIVITY

CRC, through TCMP, is integrating health and environment activities in villages surrounding the Saadani National Park through funding from the BALANCED Project and USAID/Tanzania earmarks for biodiversity conservation and the U.S. President's Emergency Plan for AIDS Relief (PEPFAR). TCMP is assisting SANAPA with the design and future implementation of a marine area within the park, and tracking the movements of elephants for spatial planning purposes. Outside the park, TCMP is promoting conservation of sea turtles, encouraging the use of fuel efficient stoves with chimneys to reduce pressure on forest resources and to improve respiratory health, and is facilitating the development of sustainable livelihoods and community-led savings and credit associations. At the same time, it is helping improve access to FP services and is implementing HIV/AIDS prevention activities. The same staff and partners working on the USAID/Tanzania activities in SANAPA are implementing BALANCED activities to help ensure PHE integration in the target villages.

During Year 2, BALANCED trained TCMP staff and partners on how to develop integrated PHE messages and draft and test IEC materials. After the IEC workshop, the BALANCED team helped TCMP prepare an IEC distribution plan, hone its integrated messages, and finalize IEC posters and leaflets, which were distributed in the Pangani District and to PHE partners in Tanzania. A BALANCED Project fact sheet was also translated to Swahili and distributed. A report on the BMS report conducted in Tanzania in Year 1 has been drafted and provides information on attitudes and behaviors related to indicators for reproductive health, poverty, food security, climate change awareness, HIV/AIDS-related behaviors, and coastal resources management. It also explores people's perceptions on how these various issues are linked with each other.

In Year 2, BALANCED trained PHE providers, who promote PHE integration, sell condoms, and refer individuals who want to use other short term contraceptive methods to dispensaries or to the MOH CBDs—the latter trained by BALANCED to provide FP

information and distribute FP commodities. These trained CBDs have the potential to address the unmet need for family planning as 70-80% of individuals living in the Mkalamo and Mkwaja wards are more than 5 km from the nearest FP provider (dispensaries). The 30 CBDs operating in the Mkwaja and Mkalamo wards are proving to play an especially important role in upgrading the quality of reproductive health services at the community level, as there is a shortage of health staff at the dispensaries and most villages lack a primary health care facility. As of the end of February 2010, the CBDs had distributed 1996 condoms and 125 cycles of pills, provided 126 FP counseling sessions, and conducted 95 antenatal care visits.

PHE adult peer educators (PEs)—ages 25-55 years—were trained by BALANCED in March 2010. Adult PEs are community members who volunteer to motivate their peers to practice FP and safe sex and to also conserve the environment. Adult PEs are also trained to refer individuals interested in FP commodities and other RH services and help people understand the linkages between population, health, and environment. Participants in this one-day training came from different community groups and included representatives from SACCOS (the local Savings and Credit Cooperative), pastoralists, tour guides, traditional dancers, breads makers, fishermen, beekeepers, and seaweed farmers that were supported under CRC's Sustainable Coastal Communities and Ecosystems (SUCCESS) Program. Although SUCCESS ended in December 2009, TCMP is continuing to work with these same groups in the new *Pwani* project. The general objective of the training was to teach the adult PEs about the linkages between RH/FP and coastal resources management. The training also included sessions on the mechanics and operation of a CBD and PHE providers system. Zuberi Ramadhani, Pangani District Integrated Coastal Management (ICM) Facilitator and a participant in the SSE-PHE study tour initiated the training—triggered by his learning about the PHE PE education system and witnessing its positive effects in the Philippines.

During Year 3, BALANCED will expand PHE activities in Pangani and scale-up PHE in Iringa and possibly in Bagamoyo and/or Zanzibar.

ACTIVITY SUMMARY

After discussing the current BALANCED activities with USAID Tanzania, we have determined the best strategy for BALANCED in Year 3 is to strengthen, expand, and refine our strategies and activities in the Pangani district as well as explore the use of different PHE models in Bagomoyo and Zanzibar (both sites are part of the *Pwani* Project).

In Pangani, PHE providers trained in Year 2—with the exception of the first group that was trained—attended only a single day-long training. Consequently, they did not receive sufficient information and skills to promote the full range of FP methods that are available from CBDs and the Pangani district hospital and dispensaries. Thus, we plan to conduct a two-day refresher training that covers the topics of condom promotion for dual protection (including family planning), other FP methods, integrated PHE messages, inter-personal communication, and the use of a job aid. It will also be important to teach the PHE providers how to conduct inter-personal communication, and how to refer individuals to CBDs and the MOH for other FP methods. The refresher training will help build the

BALANCED Project's own cadre of trained community volunteers, and will support the MOH CBDs, who are responsible for tasks other than PHE and family planning.

We will also conduct a one-day refresher training for active CBDs on the use of PHE IEC materials, intra-personal communication, and job aids. The training will also introduce a reporting form to track how, when, and the number of PHE IEC materials and other inter-personal communications they are distributing. We will also establish a referral system among community volunteers and MOH whereby: 1) CBDs can make referrals to PHE providers, who can provide commercial/branded condoms for purchase; 2) adult PEs can help CBDs follow-up with clients; and 3) PHE providers can report sales to CBDs/MOH.

In Year 3, we plan to replicate our PHE model in Pangani through GTZ-trained CBDs in the Kipumbwi, Mikinguni and Mwera wards situated along the coast between Pangani town and Mkwaja. The training will be similar to the refresher training conducted with the CBDs in Mkalamo and Mkwaja.

BALANCED will also expand PHE activities to target out-of-school youth ages 15-24 years. Towards this end, we will invite key staff from TCMP, its partners and the Pangani District to attend the East Africa youth peer educator TOT (see Activity 1.2). Participants in the East Africa TOT will, thereafter, train youth peer educators in the Mkwaja and Mkalamo wards and develop a cadre of PHE youth leaders to monitor and strengthen the PHE community-based systems established in the Mkwaja and Mkalamo wards. BALANCED will recruit youth who are participating in theater groups—most villages have theater groups comprised largely of youth—to attend the training. Many theater groups have already worked on plays related to HIV/AIDS and the environment, so the idea of delivering integrated messages is somewhat familiar to them.

As a result of recent conversations with USAID Tanzania, we intend to explore the possibility of testing different PHE models in Bagamoyo through approved pharmacy outlets (APO) and/or expand to Zanzibar in collaboration with Engender Health and other collaborating agencies working on the island (both sites are part of the *Pwani* Project). A thorough assessment will be made prior to initiating any new activities and every effort will be made to reduce start-up time by building on lessons learned in Pangani.

Specific activities will include:

Expanding in Pangani:

- Conduct monthly monitoring, mentoring, and follow-up meetings with existing CBDs, PHE providers, and PHE PEs to assess the effectiveness and impact of the PHE peer education outreach and service delivery systems, and to ensure trainees refer and distribute modern contraceptives as well as provide integrated PHE messages.
- Based on the monitoring results, conduct a two-day training for existing PHE PEs to deepen the impact of, strengthen existing skills in developing, and provide additional knowledge on the use of PHE IEC, inter-personal communications, job aids, reporting, and making referrals to PHE providers, CBDs and the MOH.

- Work with the larger TCMP team to ensure that the activities implemented under BALANCED are integrated with the H and E activities implemented under the *Pwani* Project so as to become a true PHE initiative—i.e., one that is conceptually linked and operationally coordinated. This will include contributing to a memorandum of understanding (MOU) between TCMP and the Pangani District Council.
- Train youth PHE PEs in the coastal wards between Pangani town and Saadani National Park.
- Develop, modify, translate, pretest and distribute integrated IEC materials that focus on youth and gender messages. We will also develop generic integrated PHE messages that can be distributed throughout Tanzania, including brochures on family planning methods available from CBDs/MOH.
- Conduct PHE training for existing CBDs that operate in three coastal wards between Pangani town and Mkwaja—Kipumbwi, Mikinguni, and Mwera.
- Hold regular consultations with the MOH, Pangani District officials and village leaders.
- Based on the demographic and BMS data collected in Year 1 as well as information from monthly monitoring visits, individual interviews, etc. draw lessons learned and draft success stories that can be shared with partners and USAID Tanzania as part of promoting scale-up/replication in other areas of Tanzania.

Scaling up in Tanzania

- Assess potential new geographic and thematic areas for scale-up and integration, including site visit/scoping trip to assess possibility of expanding PHE activities to the Bagamoyo District or Zanzibar as well as exploring different models for provision of information and FP services to coastal communities. If conditions are favorable, initiate pilot PHE activity in new *Pwani* site(s).

ORGANIZATIONS INVOLVED

Funded partners: CRC and PFPI providing technical assistance to overall Project and conducting training on PHE for existing CBDs and new youth PEs

Collaborative partners: TCMP, Pangani District Council, Mkalamo and Mkwaja wards and village governments, SANAPA, UZIKWASA, WCS, and AWF, JGI

KEY OUTPUTS

- Existing MOH CBDs in three new wards in Pangani trained in PHE and community-based and peer education
- PHE Providers and peer educators trained in three new wards in Pangani
- PHE providers in current Pangani PHE sites with strengthened PHE skills (after attending refresher training)
- Youth PEs trained
- IEC materials with develop and disseminated with: 1) youth and gender focus, and 2) generic integrated PHE messages/materials, including brochures for PHE adult and youth peer educators, PHE providers, and CBDs

- Youth Peer Educator Training Manual (See IR 1, Activity 1.2 result)
- Collect baseline data on youth RH/FP behaviors
- Field indicator results related to family planning, HIV/AIDS, biodiversity conservation, youth, and economic development collected

EXPECTED RESULTS AND INDICATORS

Expected results:

- At least 85 CBDs and PHE providers trained/re-trained in PHE (1.1)
- At least 30 individuals trained on PHE Youth Peer Education and how to integrate PHE into existing CBDs (1.1)
- At least 2 BALANCED TOT participants training youth peer educators (1.2)
- MOU developed with Pangani District Council (1.3)
- Technical support provided to TCMP, district MOH, WCS, JGI, AWF (1.4)
- At least one case study and two success stories published, describing the impacts of BALANCED PHE activities in Tanzania (2.2.)
- PHE scaled in other *Pwani* site (3.2)

INDICATOR	YR 3 TARGET
1.1 Number of individuals trained by BALANCED in PHE know-how and SOTA (State of the Art) practices using 21st century learning tools	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	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)	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)	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)	3
3.2 Number PHE programs scaled-up (PRH 3.4)	1 (WCS or other <i>Pwani</i> site)
3.3 Number of BALANCED field site activities that produce results that can feed into KM activities (development of tools and success stories)	1

3.2 Scale-up PHE in the Philippines (USAID/Philippines buy-in)

New	Activity leader: Joan Castro
Activity Start: July 1, 2010	Activity End: June 30, 2011

RATIONALE FOR ACTIVITY

In Year 2, USAID/Philippines committed to issuing a Buy-in to the BALANCED Project to be used for scale-up of PHE in the Philippines—i.e., to expand coverage of the ongoing PPE program and/or to replicate the IPOPCORM approach in other high-growth biodiversity conservation priority areas of the Philippines. When sign-off on the Buy-in is final, the BALANCED team will produce an annex to the Year 3 workplan to describe in detail the specific activities to be implemented with this additional funding.

Details will be provided pending USAID approval of scope of work and Year 1 workplan in September 2010.

3.3 Provide seed grant and technical support to EWNRA in Ethiopia

Ongoing	Activity leader: Joan Castro
Activity Start July 1, 2010	Activity End June 30, 2011

RATIONALE FOR ACTIVITY

In Year 2, the BALANCED Project provided a \$15,000 seed grant to EWNRA to strengthen the family planning component of its PHE approach in the Wichi wetland-watershed region and its current project in Agelo Shenkora watersheds. The objectives of the Wichi project, which began in October 2009, are to:

- Learn how to design, implement and assess sustainable PHE activities,
- Increase awareness of key community stakeholders (i.e. wetland committee members, village leaders, etc) of FP and its role in conservation and family health,
- Increase target communities' awareness of FP and its role in conservation and family health, and
- Increase access to, and use of, modern FP methods.

In November 2009, BALANCED conducted a TOT on PHE CBD and PE systems in Jima, Ethiopia for NGOs working on integrated PHE activities in Ethiopia. Participants in the training included key staff of the EWNRA project along with their local partners, i.e., representatives from the local agriculture and rural development organizations and the local MOH of the Metu Woreda and Illu Bora zones. These trained project staff in turn trained a total of 72 adult PEs and 36 PHE providers who are educating and motivating the community on the benefits of integrating FP in the watershed management activities and providing access to modern FP commodities at the kebele/village level. The PEs and PHE providers were selected by the local micro-watershed communities in the project sites.

In addition to training local PEs and PHE providers, EWNRA secured formal agreements with project collaborators, i.e., the Ill Aba Bora zonal health office and Regional Health

Bureau of Oromia, to integrate FP into watershed management projects. They also established formal arrangements with DKT Ethiopia to support the provision of family planning commodities to the trained PHE providers in the project site. EWNRA worked with and through the watershed committees and Kebele administrators of Wichi and Agelo Shenkora. Together, they introduced the PHE approach to the various micro-watershed communities, who in turn helped gather baseline data on RH/FP and NRM practices.

ACTIVITY SUMMARY

During year 3, BALANCED will provide the second tranche of seed grant funding to support new activities, monitor the existing cadre of PHE PEs and PHE providers, provide refresher training for the PHE PEs and PHE Providers and strengthen the existing PHE interventions to expand access to family planning information and products at the grassroots level as outlined in the EWNRA Year 2 detailed implementation plan. This includes strengthening the initiatives that link trained PHE providers with the DKT Ethiopia national social marketing network for supply of FP commodities. This partnership will expand access of FP commodities in hard-to-reach areas or in areas not reached by the government facilities. A benefit of this linkage is that the PHE providers who are also social marketing entrepreneurs or social marketers of condoms and pills can potentially gain a small income from selling the pills and condoms.

As part of the seed grant, BALANCED staff provides technical assistance on project implementation, monitoring and capacity building. During the development of EWNRA's project, they indicated a strong interest in incorporating youth into their conservation and PHE activities for Year 2 of their seed grant. Therefore, BALANCED staff will train EWNRA and its partners on youth peer education during our annual technical support and follow-up visit to this seed grant recipient. This trip is scheduled much later than the East Africa Youth TOT (February 2011), which is why we propose training EWNRA separately. This allows them time to completed existing planned activities before starting with youth activities.

When BALANCED staff is in Ethiopia working with EWNRA, they will also provide support to PHE Ethiopia members on youth activities and other areas of capacity building needs. This takes advantage of BALANCED annual visit to Ethiopia to simultaneously provide support to other organizations in the country. We feel it is less costly to include five to seven additional organizations in a planned training for our seed grant than sending 10 to 14 Ethiopians to Tanzania for the Youth TOT. Moreover, this strategy allows us to work directly with Ethiopians – a key BALANCED country – to strengthen PHE capacity there (as opposed to diluting our attention to them in a larger multi-country workshop).

Trained EWNRA facilitators will, in turn, train PHE youth peer educators (YPE) in the project sites. The trained PHE YPE will be responsible for educating other youth ages 15-24 years to become stewards of the environment and their future families. These youth will become PHE leaders and advocates of the environment and their sexuality, and thus, contribute to advancing support for healthy families and environments in the future. This new cadre of youth leaders will further strengthen the PHE community-based delivery

systems that will be necessary to achieve the goals and objectives of the EWNRA PHE project.

Specific activities in Year 2 will include:

- Provide second tranche of seed funds for EWNRA to strengthen its current initiatives in implementing the FP and other PHE components of their detailed implementation plan
- Provide technical support as per terms and conditions in the seed grant
- Conduct TOT on youth peer education for PHE activities with EWNRA, its partners, and other organizations in Ethiopia working on PHE activities
- Train EWNRA's PHE YPEs
- Conduct refresher training for adult PEs
- Develop IEC materials with integrated PHE messages targeted to youth
- Conduct follow-up survey with micro-watershed committees

ORGANIZATIONS INVOLVED

Funded partners: CRC, PFPI

Collaborative partners: EWNRA, DKT, local MOH of Metu and Illu Bora zones

KEY OUTPUTS

- EWNRA project personnel, partners, and select conservation groups implementing PHE activities trained on PHE Youth peer education
- Youth peer volunteers selected and trained in community-based PHE youth peer education in EWNRA sites
- Active Adult PEs (70 percent of trained adult PEs in Year 1) and 25 PHE providers attending refresher courses (1.1)
- PHE YPE manual used by EWNRA in their work
- At least one IEC material for the youth produced
- Adult PHE PE and PHE Provider refresher training modules
- Collect baseline data on youth RH/FP behaviors

EXPECTED RESULTS AND INDICATORS

Expected results:

- EWNRA incorporating PHE tools into their work (SO-1)
- At least five EWNRA project personnel trained on how to train PHE YPEs (1.1)
- At least five other conservation groups trained on how to train PHE YPEs (1.1)
- At least five EWNRA staff conducting youth peer education training in their PHE project sites and providing refresher training to Adult PEs and PHE providers (1.2)
- At least 36 youth peer volunteers trained in community-based PHE youth peer education (1.1)
- At least 25 PHE providers and 45 active adult PEs provided with refresher courses (1.1)

INDICATOR	YR 3 TARGET
SO-1: Number of target organizations incorporating PHE tools, protocols, etc. into their work (PRH 1.1)	1
1.1 Number of individuals trained by BALANCED in PHE know-how and SOTA (State of the Art) practices using 21st century learning tools	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	5
1.4 Number of technical interventions provided by BALANCED to Missions and organizations to implement PHE in their programs (PRH 3.2)	1
3.1 Number of PHE tools, methodologies, and actionable findings replicated in new countries and geographic areas (PRH 3.1)	1

3.4 Provide seed grant and technical support to WCS Zambia

New	Activity leader: Joan Castro
Activity Start: July 1, 2010	Activity End: June 30, 2011

RATIONALE FOR ACTIVITY

The BALANCED Project provides limited seed grant support to strengthen the capacity of new conservation NGOs to implement family planning activities in conjunction with wildlife conservation activities. In Year 2, BALANCED started providing remote technical assistance to WCS/Zambia by reviewing the family planning contents of their “Better Life Book” (an IEC material) and by providing the latest guidance on family planning norms and ways to improve the effectiveness of family planning messages. Subsequently, BALANCED provided in-country technical assistance to identify areas where family planning information and services can be integrated into the existing WCS COMACO activities in 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 COMACO program providing sustainable sources of alternative incomes and other incentives for conservation to families living around Zambia’s national parks in the Luangwa Valley. To date, the program has recovered more than 50,000 snares and 1,700 firearms that were previously used to illegally kill wild animals. The complementary role of COMACO suggests an important way to help reduce the cost of law enforcement and patrols for the Zambian Wildlife Authority while reducing the underlying cause of poaching. Surplus commodities grown by local community members and sold under the brand *It’s Wild!*, generated more than \$500,000 in revenues in 2008.

With COMACO's growing success, WCS has one of the few programs that can claim to operate at the scale of an entire ecosystem, contributing to increased wildlife numbers and better protected habitats. The program's business model is still being tested for financial sustainability, but its impact clearly demonstrates growing levels of community cooperation to conservation, showing that more and more of these households can meet their families' income and food supply needs in ways that do not conflict with conservation needs. As a result, 661 former poachers, many of whom once hunted elephants, adopted alternative livelihoods supported by COMACO and have surrendered their firearms. WCS estimates that by removing snares and firearms from the area, COMACO contributes to the annual savings of more than 6,000 wild animals across the Luangwa Valley, including such species as giraffe, zebra, wild dogs, lions, impala, and waterbuck.

COMACO reaches an estimated 34,381 members/households, in an area where there are no CBDs—in fact, CBDs do not exist anywhere in Zambia. Health posts are found only every 12 kilometers. The project site does, however, have 43 area extension officers and trained community health workers (two to three per village). There is also a youth-friendly corner at the clinics with the potential to reach youth from producer groups. With regards to the connection between wildlife health and human health, WCS recognized that integrating family planning information and services in WCS/Zambia's livelihood and wildlife/natural resource conservation program can contribute to better life for the nearly 35,000 families they reach.

ACTIVITY SUMMARY

In Year 3, BALANCED will provide seed grant funding support to the WCS/Zambia COMACO program and provide technical assistance to build the WCS/Zambia organizational capacity to implement community-based integrated PHE activities. As part of its support to WCS/Zambia in Year 2, BALANCED identified a community that is very receptive to family planning. This fact, added to the fact that WCS leadership recognizes the need to integrate FP interventions into the WCS COMACO program, prompted the decision to continue support and technical assistance to WCS/Zambia again in Year 3. The inclusion of FP as a strategic intervention to WCS/Zambia's comprehensive and holistic approach to development and wildlife/natural resources is recognized as contributing to people's overall welfare. Although Zambia lacks CBDs, there is a high probability for working with the MOH-trained community health workers to enhance distribution of FP commodities and address the unmet FP needs of the COMACO members—within the broader overall context of PHE.

WCS/Zambia will receive seed grant support for two years and the US\$20,000 provided in Year 3 is specifically to integrate FP and other PHE components into the COMACO program.

Specific activities will include:

- Draft integrated PHE program implementation plan
- Collect baseline data and information on RH/FP practices, including RH/FP behaviors among youth
- Develop, pre-test and produce IEC materials with integrated PHE messages

- Develop referral system involving PEs, community health workers and local MOH staff
- Develop community-based distribution system of free pills and condoms from the nearest health center
- Develop a monitoring and reporting system
- Train trainers on integrated PHE for WCS, local MOH and other NGO staff to train area extension officers (43) and trained community health workers (2-3 per village), who, in turn, will integrate PHE and train lead farmers and chairpersons of producer groups to become PHE adult PEs to the 34,381 members of COMACO
- Select and train adult PEs
- Explore potential collaboration with other in-country local NGOs with family planning programs/projects, such as Society for Family Health, Family Health Trust, etc., USAID, and other donors

ORGANIZATIONS INVOLVED

Funded partners: CRC, PFPI

Collaborative partners: WCS/Zambia COMACO, local MOH

KEY OUTPUTS

- Seed grant proposal developed
- Seed grant funds contract executed with WCS/Zambia
- WCS/Zambia PHE program implementation plan
- WCS/Zambia COMACO, local MOH, area extension workers, community health workers and other NGO staff trained on PHE and adult peer education
- Active PHE adult PEs, community health workers and local MOH staff
- PHE Adult Peer Educator manual used by COMACO PEs
- Baseline data and information collected, including on youth RH/FP behaviors
- IEC materials with integrated PHE messages drafted, pre-tested and reproduced
- Monitoring and reporting forms/reports

EXPECTED RESULTS AND INDICATORS

Expected results:

- At least 10 WCS Zambia/COMACO, local MOH, area extension workers, community health workers and other NGO staff trained on integrated PHE, on how to integrate the PHE approach, and on adult peer education (1.1)
- At least two WCS and/or partner TOT participants training PHE adult PEs (1.2)
- At least 50 trained adult PEs trained in community-based PHE peer education (1.1)
- PHE peer education manual adapted for WCS Zambia (3.1)
- WCS Zambia/COMACO incorporating PHE tools into their work (SO-1)

INDICATOR	YR 3 TARGET
SO-1: Number of target organizations incorporating PHE tools, protocols, etc. into their work (PRH 1.1)	1
1.1 Number of individuals trained by BALANCED in PHE know-how and SOTA (State of the Art) practices using 21st century learning tools	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	2
1.4 Number of technical interventions provided by BALANCED to Missions and organizations to implement PHE in their programs (PRH 3.2)	1

3.5 Provide seed grant and technical support to one conservation NGO

Delayed from Year 2	Activity leader: Linda Bruce
Activity Start: July 1, 2010	Activity End: June 30, 2011

RATIONALE FOR ACTIVITY

During Year 2, BALANCED had proposed providing a seed grant to an organization working in the CT Region. We anticipated providing this seed grant support to a recipient of the SSE-PHE study tour. A review of the action plans developed by SSE-PHE participants from CT countries led BALANCED to consider WWF/Philippines or Kabang Kalikasan ng Pilipinas Foundation Inc. (KKPFI) as a potential seed grant recipient. WWF/KKPFI is gearing up to implement a new five-year initiative supported by the European Union (for €800,000) that will integrate population, reproductive health, and coastal resources management in key areas of Tawi-Tawi. Results of this project would contribute to the CTSP results of the CTI. However, after many discussions with Filemon Romero, SSE participant and coordinator of the WWF CTSP, it was decided that WWF/KKPFI needs only technical assistance at this time. This will be provided in Year 3 as part of BALANCED post-training support (see Activity 1.4).

ACTIVITY SUMMARY

During Year 3, BALANCED will identify another conservation organization that is interested in integrating health and family planning into their programs and could benefit from some financial and technical support to achieve this objective. Carry-over funds from the Year 2 budget will be used for this activity. BALANCED will present the rationale and justification for the seed grant recipient to USAID and seek final approval from USAID when a seed grant recipient is identified.

Examples of potential seed grant recipients we will explore include, but are not limited to:

- A conservation organization in Senegal where CRC has been asked to submit a proposal for a large coastal resources management project.

- Depending on outcome of the June PHE workshop in Uganda, a conservation group that is interested in PHE integration there.
- Gorongosa National Park in Mozambique. The Carr Foundation is supporting the restoration of the Gorongosa National Park and is interested in providing health services to the populations surrounding the park. A seed grant could support technical assistance and capacity building that would strengthen the Carr Foundation’s USAID Mozambique-funded Ecohealth Project.
- A conservation group in the CT region to be identified by PFPI as a result of their discussions with the RMDA and with organizations in the region interested in PHE activities.

ORGANIZATIONS INVOLVED

Funded partners: CRC, PFPI, CI

Collaborative partners: TBD

KEY OUTPUTS

- Seed grant proposal developed and seed grant agreement with NGO partner/MOU for technical assistance
- Seed grant recipient’s implementation plan
- Adapted curricula and other learning tools used by seed grant recipient
- Collect baseline data, and, if conducting youth activities, collect data on youth RH/FP behaviours
- Other outputs TBD

EXPECTED RESULTS AND INDICATORS

Expected results:

- At least 10 trainers trained on PHE community-based and peer education system or other skill as identified in the seed grant recipient detailed implementation plan (1.4)
- At least two trainers training CBDs and PHE peer education or other technical skill (SO-1 & 1.2)
- MOU for TA provided to NGO or seed grant agreement with the NGO partner (1.3)

INDICATOR	YR 3 TARGET
SO-1: Number of target organizations incorporating PHE tools, protocols, etc. into their work (PRH 1.1)	1
1.1 Number of individuals trained by BALANCED in PHE know-how and SOTA (State of the Art) practices using 21st century learning tools	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	2
1.3 Number of new and/or strengthened partnerships established and	1

actively involved in advancing and supporting wider use of PHE approaches as a result of BALANCED capacity-building activities	
1.4 Number of technical interventions provided by BALANCED to Missions and organizations to implement PHE in their programs (PRH 3.2)	1

3.6 Provide technical support to PHE activities in Ghana

New	Activity leader: Joan Castro
Activity Start: July 1, 2010	Activity End: June 30, 2011

RATIONALE FOR ACTIVITY

CRC-URI was recently awarded the four-year ICFG Project from USAID/Ghana. The Mission sees this project 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 as well as build the capacity of local and national government to support 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.

Ghana's fishery is characterized by a high migration of fishers within regions of the nation as well as to/from neighboring countries. In addition, coastal fishing villages and urban centers have high population growth rates including rapid in-migration due to growth in the oil industry. These factors represent long-term threats to protecting coastal biodiversity and achieving sustainable fisheries in Ghana. The ICFG project staff is currently assessing biodiversity threats to the six project sites as one of the initial issue assessment activities. The comprehensive survey of coastal communities by ICFG has identified dozens of places where family related health, sanitation, and eco-health concerns are prevalent. Thus, this is an opportune time to assess family planning information and service delivery needs and determine how family planning and health can be integrated across the ICFG Project sites to address the need to include family planning and HIV/AIDS prevention activities as part of an integrated approach to improving quality-of-life, and stemming biodiversity loss and overfishing. ICFG is preparing a statement of coastal issues ("Our Coast") in the Western Region that will incorporate these concerns.

Ghana is a USAID family planning focus country and, thus, an ideal site for integrated PHE approaches. Overall population growth is fueling increased demand for fish. This, in turn, is fueling over-fishing. Integrating FP into conservation activities is not only a conservation approach. It also brings health benefits to hard-to-reach communities. Planned families can help fisher folk better address daily needs such as food and income security and can help reduce the likelihood these families will be driven to use ecosystem-destructive practices to secure that food and income.

One of CRC's local implementing partners for ICFG is Friends of the Nation (FoN). FoN is a local environmental and community development NGO responsible for implementing

advocacy and communications activities in fishing communities as well as strengthening community-based fisheries committees and fishermen organizations; for implementing coastal livelihood activities; and for conducting community information-education-communications campaigns. FoN also has experience with HIV/AIDS prevention and condom distribution. Randolph Kwesi Benyi Johnson (Kwesi), a senior field officer with FON, attended the BALANCED South-to-South PHE study tour in the Philippines and will be the key person responsible for integrating population and health initiatives into the ICFG project. The ICFG project is also implementing a small grants program for local organizations to conduct actions in coastal communities that are impact- and results-oriented in terms of providing tangible benefits to fishing communities.

During Year 3, BALANCED will leverage the cost of providing technical expertise to train and mentor FoN and their partners to develop integrated PHE approaches within the ICFG project that meet the needs of communities where conservation interventions will be implemented.

ACTIVITY SUMMARY

The specific activities to integrate population and health into the ICFG project will derive from the findings and recommendations of the BALANCED Year 2 in-country assessment scheduled to take place mid-June. Strategies and activities for PHE integration will also draw from the conceptual framework and action plan that was developed by Mr. Johnson during the SSE PHE study tour in Year 2. This plan includes steps to advocate and integrate PHE as an “organic package of initiatives” through active collaboration between local governments in partnership with grassroots communities.

Specific activities may include (and will be refined after June scoping visit):

- Identify /develop examples of the PHE themes/messages that would be most appropriate to integrate into the ICFG Project’s environment activities.
- Conduct capacity development trainings on PHE for staff of the ICFG project, FoN and other possible partners.
- Review/refine the PHE conceptual framework and action plan for PHE integration.
- Conduct a TOT on PHE community-based distribution and peer education.

ORGANIZATIONS INVOLVED

Funded partners: CRC, PFPI

Collaborative partners: FoN, JHU, John Snow International (JSI), Population Services International (PSI) or DKT, local MOH

KEY OUTPUTS

- PHE framework and action plan/PHE package of activities
- FoN and ICFG partners trained in PHE CBD and PE system and other PHE components needed to implement an integrated approach in ICFG project sites
- Active community volunteers

- IEC materials with integrated PHE messages drafted, pre-tested and reproduced
- FoN incorporating PHE tools into their work on ICFG
- Collect baseline data, and, if conducting youth activities, collect data on youth RH/FP behaviors

EXPECTED RESULTS AND INDICATORS

Expected results:

- At least five FoN and ICFG partners trained on PHE and community-based distribution and peer education (1.1)
- At least one person from FoN is training community-based volunteers (1.2)
- At least 10 community volunteers trained in community-based family planning and other PHE components needed to implement an integrated approach in one or more ICFG project sites (1.1)
- Community-based distribution and peer education training materials adapted for use in Ghana (3.1)
- FoN incorporating PHE tools into their work (SO-1 and 3.1)

INDICATOR	YR 3 TARGET
SO-1: Number of target organizations incorporating PHE tools, protocols, etc. into their work (PRH 1.1)	1
1.1 Number of individuals trained by BALANCED in PHE know-how and SOTA (State of the Art) practices using 21st century learning tools	15
1.2 Number of participants who received BALANCED training and/or mentoring that are now providing training or TA to others on PHE implementation	1
1.4 Number of technical interventions provided by BALANCED to Missions and organizations to implement PHE in their programs (PRH 3.2)	1
3.1 Number of PHE tools, methodologies, and actionable findings replicated in new countries and geographic areas (PRH 3.1)	1

3.7 Implement recommendations from Glacial Melt Study

New	Activity leader: Linda Bruce
Activity Start: July 1, 2010	Activity End: June 30, 2011

In Year 2, BALANCED received a Buy-in from the USAID Asia and Near East Bureau (ANE) to implement selected of the recommendations from a study under the Environmental Health Task Order that assessed a “blueprint” of what USAID should do to address glacial melt in the Asia region. The study was conducted in April 2010 and the report and recommendations will be available in May 2010.

ACTIVITY SUMMARY

Once the report and recommendations are made available, BALANCED will meet with the USAID PHE Technical Advisor to discuss next steps and how BALANCED will program the ANE funds. An implementation plan will be developed with USAID and amended to this workplan.

ORGANIZATIONS INVOLVED

Funded partners: CRC, PFPI, CI

Collaborative partners: TBD

KEY OUTPUTS

TBD

EXPECTED RESULTS AND INDICATORS

TBD

3.8 Secure funding for PHE expansion/scale-up for at least two countries for Year 3

New	Activity leader: Linda Bruce
Activity Start: July 1, 2010	Activity End: June 30, 2011

RATIONALE FOR ACTIVITY

The BALANCED Project needs to seek opportunities to support replication and start-up of field-based PHE activities through additional financing from a mix of Mission and Bureau Buy-ins, non-US government (USG) donor support, leveraged funds from NGOs and local governments, and from BALANCED Project partner cost share.

In Year 2, the BALANCED Project initiated discussions with several USAID Missions to seek their interest and support in the PHE activities that were being implemented in their country. Towards this end, we consistently briefed the USAID Population, Health and

Nutrition (PHN) officer in Tanzania on BALANCED activities and informed him that not only is BALANCED supporting the integration of CBFP into the Mission's new *Pwani* project, which receives NRM and PEPFAR funds, but we are also expanding the PHE approach to WCS and other conservation groups in Tanzania that expressed interest as a result of our capacity building and advocacy efforts.

Further, in the CT region, PFPI continuously advocated for PHE, updated USAID/RDMA, CTSP and USAID/Philippines on the David and Lucile Packard Foundation and BALANCED-funded activities in the Philippines, the SSE-PHE study tour, and noted the BALANCED Project's interest in providing technical support to PHE activities in other CT countries. As a result of these efforts and input from the BALANCED USAID PHE Technical Advisor, USAID/Philippines awarded the BALANCED Project a \$500,000 Buy-in per year to scale-up PHE in the Philippines during Year 3.

ACTIVITY SUMMARY

During Year 3, BALANCED will continue to seek USG support (Mission, Bureau, program) for new and scaled-up field-based PHE activities in USAID family planning focus countries (including 1st and 2nd Tier and graduated countries) with 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 coordination with the BALANCED Project USAID AOTR and PHE Technical Advisor, we intend to explore opportunities for additional USG support which includes, but are not limited to:

- 1) Direct (Buy-in) or leveraged support from USAID/CTI RDMA to integrate PHE into CTI activities in at least one of the six countries in the Coral Triangle. We will continue to engage the RDMA and CSTP in discussions about the benefits of PHE and how BALANCED can leverage its resources with USAID support to NGOs in the CT region as well as showcase the successful PHE activities in the Philippines as models for other CT countries.
- 2) Direct support from a USAID Mission in Africa where BALANCED is supporting new or scaled-up PHE activities. To this end, we will update the current NRM officer and new PHN officer in USAID Tanzania on TCMP's PHE activities in Pangani and the expansion of PHE activities within Tanzania through WCS, AWF and/or conservation groups. As appropriate, we will explore Mission interest in providing funding support to scaling-up and/or expanding PHE in Tanzania. We plan to update the Ghana Mission on PHE activities in that country's Western Region and explore their interest in supporting scale-up. Working together with WCS/Zambia, we will also explore USAID/Zambia's interest in expanding PHE activities into two or three additional regions as part of the successful WCS livelihoods project that reaches more than 35,000 families.
- 3) Support from USAID-funded health projects, such as the President's Malaria Initiative, Food Security, and Food for Peace that would be interested in funding the integration of their activities into BALANCED PHE sites.

- 4) Leveraged funds from conservation and health NGOs and/or government agencies working in environment, health, agriculture, energy or rural development sectors to support new or scaled-up field-based PHE activities in priority biodiversity conservation areas in USAID family planning focus First Tier Intensive and First Tier countries. We will be leveraging funds from CRC's ICFG project to integrate PHE in Ghana's Western region. Meanwhile, WCS, AWF, SID, Tanzania MOH, and the Saadani and Mzanzai Bay national parks have all expressed interest in working with the BALANCED Project to integrate PHE into their existing conservation and health activities. We will continue to seek leveraged funds from our partners to co-finance capacity building and/or scale-up of PHE activities in the field.
- 5) Non-USG resources to support field-based PHE activities in USAID family planning focus countries with biodiversity conservation priorities. BALANCED is in dialogue with WWF/KKPFPI to provide technical to their PHE activities in Mindanao, which are funded by the EU. If this activity moves forward, we would leverage the EU support for these activities. Opportunities also exist to leverage funds from TNC and UNFPA to support PHE capacity building activities in Indonesia as described in the IR1 section of this report. CI will also continue to explore non-USG funding support from private donors.

During Year 3, we will also hone and fine-tune our resource mobilization plan based on new information from the field and donors and opportunities that present themselves as we expand PHE activities in Africa and Asia.

ORGANIZATIONS INVOLVED

Funded partners: CRC, PFPI and CI

Collaborative partners: WWF-Philippines, WCS, AWF, UNFPA, NOAA, USAID CTI RDMA, CTSP, USAID Missions in Tanzania, Zambia and Ghana

KEY OUTPUTS

- Regular e-mail communication with USAID/W on discussions with Missions regarding support for PHE projects in the Philippines, USAID CTI RDMA, Tanzania, Zambia, Ghana and other countries as interest develops
- MOUs and/or reports on discussions with NGOs and local governments to leverage local resources for local PHE activities

INDICATORS AND EXPECTED RESULTS

Expected results:

- \$550,000 in Mission Buy-ins from USAID Philippines (for 2nd year of buy-in) and/or USG support leveraged for Year 3
- \$50,000 in NGO and/or non-USG resources leveraged for Year 3

INDICATOR	YR 3 TARGET
SO2 Dollar value of funds leveraged from USAID Missions and non-USG sources to support PHE implementation and scale-ups (in millions \$) (PRH 1.2)	0.6

Project Management

Key Implementing Partners

The Coastal Resources Center (CRC) at the University of Rhode Island (URI) serves as Leader of the BALANCED Project, supported by two strategic partners—Conservation International (CI) and PATH Foundation Philippines, Inc. (PFPI). This team provides expertise and experience that spans a wide range of countries across multiple geographic regions. It brings expertise and experience in the three PHE sectors of population, health, and environment; and includes complementary strengths in capacity building, knowledge management and monitoring and evaluation systems. As well, this diverse team brings with it a network of talented and committed local implementing partners who can potentially work with country specific initiatives through Mission add-ons or associate awards. This includes organizations and entities already carrying out complementary projects with synergistic activities—e.g., the Tanzania Coastal Management Partnership (TCMP) and its HIV/AIDS and Environment efforts. Moving forward, as the Project expands into other countries, additional partners who have expressed interest in aligning with BALANCED include the African Wildlife Foundation (AWF) in Tanzania, Wildlife Conservation Society (WCS) in Tanzania, Zambia and Uganda, World Wildlife Fund (WWF) in East Africa and Nepal, Adventist Development and Relief Agency (ADRA) in Tanzania, and German Foundation for World Population (DSW) in East Africa.

Management Structure and Key Staff

Linda Bruce of URI-CRC serves as the BALANCED full-time Project Director. Ms. Bruce assumes overall technical and management responsibility for all aspects of the Cooperative Agreement and is the principal point of contact with the USAID Agreement Officer's Technical Representative (AOTR), the USAID Technical Advisor, and with USAID Missions and Bureaus and is the key liaison with USAID on all programmatic matters. Ms. Bruce reports to the Director of International Programs at CRC, Dr. Brian Crawford.

Ms. Bruce is based in the URI-CRC Washington D.C. office, which is rented from the Population Reference Bureau (PRB). This locale provides Ms. Bruce with the opportunity for almost daily interactions with not only PRB staff, but those of numerous other international groups and organizations working on PHE. Ms. Bruce is assisted by two half-time deputy directors, a PHE technical assistance lead (PTAL), and a monitoring, evaluation, and learning (ME&L) specialist. Lesley Squillante serves as the Deputy Director for KM and Administration, and Elin Torell as the ME&L Specialist. Both Squillante and Torell are based at the URI-CRC offices in Rhode Island. Janet Edmond, Deputy Director for PHE Advocacy and Outreach, is based at Conservation International in Arlington, Virginia. Dr. Joan Castro, the PHE PTAL, is based in Manila at PFPI.

The BALANCED team is a geographically dispersed, virtual management team that meets at least annually for Project reviews and work planning.

Staff Responsibilities for Year 3 Key Program Results and Associated Activities

Those responsible for implementing various activity areas within each result category of this workplan are summarized in the following Table.

Program Areas	Key Staff Responsible	Organization
IR 1 PHE Capacity Built		
1.1 Build capacity of NGOs in CT countries on PHE Program Design	Joan Castro	PFPI
1.2 Conduct training of trainers on PHE Youth Peer Education in East Africa	Joan Castro	PFPI
1.3 Build capacity of Wildlife Conservation Society staff to integrate family planning into their conservation activities	Linda Bruce	CRC
1.4 Provide on-going support to BALANCED trainees and PHE Practitioners	Joan Castro	PFPI
1.5 Finalize IEC training materials and manual	Linda Bruce	CRC
IR 2 PHE Knowledge and Tools Developed, Synthesized and Shared		
2.1 Identify, document, and synthesize knowledge	Lesley Squillante	CRC
2.2 Organize existing and new knowledge for PHE website	Lesley Squillante	CRC
2.3 Share knowledge within the PHE and broader community	Janet Edmond	CI
IR 3 Results-oriented PHE Field Activities Implemented in areas of high biodiversity		
3.1 Scale-up PHE activities in Tanzania	Elin Torell	CRC
3.2 Scale-up PHE activities in the Philippines (Mission Buy-in)	Joan Castro	PFPI
3.3 Provide seed grant and technical support to EWNRA in Ethiopia	Joan Castro	PFPI
3.4 Provide seed grant and technical support to WCS Zambia	Joan Castro	PFPI
3.5 Provide seed grant and technical support to one conservation group	Linda Bruce	PFPI
3.6 Provide technical support to PHE activities in Ghana	Joan Castro	PFPI
3.7 Implement recommendations from Glacial Melt Study	Linda Bruce	CRC
3.8 Secure funding for PHE expansion or scale-up for at least two countries for Year 3	Linda Bruce	CRC

Key Year 3 Management Tasks

In Year 2, the BALANCED team worked hard to increase the number of capacity building events, to increase the number of organizations interested in and willing to integrate family planning into their on-going conservation and health projects, to disseminate PHE documents through a variety of media and assess the benefits of PHE programs through applied field-based research. Members of the BALANCED team who provide technical assistance and capacity building in the field, took again—as a refresher—the online USAID family planning compliance course. They also developed a checklist for monitoring compliance in field activities. They monitor compliance as part of each field visit and then submit the monitoring forms/information to CRC. In Year 3, the Project Director will continue to monitor family planning compliance in BALANCED field sites and note any areas in which the process for monitoring of compliance could be improved.

For all training activities, TraiNet forms were completed and sent to CRC for inclusion into the USAID TraiNet system. USAID recently changed/added to TraiNet procedures and the CRC staff will undertake training in these changes in the Fall of 2010 and make any modifications to their process, procedures and forms to ensure full compliance with these changes.

In Year 2, PFPI was trained on 508 compliance and the Project Director received mentoring on 508 compliance when problems arose. Staff at the CRC home office in RI will continue to provide backstopping support in TraiNet, branding, and 508 compliance—helping to ensure the Project complies with federal and USAID-specific administrative regulations and guidelines. While it has taken time for the full BALANCED team to become skilled in making documents (publications, presentations, etc.) 508 compliant, the team is becoming quite adept at this process and does not anticipate problems moving ahead as it generates more and more tools, publications, etc.

Management Challenges

- With a team located in offices spread across Rhode Island, Washington DC, Virginia, and the Philippines, communications and planning can be a challenge. However, the implementation and use of the web-based BALANCED Project Forum—a real-time “filing” and communications tool – has been instrumental in sharing reports and project ideas. We have increased our phone communication with the Philippines office to help ensure that they are intricately involved in strategic planning, project management and implementation. In order to minimize the costs of such communication, we use Skype to stay in frequent phone/chat contact. Staff has also taken advantage of many opportunities when PFPI is traveling to the field or to Washington, DC for non-BALANCED activities to include PFPI in team meetings and in meetings with other PHE players, such as Population Action International, PRB, WWF, JGI, etc. CRC staff has also taken advantage of existing opportunities to visit each other in Rhode Island or Washington, DC. This has greatly improved communication and synchronicity of the team.
- The URI-CRC Project staff continues to upgrade their skills in PHE—for example, by attending the BALANCED SSE-PHE study tour in the Philippines, incorporating PHE

into the Center's coastal resources management project in Ghana, and participating in meetings with the PHE community in Washington and the field. Similarly, PFPI is continually learning the rules and policies for USAID centrally funded projects and demonstrating increased skills in this area.

- While significant progress was made in Year 2 in development of the new PHE Toolkit as part of the K4Health website, enhancements to the Toolkit/site—including its functionality, and its ability to attract users to the site to both upload and download materials—continues to demand the attention of BALANCED team for two reasons. First, promoting the site to users needs to be coordinated with JHU in order to leverage the efforts/resources of both the BALANCED and the K4Health projects. These marketing efforts need to be in sync with vs. independent of each other. Second, historically it takes time to promote new sites so the results of efforts to do this may not be realized in the short term.

Another challenge is securing the agreement of partners from non-BALANCED projects to serve as a member of the PHE Toolkit content management team. In querying various individuals the response has been similar—i.e., that this task is not part of their workplan/portfolio and they lack the time to commit to it. Nevertheless, the BALANCED team will continue in Year 3 to solicit volunteers to assist with content management.

- The BALANCED PTAL team is located in the Philippines, yet a significant amount of the BALANCED capacity building and technical assistance activities are focused on East Africa countries. This has created a drain on Project's human and financial resources. To address this, the Project will hire a consultant to be based at least half of Year 3 in East Africa (likely in Tanzania), making it easier and more efficient to provide PHE support to BALANCED clients in this region.

Routine Project Management and Administration Activities

The following table lists the routine and recurring Project management and administrative activities, reports and plans required annually. It covers the Year 3 workplan period of July 1, 2010 to June 30, 2011.

Activity	July 2010 – June 2011												Responsible Person / Institution
	J	A	S	O	N	D	J	F	M	A	M	J	
Work Planning													
Year 4 Workplan and Budget Request to USAID							x						LB
Year 4 final Workplan to USAID											x		LB
Progress Reports													
Semiannual program report to USAID		x						x					LB
Semiannual PMP report		x						x					ET
Quarterly PMP reporting to CRC		x			x			x			x		CI, PFPI
Results Review				x									
Input TraiNet data into USAID web	x	x	x	x	x	x	x	x	x	x	x	x	KK
Financial Management/Reports													
Quarterly expenditure reports from subcontractors to CRC/URI	x			x			x			x			CI & PFPI
Quarterly expenditure reports to USAID from CRC/URI		x			x			x			x		CM
Quarterly 269 report to USAID from URI. CRC to send Liz, Heather and Ruth an electronic copy too.		x			x			x			x		URI and CRC

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

Travel Schedule

The following table represents the tentative international and domestic travel schedule for key staff and consultants related to intermediate results and Project management activities. It covers the Year 3 workplan period of July 1, 2010 to June 30, 2011.

IR	Approx Date	Person	From	Destination(s)	Days	SOW (workplan activity)
1, 3	Aug '10	Ricky Hernandez	Manila	Housed in Tanzania but trips to - Zambia (1), - Ethiopia (1) - Kenya/Ug.(1) - Pangani, Iringa & other (4)	Total-120 6 (Z) 6 (E) 6 (K) 40 (P & other)	Provide follow-up to PHE activities and BALANCED trainees in Tanzania, Ethiopia, Uganda, Zambia; develop seed grant with WCS Zambia (1.4 & 3.4)
3	Aug '10	Joan Castro	Manila	Thailand /Indonesia	5	Discuss BALANCED and CTI linkages; resource mobilization (3.8)
3	Sept '10	Joan or PFPI consultant	Manila	Ghana	14	Conduct CBD (or other) TOT (3.6)
2	Oct '10	Richard Pollnac	Providence	Nepal	14	Value added research scoping trip to Nepal (2.1)
1	Nov '10	Joan or Ronald	Manila	Workshop site in Philippines	6	Conduct PHE Program Design workshop (1.1)
1	Oct '10	Ronald Quintana	Manila	Tanzania	14	Conduct TOT on Youth Peer Education for East Africa (1.2)
1	TBD'11	Ricky Hernandez	Manila	Tanzania - Zambia (2), - Ethiopia (2) - Kenya/Ug.(2) - Pangani, Iringa & other (3)	Total-90 6 (Z) 6 (E) 6 (K) 30 (P & other)	Provide follow-up to PHE activities and BALANCED trainees in Tanzania, Ethiopia, Uganda, Zambia (1.4)
3	Feb '11	Ronald Quintana	Manila	Ethiopia	14	Conduct TOT on YPE and provide follow-up to EWNRA (3.3)
2	Feb'11	Bob Bowen	Providence	Ethiopia	7	Link PHE Ethiopia website with PHE toolkit (2.2)
2	Apr '11	Richard Pollnac	Providence	Nepal	21	Conduct value added research (2.1)
4	Apr '11	Joan & Isabel	Manila	Washington	10	Workplan meeting
3	TBD	Joan or	Manila or	TBD	7	Develop DIP and proposal

IR	Approx Date	Person	From	Destination(s)	Days	SOW (workplan activity)
		Ricky/Ronald	Tanzania			for seed grant (3.5)
1	TBD	Joan or Ronald	Manila	Indonesia	7	Conduct training for SID (1.1)
1	TBD	Joan or Leona	Manila	Indonesia	7	Conduct TOT with TNC(1.1)
1	TBD	Joan or Linda	TBD	Field or New York	5	Build capacity of WCS to integrate FP into their conservation sites (1.3)
3	TBD	Linda	Washington	Africa	14	Responsive trip for resource mobilization (3.8)
4	TBD	Joan	Manila	DC/RI	14	BALANCED Partners meeting
Domestic Travel						
2, PM	Aug '10 Jun '11	Brian Crawford	Providence	Washington	3 trips: 9 days	Project Management; PHE benefits research; BALANCED Partner's meeting
2, PM	Aug '10 Jun '11	Don Robadue	Providence	Washington	3 trips: 6 days	PHE website; KM (research on conceptual models/research papers); BALANCED Partner's meeting
2, PM	Aug '10 Dec '10 Jun '11	Bob Bowen	Providence	BWI/ Washington	3 trips: 6 days	PHE website; KM BALANCED Partner's meeting
2, PM	Aug '10 Jun '11	Elin Torell	Providence	Washington	2 trips, 9 days	PHE benefits research; PMP; Learning; BALANCED Partner's meeting
2, PM	Aug '10 Jun '11	Lesley Squillante	Providence	Washington	3 trips, 9 days	Project Management and KM-related
PM	Apr '10	Cindy Moreau	Providence	Washington	2 trips, 5 days	BALANCED and USAID meetings
PM, 2	July '10 June '11	Linda Bruce	Washington	Providence	3 trips 10 days	Project Management
2	July '10 June '11	Janet Edmond	Washington	Providence	2 trips, 6 days	KM activities

Appendix 1 – Sample Year 3 Post-training Plan

Tanzania (TA provided by East Africa Consultant, Elin during Pwani visits, and PFPI staff working in the region)

Organization	TA needs per NGO Action Plan or trainer's suggestions
TCMP	<ul style="list-style-type: none"> • Support for planning and conducting CBD and PE refresher training in Pangani • Support for training youth peer educators • Support to develop new IEC materials for Pangani and areas where PHE will be replicated • Support to continue to operationally link TCMP's P, H and E activities • Support to monitor PHE activities
Pangani District Hospital	<ul style="list-style-type: none"> • Support for planning and conducting CBD and PE refresher training in Pangani • Support for training youth peer educators • Support to develop new IEC materials for Pangani and areas where PHE will be replicated
JGI	<ul style="list-style-type: none"> • Support for training youth peer educators • Support to develop IEC materials for their youth activities
WCS	<ul style="list-style-type: none"> • Support to operationally link P, H, and E activities • Support for planning and conducting PE training • Support to develop/revise IEC materials
AWF	<ul style="list-style-type: none"> • Support for to develop conceptual framework for integrating CBFP into their conservation activities • Support to train CBD and/or PEs • Support for training youth peer educators, if WCS is ready • Support to develop IEC materials with integrated messages
NGO/Pharmacy in news sites	<ul style="list-style-type: none"> • Support for CBD and adult PE training • Support for developing/adapting IEC materials
Engender Health (<i>if TCMP expands PHE into Zanzibar</i>)	<ul style="list-style-type: none"> • Support for CBD and PE training • Support to adapt IEC materials with integrated messages
Ramadhani Zuberi/Gov ICM	<ul style="list-style-type: none"> • Support to integrate PHE into local government budgets • Support to action plans developed during SSE
Jermiah Daffa	<ul style="list-style-type: none"> • Support to operationally link TCMP's P, H, and E activities

Ethiopia (TA provided by East Africa consultant and when CRC and/or PFPI staff when working in the region)

Organization	TA needs per NGO Action Plan or trainer's suggestions
PHE Ethiopia	<ul style="list-style-type: none"> • Support on monitoring common PHE indicators used by members to monitor and assess country's PHE projects • Support on assessing PHE Ethiopia member capacity on PHE Program Design • Support of planning and conducting PHE Program Design refresher training, based on capacity building needs
EWNRA	<ul style="list-style-type: none"> • Support for planning and conducting CBD and PE refresher training • Support for training youth peer educators • Support to develop IEC materials for community and youth • Support to continue to operationally link EWNRA's P, H and E activities • Support to collect baseline data on youth RH/FP behaviors • Support to monitor PHE activities, including youth activities
CDRA	<ul style="list-style-type: none"> • Support on monitoring common PHE indicators • Support on training adult and youth peer educators, if requested
ADA	<ul style="list-style-type: none"> • Support on monitoring common PHE indicators • Support on training adult and youth peer educators, if requested
Engenderhealth	<ul style="list-style-type: none"> • Support on CBD and PE activities, if requested • Support on training youth peer educators, if requested
GPSDO	<ul style="list-style-type: none"> • Support on training youth peer educators, if requested
LEM Ethiopia	<ul style="list-style-type: none"> • Support on monitoring common PHE indicators • Support on training youth peer educators, if appropriate
ODA	<ul style="list-style-type: none"> • Support on monitoring common PHE indicators • Support on training youth peer educators, if appropriate
MELCA	<ul style="list-style-type: none"> • Support on monitoring common PHE indicators • Support on training youth peer educators, if appropriate
DSW	<ul style="list-style-type: none"> • Support for training youth peer educators, if requested
Daniel Danano Dale/MoAg & Rural Dev	<ul style="list-style-type: none"> • Support to action plans developed during SSE
Awed Jibril Muhammad/ODA	<ul style="list-style-type: none"> • Support to ODA action plans developed during SSE

Kenya (Provided by East Africa consultant and CRC and/or PFPI staff when working in the region)

Organization	TA needs per NGO Action Plan or trainer's suggestions
APHIA II Coast (for WWF/Kenya project)	<ul style="list-style-type: none"> • Support on youth activities, if requested • Support on IEC/BCC, if requested • Support on collecting data on youth RH/FP behaviors, if requested
Lamu Ministry of Health (for WWF/Kenya)	<ul style="list-style-type: none"> • Support on youth activities, if requested • Support on IEC/BCC, if requested • Support on collecting data on youth RH/FP behaviors, if requested
FHI	<ul style="list-style-type: none"> • Support on PE activities, if requested • Support to Caroline MacKenzie's action plans developed during SSE

Zambia (Provided by East Africa consultant as well as CRC and/or PFPI staff is working in the region)

Organization	TA needs per NGO Action Plan or trainer's suggestions
WCS	<ul style="list-style-type: none"> • Support to train adult peer educators • Support to develop/revise IEC materials • Support to develop MOU with DKT or PSI • Support on developing a monitoring and reporting system
Local MOH	<ul style="list-style-type: none"> • Support to train adult peer educators • Support to develop/revise IEC materials
Other NGOs	<ul style="list-style-type: none"> • Support to train adult peer educators

Ghana (TA provided by East Africa consultant and CRC and/or PFPI staff when working in the region)

Organization	TA needs per NGO Action Plan or trainer's suggestions
CRC	<ul style="list-style-type: none"> • Support to post training activities (i.e. CBD/PE, youth, IEC) as identified during June visit
FoN	<ul style="list-style-type: none"> • Support to post training activities (i.e. CBD/PE, youth, IEC) as identified during June visit • Support to Kwesi Johnson's action plan developed during SSE
MOH	<ul style="list-style-type: none"> • Support to post training activities (i.e. CBD/PE, youth, IEC) as identified during June visit

Philippines (TA provided by PFPI staff and consultants)

Organization	TA needs per NGO Action Plan or trainer's suggestions
PHE Network	<ul style="list-style-type: none">• Support to action plans developed during one-day PHE Program Design workshop (as part of PHE conference)
WWF/P	<ul style="list-style-type: none">• Support to Filemon Romero's action plans developed during SSE• Support on PHE activities funded by EU

Indonesia (TA provided by PFPI staff and consultants)

Organization	TA needs per NGO Action Plan or trainer's suggestions
SID	<ul style="list-style-type: none">• Support to action plan developed after PHE Program Design training
TNC-CTC	<ul style="list-style-type: none">• Support to TNC to build capacity of org. to integrate PHE Program Design into its training center• Support to Hesti Handayani's action plan developed during SSE
NOAA or other	<ul style="list-style-type: none">• Support based on action plan developed during BALANCED training

Appendix 2: Nepal Research

Research studies in Nepal on the benefits of PHE will use as its unit of analysis the Community Forest User Groups (CFUGs) sites that were part of PHE activities implemented by the Resource Identification and Management Society Nepal (RIMS-Nepal) and WWF. RIMS worked with 82 CFUGs in nine Village Development Councils (VDC) of Dhading District, while WWF worked with 32 CFUGs in three VDCs in Bardia District—a total population of 114 sites from which to draw a random sample.

Control sites—those where E or P interventions only were implemented—might also be used if available, but these are not critical to the overall research, as the range and type of interventions at each CFUG are used as variables. The fact that WWF changed its intervention strategy two years ago will be used as a grouping variable to assess impact of that change on success measures. The VDCs will also be used as a grouping variable and its influence assessed.

Time differences—i.e. PHE activities at the RIMS sites were completed as of two years ago while those at the WWF sites remain ongoing—in project duration and/or completion dates between RIMS and WWF sites will also be assessed.

The climate change component of the Nepal research will attempt to draw on the same variables used in the BMS data collected on climate change impacts in the Philippines and Tanzania, and therefore will also allow for cross country comparisons between these three countries.

Appendix 3: Draft SOW for Linking PHE Ethiopia Website to PHE Toolkit

In consultation with Negash Teklu (Director of PHE Ethiopia), Meseret Teferi (Program Assistance to PHE Ethiopia Consortium), Annie Wallace (PHE Fellow), and Techno Bros. (a local Ethiopian web technology/development company), the BALANCED Project will:

- 1) Via email and phone calls, evaluate the software architecture running the PHE Ethiopia website. The PHE-Ethiopia Consortium will need the ability to maintain what is created.
 - a) WHO: Bob with Negash, Meseret, Annie and Techno Bros.
 - b) WHEN: Aug – Sep 10
- 2) Via email and phone calls, determine the content type and workflow for documents and stories that will be fed into the PHE Ethiopia website and which we want to promote with automatic listings on the PHE Toolkit website.
 - a) WHO: Bob with Annie & Negash
 - b) WHEN: Oct – Nov 10
- 3) Travel to Baltimore to structure the PHE Toolkit site at K4Health to accommodate live feed material and collate it into an easily accessible form on the PHE Toolkit website.
 - a) WHO: Bob and JHU/CCP staff
 - b) WHEN: Dec 10 – Jan 11
- 4) Travel to Ethiopia, work with Techno Bros. to construct the document library on the PHE Ethiopia site so it provides an automatic feed and provide hands-on training in using it
 - a) WHO: Bob with Techno Bros.
 - b) WHEN: Feb 11
- 5) Via e-mail and calls, assist PHE Ethiopia if they have problems loading new documents (and stories) onto the newly structured PHE Ethiopia website and verify they are posting automatically to the JHU K4Health site
 - a) WHO: Bob with Negash, Meseret and Techno Bros
 - b) WHEN: Feb – Mar 11.
- 6) Document the process by which the PHE Ethiopia website delivers immediate indexing at K4Health (PHE Toolkit) of materials that it hosts on its own in-country website.
 - a) WHO: Bob with Negash, Meseret, and Techno Bros
 - b) WHEN: by June 2011

Appendix 4 - Summary of Year 3 PMP Targets and Field Indicators

Note: The cumulative results for years 1 and 2 do not include the results from the second part of year 2, which will be reported on in the second semi annual report. Therefore, for most indicators, the actual cumulative results for years 1 and 2 will be higher than noted in this table.

INDICATOR	Cumulative Results Year 1 and 2 (first half)	Year 3 Target Summary	Results to date + targets for year 3	Year 1-3 cumulative Target program statement
SO-1: Number of target organizations incorporating PHE tools, protocols, etc. into their work (PRH 1.1)	3	7	10	12
SO-2: Dollar value of funds leveraged from USAID Missions and non-USG sources to support PHE implementation and scale-ups (million dollars) (PRH 1.2)	1,124,312	0.6	1.724	1.5
1.1 Number of individuals trained by BALANCED in PHE know-how and SOTA using 21st century learning tools	134	351	485	120
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	21	24	15
1.3 Number of new and/or strengthened partnerships established and actively involved in advancing and supporting wider use of PHE approaches as a result of BALANCED capacity-building intervention (PRH 1.3)	0	4	4	8
1.4a. Number of technical support interventions provided by BALANCED to Missions and to organizations to implement PHE within their programs (PRH 3.2)	5	24	29	15

INDICATOR	Cumulative Results Year 1 and 2 (first half)	Year 3 Target Summary	Results to date + targets for year 3	Year 1-3 cumulative Target program statement
1.4b. Number of new organizations receiving TA by BALANCED	3	12	15	No cumulative 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)	1	4	5	15
2.2a Number of success stories, peer review articles, conference papers, research studies documenting key actionable findings about the PHE approaches, their lessons extracted, and value-added (PRH IR 2.2)	8	12	20	6
2.2b. Number of peer reviewed articles and research studies	0	1	1	No cumulative target
3.1 Number of PHE tools, methodologies, and actionable findings replicated in new countries and geographic areas (PRH 3.1)	3	4	7	6
3.2 Number PHE programs scaled up (PRH 3.4)	3	1	4	4
3.3 Number of BALANCED field site activities that produce results that can feed into KM activities (development of tools and success stories)	1	1	2	4

Field Indicators

General

Number of individuals trained (disaggregated by population (P), health (H), and environment (E) topic-specific training, integrated trainings, and gender)

Leveraged funding

Family Planning and Reproductive Health

Number of new users

Number of counseling visits for family planning/reproductive health (FP/RH) as a result of USG assistance

Number of USG-assisted service delivery points providing FP counseling or services

Average household distance/time to access family planning commodities

Biodiversity

Number of hectares in areas of biological significance showing improved biophysical conditions for selected parameter(s)

Number of sustainable natural resource management and conservation policies, strategies, and guidelines implemented

Number of hectares with improved natural resource management, including biologically significant areas, watersheds, forest areas, and sustainable agricultural lands

Economic growth

Number of full time jobs in excess of two weeks created

HIV/AIDS prevention

Number of targeted condom service outlets

Number of individuals reached through community outreach that promotes HIV/AIDS prevention through other behavior change beyond abstinence and/or being faithful

Number of local organizations provided with technical assistance for HIV-related policy development

Water and sanitation

Number of people in target areas with access to improved drinking water supply

Number of people in target areas with access to improved sanitation facilities

Maternal and Child Health

Number of antenatal care visits by skilled providers from USG-assisted programs

Number of deliveries with a skilled birth attendant in USG-assisted programs

Integrated indicators

Number of PHE intersectoral committees formed

Number of population, health, environment organizations addressing non-traditional audiences

Number of local ordinances enacted that integrate PHE

Potential NEW field indicators

Integrated indicators (including youth)

1. Number and frequency of PHE educational sessions provided in the target community
2. Number of PHE youth clubs established and number of members (% women)
3. Number of youth peer educators actively counseling youth on PHE messages
4. Number of PHE youth peer educator counseling sessions recorded (in peer educator log books)

Value added indicators

1. Proportion of women headed households that are involved in PHE committees
2. Percent of leadership positions held by women in committees
3. Number of fuel efficient stoves in use/or distributed