SUC-Assisted Approach in Comprehensive Development Plan Formulation

MODULE 2

Presentation of Ecological Profile

A Joint Project of the
Department of the Interior and Local Government – Region VI
and
University of the Philippines Visayas

2021

MODULE 2

PRESENTATION OF ECOLOGICAL PROFILE

This institutional public service project is under the UPV Office of the Vice-Chancellor for Research and Extension (OVCRE) and is implemented by the Office of Continuing Education and Pahinungod (OCEP).

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DEPARTMENT OF THE INTERIOR AND LOCAL GOVERNMENT

The State Universities and Colleges (SUC)–Assisted Approach in Comprehensive Development Plan (CDP) Formulation Project is under the Improving Local Area and Sectoral Plans through the SUCs program of the DILG. The Support to Local Government Programs – Oversight Project Management Office (SLGP-OPMO) provided the funds amounting to Php 25M for the project implementation. This is through a Memorandum of Agreement (MOA) signed by Atty. Anthony C. Nuyda, CESO III, former Regional Director DILG Region 6 and the University of the Philippines Visayas last March 23, 2018. The project was continued by Engr. Ariel O. Iglesia, CESO IV upon his assumption as Regional Director.

The Comprehensive Development Plan (CDP) is one of the mandated plans formulated by the Local Government Units (LGUs). As it was recorded, Western Visayas has the second lowest number of approved CDPs. One of the reasons behind this is that there is no specific system in place for LGUs to observe proper data generation, management, and updating in compliance with the demand of the latest policies and guidelines.

We are grateful to have partnered with UPV being one of the higher learning institutions in the region, that compose the Western Visayas Local Governance Resource Consortium. Certainly, the project achieved the objectives of introducing an academe-assisted approach in the generation and management of data, enhancing plans through critiquing, mentoring and coaching, creating a Management Information System (MIS), and delivering workshops and training to LGUs for capability building.

The CDP Modules are produced by UPV as output to the project. These Modules intend to introduce a ladderized approach in the delivery of capability building interventions to LGUs in the formulation of their CDPs. The modules shall be utilized by the academe or Learning Resource Institutions (LRIs) as the DILG 6 through its Local Governance Resource Center expands its provision of technical assistance, and challenges all LGUs to step up and formulate quality CDP in compliance with the prescribed existing policies and guidelines.

It is our hope in the DILG 6 that through this project with UPV, we continue to enrich our knowledge platforms in strengthening local development planning in the region.

Padayon kita!

JUAN JOVIAN INGENIERO, CESO IV
Regional Director

UNIVERSITY OF THE PHILIPPINES VISAYAS

I am happy to note that the project SUC-Assisted Approach to Comprehensive Development Plan (CDP) Formulation is bringing out training modules so that these can be shared to other state colleges and universities in Panay Island, as well as in other areas of the country in the future.

The project introduced an academe-assisted approach in generating data and enhancing the quality of CDP plans through critiquing and coaching. UPV's SUC-Assisted Approach supplemented the current DILG process, guiding the formulation of quality comprehensive development plans for 20 municipal/city local government units over a period of 2 years starting in 2018. The project is implemented by the Office of Continuing Education and Pahinungod (OCEP). OCEP is under the Office of the Vice Chancellor for Research and Extension of the University of the Philippines Visayas (UPV).

The project is made possible through the DILG's Support to Local Government Programs – Oversight Project Management Office (SLGP-OPMO). The program is designed to assist municipal government units in delivering basic services through the provision of financial subsidies for priority programs and projects.

The project is a partnership among UPV, the municipal local government units, and DILG VI. The partnership was formalized through a Memorandum of Agreement signed by then UPV Chancellor Ricardo Babaran, DILG IV Regional Director Anthony Nuyda, and the chief executives of the 20 local government units.

I am confident that the modules will benefit users by helping them guide municipal local governments realize their development goals.

PROF. CLEMENT C. CAMPOSANO, Ph.D.
Chancellor

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INTRODUCTION

Rationale

In the Philippines, the formulation of the Comprehensive Development Plan (CDP) used to be the responsibility of national government agencies until the passage of the Local Government Code of 1991 (Republic Act 7160). The passage of this law, along with other related issuances (DILG-HLURB JMC No. 001 Series of 2009 Guidelines on the Harmonization of CLUP and CDP; DILG-NEDA-DBM-DOF JMC No. 001 Series of 2016 Updated Guidelines on the Harmonization of Local Planning Investment Programming, Resource Mobilization, Budgeting, Expenditure Management and Performance Monitoring and Coordination in Fiscal Oversight; DILG MC No. 2008-156 Guide to Comprehensive Development Plan Preparation for Local Government Unit; DILG MC No. 2010-112 LGU Compliance to Updating and Legitimization of CLUP and CDP; and, DILG MC No. 2016-102 Guidelines on the Preparation or Updating of Local Plans), have made LGUs as the principal implementing body about addressing their development needs. To enable the Local Government Units (LGUs) to effectively and efficiently implement its mandates on development concerns, a Comprehensive Development Plan is necessary.

The CDP is the document that pertains to the multisectoral plan formulated at the city or municipal level, which embodies the vision, sectoral goals, objectives, development strategies and priorities within the terms of the LGU officials and the medium term. The CDP contains the 1) Ecological Profile; 2) Sectoral Development Plan; and 3) Implementing Instruments (http://blgf.gov.ph/wp-content/uploads/2017/01/JMC-No.-1-DILGDBM-DOF-BLGF-NEDA.pdf). In the SUC-Assisted approach, the Methodology is another supplementary document that the LGUs have to submit that discusses the process, activities, people, and methods used in making the various documents.

The SUC-Assisted Approach in CDP Formulation Modules lay-out the principles and guidelines in the formulation of the CDP, the Ecological Profile, and the Local Development Investment Program. The modules aim to do the following:

- Provide a step-by-step procedure in formulating a comprehensive development plan that will address the various problems in the locality; to ensure that the programs, projects, and activities are responsive to the demands of the locality;
- Enable the LGUs to plan and implement their specific mandates based on RA 7279 and other pertinent issuances;
- Facilitate the linkage between the LGU’s Comprehensive Development Plans (CDP) and the Comprehensive Land Use Plan (CLUP), and other related local plans;
- Ensure that the LGU’s CDP and LDIP integrate and promote actions that also address thematic concerns such as disaster risk and climate change resilience; and,
- Operationalize the guiding principles presented in these modules.

Guiding Principles of Plan Formulation

The guiding principles in CDP formulation are inclusivity, participatory, and consultative.

Participatory preparation of the plan involves activities that facilitate the generation of the community's felt needs, desires, and perceived issues and opportunities. Suggestions to address issues and concerns can also be derived from this exercise. Participatory assessment is based on the outcomes of community consultations, focus group discussions, meetings with key informants, and multi-sectoral meetings among others.

Consultative plan preparation is an active process in which the planning team opens formal and informal communication channels between the LGU and the various stakeholders. These formal communication channels might include open meetings where stakeholders are invited to a meeting or series of meetings, surveys, and focus group discussion. Informal meetings may include interacting with other people at an event to get certain ideas and their varied responses on certain topics.

Inclusive planning involves a fair representation of citizens providing meaningful and educated inputs. Inclusive planning also involves planners that advocate for greater equity in public policies that address multiple objectives of sustainable development.

The Modules and Its Users

The modules provide Trainers, Facilitators, and Training Monitor of the SUC-Assisted Approach in CDP Formulation with training skills and know-how for an effective process and content delivery. The five (5)-part modules are composed of the following topics:

Module 1. Introduction to Development Planning and LGU Vision Review

Module 2. Presentation of Ecological Review

Module 3. Doing the Sectoral Development Plan

Module 4. Formulating the Local Development Investment Program

Module 5. Writing the Comprehensive Development Plan

To complement the delivery of the modules, worksheets, assessment forms, and powerpoint presentations per session topics are included in the Annexes section.

A Procedures Guide was created for systematic delivery of the approach from the pre-implementation phase, implementation phase, to project closing phase. There is also a separate User Guide for the MIS for CDP.

MODULE 2
PRESENTATION OF ECOLOGICAL PROFILE

Overview

Workshop Objectives

The two and a half-day (2.5-day) workshop aims to:

1. Discuss data for the Ecological Profile tables;
2. Understand and apply the planning tools for qualitative data analysis (VRG matrix, Problem – Solution Finding Matrix (PSFM), problem tree analysis, objective tree analysis) through group workshops;
3. Apply Infographics and MIS for CDP as tools to enhance EP and CDP documents; and,
4. Validate the results of the Capacity Assessment Survey on CDP Formulation

Workshop Outcomes

At the end of the 2.5-day training-workshop, the participants have:

1. Applied the learnings in filling-up the Ecological Profile tables;
2. Demonstrated knowledge and skills on the VRG and PSFM as planning tools for qualitative data and analysis;
3. Applied infographics and MIS for the Ecological Profile; and,
4. Provided feedback on the capacity assessment survey results

Workshop Outputs

1. Form 1c. Ecological Profile
2. Vision-Reality Gap (VRG) matrix
3. Problem-Solution Finding Matrix (PSFM)

The Training Team and Process Documentation Team

The Facilitator is the person that helps the trainer and the participants in achieving the training-workshops' objectives. The facilitator is more focused on the process. He/she leads the discussions and helps participants learn from their own experiences and shared information.

The Trainer is a person who leads a discussion about the topics' content. A trainer provides coaching and uses lectures, conducts demonstrations, supervises skill practice, and provides feedback on the participants' outputs. In contrast to a Facilitator who is a process expert, the trainer is a content expert.

The Training Monitor checks the requirements or assignments that LGUs are expected to do or bring to the workshops. He/she checks the activity flow and approved content. The Training Monitor fills-up a monitoring form after the training sessions.

The Secretariat is in charge of the registration, distribution of materials, collection of output, equipment food. They assist the facilitator in the conduct of the training and distribution of certificates and training materials.

The Process Documentation team is in charge of documenting the activities, discussions and agreements, and of organizing the outputs during the training sessions.

Participants

The Planning Core Group and/or the Technical Working Group (TWG) for CDP Formulation (maximum of 10 members).

Requirements and Materials

Before the Workshop	The TWG has gathered secondary data as inputs to tables in the Ecological Profile.
References	References as per DILG Illustrative Guide (2015) • Chapter IV of the Illustrative Guide CDP Preparation Step 3: Prepare Ecological Profile, and Structured List of PPAs (Pages 7-10) • DILG Guide to Ecological Profiling • DILG MC 2008 – 156: Guide to CDP Preparation
Materials	1. Meta-cards of various colors 2. Manila papers 3. Colored Markers 4. Notepads or writing pads 5. Scotch tapes 6. At least 1 laptop per LGU (with HDMI adaptor) 7. Multi-media projector 8. Attendance Sheet 9. Registration and Evaluation Forms
Suggested additional training materials/ activities	Informational videos, energizers, simulated learning exercises
After the Workshop	Conduct follow-up sessions in their LGUs to ensure that outputs are accomplished.

Workshop Sessions

Session 1	Module Overview and Expectations Check
Session 2	Validation of Capacity Assessment Survey Results
Session 3	Review and Discussion of EP Chapters/Sectors using the EP Checklist
Session 4	Tool to Enhance CDP: Infographics
Session 5	Tool to Enhance CDP: MIS
Session 6	Planning Tool for Qualitative Data Analysis: PSFM
Session 7	Planning Tool for Qualitative Data Analysis: VRG
Session 8	Planning Tool for Qualitative Data Analysis: Problem Tree Analysis
Session 9	Planning Tool for Qualitative Data Analysis: Objective Tree
Session 10	CDP Outline and Content
Session 11	Action Planning and Evaluation

Activity Flow

Day	Sessions	Duration (in minutes)
Day 1 AM	*Arrival of Participants (morning)*	-
Day 1 PM	*Preliminaries:* *Registration* *Invocation and National Anthem* *Message/s*	10
	Session 1: Module Overview and Expectations Check	20
	Session 2: Validation of Capacity Assessment Survey Results and Open Forum	45
	Session 3: Review and Discussion of EP chapters/sectors using the EP checklist: a. Geo-Physical b. Population and Social Profile c. Local Economy *Energizer* d. Infrastructure and facilities e. Local institutional capacity Open Forum	210
	Wrap-up Day 2 & Instructions for Day 3	15
	Total	300 (*5 hours*)
Day 2	Preliminaries	30

	Registration Check Attendance Recap	
	Session 4: Tools to Enhance the CDP: Infographics *Workshop 1*	180
	Session 5: Tools to Enhance CDP: MIS	60
	Lunch Break	
	Session 6: Tool for Qualitative Data Analysis: PSFM *Workshop 2: PSFM*	90
	Session 7: Tool for Qualitative Data Analysis: VRG *Workshop 3: VRG*	150
	Presentation of outputs	60
	Total	570 (*9.5 hours*)
Day 3	Preliminaries: Registration Check Attendance Recap	30
	Session 8: Planning Tool for Qualitative Data Analysis: Problem Tree Analysis Workshop 4	130
	Session 9: Planning Tool for Qualitative Data Analysis: Objective Tree Analysis Workshop 5	130
	Session 10: Methodology and Outline	60
	Session 11: Action Planning and Next Steps	30
	Total	390 (*6.5 hours*)

**Snacks will be served in-between activities.*

SESSION 1
Module Overview and Expectations Check

Objective	To introduce to the participants the objectives and outputs of the training-workshop.
Duration	20 minutes
Materials	Meta-cards of various colors, Manila papers, Colored Markers, Scotch tapes
Powerpoint	2.1 Module Overview and Expectations Check
References	None
Outputs	Expectations on metacards

STEPS:

Step 1. Check participants' expectations

For each set of meta cards, assign a color specific to expectations. The facilitator then distributes the meta cards to training participants. Allow participants to write their expectations on the following topics: a) content and methods of delivery in the writeshop; b) expectations of other participants; and, c) expectations to self. Each main thought is written on the colored meta card with an assigned topic. For example, a green meta card is used for expectations on content and methods of deliver, a yellow meta card for expectations to self, and a pink meta card for expectations with others. Give participants 5 minutes for this activity.

Step 2. Process training expectations of the participants

The facilitator processes the outputs by grouping participants' similar ideas. If some expectations do not match with the outputs, deliverables and methods of delivery in the workshop, the trainer makes necessary adjustments in consultation with other team members.

Step 3. Present and discuss the house rules

The facilitator presents and discusses the house rules to the participants. House rules should include the following details:

1. Attendance, log-in and log-out policies
2. Issuance of certificates and accomplishment of evaluation forms
3. Use of mobile phones
4. General guidelines including emergency

The facilitator emphasizes that there must be at least 80% attendance to the training workshop to be given a certificate of participation and a certificate of attendance. Only a certificate of attendance will be given for attendance below 80% for the duration of the workshop. Each participant submits an accomplished evaluation form at the end of the event to be issued certificate/s.

At the end of the series of training-workshops, a Certificate of Completion will be given to participants who have completed at least 75% of all training workshops.

SESSION 2
Validation of Capacity Assessment Survey Results

Objective	To present to the participants for validation the results of the capacity assessment pre-test survey.
Duration	45 minutes
Powerpoint	2.2 Validation of Capacity Assessment Survey Results
References	None
Forms/Outputs	Feedback on the results

STEPS:

Step 1. Presentation of Capacity Assessment Survey Objectives and Results

The facilitator presents the objectives and results of the Capacity Assessment Pre-Test Results. The results will be presented in the following outline:

I. Objectives of the Capacity Assessment Pre-Test Survey
II. Pre-Test Findings
   a. Profile of planners
   b. Level of knowledge of the various aspects of the CDP
   c. Level of knowledge of the CDP Plan Guidelines and References
   d. Institutional Capacity of the LGU in the CDP formulation
   e. Perceptions on
      i. CDP Importance
      ii. Planning and Good Planning
      iii. Trainings needed
      iv. Facilitating and hindering factors in the application of learning
   f. Suggestions for improvement in the CapDev Program

Step 2. Discuss feedback

The facilitator discusses comments from the participants on the results of the survey and ask for a validation form the participants. Clarifies and validates vague answers in the survey.

SESSION 3
Review and Discussion of EP Sectors

Objective	At the end of the session, the participants have an initial draft of their EP based on the EP checklist.
Duration	210 minutes
Methods	Lecturette
Materials	Laptop, LCD Projector
Powerpoint	2.3 Review and Discussion of EP Chapters/Sectors using the EP Checklist
References	DILG Guide to Ecological Profiling
Forms/Outputs	Feedback on the EP Checklist

STEPS:

Step 1. Deliver the lecturette

The trainer explains the content of the EP checklist that was sent to them prior to the training. Trainer asks participants to group themselves according to their sector or chapter assignment and discuss among themselves if the results were compliant with the checklist (see Annex 2A EP Checklist).

Step 2. Discuss participants' outputs

Trainer assign the sectors to be presented by a group. Follow the presentation flow below:

- Present the vision
- Present the success indicator pertinent sector being tasked of you to present
- Present your EP
- You have 20 minutes to present
- 10 minutes in total for critiquing
- Please take the critiquing as input

Step 3. Discuss participants' feedback

The trainer discusses with participants their insights on the review and feedback at the end of the presentation. Trainers discuss the role of a certain personnel (e.g. MLGOO, M and E person-in-charge) in reviewing the EP based on the EP checklist. See Illustrative Guide page 82 and MC 2008-156 page 46 for the Guide Questions.

Step 4. Check group outputs

The Training Monitor checks the completeness of the forms or outputs assigned for that day. The facilitator clarifies from participants on the incompleteness of the outputs and ensures that the participants can indicate in their action plan the compliance to complete the outputs.

The Training Monitor discusses with the Trainer and Facilitator if the workshop objectives were achieved (see Annex 2F). He/she also looks for the outputs of the participants to ensure that they have submitted the hard and soft copies to the Facilitator.

Step 5. Collect group outputs

The facilitator collects the forms. He/she informs the participants that follow-up sessions must be done in their respective LGUs to ensure that the necessary forms are accurately filled-up and are accomplished.

The Secretariat assists the facilitator in checking that every LGU has made initial entries into the forms.

The Process Documentation team gathers all collected outputs and organizes using a simple filing system.

Step 6. Give instructions for the next day

The facilitator informs the participants of room assignments and other administrative concerns and about activities for Day 2.

SESSION 4
Tools to Enhance the CDP: Infographics

Objective	At the end of the session, the participants have learned the basic skill in Infographics to enhance the preparation of the CDP.
Duration	180 minutes
Methods	Lecturette, workshop
Materials	Laptop, LCD Projector, vision matrix handouts
Powerpoint	3.4 Tools to Enhance CDP: Infographics
Reference	None
Form/Outputs	One infographic presenting selected quick facts of the municipality/city.

STEPS:

Step 1. Deliver the lecturette

Trainer discusses how infographics can enhance their documents. Explains the basic skills and knowledge of creating infographics. The presentation outline is below:

Presentation outline

I. Introduction and setting of expectations
II. What is Information Repackaging
III. How to make your Infographics
IV. Creating the story and the lay-out

Step 2. Facilitate the workshop

Trainer ask the participant to apply their learnings by making infographics of selected information about their LGU. Participants can select a section of their EP.

Step 3. Discuss Infographics outputs

Trainer asks each LGU to present their sample Ecological Profile using Infographics. He/she discusses with participants their comments at the end of the presentations.

SESSION 5
Tools to Enhance the CDP: MIS

Objective	At the end of the session, the participants must be able to familiarize themselves with the MIS for CDP preparation.
Duration	60 minutes
Methods	Lecturette
Materials	Laptop, LCD Projector
Powerpoint	3.5 Tools to Enhance CDP: MIS
Reference	None
Form/Outputs	Feedback on the MIS for CDP

STEPS:

Step 1. Deliver the lecturette

The trainer provides a more in-depth discussion of the functions of the MIS for the CDP preparation. This is because the participants are expected to provide inputs in the system while populating the tables of their Ecological Profile.

Presentation outline

I. Purpose of the CDP MIS
II. Types of MIS Users
III. Components of CDP MIS
IV. Sample of the contents of MIS
V. CDP-MIS Requirements

Step 2. Get feedback from participants

The trainer discusses with participants their feedback on the MIS. Also gather suggestions to improve usage of the MIS.

Step 3. Synthesis of MIS usage

Trainer discusses highlights of the MIS and its capability and how LGU will be able to make them manage their data efficiently in making the CDP. Shares best practices from other LGUs as well.

SESSION 6
Tools for Qualitative Analysis: Problem Solution Finding Matrix (PSFM)

Objective	At the end of the session, the participants must be able to • Familiarize themselves with PSFM as a tool to analyze issues and problems; and, • Use the PSFM tool to analyze an issue or problem in their LGUs.
Duration	90 minutes
Methods	Lecturette, Workshop
Materials	Laptop, LCD Projector, Manila Paper and Pens
Powerpoint	2.6. Planning Tool for Qualitative Data Analysis: PSFM
Reference	DILG MC 2008-156 Guide to CDP Formulation
Form/Outputs	Worksheet 1. Modified PSFM

STEPS:

Step 1. Deliver the lecturette

The trainer presents the Problem Solution Finding Matrix as a tool for analyzing LGU issues and problems.

Presentation outline

I. What is the Problem Solution Finding Matrix?
II. Importance of the PSFM and other tools in the Comprehensive Development Planning Cycle
III. Workshop on the Problem Solution Finding Matrix

Step 2. Facilitate the workshop

The trainer provides instructions in filling up the (modified) PSFM. The worksheet is provided below (see Annex 2B).

WORKSHEET 1. Modified PSFM

Issue/ Problem or observed condition	Explanations (Causes)	Standard (desired scenario)	Gap (disconnect between the reality & desired scenario; the current reality)	Implication if unresolved	Policy options

Step 3. Get feedback from participants

The trainer discusses with participants their insights on the presentation.

SESSION 7
Tools for Qualitative Analysis: Vision Reality Gap (VRG)

Objective	At the end of the session, the participants should be able to assess the disparity between the envisioned state and the current condition of the LGU using the VRG.
Duration	150 minutes
Methods	Lecturette, Workshop
Materials	Laptop, LCD Projector
Powerpoint	2.7 Planning Tool for Qualitative Data Analysis: VRG
Reference	DILG MC 2008-156 Guide to CDP Formulation
Form/Output	Worksheet 2.Vision-Reality Gap Matrix

STEPS:

Step 1: Deliver the lecturette

The trainer discusses the Vision Reality Gap as a tool for qualitative analysis. He/she explains the components of the VRG matrix.

Presentation outline

I. What is Vision-Reality Gap (VRG)?
II. Determining the VRG
  a. VRG Analysis
  b. The VRG Rating Scale
III. Examples of VRG

THE CURRENT REALITY RATING SCALE

Rating	INTERPRETATION
0	Absolutely nothing has yet been done about the goal.
1	
2 3	Something is already being done to achieve the goal, but the level of attainment is still on the low side.
4	
5	The goal is half accomplished.
6	
7	
8	Goal is more than half-fulfilled but still short of full attainment.
9	
10	The goal is completely attained, and no further effort is needed.
N	No data are available.

Step 2. Facilitate the workshop

The trainer provides instructions on the conduct of the VRG Analysis. He/she instructs the participants to examine the sectoral descriptors and their corresponding success indicators and instructs them to review the scores/values. He/she then provides instructions on how to use the VRG Rating Scale if quantified values are not available. He/she gives instructions on how to fill-in the VRG Matrix (see Annex 2C).

WORKSHEET 2. Vision-Reality Gap Matrix

Vision elements	Descriptors	Success indicators	Current reality rating	Vision-reality gap rating*	What to do to close the gap

Step 3: Presentation of output and feedbacking

The trainer gives time for each LGU to present their workshop The LGU participants are given to present their workshop outputs. The trainer could just select a VRG Analysis of a sector for every LGU. Then, he/she discusses with participants their insights on the review and feedback at the end of the presentation.

Step 4. Check group outputs

The Training Monitor checks the completeness of the forms or outputs assigned for that day. The facilitator clarifies from participants on the incompleteness of the outputs and ensures that the participants can indicate in their action plan the compliance to complete the outputs.

The Training Monitor discusses with the Trainer and Facilitator if the workshop objectives were achieved (see Annex 2F). He/she also looks for the outputs of the participants to ensure that they have submitted the hard and soft copies to the Facilitator.

Step 5. Collect group outputs

The facilitator collects the forms. He/she informs the participants that follow-up sessions must be done in their respective LGUs to ensure that the necessary forms are accurately filled-up and are accomplished.

The Secretariat assists the facilitator in checking that every LGU has made initial entries into the forms.

The Process Documentation team gathers all collected outputs and organizes using a simple filing system.

Step 6. Give instructions for the next day

The facilitator informs the participants of room assignments and other administrative concerns and about activities for Day 3.

SESSION 8
Tools for Qualitative Analysis: Problem Tree

Objective	At the end of the session, the participants would have • an understanding of the Problem Tree as a tool for qualitative analysis of the LGU problem and situation, which will assist them in them in their CDP formulation; and • constructed a problem tree based on a starter problem.
Duration	130 minutes
Methods	Lecturette, Workshop
Materials	Laptop, LCD Projector
References	Problem Tree Analysis (UN-Habitat and EAWAG) Tools for Development (DFID)
Powerpoint	2.8 Planning Tool for Qualitative Data Analysis: Problem Tree
Reference	DILG MC 2008-156 Guide to CDP Formulation
Form/Output	Problem Tree

STEPS:

Step 1: Deliver the lecturette

The trainer presents the Problem Tree as a tool for qualitative data analysis.

Presentation outline

I. What is a problem tree?
II. Linking components of a problem tree
III. Example of a problem tree
IV. Steps in the problem tree analysis

Step 2: Facilitate the workshop

The trainer provides instructions for the workshop on the problem tree.

Step 3: Presentation of output through a gallery walk

The trainer asks each LGU to present their problem tree analysis of a selected starter problem. The outputs are posted on the boards/walls, which would allow other participants to examine and provide feedback on the outputs.

Step 4. Check group outputs

The facilitator checks the completeness of the forms or outputs assigned for that day. The facilitator clarifies from participants on the incompleteness of the outputs and ensures that the participants can indicate in their action plan the compliance to complete the outputs.

The facilitator discusses with the Trainer if the workshop objectives were achieved (see Annex 2F). He/she also looks for the outputs of the participants to ensure that they have submitted the hard and soft copies to the Facilitator.

Step 5. Collect group outputs

The Training Monitor collects the forms. He/she informs the participants that follow-up sessions must be done in their respective LGUs to ensure that the necessary forms are accurately filled-up and are accomplished.

The Secretariat assists the facilitator in checking that every LGU has made initial entries into the forms.

The Process Documentation team gathers all collected outputs and organizes using a simple filing system.

SESSION 9
Tools for Qualitative Analysis: Objective Tree

Objective	At the end of the session, the participants should: • Understand the use of Objective Tree as a method for qualitative analysis of the LGU situation; and, • Have reformulated the elements in the problem tree, in the previous session, into positive desirable conditions.
Duration	130 minutes
Methods	Lecturette, Workshop
Materials	Laptop, LCD Projector
References	Tools for Development (DFID)
Powerpoint	2.9 Planning Tool for Qualitative Data Analysis: Objectives Tree
Reference	DILG MC 2008-156 Guide to CDP Formulation
Form/Output	Objective Tree

STEPS:

Step 1: Deliver the lecturette

The trainer discusses how to use the Objective Tree as a method for qualitative analysis in preparing the CDP.

Presentation outline

I. What is an Objective Tree?
II. Compare Problem Tree vs Objective Tree
III. Steps in the Objective Tree Analysis

Step 2: Facilitate the workshop

Trainer gives instruction to participants on how to turn their problem tree into an objective tree.

Step 3: Discuss the output

The trainer gives time for each LGU to present their objectives tree. Then, he/she discusses with participants their insights on the review and feedback at the end of the presentation.

SESSION 10
Methodology Outline and Content

Objective	At the end of the session, the participants should have knowledge of the outline and the contents of the Methodology Report.
Duration	60 minutes
Methods	Lecturette
Materials	Laptop, LCD Projector
Powerpoint	2.10 CDP Outline and Content
Reference	DILG MC 2008-156 Guide to CDP Formulation
Form/Output	Feedback

STEPS:

Step 1: Deliver the presentation

The trainer presents to the participants the outline and the contents of the Methodology in the CDP Report.

Title

Table of Contents

A. Introduction
- Legal Bases for CDP formulation
- Creation of the Team - Executive order and Team Composition

B. Process in Visioning
- Procedure in the Review of the LGU's Vision, Process in identifying the descriptors and RAPIDS indicators
- Tools used in the VRG and PSFM
- Photos during workshops

C. Process in Doing the Ecological Profile
- Refer to the EP Checklist
- References Used in Making the EP
- Schedule and Participants of EP workshops
- Photos during workshops

D. Schedule of Meetings for Process Assessment
- LDC, PPDO, Sectoral Groups, Local Special Bodies/ Advisory Councils
- Refer to DILG Local Planning Illustrative Guide (2015, pp. 87 -88)

E. Process in Creating Sectoral Development Plans

- LGU Composition Per Sector
- Outputs in the Problem Tree, Objective Tree
- Schedule of Sectoral Planning Workshops
- Photos during workshops

F. Process in Formulating the LDIP

- Description of Tools used in the LDIP
- Outputs from the Sifting, PPA Prioritization (Urgency Test), and GAM
- Schedule of Sectoral Planning Workshops
- Photos during workshops

G. Challenges in CDP Creation

- Concerns on:
  - data collection, processing, and analysis
  - human resource
  - administrative matters
- Other challenges

H. Dealing with Challenges

- Tactics and Strategies in Response to Challenges

Step 2. Get feedback from participants

The trainer allows the participants to ask questions and clarify issues.

SESSION 11
Action Planning, Administration of Activity Evaluation Form and Next Steps

STEPS:

Step 1. Synthesize the training-workshops

The facilitator summarizes key concerns raised during the training-workshop.

Step 2. Get feedback from the participants

The facilitator assigns one representative per LGU to provide insights about the training-workshop. The facilitator responds to the queries of the representatives. If pressed for time, assign one or two representatives from the participants instead of getting feedback from each LGU representative.

Step 3. Check group outputs

The Training Monitor checks the completeness of the forms or outputs assigned for that day. The facilitator clarifies from participants on the incompleteness of the outputs and ensures that the participants can indicate in their action plan the compliance to complete the outputs.

The Training Monitor discusses with the Trainer and Facilitator if the workshop objectives were achieved (see Annex 2F). He/she also looks for the outputs of the participants to ensure that they have submitted the hard and soft copies to the Facilitator.

Step 4. Collect group outputs

The Training Monitor collects the forms. He/she informs the participants that follow-up sessions must be done in their respective LGUs to ensure that the necessary forms are accurately filled-up and are accomplished.

The Secretariat assists the facilitator in checking that every LGU has made initial entries into the forms.

The Process Documentation team gathers all collected outputs and organizes using a simple filing system.

Step 5. Finalize agreements and next steps

The facilitator presents the form of the action plan. Give participants two-three minutes to fill-up the action plan (Annex 2D). Instruct participants to submit the action plan to the Secretariat at the end of the session.

The facilitator reiterates that follow-up workshop session/s should be conducted in the LGUs to ensure that the CDP documents are accomplished before the schedule of the next training workshop.

ACTION PLAN

PROVINCE: ________________

MUNICIPALITY: __________________

ACTIVITIES	DATE	OUTPUT	Office Personnel Required	BUDGET/FACILITIES/ EQUIPMENT NEEDED	REMARKS
1.					
2.					
3.					

Step 6. Administer the evaluation form

The facilitator lets participants fill-up an activity evaluation form (Annex 2E). He/she instructs participants to submit the form to the Secretariat.

The post-activity evaluation aims to point out the good points about the training-workshop activity so that the organizations can continue to do it the same way in future training-workshops. It also points out the things that must be improved or changed in the activity to make everything better.

Step 7. Accept form, outputs and give certificates

The Training Monitor, assisted by the Secretariat, accepts all the forms submitted by the participants. The Secretariat examines the completeness of the forms. Soft copies are also submitted to the Facilitator.

The Secretariat gives a Certificate of Attendance and Certificate of Participation to participants who have complied with the requirements.

ANNEXES

ANNEX 2A

GENERIC ECOLOGICAL PROFILE (EP) CHECKLIST REPORT

____

Name of Municipality/City

This Generic EP Checklist Report shall be used as the *interim* pro-forma for the requirements for the Comprehensive Development Plan where an official format has not yet been developed by DILG but is a required output in the submission of the CDP document.
Read the questions carefully and write the required information on the blank spaces provided or otherwise check (✓) the appropriate boxes □ or parenthesis ( ). Boxes with checkmarks (✓) are automatically required. Use additional sheets if necessary and indicate this in the appropriate space.

FACT SHEET OF THE TOWN/CITY

Town or City Name ____

Province ____

Vision of the Town ____

____

*Base Years of the Data (earliest & the latest) ____

*Note: Earliest population data is 2010, the latest is 2015. Use official data if obsolete.

Office Address ____

**Contact Person ____

Designation ____

Contact Number/s ____

** Contact Person: Either the MPDC or the Appointed Person of the Mayor.

Landline ____

Fax Number ____

Mobile Number ______________________________

Email address ______________________________

The objectives of the Checklist concerning the Ecological Profile are to:

Format Review

- ensure that the submitted document is complete (i.e. there are no missing pages and all the tables, maps and graphs are clear and proper citation is observed using a citation style guide consistent throughout the document.)
- determine whether the draft EP conforms to the and sequence described in DILG's Guide in Making the Ecological Profile.

Content Review

- to assess the substance and logic of the EP data with emphasis on the coherence of the data to the ideal situation of the sector
- Determine the relevance of data to target setting to achieve the vision of the LGU.

It is suggested that the indicators with the vision have already been established before the start of the Format and Content review.

The individual results of the form and content reviews will be the basis for feedback and for revising or augmenting the EP.

PART 1. FORMAT REVIEW CHECKLIST. Review based on the completeness and sequence (Source: DILG Illustrative Guide 2015, pp.80-81)

FORM	Yes	No	Remarks (e.g. Missing Year of Foundation, No History)
COMPLETENESS			
Are the minimum data required present and updated in the…			
History of the City/Municipality?			
Geo-Physical Environment?			
Population and Social Services Sector?			
Local Economy Sector?			
Infrastructure and Physical base Sector?			
Local Institutional Capability?			
Are the data sufficient to be used as baseline for targeting in plans in the…			
Geo-Physical Environment?			
Population and Social Services Sector?			
Local Economy Sector?			
Infrastructure and Physical base Sector?			
Local Institutional Capability?			

SEQUENCE (To be answered AFTER the entire Content Review has been filled-up) *Does the EP follow the sequence prescribed in the Guide to Ecological Profiling or is the sequence of data logical?*	YES	NO	Remarks (If NO, indicate why current sequence is acceptable)
History of the City/Municipality			
Geo-Physical Environment			
Population and Social Services Sector			
Local Economy Sector			
Infrastructure and Physical base Sector			
Local Institutional Capability			

MINIMUM MAPS & TABLES *Are the minimum tables and maps present?*	YES	NO	Remarks
History of the City/Municipality			
Geo-Physical Environment			
Population and Social Services Sector			
Local Economy Sector			
Infrastructure and Physical base Sector			
Local Institutional Capability			

SOURCE ACKNOWLEDGEMENT *Is there proper acknowledgement of sourced material through footnotes, endnotes and proper citations?*	YES	NO	REMARKS
History of the City/Municipality			
Geo-Physical Environment			
Population and Social Services Sector			
Local Economy Sector			
Infrastructure and Physical base Sector			
Local Institutional Capability			
Other Observations (proper citation, correct graphical format, size of font, tables, and graphs)			

PART 2. CONTENT REVIEW CHECKLIST. Review based on the substance, logic and relevance of the data

CONTENT	YES	NO	REMARKS
HISTORY			
Legends is mentioned in the formation of the town			
Key events that influenced the formation of the city/town are briefly discussed, preferably written in a timeline.			
Early settlers or inhabitants and their characteristics are mentioned in the document.			
Other Observations (proper citation, correct graphical format, size of font, tables, and graphs):			
GEO-PHYSICAL ENVIRONMENT			
There is description of the location, topography, geology, land area and political subdivisions.			
There is a description of the land resources and land uses.			
There is a description of water resources.			
There is a description of the climate.			
There is an inventory of the surface water by class. (p. 60 of Guide to Making an EP).			
The computation on land area is correct.			
Consistent and appropriate unit of measurement is used.			
There is a description of hazards (natural/human) including their location.			

CONTENT	YES	NO	REMARKS
There is a description of the status of species in the area.			
The Problem-Solution Finding Matrix is presented.			
Other Observations (proper citation, correct graphical format, size of font, tables, and graphs):			
POPULATION AND SOCIAL SERVICES SECTOR			
3.a. Population			
There is a description of household social composition and characteristics (ex. marital status, age-sex distribution, age dependency ratio, school-going age population, HH population 7 years old & above by educational attainment, labor force, employment rate, labor force participation rate, un/underemployment rate).			
The spoken languages/dialects are mentioned.			
There is description of historical population size and growth rate.			
The computations and interpretation on population (size, growth rate, and population distribution) are correct.			
Correct graphical forms of data (ex. population pyramid, bar graphs, pie charts).			
There is a description of the migration pattern. (Includes seasonal workers and OFWs)			
There is a description of the poverty threshold and income			
Consistent and appropriate use of unit of measurement is used.			
3.b. Education			
There is data on the drop-out rate.			
There is historical enrolment data by level (elementary, secondary) in private schools			
There is historical enrolment data by level (elementary, secondary) in public schools			
There is an inventory of tertiary and vocational schools (public/private).			
General Comments:			
Status of facilities and human resources as per planning standards are discussed (ex. student-teacher-classroom ratio).			
Computation and interpretation of data are correct.			
Consistent and appropriate unit of measurement is used.			
The sub-sector describes how disadvantaged groups access the resources.			
3.c. Health			

CONTENT	YES	NO	REMARKS
There is description of health facilities (ex. public and private hospitals, health services, health personnel).			
There is data on fertility, mortality, and morbidity.			
There is data on nutritional status.			
General Comments:			
Status of facilities and human resources as per planning standards are discussed (ex. hospital-population ratio, doctor, nurses, BHWs per population/area).			
Computation and interpretation of data are correct.			
Consistent and appropriate unit of measurement is used.			
The sub-sector describes how disadvantaged groups access the resources. (Compliance to accessibility laws, Magna Carta for Women, Senior Citizen, PWDs, Solo Parent Act)			
3.d. Social Welfare & Development			
There is description of social welfare services and clientele served.			
There is description of day care services.			
There is a description of People with Special Needs.			
There is description of social welfare facilities.			
General Comments			
Status of facilities and human resources as per planning standards are discussed (if applicable).			
Computation and interpretation of data are correct.			
Consistent and appropriate unit of measurement is used.			
The sub-sector describes how disadvantaged groups access the resources.			
3.e. Housing			
Number of homeless is indicated.			
Tenure status is described.			
Types of materials are described.			
Toilet facilities are described.			
Sources of drinking water are described.			
There is information about informal settlers.			
There is inventory of potential lands for housing.			
General Comments:			
Status of facilities and human resources as per planning standards are discussed (ex. distance from water source from house).			
Computation and interpretation of data are correct.			
Consistent and appropriate unit of measurement is used.			
The sub-sector describes how disadvantaged groups access the resources.			

CONTENT	YES	NO	REMARKS
3.f. Public Order and Safety			
There is description of crime incidence.			
There is a report of fire incidence.			
There is description of equipment and facilities for fire and police.			
There is a description of jail facilities			
There is description of human resources on jail management			
General Comments:			
Status of facilities and human resources as per planning standards are discussed (ex. police-population ratio).			
Computation and interpretation of data are correct.			
Consistent and appropriate unit of measurement is used.			
The sub-sector describes how disadvantaged groups access the resources.			
3.g. Sports and Recreation			
There is description of parks and playgrounds.			
There is description of sports facilities.			
General Comments:			
Status of facilities and human resources as per planning standards are discussed (ex. police-population ratio).			
Computation and interpretation of data are correct.			
Consistent and appropriate unit of measurement is used.			
The sub-sector describes how disadvantaged groups access the resources.			
The Problem-Solution Finding Matrix is presented.			
Other Observations (proper citation, correct graphical format, size of font, tables, and graphs):			
THE LOCAL ECONOMY			
4.a. Farming Agriculture			
There is a description of agricultural crop production			
There is a description of livestock and poultry			
There is a profile of agricultural occupation/groups			
There is an inventory of livestock and poultry farms			
There is number of people employed in agriculture.			
4.b. Fisheries			
There is data on inland fishing			
There is data on municipal fishing			
There is data on commercial fishing.			
There is data on fishing grounds			

CONTENT	YES	NO	REMARKS
There is number of people engaged in fishing (fisherfolks)			
4.c. Mining and Quarrying			
There is data on mining activities			
There is data on quarrying activities			
4.d. Forestry			
There is data on forest-based production activities			
4.e Manufacturing			
There is data on manufacturing/industrial establishments (ex. Location, type, number, classification assets)			
There is data on industrial establishment by employment status and/o capitalization			
4.f. Tertiary Services			
There is data on tertiary services (no. of hotels, restaurants, storage facilities, financial institutions)			
There is employment data on tertiary services			
There is data on real estate, business activities			
There is employment data on real estate			
There is inventory of industrial establishments by degree of hazard and pollution.			
4.g. Tourism			
There is inventory of tourist attractions within protected areas or areas that need protection.			
There is a profile of tourist attractions and their location.			
General Comments:			
There are areas for other economic activities not mentioned above.			
The Location Quotient is determined.			
Status of facilities and human resources as per planning standards are discussed (if applicable).			
Computation and interpretation of data are correct.			
Consistent and appropriate unit of measurement is used.			
The sub-sector describes how disadvantaged groups access the resources.			
The Problem-Solution Finding Matrix is presented.			
Other Observations (proper citation, correct graphical format, size of font, tables, and graphs):			
INFRASTRUCTURE, UTILITIES, AND FACILITIES			
There is inventory of roads, bridges, street facilities.			
There is inventory of transport facilities (jeepneys, buses, boats, and airport).			

CONTENT	YES	NO	REMARKS
There is an inventory of communication facilities.			
There is an inventory of water supply per level of access and other sources of water (Ex. for domestic, commercial, industrial uses).			
There is an inventory of electric power supply.			
There is a description of the status of cemeteries.			
There is a profile of the slaughterhouse.			
There is a description of the public market.			
There is an inventory of agricultural support facilities.			
There is a description of irrigation facilities.			
There is an inventory of solid waste management facilities.			
There is a description of the types of wastes, volume, and sources.			
There is a profile of waste generation by source and system of disposal			
General Comments			
Status of facilities and human resources as per planning standards are discussed (if applicable).			
Computation and interpretation of data are correct.			
Consistent and appropriate unit of measurement is used.			
The sub-sector describes how disadvantaged groups access the resources.			
The Problem-Solution Finding Matrix is presented.			
Other Observations (proper citation, correct graphical format, size of font, tables, and graphs):			
LOCAL INSTITUTIONAL CAPACITY			
There is description of the organizational structure (ex. Staffing, plantilla positions, distribution of personnel, educational attainment).			
There is a list of Local Special Bodies and their status.			
There is a list of National Government Agencies operating in the LGU.			
There is a list of CSO/NGOs operating in the LGU and their services.			
There is a record of Property Tax Revenue and Other Taxes.			
There is a description of the expenditures (service, operations).			
There is a record of business permits issued.			

CONTENT	YES	NO	REMARKS
There is an inventory of legislations (ordinances, resolutions) issued or enacted by sector (Required: Investment Code, Environment Code.			
General Comments			
Status of facilities and human resources as per planning standards are discussed (if applicable).			
Computation and interpretation of data are correct.			
Consistent and appropriate unit of measurement is used.			
The sub-sector describes how disadvantaged groups access the resources.			
The Problem-Solution Finding Matrix is presented.			
Other Observations (proper citation, correct graphical format, size of font, tables, and graphs):			

Prepared by:

Certified Correct:

ANNEX 2B

WORKSHEET 2.1. Modified Problem-Solution Matrix

Issue/ Problem or observed condition (sectoral)	Explanations (Causes)	Standard (desired scenario)	Gap (disconnect between the reality & desired scenario; the current reality)	Implication if unresolved	Policy options
Problem 1					
Problem 2					
Problem 3					

ANNEX 2C

WORKSHEET 2.2. Vision-Reality Gap Matrix

Vision elements	Descriptors	Success indicators	Current reality rating	Vision-reality gap rating*	What to do to close the gap

ANNEX 2D

WORKSHEET 2.3. ACTION PLAN

PROVINCE: _______________

MUNICIPALITY: _________________

ACTIVITIES	DATE	OUTPUT	Office Personnel Required	BUDGET/FACILITIES/ EQUIPMENT NEEDED	REMARKS
1.					
2.					
3.					
4.					
5.					
6.					

ANNEX 2E.

POST-ACTIVITY EVALUATION FORM

(To be administered after the training, before the release of certificates)

Name ______________________________

Designation ______________________________

LGU ______________________________

Training Title ______________________________

____

Date and Venue ______________________________

Part 1.

Please rate the level of Attainment of the following objectives. Mark the rating of your choice using the rating scale below:

1-Very low **2-Low** **3-High** **4-Very High**

Attainment of Activity Objectives	RATING			
	1	2	3	4
1.				
2.				
3.				
4.				

Please indicate the number which best corresponds to your assessment of the program design and management. Encircle the rating of your choice using the rating scale below:

1 – Poor *3 – Satisfactory* *5 – Excellent*
2 – Fair *4 – Very Satisfactory*

Assessment of Program Design and Management	RATING				
1. Topics/Sessions and Method					
1.1 Sequencing of topics/sessions	1	2	3	4	5
1.2 Usefulness of topics/sessions	1	2	3	4	5
1.3 Relevance to present work and functions	1	2	3	4	5
1.4 Applicability to my job	1	2	3	4	5
1.5 Suitability of exercises/activities	1	2	3	4	5
1.6 Adequacy of time allotted for topics/sessions	1	2	3	4	5
2. Handouts, Materials, and other Instructional Aid					
2.1 Adequacy of content of handouts	1	2	3	4	5
2.2 Quality of printing	1	2	3	4	5

2.3 Effectiveness as aid to instruction	1	2	3	4	5
2.4 Readability	1	2	3	4	5
2.5 Availability of training materials	1	2	3	4	5
3. Resource Speakers/Facilitators					
3.1 Competency	1	2	3	4	5
3.2 Preparedness	1	2	3	4	5
3.3 Punctuality	1	2	3	4	5
4. Training Secretariat					
4.1 Helpfulness	1	2	3	4	5
4.2 Courteousness	1	2	3	4	5
4.3 Punctuality	1	2	3	4	5
5. Venue					
5.1 Spacious	1	2	3	4	5
5.2 Quality of sound system	1	2	3	4	5
5.3 Quality of lighting	1	2	3	4	5
6. **Food**	1	2	3	4	5
7. **Accommodation**	1	2	3	4	5

Part 2.

How will you rate your level of satisfaction on the overall conduct of this training?

Poor Fair Satisfactory Very Satisfactory Excellent

Is the Training timely? ☐ Yes ☐ No

Please describe how you benefited (if at all) from this activity?

____

____

What did you find most useful in the activity and why?

____

____

What advice can you give us to improve activities of this kind in the future?

____

____

Other Comments:

____

____

THANK YOU!

ANNEX 2F

ACTIVITY MONITORING AND EVALUATION FORM FOR MONITORS

Title of Activity:

Activity Venue:	Date of Activity:

Names of Resource Persons:

Activity Evaluation:

SUBMITTED Program of Activities			ACTUAL Program of Activities			Remarks	
Topic	Time Frame	Speaker	Topic	Time Frame	Speaker	Compliant	Non-Compliant

Total Number of Participants: _____Males _____Females _____ Persons with Special Needs (project proponents and resource persons not included in the count)

Observations:

Suggestions/Recommendations:

MONITORED BY:

Date:

FOR INQUIRIES
CONTACT:
DILG Region VI
WEBSITE: region6.dilg.gov.ph
EMAIL: r6lgcdd@gmail.com