



SLGP
Support for the Local Governance Program



SUC-Assisted Approach in Comprehensive Development Plan Formulation

MODULE 5

Writing the Comprehensive Development Plan

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

2021

MODULE 5

WRITING THE COMPREHENSIVE DEVELOPMENT PLAN

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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 multi-sectoral 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 5

WRITING THE COMPREHENSIVE DEVELOPMENT PLAN

Overview

Workshop Objectives

This is a three-day (3) workshop that aims to:

1. Update initial inputs in the Comprehensive Development Plan (CDP) and Local Development Investment Program (LDIP);
2. Review inputs into the prescribed forms; and to,
3. Enable the LGU participants to write the narrative of the CDP and LDIP.

Workshop Outcomes

At the end of the 3-day training-workshop, the participants have:

1. Updated initial inputs in the CDP and LDIP documents;
2. Reviewed inputs in the prescribed forms; and,
3. Written the narrative of the CDP and LDIP.

Workshop Outputs

1. Accomplished the prescribed forms
2. Updated drafts of the CDP and LDIP according to the prescribed format and contents

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. S/he leads 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. S/he checks the activity flow and approved content. The 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 Municipal/City Planning and Development Coordinator (M/CPDC), Information Technology (IT) Personnel, Planning Staff
- Two to three (2-3) members per LGU

Requirements and Materials

<p>Before the Workshop</p>	<p>The TWG has:</p> <ul style="list-style-type: none"> • updated available data and process information relevant to writing the main CDP through follow-up workshop session/s in their LGUs; • ensured that the processing of information and the corresponding actions are in line with national policies and standards; • reviewed the linkages and substantial inputs from appropriate national government agencies, civil society organizations, and private sector groups in the earlier stages of the CDP formulation; • made inputs in the prescribed forms <ul style="list-style-type: none"> ○ Form 1a. Executive Order Template ○ Form 1b. Sample Harmonized Workplan for the Preparation of the CLUP and CDP ○ Form 1c. Ecological Profile ○ Form 1d. Local Development Indicator System/RaPIDS ○ Form 2a. Structured List of PPAs per Sector (Long List)
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	<ul style="list-style-type: none"> ○ Form 3a. Ranked List of PPAs for Investment Programming ○ Form 3b. Project Brief for Each PPA ○ Form 3c. Projection of New Development Investment Financing Potential ○ Form 3d. Summary of Medium-Term Financing Plan ○ Form 3e. LDIP Form ○ Form 4. AIP Summary Form ○ Form 5a. CapDev Program Summary Form ○ Form 5b. Priority Legislative Requirements Summary Form ○ Form 6a. <i>Annual Accomplishment Report (only filled up if the LGU is UPDATING the CDP)</i> ○ Form 6b. Monitoring & Evaluation Strategy Template; and, ● have conducted proper consultation and validation of data in the forms and other tables.
References	DILG's Guide to CDP Formulation (DILG MC 2008-156) DILG's Local Planning Illustrative Guide (2015) DILG MC 2018-172
Materials	Meta-cards of various colors Manila papers Colored Markers Notepads or writing pads Scotch tapes At least 2 laptops (with HDMI adaptor) Multi-media projector Attendance Sheets Registration and Evaluation Forms
Suggested additional training materials	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	Expectations Check and House Rules
Session 2	Overview of the CDP Writeshop, Approaches, and Assessment Forms
Session 3	Tips to Technical Writing
Session 4	Writing the Chapters on Introduction and Quick Facts About the LGU
Session 5	Writing the Chapter on Visioning and Alignment of Plans
Session 6	Writing the Chapter on Sectoral Development Plans
Session 7	Writing the Chapter on Local Development Investment Program
Session 8	Writing the Monitoring and Evaluation Strategy

Activity Flow

Day	Sessions	Duration (in minutes)
Day 0	<i>Arrival of Participants</i>	-
Day 1	<i>Preliminaries:</i> <i>Registration</i> <i>Invocation and National Anthem</i> <i>Message/s</i>	45
	Session 1: Expectations Check and House Rules	30
	Session 2. Overview of the Module, Approaches, and Assessment Forms	75
	Session 3. Tips on Technical Writing	60
	Lunch Break	60
	Session 4. Writing the Chapters on Introduction and Quick Facts About the LGU	240
	<i>Wrap-up and Instructions for Day 2</i>	10
	<i>Total</i>	<i>540</i> <i>(9 hours)</i>
Day 2	<i>Check Attendance and Output Setting</i>	10
	Session 5. Writing the Chapter on Visioning and Alignment of Plans	230
	Lunch Break	60
	Session 6: Writing the Chapter on Sectoral Development Plans	240
	<i>Total</i>	<i>540</i> <i>(9 hours)</i>
Day 3	<i>Check Attendance and Output Setting</i>	10
	Session 7. Writing the Chapter on Local Development Investment Program	230
	Lunch Break	60
	Session 8. Writing the Monitoring and Evaluation Strategy	120
	Session 9: Feedback and Next Steps Feedback and Next Steps Submission of Forms by Participants Distribution of Certificates	30
	<i>Total</i>	<i>450</i> <i>7.5 hours</i>

*Snacks will be served in-between activities.

SESSION 1

Expectations Check and House Rules

Objective	To discuss with the participants the objectives and outputs of the training-workshop.
Duration	30 minutes
Materials	Meta cards Markers Tape LCD Projector Laptop
Powerpoint	5.1 Expectations Check & House
Key References	None
Key Forms/Outputs	Expectations on meta cards

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 delivery, yellow meta cards 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% of the entire training 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 the workshops.

SESSION 2

Overview of the CDP Writeshop, Approaches, and Assessment Forms

Objectives	<ul style="list-style-type: none"> To guide the participants on how the writeshop will be conducted and the expected outputs at the end of each session. To present the principles of CDP approaches and the CDP assessment forms.
Duration	75 minutes
Materials	LCD Projector Laptop
Powerpoint	5.2 Overview of the CDP, Approaches and Assessment Forms
References	<ul style="list-style-type: none"> DILG Local Planning Illustrative Guide to CDP Formulation (2015) DILG Planning Guide to CDP Formulation (2008) MC 2018-172 (Assessment of CDPs for Component Cities and Municipalities)
Key Forms/ Outputs	<ul style="list-style-type: none"> BLGD CAT Form 1: CDP Assessment Checklist BLGD CAT Form 1-A: Mainstreaming Sector/Thematic Concerns BLGD CAT Form 2: Executive Order Template

STEPS:

Step 1. Present the rationale

The trainer provides the rationale of municipal and city LGUs to formulate the CDP as mandated by the Local Government Code and other legal issuances.

Step 2. Discuss the module overview, objectives and methodology

The trainer presents the main aims of the writeshop which are to enable the participants to review and revise the prescribed forms and to write the narratives on the main CDP and LDIP. Before the writeshop, LGU participants should have made initial entries in the forms.

The modes of training-workshop delivery: lecturette, facilitated discussion, plenary presentation, brainstorming (for each LGU group), and use of Google drive to access the workshop templates.

Step 3. Present the principles of the CDP approaches

The trainer presents the basic approaches to CDP preparation. These are inclusive, 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.

Step 4. Give an overview of the CDP Review Forms

The trainer refers to the Assessment of CDPs for Component Cities and Municipalities (MC 2018-172) for the Policy Content and Guidelines (Section 6).

The trainer presents two forms used by the CDP TAC in the assessment of documents.

- BLGD CAT Form 1: CDP Assessment Checklist which includes the form, process, and content. CAT Form 1 is an updated form in DILG’s Local Planning Illustrative Guide (2015, pp. 86 to 90). Refer to BLGD CAT Form 1 found at the [Annex 5A](#) of this module.
- BLGD CAT Form 1-A: Mainstreaming Sector/ Thematic Concerns.

BLGD CAT Form 1-A: Mainstreaming Sector/ Thematic Concerns.

Mainstreaming Concerns. *The need to consider sector/thematic concerns is deemed essential to increase the responsiveness of the CDP. Put a check (✓) if the sector has been considered or a cross (x) if there is no evidence manifested in the below-cited documents/elements if the CDP.*

Sectoral and Thematic Concerns	Ecological Profile	Situational Analysis	Sectoral Goals & Strategies	Long List of PPAs/ LDIP	Regulatory Measures	Capacity Development Requirements
1. Protection of Children						
2. Aquatic & Fisheries Management						
3. Promotion of Culture and the Arts						
4. Poverty Reduction						
5. Disaster Risk Reduction Management						
6. Food Security						
7. Forest Management						
8. Gender and Development						
9. Entrepreneurship Development						
10. Sustainable Area Development						
11. Tourism Management and 12. Development						
13. Small & Medium Enterprise 14. Development						
15. Development of Strategic Agriculture and Fisheries Development Zones						
16. Solid Waste Management						
17. Watershed Management						
18. Ancestral Domains Sustainable Development and Protection						
19. Welfare of Persons with Disabilities						

20. Forest Land Use						
21. Climate Change Adaptation and Mitigation						
22. Peace and Order Public Safety						
23. Nutrition						
24. Welfare of the Elderly						
25. Health and Family Planning						
26. Coastal Management						
27. Transportation Management						

SESSION 3

Tips on Technical Writing

Objectives	To review how to enhance the writing style of the Planning Core Group. To present the format recommended for the main CDP.
Duration	60 minutes
Materials	LCD Projector Laptop
Powerpoint	5.3 Tips on Technical Writing
Key References	None
Key Outputs/Forms	None

STEPS:

Step 1. Present the nature of technical writing style

The trainer presents the definition of writing style and the variety of technical writing styles. Make a distinction between technical writing style and other types of writing style.

Step 2. Discuss good technical writing style

The trainer presents how writers can enhance writing style by observing the following:

- Consider the readers whose characteristics vary
- Maintain consistent and “good” style
- Adopt a “You-Attitude”
- Avoid bias by using nonsexist language that treats both sexes neutrally
- Don’t make assumptions about the audiences’ sexual orientation, gender, marital status, etc.
- Use non-discriminating language

- Never use “I”
- Never begin sentence with “and”, “or”, “but”
- Use active verbs instead of passive verbs
- Eliminate wordiness
- Begin most paragraphs with the topic sentence
- Make proper citations

Step 3. Present the outline of the main CDP format

The trainer presents the formal and substantive elements of the Comprehensive Development Plan to include but are not limited to the following (DILG MC 2008-156, pp.14-17):

Contents of the CDP	
Preliminary Pages	
a.	<i>Resolution adopting the CDP</i>
b.	<i>Foreword</i>
c.	<i>Acknowledgment</i>
d.	<i>Table of Contents</i>
e.	<i>Acronyms</i>
f.	<i>List of Tables</i>
g.	<i>List of Figures</i>
h.	<i>List of Boxes</i>
1. Introduction	
2. Quick Facts about the LGU (Brief and preferably in bullet form only)	
a.	Brief Historical Background
b.	Geo-physical Characteristics
	<ul style="list-style-type: none"> • Location and Total Land Area • Topography • Climate
c.	Population and Demographic Profile
	<ul style="list-style-type: none"> • Total population – male and female; urban – rural; school-age population by level, by sex; • Dependent population, male and female; labor force, male and female • Population density • Ethnicity • Religion • Languages/dialects • Poverty incidence
d.	Social Services
	<ul style="list-style-type: none"> • Number of schools, hospitals, daycare centers
e.	Economy
	<ul style="list-style-type: none"> • Major economic activities • Number of business establishments by industry sectors

- f. **Infrastructure**
 - **Transport and Utilities (major circulation network, sources of water and power supply and communication facilities)**
 - **Administrative infrastructures (number of national government offices situated and operating in the LGU)**
 - g. **Environment**
 - **Solid waste management**
 - **General air quality**
 - **General water quality**
 - h. **Institutional Machinery**
 - **Political subdivisions (Number of Districts, Barangays)**
 - **Organizational Structure**
- 3. Review of Vision and Alignment of Plans**
- 4. Comprehensive Development Plan**
- a. **Vision**
 - b. **Vision – Reality Gap Analysis**
 - c. **Cross-Sectoral / Special Issues and Concerns**
 - d. **Sectoral Development Plans**
- 5. Local Development Investment Program**
- a. **List of programs and projects with their corresponding costs to be funded from local sources ranked by level of urgency**
 - b. **List of programs and projects with their corresponding costs to be funded from other sources, i.e., province, national government, private sector, foreign donors, grants, loans, etc.**
- 6. M and E Strategy**

Step 4. Discuss the annexes

After discussing the substantive part of the CDP document, the trainer discusses documents to include in the Annexes.

It is suggested that the Annexes will come after each chapter for easy reference.

Annexes:

- Other forms
- Other tables
- List of Participants
- Glossary
- References

SESSION 4

Writing the Chapters on Introduction and Quick Facts about the LGU

Objective	To guide the Planning Core Group in writing the Introduction and Quick Facts about the LGU. To enable the participants to write the initial drafts of certain sections of their main CDP.
Duration	240 minutes
Materials	LCD Projector Laptop
Powerpoint	5.4 Writing the Chapters on Introduction and Quick Facts
Key References	DILG Local Planning Illustrative Guide to CDP Formulation (2015) Socio-Economic Data of the LGU Secondary Data of the LGU
Outputs/Forms	Initial draft of Chapter 1. Introduction Initial draft of Chapter 2. Quick Facts about the LGU

STEPS:

Step 1. Present the parts of the introduction chapter

The trainer proceeds to discuss the contents of Chapter 1 or the Introductory Chapter. S/he is allotted fifteen minutes (15) to explain the following topics under this chapter.

- 1.0 Rationale of the CDP
 - Local Planning and Development Model
 - Legal Bases of the CDP
- 1.2 Overview of the Methodology/Process
- 1.3 CDP Summary

Step 2. Present the rationale of the CDP

The trainer discusses the local planning and development model. Refer to DILG local Planning Illustrative Guide to CDP Formulation (2015, p.3)

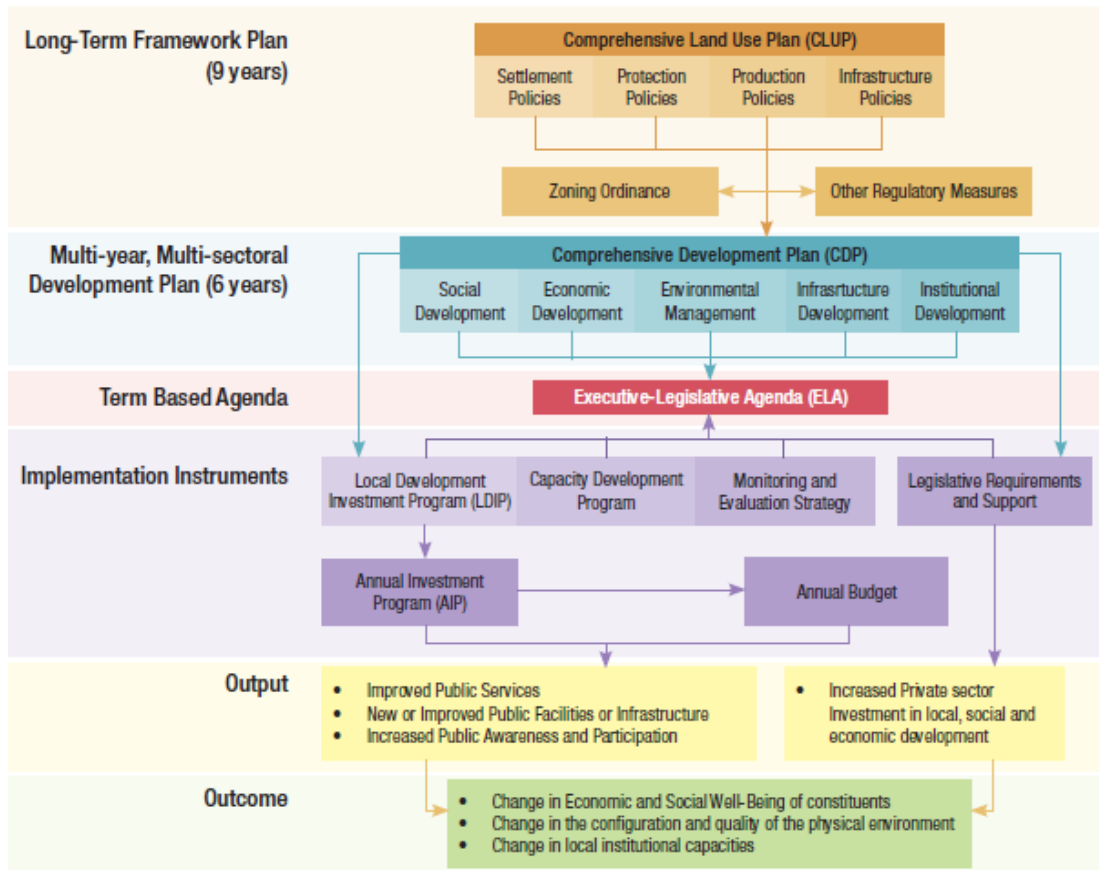


Figure 1. A Local Planning and Development Model

The figure above illustrates the relationship of the CLUP with the CDP, ELA and other implementation instruments.

The legal bases of the CDP are presented below.

a. RA 7160, Section 2 (c):

(c) "It is likewise the policy of the State to require all national agencies and offices to conduct periodic consultations with appropriate local government units, non-governmental and people's organizations, and other concerned sectors of the community before any project or program is implemented in their respective jurisdictions."

b. RA 7160 Section 3 (e), (f), (g)

(e) Provinces with respect to component cities and municipalities, and cities and municipalities with respect to component Barangays, shall ensure that the acts of their component units are within the scope of their prescribed powers and functions:

(f) Local government units may group themselves, consolidate or coordinate their efforts, services, and resources for purposes commonly beneficial to them;

(g) The capabilities of local government units, especially the municipalities and Barangays, shall be enhanced by providing them with opportunities to participate actively in the implementation of national programs and projects;

c. RA 7160, Section 106 (a)

(a) "Each local government unit shall have a comprehensive multi-sectoral development plan to be initiated by its development council and approved by its Sanggunian. For this purpose, the development council at the provincial city, municipal, or Barangay level, shall assist the corresponding Sanggunian in setting the direction of economic and social development, and coordinating development efforts within its territorial jurisdiction."

d. RA 7160, Section 305 (h) (i) (j) (k)

(h) Local budget plans and goals shall, as far as practicable, be harmonized with national development plans, goals, and strategies in order to optimize the utilization of resources and to avoid duplication in the use of fiscal and physical resources;

(i) Local budgets shall operationalize approved local development plans;

(j) Local government units shall ensure that their respective budgets incorporate the requirements of their component units and provide for equitable allocation of resources among these component units;

(k) National planning shall be based on local planning to ensure that the needs and aspirations of the people as articulated by the local government units in their respective local development plans are considered in the formulation of budgets of national line agencies or offices;

e. DILG-HLURB JMC No. 001 Series of 2009 Guidelines on the Harmonization of CLUP and CDP, dated 19 October 2009

f. 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, dated 18 Nov 2016

g. DILG MC No. 2008-156 Guide to Comprehensive Development Plan Preparation for Local Government Units, dated 22 October 2008

- h. **DILG MC No. 2010-112** LGU Compliance to Updating and Legitimization of CLUP and CDP, dated 12 October 2020.
- i. **DILG MC No. 2016-102** Guidelines on the Preparation or Updating of Local Plans, dated 8 August 2016

Others:

- a. **DILG Memorandum Circular No 2008-154** “Reconciliation of 5 Development Sectors in the Comprehensive Development Plan and Three Sectoral Classifications with the Annual Investment Program”
- b. **DILG Memorandum Circular No 2008-154** Reconciliation of 5 Development Sectors in the Comprehensive Development Plan and Three Sectoral Classifications with the Annual Investment Program
- c. **DILG Memorandum Circular No. 2017-84** Strengthening of Linkages of National/Regional/Provincial Development Strategies, Programs, Projects, and Activities with the Comprehensive Development Plan

Step 3. Present the overview of the Methodology/CDP Process

The trainer reviews the CDP process. The participants are expected to write their experiences from setting/revisiting the vision (step 1) up to making the plan monitoring and evaluation (step 13). It is possible that the steps are not followed accordingly, such as when the vision is set or revisited after determining current reality.

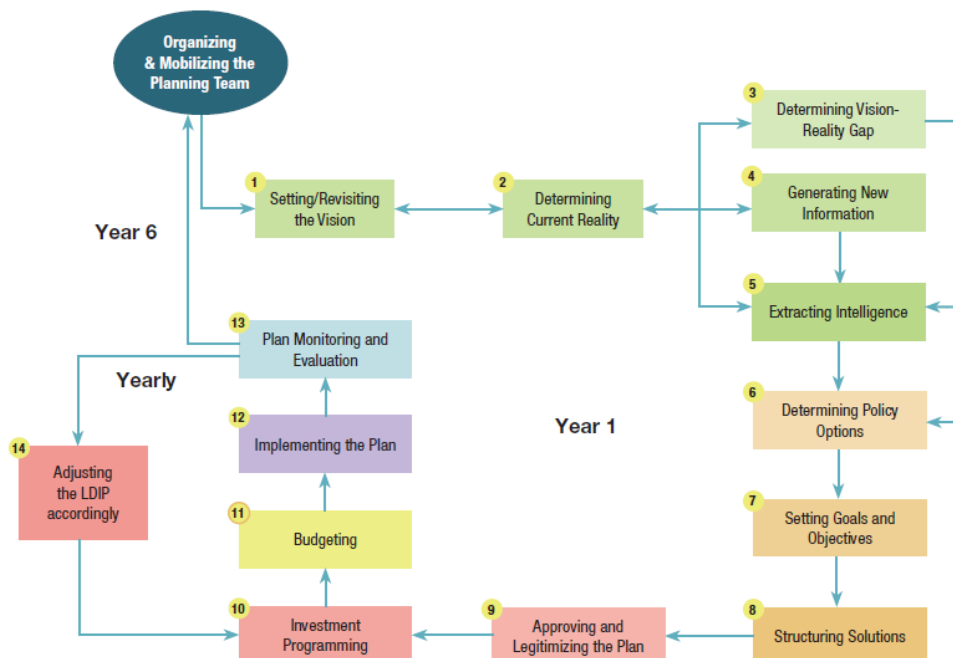


Figure 2. The Enhanced Comprehensive Development Planning Cycle *DILG Local Planning Illustrative Guide, 2015, p. 8).

Guide questions in writing the Methodology:

- Who was involved in the sectoral planning workshop?
- Who was involved in the LDIP workshop?
- What planning methods/tools were used in the sectoral planning workshop?
- What methods were used in making the LDIP?
- What were the challenges in the conduct of determining the current reality?
- What were the challenges in the conduct of the vision-reality gap activity?
- What factors facilitated the conduct of the workshops on Ecological Profile, Sectoral Planning, and LDIP?

The trainer provides soft and hard copies of the guide questions to the participants.

Step 4. Present the summary

To close the Introductory chapter, the trainer presents the content summary of the major chapters of the CDP. For example, the next chapter is Quick Facts about the LGU which includes information about the area based on the descriptors and indicators. The next chapter is the Visioning and Alignment of Plans which describes the results of the LGU's vision-reality gap matrix and the results of the problem-solution finding matrix (PSFM).

Step 5. Present the parts of the quick facts about the LGU Chapter

The trainer is given fifteen (15 minutes) to present the contents of the quick facts chapter.

The presentation must be brief, preferably in bullet form, and information is in infographics. Data relevant to the descriptors and indicators (RaPIDS & LDIs) are emphasized. Outputs should come during the session on Infographics in Module 2.

Content Outline of Quick Facts about the LGU

- 2.1 Brief Historical Background
- 2.2 Geo-physical Characteristics
 - Location and Total Land Area
 - Topography
 - Climate
- 2.3 Population and Demographic Profile
 - Total population—male and female; urban—rural; school-age population by level, by sex; dependent population, male and female; labor force, male and female
 - Population density

- Ethnicity
- Religion
- Languages/dialects
- Poverty incidence
- 2.4 Social Services
 - Number of schools, hospitals, daycare centers
- 2.5 Economy
 - Major economic activities
 - Number of business establishments by industry sectors
- 2.6 Infrastructure
 - Transport and Utilities (major circulation network, sources of water and power supply and communication facilities)
 - Administrative infrastructures (number of national government offices situated and operating in the LGU)
- 2.7 Environment
 - Solid waste management
 - General air quality
 - General water quality
- 2.8 Institutional Machinery
 - Political subdivisions (Number of Districts, Barangays)
 - Organizational Structure

Step 6. Conduct the writeshop

The trainer informs participants that they are allotted 3.5 hours to work on their narrative for the Introductory and Quick Facts chapters using data from earlier modules. These data should have been reviewed and validated before the CDP writeshop.

Step 7. 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 are able to 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 5C). S/he also looks for the outputs of the participants to ensure that they have submitted the hard and soft copies to the Facilitator.

Step 8. Collect the initial drafts

The facilitator collects the initial drafts of the Introduction and Quick Facts at the end of Day 1. S/he 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 9. 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 5

Writing the Chapter on Visioning and Alignment of Plans

Objective	To guide the Planning Core Group in writing the chapter on Visioning and Alignment of Plans. To enable the participants to write the initial drafts of certain sections of their main CDP.
Duration	240 minutes
Materials	LCD Projector Laptop
Powerpoint	5.5 Writing the Chapter on Visioning and Alignment of Plans
References	DILG Local Planning Illustrative Guide to CDP Formulation (2015) DILG Guide to CDP Formulation (MC 2008-156), Chapter II. Setting the vision, pp. 40-46, 70 -73
Outputs/Forms	Initial draft of Chapter 3 (Visioning and Alignment of Plans) Vision-Reality Gap Matrix Problem Solution Finding Matrix Form 1d. Local Development Indicator System/RaPIDS Summary of Alignment of Plans

STEPS:

Step 1. Present the parts of the chapter

The trainer discusses the contents of Chapter 3 or the Visioning and Alignment of Plans. S/he is allotted thirty minutes (30) to explain the following topics under this chapter.

- 3.1 LGUs Vision
- 3.2 Vision – Reality Gap Analysis (Accomplished Vision-Reality Gap Matrix)
- 3.3 Cross-Sectoral / Special Issues and Concerns (Accomplished Problem-Solution Finding Matrix)
- 3.4 Local Development Indicators
 - 3.4.1 Summary of the Indicators per Sector...Details will be referred to Annex
 - 3.4.2 Alignment of Plans

Step 2. Present the LGU Vision

The trainer refers to outputs in Module 2 (Ecological Profile Presentation and Review) for the LGU’s vision. Participants are expected to expound on key descriptors of the vision statement. For example, “To be ecologically-balanced means to increase our part of Northern Negros Natural park forest cover, mangrove forest cover, and a number of trees grown in urban/greenbelts”. Another example would be, “To be a modern city with improved facilities, 100% paved roads, increased tourist arrivals and increased client satisfaction.”

Step 3. Vision-Reality Gap Analysis

The trainer emphasizes that the current realities of the LGU are based on their Ecological Profile. The vision-reality gap (VRG) analysis is the method used to conduct the process of forging ways to move from the current state to the desired state.

The VRG analysis is done per sector during Module 2 (Ecological Profile Presentation and Review) training.

3.2.1 Vision – Reality Gap Analysis (Accomplished Vision-Reality Gap Matrix)

Descriptors	Success Indicators (must be quantifiable)	Current Situation
Health of people	100% reduction in malnutrition rate	40% malnutrition rate

3.2.2 Vision – Reality Gap Analysis (Accomplished Vision-Reality Gap Matrix)

Descriptors	Success Indicators (must be quantifiable)	Current Situation	Vision-Reality Gap
Health of people	100% reduction in malnutrition rate	4	6

Step 4. Cross-Sectoral/Special Issues and Concerns

The trainer presents this section with key areas of issues and concerns that cut across sectors. They are influenced by several interrelated factors (e.g. climate variability and urban growth functions) so that interventions must be multi-sectoral in approach (e.g. LGUs and national agencies; infrastructure and health sectors).

The PSFM is done during Module 2 (Ecological Profile Presentation and Review) training.

3.3.1 Modified Problem Solution Finding Matrix

Issues/ Problems or Observed Condition (Sectoral)	Explanations (Causes)	Standards	Gap (disconnect between current reality & desired scenario)	Implication if Unresolved	Policy Options
Sector					
Problem 1					
Problem2					

Source: MC 2008-156, p. 65.

3.3.2 Modified Problem Solution Finding Matrix (Accomplished Form)

Issues/ Problems or Observed Condition (sectoral)	Explanations (Causes)	Standards	Gap (disconnect between current reality & desired scenario)	Implication if Unresolved	Policy Options
Environment Sector					
Degradation of corals in Negros Island area	Dynamite fishing	Good to an excellent rating in live coral coverage situation	Poor rating in live coral coverage condition	Ecological imbalance, low fish catch, etc.	Implement provisions in the environme nt code

Step 5. Review Local Development Indicators System (LDIS)/RaPIDS

The trainer discusses this section about the Rational Planning Indicators and Data Set (RaPIDS) in DILG's Local Planning Illustrative Guide. The 172 RaPIDS are updated information of the Local Development Indicators System (LDIS) to be consistent with themes set by national and international organizations.

The LGUs may include indicators that are not included in the RaPIDS to capture the unique characteristics of their locality.

This section only presents a summary of the indicators per sector. See the table below.

3.4.1 Summary of sectoral indicators based on LDIs and RaPIDS

Sector	Sub-sector	No. of Indicators
Economic	Agriculture	42
Economic	Tourism	55

The accomplished Form 1d. Local Development Indicator System/RaPIDS is found in the annex of the CDP.

Outputs for Form 1d is generated during Module 3 (Doing the Sectoral Development Plan).

Sample Form 1d. Local Development Indicator System/RaPIDS for LGU X

Sector/ Sub-Sector	Core Concerns	Indicator of Development or Underdevelopment	Planning Areas	Large Spatial Unit	Smaller Spatial Unit			
					1	2	3	Etc.
1. Sector								
Demography	Population size	Population Size (all census years including the latest)						
	Population growth rate	Growth rate, urban and rural, short-term, medium-term, long term (formula used)						
	Population distribution	Gross population density 2 reference years Net population density, reference years Percent of urban population, 2 reference years						

Step 6. Present the alignment of plans

The trainer discusses this section concerning the outputs in Module 3 training-workshop. This section deals with the alignment of priority programs and projects of the LGU to the Sustainable Development Goals of the United Nations and the development plans of the Philippine Government (ex. Ambisyon 2040) and the local governments (the region, the province).

Each sector must submit a list of priority projects and indicate the planning tool/s used (e.g. for screening PPAs there are Goal Achievement Matrix or GAM, the Urgency Test, Resource Impact Matrix, or Conflict-Compatibility-Complementarity Matrix) to identify the projects ranked from the most urgent need of implementation to deferrable level of urgency.

The planning tools used to harmonize plans must also be indicated in this section (e.g. Nominal Group Technique, Brainstorming).

3.4.2 Alignment of Plans

Table __. Summary of Alignment of Plans

Government Agency	Priority Programs and Projects of the CDP 20_ to 20_	
	No. of Programs Implemented/ Adopted in the LGU	No. of Projects Implemented/Adopted in the LGU
International (SDG)		
National		
Regional		
Province		

Step 7. Writeshop

The participants are allotted 3.5 hours to work on their narrative for the Visioning and Alignment of Plan chapter using data from earlier module training workshops. These data should have been reviewed and validated before the CDP writeshop.

Step 8. Collect the initial drafts

The facilitator collects the initial drafts of the Visioning and Alignment of Plans at the end of the session. S/he 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 6

Writing the Chapter on Sectoral Development Plans

Objective	To guide to the Planning Core Group in writing the chapter on Sectoral Development Plans. To enable the participants to write the initial drafts of certain sections of their main CDP.
Duration	240 minutes
Materials	LCD Projector Laptop
Powerpoint	5.6 Writing the Chapter on Sectoral Development Plans
References	DILG Local Planning Illustrative Guide to CDP Formulation (2015) DILG Guide to CDP Preparation (DILG MC 2008-156, pp. 15-16).
Outputs/Forms	Initial draft of Chapter 4. Sectoral Development Plans Form 2a. Structured List of PPAs per Sector (Long List) Form 2b. Structured List of PPAs per Sector and Development Indicator (Long List) Summary of Sectoral List of Project Briefs with Estimated Cost per Year Form 3a. Ranked List of PPAs for Investment Programming Form 3b. Project Brief for Each PPAs

STEPS:

Step 1. Present the parts of the chapter

The trainer discusses the contents of Chapter 4 or the Sectoral Development Plans. S/he is allotted thirty minutes (30) to explain the following topics under this chapter. Outputs for this chapter are generated during the Sectoral Planning Workshop.

Chapter Outline of Sectoral Development Plans

- 4.1 Infrastructure and Physical Development Plan
- 4.2 Social Development Plan
- 4.3 Economic Development Plan
- 4.4 Environmental Management Plan
- 4.5 Institutional Development Plan

Each sector has the following sections

- a. Introduction
- b. Goals
- c. Objectives and Targets
- d. Strategies
- e. Programs and Projects
- f. Proposed Legislations
- g. List of Project Brief

Step 2. Present the main contents of each sectoral plan

The trainer discusses the contents of each sectoral plan (DILG MC 2008-156, pp. 15-16).

Infrastructure and Physical Development Plan

This deals with the infrastructure building program and the land acquisition required as right-of-way or easements of public facilities. The physical development plan may include proposals for the redevelopment of old and declining sections of the locality, opening up new settlement areas, or development of new growth centers in conformity with the chosen spatial strategy.

Social Development Plan

This is a compendium of proposed activities designed to deal with the identified issues and concerns relative to improving the state of well-being of the local population and upgrading the quality of social services such as health, education, welfare, housing, and the like. Questions of equity and social justice and gender sensitivity are also addressed by this sectoral plan. Many programs and projects in this sector are of the “soft” non-capital type but they are as important as the capital investment or “hard” projects.

Economic Development Plan

This embodies what the local government intends to do to create a favorable climate for private investments through a combination of policies and public investments to enable business and industry to flourish and, ultimately, assure the residents of a steady supply of goods and services and of jobs and household

income. A very significant component of this sectoral plan is the LGU's support to agriculture and other food production activities and the promotion of tourism programs.

Environmental Management Plan

This consolidates the environmental implications of all development proposals within the municipality and provides mitigating and preventive measures for their anticipated impacts. It embodies programs for maintaining the cleanliness of air, water, and land resources and rehabilitating or preserving the quality of natural resources to enable them to support the requirements of economic development and ecological balance across generations. A major component of this sectoral plan will also include measures to minimize the vulnerability of local residents to natural hazards and disasters.

Institutional Development Plan

This focuses on strengthening the capability of the local government bureaucracy as well as elected officials to plan and manage the development of the municipality. Manpower development, fiscal management and program/project management are the vital components of this sectoral plan. This sectoral plan likewise promotes the involvement of voluntary groups or civil society organizations in the preparation, implementation, monitoring and evaluation of the different sectoral programs, projects, and activities.

The outputs of each sectoral plan will serve as an input to the Local Development Investment Program and the Executive Legislative Agenda of the Sanggunian.

Step 3. Present the matrices of the programs and projects per sectoral plan

The trainer presents the matrices that need to be filled up per sector.

Table ____. Summary of PPAS

Sector	Goal	No. of PPAs	Duration of Years of Implementation

Sample Form 2a. Structured List of PPAs

Sectoral Goal: To raise average income of farming households

Strategy 1: To enhance farm-based income

No.	Program	Program Components	Actions/Interventions
1.0	Increased farm yield	1.1 Intensify production support services	1.1.1 Develop gravity irrigation 1.1.2 Install communal pump irrigation 1.1.3 Increase water yield of aquifer 1.1.4 Promote use of certified seed
		1.2 Improve post-harvest facility	1.2.1 Construct mechanical dryers 1.2.2 Regulate use of streets as solar dryers 1.2.3 Put up storage facilities 1.2.4 Encourage investments in processing plants

Source: DILG Local Planning Illustrative Guide (2015, p. 56)

Sample Form 2b. Structured List of PPAs and LDI (Long List)

Sector/Sub-Sector	Goals	Strategy/Objectives	Core Concerns	Indicators of Development or Underdevelopment	Program	Program Components	Actions/Interventions
Sector: Economic Sub-sector: Agriculture	To raise the average income of farming HHs	Enhance farm-based income	Agricultural production	Volume/value of agricultural crop produced by major crop, two reference years	1. Increased farm yield	1.1 Intensify production support services	1.1 Install communal pump irrigation 1.2 Promote use of certified seed
						1.2 Improve post-harvest facility	1.2.1 Construct mechanical dryers 1.2.2 Put up storage facilities
					Agricultural product diversification	2.1 Farming system research	2.1 Land suitability analysis 2.12 Pilot-test livestock & crop raising (silvi-pasture) 2.2 Encourage utilization of idle lands through imposition of idle land tax

Source: DILG Local Planning Illustrative Guide (2015, p. 57)

The accomplished CDP Form 2a. Structured List of PPAs per Sector (Long List) and the CDP Form 2b. Structured List of PPAs per Sector and Development Indicator (Long List) is found in the annex's chapter.

Step 4. Present the matrices on the Project Brief

The trainer presents the matrices that need to be filled up per sector.

Form 3a. Ranked List of PPAs for Investment Programming

Rank	PROPOSED PROJECT/ FILE NO.	LOCATION / SECTOR	COST ESTIMATE		Period of Implementation	
			Individual	Cumulative	From	To
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						

Source: DILG Local Planning Illustrative Guide (2015, p. 58)

Form 3b. Project Brief for Each PPA

Contents of Project Brief

1. Name and Type of Project
2. Activity Components
3. Estimated Cost of Resource Inputs
4. Justification of the Project
5. Target Beneficiaries
6. Target Outputs or Success Indicators
7. Possible Risks or External Factors that Could Frustrate the Realization of the Project
8. Expected Private Sector Response

For the guide questions for every section of the Project Brief, refer to DILG Local Planning Illustrative Guide (2015, p. 59).

Accomplished Form 3a. Ranked list of PPAs for Investment Programming and Form 3b. Project Brief for Each PPA are found in the annex of the Sectoral Development Plan chapter.

Step 5. Writing the Sectoral Development Plans

The trainer presents at least two ways of writing the Sectoral Development Plans.

Option 1: Sequence will depend on the set of descriptors as they appeared in the vision. For example, if the vision is “A Happy and United LGU”, the first sectoral plan is the social development plan. The terms ‘happy’ and “united” are treated under the Social Sector.

Option 2: Start with the Infrastructure and Physical Development Plan, followed by the Social Development, then the Economic Development Plan, Environmental Management Plan. Institutional Plan will be the last section.

Steps 6. Conduct the writeshop

The trainer informs participants that they are allotted 3.5 hours to work on their narrative for the Sectoral Development Plans chapter using data from earlier module training workshops. These data should have been reviewed and validated before the CDP writeshop.

Step 7. 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 are able to 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 5C). S/he also looks for the outputs of the participants to ensure that they have submitted the hard and soft copies to the Facilitator.

Step 8. Collect the initial draft

The facilitator collects the initial drafts of the Sectoral Development Plans at the end of the session. S/he 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 9. Give instructions for the next day

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

SESSION 7

Formulating the Local Development Investment Program

Objective	<ul style="list-style-type: none"> • To guide to the Planning Core Group in writing the chapter on Local Development Investment Program. • To enable the participants to write the initial drafts of certain sections of their main CDP.
Duration	240 minutes
Materials	LCD Projector Laptop
Powerpoint	5.7 Formulating the Local Development Investment Program
References	DILG Local Planning Illustrative Guide to CDP Formulation (2015) DILG Guide to CDP Preparation (DILG MC 2008-156, pp. 88-118). Local Treasury Operations Manual (LTOM) 2016 Budget Operations Manual (BOM) for Local Government Units Resource Mobilization Manual (RMM)
Outputs/Forms	Initial draft of Chapter 5. Local Development Investment Program Form 3c. Projection of New Development Investment Financing Potential Form 3d. Summary of Medium-Term Financing Plan Form 3e. LDIP Summary Form Form 4. AIP Summary Form 5a. CapDev Program Summary Form Form 5b. Priority Legislative Requirements Summary Form Form 6a. AIP Summary Form

STEPS:

Step 1. Present the parts of the chapter

The trainer describes the contents of Chapter 5 or the Local Development Investment Program (LDIP)s. S/he is allotted thirty minutes (30) to explain the topics. Outputs for this chapter were generated during the LDIP Workshop.

<p>Proposed Chapter Outline of LDIP</p> <p><i>Title Page</i></p> <p><i>Table of Contents</i></p> <p><i>List of Tables (Sample Tables)</i></p>
--

Table 1. Form 3a. Ranked List of PPAs For Investment Programming
Table 2. Time Series Record of Property Tax Revenue
Table 3. Time Series Record of Revenue Other Than Property Tax
Table 4. Time Series Record of LGU Operating Expenditures
Table 5. Obligated Debt Service Expenditure
Table 6. Projected Income and Expenditure CY 20__-20__
Table 7. Form 3c. New Development Investment Financing Potential
Table 8. Form 3d. Medium-Term Financing Plan, 20__ to 20__
Table 9. Form 3e. LDIP Project Summary

List of Figures

Figure 1. Revenue Analysis, CY 20__-20__
Figure 2. Operating Expenditure Analysis
Figure 3. Percentage of Funds Source Available for Development Investment Acronyms

5.1 Introduction
5.2 Ranked List of Program, Projects, and Activities for Investment Programming
5.3 Revenue Status
5.4 Expenditure Status
5.5 Development Investment
5.6 LGU Financing Options

Annexes

Step 2. Present the contents of each section

The trainer discusses the contents of each section.

- Introduction – brief description of the LDIP and the methods used in the preparation of the LDIP (e.g. sifting, screening, tools for ranking of projects)
- Ranked List of Program, Projects, and Activities (PPAs) for Investment Programming--summary of the nature of PPAs and their corresponding cost estimate and period of implementation of priority projects
- Revenue Status – historical revenue of the LGU from various sources (property tax, business fees & licenses, services and operations, IRA, other taxes etc.)
- Expenditure Status - recurring LGU operating expenditures
- Development Investment – projected income and expenditure, highlights of Form 3c. Projection of New Development Investment Financing Potential, the basis of computing the development investment potential, funds available for development investment

- LGU Financing Options – credit financing, external financing, local sources; highlights of Form 3d. Summary Medium-Term Financing Plan and Form 3e. LDIP Summary Form.

Descriptions and analyses can be presented in text, table, and graph forms.

Step 3. Present forms for the Annex section

The trainer present forms that will be placed in the Annex of the LDIP chapter.

- Form 4. AIP Summary
- Form 5a. CapDev Program Summary Form
- Form 5b. Priority Legislative Requirements Summary Form
- Form 6a. AIP Summary Form

Step 4. Conduct the writeshop

Participants are given the time to refine the LDIP narrative. Outputs were generated during the follow-up workshop session/s conducted by the TWG in their LGUs before the CDP Writeshop.

Step 5. Collect the Forms

The facilitator collects the forms and initial drafts. The Secretariat ensures that the forms are filled up.

SESSION 8

Writing the Monitoring and Evaluation Strategy

Objective	To guide to the Planning Core Group in writing the Plan Monitoring and Evaluation Strategy To enable the participants to write the initial draft of certain sections of their CDP.
Duration	120 minutes
Materials	LCD Projector Laptop
Powerpoint	5.8 Plan Monitoring and Evaluation Strategy
Reference	DILG Guide to CDP Preparation (DILG MC 2008-156, pp. 134-145).
Forms/Outputs	Form 5b. M and E Strategy

STEPS:

Step 1. Present the topic outline

The trainer presents the outline of Plan Monitoring and Evaluation. S/he is allotted thirty minutes (30) to explain the topics. Refer to powerpoint presentation for details.

Presentation Outline

1. Defining M and E
2. Functions of M and E:
 - in the Planning Cycle
 - in the Sectoral Planning Process
 - in the AIP / Budget cycle
 - in ELA

3. M and E Composition
4. Public Involvement in M and E
5. Frequency of Doing M and E
6. Tools in M and E

Step 2. Have an open forum

The trainer discusses with participants their feedback for clarification.

Step 3. Conduct the writeshop

The trainer gives participants the time to update the M and E form. Outputs in the form were generated during the follow-up workshop session/s conducted by the TWGs in their LGUs before the CDP Writeshop.

Step 4. Collect Form 5b. M and E Strategy

The facilitator collects the M and E strategy form. The Secretariat ensures that the forms are filled up.

SESSION 9

Feedback and Next Steps

Step 1. Get feedback from the participants

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

Step 2. 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 are able to 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 5C). S/he also looks for the outputs of the participants to ensure that they have submitted the hard and soft copies to the Facilitator.

Step 3. Finalize agreements and next steps

The facilitator discusses with participants the possible date of the TAC CDP Review and the viability of conducting the TAC in the proposed date.

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 TAC CDP Review.

Step 4. Collect outputs and the post-activity assessment form

The facilitator collects the outputs and administer the post activity assessment form (see [Annex 5B](#)).

The post-activity evaluation aims to point out the good points about the training-workshop activity so that the organizations can continue to do to 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 5. Discuss the agreements with participants

The facilitator 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 and that the capacity assessment form has been completely filled up.

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

Step 6. Distribute certificates to participants

The Secretariat gives out Certificate of Attendance and Certificate of Participation. These are given to participants who have complied with the requirements e.g. forms to be submitted and attendance.

ANNEXES

ANNEX 5A

BLGD CAT FORM 1. Comprehensive Development Plan (CDP) Assessment Checklist

Consultation/Agenda		Yes – √ No – x	Proof/Document Presented	Remarks
A. Preparatory Meeting				
1	Meetings of the Planning Team Orientation, Tasking, Schedule of Ecological Profiling, Presentations, Visioning, Sectoral Workshops, etc.			
B. Meetings/Consultations of the C/MDC on the CDP/LDIP Preparation				
1	City/Municipal Planning and Development Coordinator (C/MPDC) on Ecological Profile Validation			
2	Project Call – Long List of PPAs			
3	Prioritization of Projects			
4	Approval of the CDP and LDIP			
C. Meetings/Consultations of the City/Municipality with the Provincial Planning and Development Office (PPDO)				
1	Provincial and LGU Goals and Strategies			
2	Investment Programs and PPAs			
D. Meetings/Consultations/Workshops with Sector Group to include Non-Government Organizations/Private Organizations (NGOs/POs) on CDP/LDIP (Profiling, Project Call, Project Prioritization, and Approval)				
1	Economic Sector			
2	Social Sector			
3	Environmental Sector			
4	Institutional Sector			
5	Physical/Infrastructure Sector			

Consultation/Agenda		Yes – √ No – x	Proof/Document Presented	Remarks
E. Meetings/Consultations/Workshops with Local Special Bodies (LSBs) and Advisory Councils (Profiling, Project Call, Project Prioritization and Approval)				
1	Local Finance Committee – Presentation of LDIP, New Investment Financing Potential, and Local Resource Mobilization Program (LRMP)			
2	Peace and Order Council – Peace and Order Public Safety (POPS) Plan			
3	City/Municipal School Board – School Improvement Program			
4	City/Municipal Health Board– Investment Plan for Health			
5	City/Municipal Fisheries and Aquatic Resources Management Council – Coastal Resource Management Plan			
6	City/Municipal Disaster Risk Reduction and Management Council – Local Disaster Risk Reduction Management Plan (LDRRMP) and Local Climate Change Action Plan (CLCCAP)			
7	City/Municipal Solid Waste Management Council – Local Solid Waste Management Plan			
8	City/Municipal Water Resources Management Council (if applicable) – Water Resource Management Plan			
9	Other Advisory Councils and Sectoral or Functional Committees			
	Specify: _____			

ANNEX 5B

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 5C

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
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