

The implementation of the Community-Based Monitoring System (CBMS) in the Philippines is a joint undertaking of the PEP-CBMS Network Coordinating Team of the Angelo King Institute for Economic and Business Studies of the De La Salle University, national government agencies (NGAs), nongovernment organizations (NGOs) and various local government units.

The CBMS was developed to address the lack of disaggregated data for planning, program formulation, policy impact assessment and poverty monitoring. At the same time, there was also a need to come up with support mechanisms for the implementation of the decentralization policy that was passed in the early 1990s. The CBMS involves the design, pilot-test and implementation of a methodology for data collection and processing, validation and utilization of survey data for needs identification as well as for the design and monitoring of program interventions at all geopolitical levels. The CBMS poverty maps are used to identify who and where the poor are.

The framework and design of the CBMS methodology and instruments were developed by the PEP-CBMS Network Coordinating Team (formerly known as the MIMAP-CBMS Philippines Team). Further refinements in the methodology to incorporate recent developments such as localizing the Millennium Development Goals (MDGs) are also being spearheaded and undertaken by the Team in collaboration with various CBMS partners at the national and local levels in the country.

Aside from the Philippines, the CBMS initiative is also being implemented in Bangladesh, Burkina Faso, Benin, Cambodia, Ghana, Indonesia, Lao PDR, Nepal, Pakistan, Senegal, Sri Lanka and Vietnam in collaboration with various government, research and academic institutions in these countries. Work in these countries and in the Philippines is being coordinated by the PEP-CBMS Network Coordinating Team with financial support from the Government of Canada through the International Development Research Centre (IDRC) and the Canadian International Development Agency (CIDA).

Information regarding the CBMS-Philippines Project may be sent through:

Network Coordinating Team
Address: Angelo King Institute for Economic and Business Studies
University, Manila
10th Floor, Angelo King International Center
Arellano Avenue
1004 Philippines

Telephone: (632) 5262067 (direct)/ 5245333 (trunkline)
(632) 5262067
E-mail: cbms-dls-csb.edu.ph; cbms.network@gmail.com

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Monitoring the Achievement of the Millennium Development Goals (MDGs) Using CBMS
Proceedings of the 2008 National Conference on CBMS

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Proceedings of the
2008 National Conference on CBMS

January 30-February 1, 2008
Manila, Philippines



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**Proceedings of the
2008 National Conference on CBMS**

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January 30-February 1, 2008
City of Manila, Philippines

The 2008 National Conference on CBMS was organized by the PEP-CBMS Network Coordinating Team of the Angelo King Institute for Economic and Business Studies, De La Salle University-Manila with support from the International Development Research Centre (IDRC), Ottawa, Canada and the Canadian International Development Agency (CIDA).

Serving as co-organizers were the following: Department of the Interior and Local Government (DILG), National Economic and Development Authority (NEDA), National Anti-Poverty Commission (NAPC) and the League of Municipalities of the Philippines (LMP).

**Monitoring the Achievement of the Millennium Development Goals (MDGs) Using
CBMS**

Proceedings of the 2008 National Conference on CBMS

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Preface

This volume contains the proceedings of the 5th National Conference on the Community-Based Monitoring System (CBMS) organized by the PEP-CBMS Network Coordinating Team of the Angelo King Institute for Economic and Business Studies of the De La Salle University-Manila in collaboration with the Department of the Interior and Local Government (DILG), the National Economic and Development Authority (NEDA), the National Anti-Poverty Commission (NAPC) and the League of Municipalities of the Philippines (LMP).

The 3-day Conference held at the Manila Hotel on 30 January - 01 February 2008 attracted the biggest attendance as yet with the participation of over 350 CBMS stakeholders consisting of local chief executives, development practitioners, policymakers, academicians and researchers from the north to the south of the Philippines.

Under the theme "*Monitoring the Achievement of the Millennium Development Goals in the Philippines Using CBMS*," the Conference featured keynote presentations and panel discussions on various topics: localizing the MDGs using CBMS, managing health service delivery using CBMS, CBMS repositories, local level planning and budgeting, using CBMS for program targeting and impact monitoring, using CBMS as a tool for implementing regional development strategies, improving local governance and accountability through CBMS, and enriching partnerships for scaling up MDG initiatives and poverty reduction using CBMS.

Once again, the Conference showcased the rich, fruitful and meaningful experiences of local government units all over the country in using CBMS for planning, program formulation, policy impact assessment and poverty monitoring, among others. The insightful presentations of the invited resource persons were most often followed by spirited discussions that were stimulated further by the commentaries and responses of session discussants. Their transcripts are likewise documented here to provide the reader a comprehensive view of the wealth of ideas that emerged during the Conference.

We take this opportunity to convey our sincerest thanks and appreciation to the authors for allowing us to feature their papers and presentations in this volume. We also gratefully acknowledge the financial support provided by the International Development Research Centre (IDRC) and the Canadian International Development Agency (CIDA) as well as the United Nations Development Programme (UNDP-Philippines), United Nations Population Fund (UNFPA) and Social Watch Philippines (SWP) who generously supported the participation of selected LGUs and NGA representatives in the conference. Finally, we convey our special thanks to our growing list of partners who continually provide us with the inspiration to continue pursuing and advocating the CBMS cause through their first-hand accounts of how they have been able to find pathways out of poverty through CBMS.

The PEP-CBMS Network Coordinating Team

Program

Day 1: January 30, 2008

Theme: Monitoring the Achievement of the Millennium Development Goals Using CBMS

Opening Ceremony

8:30am-8:35am	Invocation Mr. Rolando Londonio City Cooperative Officer City Government of Pasay
8:35am-8:40am	Welcome Remarks Dr. Celia M. Reyes Poverty & Economic Policy (PEP) Co-Director and CBMS Network Leader
8:40am-8:45am	Welcome Remarks Dr. Ponciano S. Intal, Jr. Executive Director Angelo King Institute for Economic and Business Studies, De La Salle University
8:45am-8:50am	Welcome Remarks Dr. Evan Due Senior Regional Program Specialist International Development Research Centre (IDRC-Canada) Regional Office of Southeast and East Asia
8:50am-9:30am	Keynote Address Honorable Domingo F. Panganiban Secretary and Lead Convenor National Anti-Poverty Commission (NAPC)

Session 1: Localizing the MDGs Using CBMS
Session Chair: Asec. Dolores De Quiros-Castillo, NAPC

Presentors

10:20am-10:35am	Hon. Antonio Raymundo, Jr. Mayor, Municipality of Orion, Bataan
10:35am-10:50am	Hon. Jonathan M. Cuyahon Mayor, Municipality of Kiangan, Ifugao
10:50am-11:05am	Hon. Hilario Trestiza Barangay Chairman, Brgy. 186, Pasay City

Discussant:

Professor Leonor Briones
Lead Convenor, Social Watch Philippines

Session 2: Managing Health Service Delivery Using CBMS
Session Chair: Hon. Cielo Krisel Lagman Luistro, Mayor, Tabaco City, Albay

Presentors

1:35pm-1:50pm	Mr. Ernesto V. Beltran Senior Vice President Philippine Health Insurance Corporation
1:50pm-2:05pm	Mr. Ben Mabansag Municipal Planning & Development Coordinator LGU-Maydolong, Eastern Samar

Discussant

Mr. Lluis Vinyals

Health Financing Expert, European
Commission Technical Assistance to the
Department of Health (DOH) and Philippine
Health Insurance Corporation (PhilHealth)

Session 3: Presentation of CBMS Repositories

*Session Chair: Dr. Ponciano S. Intal, Jr., Executive Director,
AKIEBS-DLSU*

Presentors

3:20pm-3:50pm

Hon. Maria Valentina Plaza

Governor, Province of Agusan del Sur

3:35pm-3:50pm

Engr. Bimbo Doria

Municipal Planning and Development
Coordinator
Municipality of Sta. Elena, Camarines Norte

3:50pm-4:05pm

Engr. Floro Roco

Municipal Planning and Development
Coordinator
Municipality of Mariveles, Bataan

4:05pm-4:20pm

Hon. Madeleine V. Ong

Mayor, Laoang, Northern Samar
Chapter President, League of Municipalities
of the Philippines (LMP) Northern Samar

Discussants

Ms. Linda SD Papa

Director

Information Management Department
National Mapping and Resource
Information Authority (NAMRIA)

Ms. Emma Ulep

Head, Information Technology Group
Housing and Land Use Regulatory Board
(HLURB)

Day 2: January 31, 2008

Theme: Improving Planning and Budgeting through CBMS

9:00am-9:10am	Welcome Remarks Ms. Frances Tanner First Secretary Canadian International Development Agency (CIDA)
9:10am-9:40am	Keynote Address Dr. W. Randy Spence President, Economic and Social Development Affiliates (ESDA-Canada)

Session 4: Local Level Planning and Budgeting

*Session Chair: Dir. Carmencita Delantar, Department of Budget
and Management (DBM)*

Presentors

10:20am-10:35am	Dir. Manuel Gotis Bureau of Local Government Development
-----------------	--

Department of the Interior and Local Government (DILG)

10:35am-10:50am	Dr. Aniceto C. Orbeta, Jr. Senior Research Fellow Philippine Institute for Development Studies (PIDS)
10:50am-11:05am	Hon. Celia Flor Councilor, Bacolod City Executive Director, DAWN Foundation, Inc.
11:05am-11:20am	Mr. Godofredo Reteracion City Planning and Development Coordinator Escalante City, Negros Occidental

Discussants

Dir. Susan Rachel Jose
Director
Regional Development Coordination Staff, National Economic and Development Authority (NEDA)

Ms. Nancy Spence
Former Head, GRB Unit
Commonwealth Secretariat

Ms. Emmeline L. Versoza
Executive Director
National Commission on the Role of Filipino Women (NCRFW)

Session 5: Using CBMS for Program Targeting and Impact Monitoring

Session Chair: Dr. Marissa Garcia, Deputy Director, AKIEBS-DLSU

Presentors

1:35pm-1:50pm	Hon. Leovigildo Basmayor, Jr. Mayor, Municipality of Minalabac Camarines Sur
1:50pm-2:05pm	Engr. Merlita Lagmay City Planning and Development Coordinator, Pasay City
2:05pm-2:20pm	Architect Madonna Abular Provincial Planning and Development Coordinator, Camarines Norte <i>(Grantee, CBMS-UNDP Development Grant Program)</i>
2:20pm-2:35pm	Ms. Maria Teresa Fabellar Municipality of San Vicente, Palawan <i>(Grantee, CBMS-UNDP Development Grant Program)</i>
2:35pm-2:50pm	Mr. Joelous Gonjoran NARAVIL-MFA, Cabucgayan, Biliran <i>(Grantee, CBMS-PEF Development Grant Program)</i>

Discussants

Dir. Agnes Catherine Miranda
National Anti-Poverty Commission (NAPC)

Dir. Finardo G. Cabilao
Department of Social Welfare and
Development (DSWD)

Mr. Allyn Lopez
Peace and Equity Foundation (PEF)

Session 6: Using CBMS as a Tool for Implementing Regional Development Strategies

Session Chair: Dir. Susan Rachel Jose, RDCS-NEDA

Presentors

3:05pm-4:05pm	RD Oskar Balbastro NEDA Region IV-B (MIMAROPA)
4:05pm-4:20pm	RD William C. Paler DILG Region VIII (Eastern Visayas)
4:20pm-4:35pm	RD Blandino M. Maceda DILG Region V (Bicol)

Discussant

Mr. Oscar Francisco
Institute for Democratic Participation in
Governance (IDPG)

Day 3: February 1, 2008

Theme: Improving Local Governance and Scaling Up Poverty Reduction Initiatives Through CBMS

9:00am-9:30am	Keynote Address Undersecretary Austere Panadero Department of the Interior and Local Government (DILG)
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**Session 7: Improving Local Governance and Accountability
Through CBMS**

Session Chair: Ms. Li-Anne De Leon, Executive Director, LMP

Presentors

10:20am-10:35am	Mayor Alfredo P. Valdez Municipality of San Nicolas, Ilocos Norte
10:35am-10:50am	Mayor Ibarra R. Manzala Municipality of Magdiwang, Romblon
10:50am-11:05am	Mr. Rene Paraba Assistant Provincial Planning and Development Coordinator Province of Sarangani

Discussant

Dr. Victoria Bautista
University of the Philippines

**Session 8: Enriching Partnerships for Scaling Up MDG
Initiatives and Poverty Reduction Using CBMS: Action Plan
and Future Directions**

Session Chair: Mr. Mon Falcon, Social Development Staff, NEDA

Presentors

1:35pm-1:50pm	Engr. Evaristo Pandi Municipal Planning and Development Coordinator Municipality of Labo, Camarines Norte
1:50pm-2:05pm	Ms. Anna Liza F. Bonagua Assistant Director

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Bureau of Local Government Development
Department of the Interior and Local
Government (DILG)

2:05pm-2:20pm

Dr. Agueda Sunga

Technical Assistance Coordination Team
Health Policy Development and Planning
Bureau
Department of Health (DOH)

2:20pm-2:35pm

Mr. Rene Raya

Co-Convenor
Social Watch Philippines (SWP)

2:35pm-2:50pm

Ms. Veronica Villavicencio

Executive Director
Peace and Equity Foundation (PEF)

3:15pm-3:30pm

Dir. Erlinda Capones

Social Development Staff
National Economic and Development
Authority (NEDA)

3:30pm-3:45pm

Ms. Helena Habulan

Executive Director
Municipal Development Fund Office
Department of Finance (DOF)

Reponses

Mr. Roberto Limbag

Programme Director
League of Provinces of the Philippines

Mayor Ramon Guico

National President
League of Municipalities of the Philippines

Mr. Gil Salazar
Executive Director
Philippine Business for Social Progress

4:35pm-4:45pm

Mr. Kyo Naka
Deputy Resident Representative
United Nations Development Programme
(UNDP-Philippines)

4:45pm-4:50pm

**Awarding of New CBMS-UNDP
Development Grantees**

4:50pm-5:00pm

Closing Remarks
Dr. Celia M. Reyes
PEP Co-Director & CBMS Network Leader

5:00pm-5:30pm

Closing Remarks
Dr. Wyona C. Patalinhug
Vice Chancellor for Research
De La Salle University

Proceedings of the 2008 National Conference on CBMS: An Integrative Report

The availability of good statistics and the capacity of governments, donors and international organizations to systematically measure, monitor and report on progress in all social and economic spheres are at the heart of development policy and the achievement of the MDGs.

The Millennium Development Goals Report 2007

Introduction

One disturbing reality confronting development practitioners at the national and local levels today is that while efforts to attain the Millennium Development Goals (MDGs) are progressively being advocated and mounted at the national level, parallel efforts seem to be clearly wanting in bringing the MDGs into the mainstream of local development agenda. These parallel efforts are especially called for under decentralized regimes where local government units are at the forefront of policy or program execution. Unfortunately however, national statistical systems have yet to respond adequately to the demand for micro-level statistics that can aid local government units (LGUs) in their poverty alleviation efforts. One study opines that “the most comprehensive and consistent comparative subnational data is at the regional level although this is simply an administrative level of government that has no responsibilities for delivery of social services. More data is gradually becoming available at the provincial level, but not at lower levels which are at the frontline of efforts to reduce poverty.”¹

¹ *Decentralization in the Philippines: Strengthening Local Government Financing and Resource Management in the Short-Term, 2005* (A Joint Document of the World Bank and the Asian Development Bank)

In response, the Philippine Government has embarked on an initiative to localize the MDGs using CBMS. In 2005, the National Statistical Coordination Board (NSCB) issued Resolution No. 6 — “recognizing and enjoining support to the Community-Based Monitoring System (CBMS) as a tool for strengthening the statistical system at the local level that will generate statistics for monitoring and evaluating development plans, including the progress of the local governments in attaining the MDGs.”

The CBMS is indeed well-positioned to track the progress of MDG attainment at the local level for a number of reasons. For one, some of the CBMS indicators form part of the indicators used for monitoring the progress in achieving the MDGs. Secondly, CBMS is meant to be implemented on a regular basis and can therefore be used to update MDG indicators and facilitate the preparation of regular MDG reports. Thirdly, the CBMS can be used by national and local governments as a basis for costing and identifying appropriate interventions needed to achieve the MDGs as well as for resource allocation. Finally, given large disparities across geographical boundaries in terms of the various poverty indicators, the CBMS can help identify priority areas in order to achieve the targets.

Localizing the MDGs Using CBMS

The task of systematically measuring, monitoring and reporting on the progress achieved in localizing the MDGs provided a good backdrop to this year’s 5th National CBMS Conference which was held on January 30 to February 1, 2008 at the Centennial Hall of the Manila Hotel.

Under the theme “Monitoring the Achievement of the Millennium Development Goals (MDGs) Using CBMS”, the Conference tackled the following MDG-related issues: health service delivery using CBMS; utilization of CBMS data repositories; local level planning and budgeting; program targeting and impact monitoring; implementing regional development strategies; and, improving local governance and accountability through CBMS.

Keynoting the opening day of the event was Secretary Domingo Panganiban, Lead Convenor of the National Anti-Poverty Commission (NAPC). Dr. W. Randy Spence, President of the Economic and Social Development Affiliates (ESDA-Canada) and Undersecretary Austere

Panadero of the Department of the Interior and Local Government (DILG) keynoted the succeeding two days of the Conference.

In his keynote address, Secretary Panganiban underscored the need for timely and accurate information on the number, location and actual living conditions of the Filipino poor. He acknowledged that the paucity of information on the many facets of poverty has led to serious setbacks in the national government's bid to improve the provision of basic services in impoverished communities and reduce poverty levels in the country. He concluded that the adoption of the CBMS is a significant step forward in government's aspiration to give more Filipino families a just share of the national wealth, and thus, CBMS deserves the support and commitment of everyone.

Meanwhile, Dr. Spence, who once served as Senior Program Specialist in Economics for the International Development Research Centre (IDRC) - Canada and as Director of IDRC's Regional Office for Southeast and East Asia in Singapore, explored some central dimensions of well-being that are generally neither measured nor targeted. These dimensions include: (1) physical safety; (2) agency and empowerment; (3) dignity or the ability to go about without shame; (4) employment; and, (5) psychological and subjective well-being. While noting that the CBMS currently includes some of these missing dimensions, he pointed out that: (i) the security and employment indicators of CBMS can be further expanded; and, (ii) empowerment and dignity indicators can be added. He disclosed that these additional indicators of well-being will be pilot tested in the Philippines in order to: (1) determine the extent of their added value in relation to the cost of data collection using these new indicators in the CBMS; and, (2) bring about possible refinement and/or simplification of such indicators for potential use in the Philippines and other CBMS countries. He anticipates that the additional information on security, employment, dignity and empowerment will further improve the design and effectiveness of local government budgets, services and programs.

For his part, DILG Undersecretary Austere Panadero said that CBMS data is definitely useful in identifying the priority development issues at the local level. He stressed, however, that the main challenge for LGUs today is to translate their diagnoses of their respective community problems/issues into appropriate interventions and mobilize resources to finance their implementation.

Views from the Local Level

As if to answer the challenge posed by Undersecretary Panadero, Mayor Antonio Raymundo, Jr. of Orion, Bataan said that while his administration's initial focus was to use CBMS as a tool to localize the MDGs, today, the whole municipality and all its 23 barangays are also using CBMS results as the basis for formulating their Annual Investment Plans and for identifying priority programs, projects and activities. For instance, the PhP65,000 allocation for small infrastructure projects for each barangay was scrapped to give way to MDG-responsive projects such as construction of water systems, construction of additional health facilities and provision of additional medical equipment.

Meanwhile, Governor Maria Valentina Plaza of the Province of Agusan del Sur recounted how CBMS results have facilitated the formulation of appropriate interventions and the targeting of eligible beneficiaries for said programs. For example, the CBMS has provided inputs to the planning of the provincial government's Convergence Development Program (CDP) as well as the prioritization of geographic areas. The CDP aims to pool together local resources in order to arrive at a focused and integrated strategy for maximizing the impact of programs and projects for economic and social development. At present, 32 barangays and households with monthly incomes of PhP2,000 and below are being targeted.

But how do you really mainstream MDGs into the local development agenda? Mayor Jonathan Cuyahon of Kiangan, Ifugao offered the following strategies:

1. Setting the policy framework – this involves the issuance of an Executive Order and Sangguniang Bayan Resolutions adopting the MDGs as a development framework. It also includes the formation of the Technical Working Group (TWG) on the MDGs, as well as formulation of operational plans for MDG localization and monitoring.
2. Capability building and/or training focused on MDG orientation and MDG monitoring design, and the implementation of data gathering, processing and validation activities.

3. Analysis and preparation of MDG reports that contain situation analysis and trending, projected targets for each goal, together with the proposed intervention programs and the corresponding financial requirements, including fund sourcing.
4. Integrating MDG reports in Local Development Plans (LDPs), Annual Investment Plans (AIPs) & Financing Strategy of the Municipality.
5. Budget/finance advocacy and lobbying to ensure that funds are allocated for the corresponding MDG-related targets.

CBMS Data Users

LGU-presenters likewise noted the fast increasing number of existing and potential users of CBMS-generated data – which reflect the widening recognition not only of the technical soundness of the CBMS methodology, but also its practical value to a wide range of stakeholders.

Cognizant of this, the PEP-CBMS Network Coordinating Team together with its partner LGUs are now building the national repository of CBMS data. The national repository, which is now lodged at the National Anti-Poverty Commission (NAPC), is envisioned to help facilitate data sharing across government departments, the private sector, civil society, donor agencies and other relevant stakeholders. Specifically, the national repository is expected to: (1) facilitate the access and use of the integrated CBMS database by national entities in their advocacy work with key decision-makers; and, (2) effectively support government and non-government funding sources in their efforts to strengthen evidence-based planning/monitoring and align their interventions to national priorities.

However, with the increase in the demand for CBMS data, there is a need to establish clear and logical guidelines by which the data can be shared amongst interested users. These guidelines should ensure proper recognition of the owner or custodian of the data as well as the confidentiality of the household and individual information being collected and used for various purposes.

Facilitating Gender-Responsive Planning and Budgeting Through CBMS

One of the recent initiatives undertaken by the PEP-CBMS Network Coordinating Team is the Gender-Responsive Planning and Budgeting study which aims to assist LGUs in facilitating gender-responsive and evidence-based planning and budgeting.

Ms. Celia Flor, Executive Director of the DAWN Foundation discussed the research findings of this study and noted that the system has provided a clearer understanding of the status of women and men, particularly in the following areas: household roles, asset ownership and community/political participation.

Ms. Nancy Spence, Director of Economic and Social Development Affiliates (ESDA-Canada), compared the CBMS-GRB to other global models. She said that the CBMS-GRB initiative is a best practice model which is more responsive to women's needs. She also expressed optimism that the initiative could develop spin-offs into advocacy areas and be replicated in other countries in Latin America and Africa.

Challenges

Scaling up CBMS implementation in the country remains a major challenge. Efforts towards this end are faced with thorny issues especially under the legal framework that proclaims and underpins the autonomy of local government units.

For his part, Engr. Evaristo Pandi, Municipal Planning and Development Coordinator (MPDC) of Sta. Elena, Camarines Norte enumerated a number of issues which affect the implementation and adoption of CBMS. These are: (1) its acceptance by the community leaders and the public at large; (2) manpower requirements; (3) availability and capacity of equipment at the local level; and, (4) the commitment of local leaders to implement/pursue the project.

Messages of Support and Commitment

Notwithstanding the issues and challenges cited above, the commitment and support for CBMS from a wide range of stakeholders have been steadily growing over the years. Mayor Ramon Guico, National President of the League of Municipalities of the Philippines, for instance, committed to support the implementation of the CBMS

and broaden the participation of the municipalities in what he described as a “worthwhile undertaking”. He said that the League wants to replicate the innovativeness and excellence of its members in implementing the CBMS in a bigger number of Philippine municipalities.

On the part of the country’s national planning body, the National Economic and Development Authority (NEDA), Director Erlinda Capones of the Social Development Staff said that the Medium-Term Philippine Development Plan (MTPDP) for 2004-2010 targets the expansion of the CBMS to cover all LGUs by 2010. This implies that the daunting challenges of socially marketing the CBMS, conducting orientation sessions, facilitating the training modules and coaching the data gathering and processing activities in the country’s 81 provinces, 136 cities, 1,425 municipalities and 41,995 barangays must be met.

Ms. Veronica Villavicencio, Executive Director of the Peace and Equity Foundation (PEF), related how the PEF used to conduct its provincial poverty mapping to identify the priority 20 percent of the municipalities on which it must focus, and still had to identify which barangays and households need priority attention. Fortunately, the implementation of CBMS by quite a number of LGUs in the PEF’s priority provinces has facilitated the targeting of its interventions.

Meanwhile, Mr. Gil Salazar, Executive Director of the Philippine Business for Social Progress (PBSP) pointed out that his organization will be one of the many beneficiaries of an effective CBMS working at the local government level. PBSP, as a grant-making organization, usually spends an enormous amount of time and money to study and assess the situation of its target areas. But with CBMS in place, PBSP can redirect the use of its resources from building or implementing the system itself to direct program cost.

CBMS-UNDP Development Grants

One of the highlights of the Conference was the awarding of a total of PhP1.56 million to the third set of grantees of the CBMS-UNDP Development Grant Program. The grantees included eight LGUs from the provinces of Agusan del Sur, Camarines Norte, Eastern Samar and Palawan. The funds will be used to finance barangay-based

poverty reduction programs identified through the survey results of the CBMS.

Launched during the 3rd National Conference on CBMS, the CBMS-UNDP Development Grant Program was formed to build partnerships among communities and various sectors in the design and implementation of appropriate interventions in pursuit of meeting the MDGs, particularly poverty reduction. It also aims to promote good governance and greater transparency in resource allocation through evidence-based needs identification, program design and impact monitoring.

According to Mr. Kyo Naka, Deputy Resident Representative of the UNDP Philippines, the grant program aims to “bring about not only empowered communities but also empowered LGUs with a deep sense of commitment to emancipate their poor constituents from poverty.”

Participant Demographics

The 3-day Conference attracted the biggest attendance ever in the history of the CBMS National Conference with the participation of over 350 CBMS stakeholders consisting of local chief executives, development practitioners, policymakers, academicians and researchers from the north to the south of the Philippines.

Dr. Celia M. Reyes, PEP Co-Director and CBMS Network Leader, noted how the participant demographics have changed through the years. She sums up her observations, thus: “we initially started with a sprinkling of local government units, but today, these LGUs constitute the majority of participants in this annual gathering of CBMS stakeholders.”

Welcome Remarks

The CBMS National Conference Five Years After

Celia M. Reyes*

On behalf of the PEP-CBMS Network Coordinating Team, we welcome you to the 5th CBMS National Conference.

Five years ago, we conducted our first CBMS National Conference in Palawan. At that time, we had about 50 to 60 participants, a majority of who were representatives of national government agencies. We only had a handful of participants from local government units (LGUs) mostly from Palawan, with only three other LGUs coming from other provinces.

But now in this Conference, we have more than 300 participants — with about 80 percent coming from LGUs from all over the country. This is a very significant change from the first time we held our conference.

We are also quite honored to have with us today some very special people and groups whom I would like to acknowledge:

- Secretary Domingo F. Panganiban, the Lead Convenor of the National Anti-Poverty Commission (NAPC), who has been a prime mover in this advocacy towards the national institutionalization of the CBMS;
- Dr. Evan Due, of the International Development Research Centre (IDRC), who came all the way from Singapore just to be with us;

* Poverty and Economic Policy (PEP) Research Network Co-Director and CBMS Network Leader

- Dr. Ponciano Intal, the Executive Director of the Angelo King Institute for Economic and Business Studies of De La Salle University, who has served as our mentor — providing us all the moral and technical support for many years;
- our partners from national government agencies: the Department of the Interior and Local Government (DILG), the National Economic Development Authority (NEDA), the Department of Social Welfare and Development (DSWD), and, of course, the NAPC;
- our distinguished governors and mayors — who despite their hectic schedules have decided to spend some time with us over the next three days to share their respective experiences;
- the new local chief executives who are not yet implementing CBMS but would like to hear what CBMS is all about; and, of course,
- our development partners from civil society.

With DILG taking the lead in providing the capacity-building requirements of our local government units, we are very proud to report to you that CBMS is now being implemented in 37 provinces throughout the country — of which 17 are undertaking it province-wide. There are now 27 cities and 384 municipalities covering almost 10,000 barangays that are implementing CBMS.

Meanwhile, under the guidance of Secretary Panganiban, NAPC has taken the lead in mobilizing resources to capacitate LGUs to put in place a local monitoring system that will assist them in diagnosing the extent of poverty, in formulating appropriate interventions and in implementing the targeted programs.

NEDA, on the other hand, has been providing policy guidance to ensure that national and local development plans are responsive to the developmental needs of the country in general and the respective local communities in particular.

Over the next three days, our partners will be relating to us how they have used CBMS for monitoring poverty at the local level, for improving local governance, for planning and budgeting, for tracking their progress in localizing the Millennium Development Goals

(MDGs), for managing health service delivery and for facilitating gender-responsive budgeting. We will also see how projects supported by development grants from the United Nations Development Programme (UNDP) and the Peace and Equity Foundation (PEF) have contributed to the reduction of poverty in the project sites.

Since you our local partners have demonstrated the usefulness and viability of a local monitoring system, we have been inspired to bring the CBMS to other countries. Now, CBMS is being implemented in Bangladesh, Cambodia, Indonesia, Lao PDR, Sri Lanka and Vietnam in Asia, and in Burkina Faso, Ghana, Kenya, Senegal and Tanzania in Africa. Currently, we are evaluating proposals for new CBMS projects in China, Cameroon, Liberia, Sierra Leone and other countries.

What is striking about the CBMS initiative is that it is driven by local government units. Thus, it is a very good example of a bottom-up approach to social and economic development. So for the continuing support it has been rendering for this local initiative on the CBMS, we are truly grateful to IDRC.

It is our hope that through CBMS, all of us will be able to discover new pathways out of poverty.

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Welcome Remarks

Promoting Good Governance Through CBMS

Ponciano S. Intal, Jr.*

On behalf of the De La Salle University and the Angelo King Institute for Economic and Business Studies, I am pleased to welcome you all to the 5th CBMS National Conference. This conference pursues our annual tradition of gathering together to share and exchange our experiences and ideas on the Community-Based Monitoring System (CBMS). And I am glad to note that every year, more and more people are sharing their experiences and thoughts on CBMS.

Going over the conference program and the list of topics that will be covered by the speakers, one cannot help but be optimistic about the future. I dare say that there is a quiet revolution in the making in this country – and CBMS is significantly contributing to its emergence.

One clear manifestation of this quiet revolution is the rapidly growing number of local chief executives who have come to accept and believe that good governance means good politics and good economics combined.

There is, in fact, a growing number of success stories at the local level to prove this – of which, the best examples, perhaps, are the experiences of Quezon City, Pasay City, Palawan, Bulacan and Cebu. Because good local governance properly and adequately delivered the economic and social services required in these places,

* Executive Director, Angelo King Institute for Economic and Business Studies, De La Salle University, Manila

the voters therein in turn delivered their resounding approval of their respective LGUs' performances. In the case of Mayor Feliciano "Sonny" Belmonte of Quezon City, he ran for re-election effectively unopposed – reflecting the undivided support of his well satisfied constituents. Of course, I must not forget to mention the successful re-election of the incumbent Palawan governor — one of the earliest and strongest supporters of CBMS. Also worth citing is the Pasay City voters' reaffirmation of their mayor — inarguably the most fervent supporter of CBMS in Metro Manila.

The wide range of topics lined up for discussion in this conference clearly shows the immense potential of CBMS as a tool for good local governance – which makes it worth investing in for many LGUs who aspire towards such end. Note, however, that the cost of conducting a CBMS survey is not middling – which may pose a financial challenge especially to poorer LGUs.

While the PEP-CBMS Network Coordinating Team has focused on helping local government units, it may now also be high time for the Team to look into the relevance and usefulness of CBMS as a tool for achieving good governance at the national level. For if good governance resulting from good politics and good economics combined is possible at the local level, why cannot it be possible at the national level?

Indeed, the need for good governance becomes even more compelling at the national level. Last year, the political noise heard all over the country was decidedly less defeaning than what it had been the year before. As a result of the lighter political distraction and the improved investment climate experienced last year, the country posted a significant up-tick in its economic performance and a substantial increase in the value of investment commitments.

The basic truth is: good governance leads to less political noise and uncertainty, thereby improving the country's investment climate and enhancing its attractiveness and global competitiveness in the eyes of investors.

On that note, I would like to end my welcome remarks by thanking you all for joining us.

Again, welcome and have a good day!

Welcome Remarks

IDRC and the CBMS Network: A Partnership for People Empowerment

*Evan Due**

On behalf of the International Development Research Centre (IDRC), I am pleased to welcome all of you to this 5th CBMS National Conference. I have actually attended the past four conferences, and I notice that with each conference, the rooms get bigger, the number of people gets larger, and the conference itself becomes a more and more exciting forum for sharing and exchanging ideas and experiences. I am also doubly pleased that Dr. Randy Spence — who was introduced earlier as the grandfather of the Community-Based Monitoring System — is here with us today.

What makes CBMS really significant and interesting to the IDRC is the way it started out as a local initiative here in the Philippines and the way it has grown and gained international stature and importance. And what makes CBMS — as a locally-driven program — so developmentally important is the partnership it fosters between and among local communities, local government units (LGUs), and national and international agencies. On this aspect, allow me to thank Dr. Celia Reyes, who has been with the program since its inception and has been serving as its driving force, and her PEP-CBMS Network Coordinating Team members here at the Angelo King Institute for Economic and Business Studies for their unfailing and never-ending energy in moving this program forward.

* Senior Regional Program Specialist, International Development Research Centre (IDRC)

IDRC has been a partner of the program since its conception. We value this partnership tremendously because we have learned a lot from you. Learning how local research can be made available for the use of local planners and policymakers has been instructive for all of us. As Dr. Reyes pointed out earlier, this program has been transplanted to other countries — not only in Asia, but in Africa and Latin America as well. Interestingly, they all look up to the Philippines and all of you here; they also want to go to Palawan and learn from you. So we are all very proud of the work that has actually been developed in this country.

Let me briefly explain what the IDRC is all about. The IDRC is a public corporation of the Government of Canada and our business is to finance development research. Our research outputs, however, are not meant to be kept on the shelves, but are meant to be actually applied and utilized for development and people empowerment. In this regard, the CBMS has been serving as an exemplary tool for collecting information at the local level, for analyzing it, for dissecting it, and for packaging it with local planners and the local community in a way that it is developmentally relevant. This program has definitely gone a long way and is now recognized internationally by a number of different countries.

The Honorable Secretary Domingo Panganiban of the National Anti-Poverty Commission (NAPC) had the opportunity to give a presentation on CBMS before the Poverty Committee of the United Nations Economic and Social Commission for Asia and the Pacific (UNESCAP). I was informed that as a result of his presentation, a number of participating officials expressed considerable interest in CBMS. So we want to thank Secretary Panganiban for spreading the word about CBMS.

Dr. Ponciano Intal earlier touched on the important elements of local empowerment and good governance that proceeds not from the top down but from the bottom up. Indeed, having the capacity to formulate plans and allocate resources in the most effective and optimum way is important for a local community. In that respect, CBMS has served as an important tool not only for bringing knowledge from the grass roots up to the planning platform, but also for engaging the whole local community in becoming part of the whole

development process. This is what makes the governance aspect of this program so very relevant in today's world.

I certainly look forward to the sharing and exchange that will transpire over the next three days. We have a very exciting agenda, and I hope we will have the opportunity to interact and learn from each other.

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Keynote Address

CBMS as a Tool for Achieving the MDGs

Domingo F. Panganiban*

The Republic of the Philippines has entered a new and promising phase in its drive to eradicate poverty and uplift the Filipino's standard of living.

The Philippine Mid-Term Report on the Millennium Development Goals (MDGs) suggests that our nation is on track – and that we have made good progress together in localizing the MDGs. Over the past 17 years:

- We have reduced the poverty gap ratio — and cut the incidence of poverty among Filipinos by 15.3 percent.
- We have decreased the number of households that survive on inadequate food by 10.2 percent.
- And we have reduced the number of underweight children below the age of five by 10 percent.

More recently, the incidence of the self-rated poverty among Filipinos saw a sharp decline from 52 percent in the fourth quarter of 2007 to 46 percent three months later – the lowest in 20 years.

With fewer Filipinos now perceiving themselves as poor, President Gloria Macapagal Arroyo has announced that the continuing challenge of her Administration is to spread the payback of our recent economic recovery and growth to the people – especially the poor.

* Secretary and Lead Convenor, National Anti-Poverty Commission (NAPC)

And, with work on the Accelerated Hunger Mitigation Program running at full steam, the Philippine government will continue to meet the subsistence requirements of both our children and the unemployed through efforts such as the Food-for-School and Food-for-Work programs, respectively.

Overall, our pace thus far — while not as good as all of us would have wanted it to be — gained headway not only for our generation but also for future generations.

Filipino children born today have greater chances of surviving infancy and early childhood than those born in 1991.

They are far less likely to contract malaria and tuberculosis and other communicable diseases that are prevalent because of poverty.

And they are more likely to grow up in homes that have access to potable water and proper sanitation facilities.

These achievements are a testament to what we can achieve when we work together towards a common cause — when we choose to labor together in building the same boat.

Today, eight years into the new millennium, we can proudly say that we have reached another milestone.

Events in the past several years indicate that we have entered a period of transition. For example, we have evolved from a society that used to rely on the telephone for long distance communications to a modern society interconnected by computer networks and the internet for the conduct of day-to-day transactions.

Accordingly, the objective of this conference is to mobilize local leaders and donor agencies in the bid to organize an equally modern system by which government can monitor key socio-economic indicators at the community level.

The rationale is that these leaders and institutions together represent a potent but untapped resource in the effort to ensure that we have all the necessary data to plan and carry out truly effective anti-poverty programs at the grassroots level.

The Community-Based Monitoring System (CBMS) was first devised in the early 1990s under the Micro Impacts of Macroeconomic Adjustment Policies (MIMAP) Project.

What makes the system especially useful is its use of modern information technology to process and transmit data. It is therefore faster, more accurate, and far more flexible than our current

monitoring systems. Moreover, as CBMS encourages local governments to take full command of the entire data gathering process, it enables local executives to build their own data repositories.

Recent events, however, have made evident the need for wider CBMS coverage in the country.

On November 2, 2006, the nation woke up to the startling news that some 800,000 Filipino families had endured severe hunger in the third quarter of that year.

Upon receiving preliminary hard information about the crisis, the President directed her Cabinet to prepare for emergency executive action.

As plans were drawn up for the necessary remedial measures, three facts became immediately apparent:

- First, that the National Government needed detailed, up-to-date information on hunger at the barangay level in order to address the problem quickly and effectively at the lowest possible cost;
- Second, that National Government did not possess — in full measure — the necessary resources and systems to gather and process such information;
- And third, that the ability to closely monitor the food and hunger situation at the community level would have allowed the National Government to foresee — and take steps to prevent — the crisis.

It became equally clear that government cannot forever rely on the results of independent surveys to fulfill its commitment to the Millennium Development Goals.

Having traveled extensively all over the archipelago in the past year, I have come to realize — as many of you may also have realized — that poor folks everywhere feel that they are deprived of the benefits of our nation's recent economic gains.

I urge our local leaders, therefore, to review their respective local development plans — and carry out corrective measures when and where necessary. I assure you that the National Anti-Poverty Commission (NAPC) will be more than willing to help you in this matter. But this early, we must be prepared to confront serious challenges together.

Consider, for example, the following facts:

- In 2005, the net enrolment ratio in Filipino primary schooling was measured at a disappointing 84.4 percent – while only 68 percent of the children who were enrolled completed their primary education.
- That same year, only 63.7 percent of the births in the country were administered by skilled health workers. The following year, 162 women out of every 100,000 who gave birth in our country died during labor or shortly thereafter.
- In the fight against HIV/AIDS, the Department of Health (DOH) reports that the incidence of HIV/AIDS infection among Filipino overseas workers continues to grow at an alarming proportion. But the use of appropriate protection among high-risk groups remains low.

These are complex issues requiring cooperation, patience, and dedicated hard work. Arranging programs to address each problem effectively will require detailed and correct information at both the national and local levels.

Today, we shall discuss with you how we can together utilize CBMS to meet the information requirements of our Millennium Development Goals. We shall also show you how CBMS has helped various local government units in creating more effective millennium development programs for their own communities.

Friends, I for one believe that we must look to 2015 with hope, confidence and a willingness to invest in the future of our nation and people. Our task may be formidable – but equally formidable is our determination to prevail and ensure for future generations a nation that is stronger, more progressive, and more hopeful than it is today.

MDG Localization in the Municipality of Orion Using CBMS Data¹

Antonio L. Raymundo, Jr.

Preliminary Statement

I thank the PEP-CBMS Network Coordinating Team of the Angelo King Institute for Economic and Business Studies, De La Salle University for giving me this opportunity to share with you our experiences in the use of the Community-Based Monitoring System (CBMS) in the localization of Millennium Development Goals (MDG) in Orion, Bataan.

From the time you conducted your study tour for some CBMS-implementing foreign visitors in the Municipality of Orion during Barangay Bilolo's validation of its CBMS results, our municipality's development initiatives have never been the same again.

Brief Profile of the Municipality of Orion

Our municipality is one of the eleven (11) municipalities and one (1) city comprising the Province of Bataan — which is located in the western part Central Luzon. Orion has a total land area of 6,541 hectares or approximately 65.41 squares kilometers.

The municipality is approximately 132 kilometers away from Manila by car, or around 50 kilometers away by ferry across Manila Bay. It is about 8 kilometers south of Balanga City, the provincial

¹ An edited transcript of the presentation of Mayor Antonio L. Raymundo, Jr., Mayor, Municipality of Orion, Province of Bataan, and President, League of Municipalities of the Philippines (LMP)—Bataan Chapter.

capital, and about 20 kilometers north of Mariveles, the southernmost municipality in Bataan.

The major economic activities in Orion are fishing and farming, with rice and mangoes as the two major produce. Orion was reclassified into a 3rd class municipality in 2006, and has 23 barangays.

Application of the CBMS in the MDG Initiatives of Orion

In 2005, Orion was one of the six Northern and Central Luzon municipalities tapped by the Philippine Rural Reconstruction Movement (PRRM) and the Social Watch Philippines (SWP) to localize the MDGs. Towards this end, the father and son team of Governor Enrique T. Garcia and Congressman Albert S. Garcia spearheaded the implementation of CBMS in the Province of Bataan in that same year.

However, it was during the “Conference for the Capacity Development of Partner LGUs in Localizing the MDGs” held in Sagada, Mt. Province when the municipality of Orion’s Local Government Unit (LGU) came to know of the CBMS. This system would eventually enable us to capture the real picture of the poverty situation and other forms of human deprivation confronting the whole municipality of Orion.

In April 2006, Orion started the enumeration phase of the CBMS. This earned for our municipality the distinction of being at the forefront of CBMS implementation in Bataan.

While Orion’s initial focus was to use CBMS as a tool to address poverty (in line with its commitment to localize the MDG), now the whole municipality is using CBMS as the basis for formulating its Annual Investment Plan (AIP) and for identifying priority programs, projects and activities.

The CBMS has been instrumental in convincing the 23 barangays in the municipality to get their act together in responding to the basic needs of their constituents. Their decision to procure a computer to house the CBMS data served as a good starting point towards this end.

The conduct of the MDG-Responsive Barangay Budgeting Meeting serves as another vehicle for addressing the respective problem areas in each barangay in response to the call of the MDGs.

Utilizing CBMS Data in Identifying and Resolving MDG-Related Concerns in Orion

Although most LGUs are aware that there are many unmet needs in their respective areas of jurisdiction, they often do not have clear pictures of these unmet needs. Consequently, they are unable to mount the specific interventions needed to address the needs. But the implementation of CBMS rectified this situation in Orion.

Moreover, the LGU of Orion has realized that localizing the MDGs means responding to local problems identified on the basis of CBMS results. For this reason, during the barangay validation of CBMS survey results, the CBMS Core Indicators were presented in relation to the particular MDG being addressed. The municipal LGU also realized that localizing the MDG means resolving issues and concerns at the grass roots – and that is, at the barangay level.

For instance, the CBMS results revealed a high number of children (age 6-12 years old) not attending school in all of the 23 barangays of Orion. Understandably, any initiative mounted by the municipality in response to this sad situation would in effect also respond to the call of the MDG Number 2 – which is: to achieve universal primary education. The same holds true for initiatives undertaken by the municipality to address the problem of high drop-out rates among high school students due to lack of money to pay for miscellaneous fees. This problem was personally addressed by the municipality's local chief executive.

Another example is the CBMS identification of Puroks 3, 4, 6 and 7 in Barangay Bilolo as areas with no access to safe drinking water. A few weeks after the CBMS data validation, a water tank was put up to address the water problem in these puroks.

In Barangay General Lim, after the CBMS results were disseminated, priority projects were identified. These projects eventually and formally found their way into the AIP for financing. Such projects included a community-based manpower training on welding (in partnership with the municipality), a proposal for the establishment of a barangay high school (with funding coming from the congressional district), and other projects.

The CBMS results on the “proportion of households without access to safe drinking water” were used as the basis for analyzing

clients' perception on the adequacy and quality of the services delivered by a local water entity — the Orion Water District (OWD), which services some 17 barangay. Despite OWD's initial resistance to recognize and accept the findings, it has nevertheless already mounted efforts to address the issues revealed by the findings towards improving its services. Moreover, it resolved to use the findings as a basis for its future policies and directions.

Another example concerns Municipal Ordinance No. 05-0202-038 — entitled "An Ordinance Prescribing the Rules and Regulations for the Effective Implementation of the Sharing Scheme on the Cost of Medicines Dispensed at the Orion Municipal Health Center (OMHC), as Recommended by the Orion Local Health Board" — which was enacted by the Sangguniang Bayan of Orion in 2005. The ordinance provided that 50 percent of the cost of medicines should be shouldered by patients who seek medical treatment at the OMHC, except for the indigents, senior citizens and persons with disabilities — who get the medicines 100 percent free. However, doubts were cast on the ordinance's effective implementation due to the absence of a valid list of indigents.

This situation changed in 2006. With the use of the CBMS simple composite index and other documents, the Orion LGU was able to draw up a list of indigents — which up to now is being used to identify the municipality's truly deserving beneficiaries. Through CBMS, the ordinance succeeded not only in eliminating the "dole out mentality" among some people in the municipality, but also in extending the budget for the procurement of medicines by using funds generated from OHMC patients capable of paying for 50 percent of the cost of their prescribed medicines.

Another illustration of CBMS data utilization concerns the municipality's PhilHealth Medicare Para sa Masa Program — under which Orion currently has a total of 2,509 enrollees. When the project was initially implemented, the task of identifying beneficiaries was assigned to the Barangay Chairman. But the absence of a list of indigents in the barangay led to the "selection" or "identification" of relatives, friends, political allies and those close to the Chairman as program beneficiaries.

The entry of CBMS rectified this anomalous situation in the later part of 2006. When the CBMS was almost complete, Orion's local

chief executive instructed the Municipal Planning and Development Office (MPDO) to generate the simple composite index in order to serve as the temporary basis for identifying deserving program beneficiaries. The original list of beneficiaries was eventually narrowed down and finalized by validating it with other related documents in the possession of the LGU.

Programs and Projects in Response to MDG Concerns

The implementation of the Budget Operation Manual for Barangays (BOMB) for 2008 helped the municipal LGU to convince its 23 barangays to use CBMS results as the basis for utilizing their respective resources to respond to the needs of their constituents. This year's barangay budgeting, in fact, was marked by a shift from the generation of a mere "infrastructure wish list" to the generation of a list of basic social services that a barangay ought to deliver to its constituents.

To complement this, the usual allocation of PhP65,000 per barangay for small infrastructure projects (which amounts to PhP1.5 Million yearly under the AIP of the municipality) was scrapped. Instead, an amount of PhP2 Million has been earmarked for allocation to projects responding to the MDGs, with CBMS results as the basis for project prioritization.

To further encourage LGUs to localize MDGs in their respective barangays, the municipal government has launched the awards and merit system for the most responsive barangays in terms of MDG localization and other categories. To avail of the program, a barangay LGU is required to submit a project proposal that can be implemented either by the barangay alone or through a counterpartnering scheme with the municipality.

Projects that fall beyond the funding capacity of either the barangay or the municipality have been listed as priorities for external funding for endorsement either to the provincial government or other funding agencies. In this regard, it is indeed fortunate that Congressman Albert Garcia is firmly committed to implement projects anchored on CBMS results.

Future Plans

LGUs have long been aspiring to localize the MDGs – these being integral elements of the basic services they must deliver to their constituents. With the support of CBMS, the localization of MDGs has become more focused on specifically identified and prioritized concerns. Because of this, the achievement of MDGs must be institutionalized since MDGs are among the priority development initiatives of all LGUs.

Already within our reach is the formulation of the Barangay Socio Economic Profile (SEP) and the Barangay Development Plan, following the scheme of identifying projects based on CBMS results. Thus, projects can be programmed and prioritized for yearly implementation through the AIP or for external funding.

At the municipal level, the reformulation of the Local Development Plan and the on-going Executive Legislative Agenda (ELA) workshop will observe the same scheme.

To encourage and draw support from the local community as well as from overseas “kababayans”, Orion’s LGU has created in its official website (www.udyong.com) a section covering its initiatives in MDG localization and the progress it has achieved. Still a work in progress, this section primarily seeks to disseminate information on the municipality’s poverty alleviation efforts and encourage stakeholders to participate in and/or contribute financial support for these initiatives.

However, much remains to be done. One task at hand is maximizing the utilization of CBMS data. Nevertheless, it is reassuring to know that we have started on the right track, and that our plans are now based on solid facts. It is for this reason that Orion’s LGU has been able to draw the commitment of the municipality’s 23 barangays to pursue the CBMS project. Their appreciation for the usefulness of CBMS made their commitment possible.

Orion has set its mind to conduct the second round of CBMS by 2009. Before that happens, local government officials in Orion would still have enough time to build on top of their performance in CBMS implementation and provide a high benchmark for their successors in localizing the MDGs with the support of CBMS.

Localizing the MDGs: the Experience of the Kiangan, Ifugao LGU¹

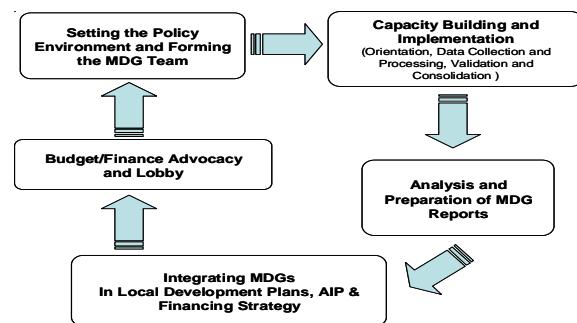
*Jonathan M. Cuyahon**

Mainstreaming the MDGs

Efforts to mainstream or localize the Millennium Development Goals (MDGs) and targets in the Municipality of Kiangan, Province of Ifugao began way back in early 2007. The objectives in mainstreaming the MDGs are: (1) to establish benchmarks for tracking accomplishments in key development indicators; (2) to assess and operationalize the MDGs and targets and other international commitments at the level of the municipality; and, (3) to adopt the MDGs as a framework for local development planning and fiscal management

Below is an overview and a brief discussion of the steps followed in MDG mainstreaming.

Figure 1: Overview of Steps in MDG Mainstreaming



¹ An edited transcript of the presentation of Mr. Josh Albert Cecilio Aguana, Municipal Planning and Development Coordinator (MPDC) of LGU-Kiangan, Ifugao in behalf of Mayor Jonathan M. Cuyahon.

*Mayor of the Municipality of Kiangan, Province of Ifugao

1. Setting the policy framework – this involves the issuance of an Executive Order and Sangguniang Bayan Resolutions adopting the MDGs as a development framework for Kiangan. It also includes the formation of the Technical Working Group (TWG) on the MDGs, as well as formulation of operational plans for the MDG localization and monitoring.
2. Capability building and/or training focused on the orientation on the MDGs and the MDG monitoring design, and the implementation of data gathering, processing and validation activities.
3. Analysis and preparation of the MDG reports that contain a situation analysis and trending, projected targets for each goal, together with the proposed intervention programs and the corresponding financial requirements, including fund sourcing.
4. Integrating MDG reports in Local Development Plans (LDPs), Annual Investment Plans (AIPs) & Financing Strategy of the Municipality.
5. Budget/finance advocacy and lobbying to ensure that funds are allocated for the corresponding MDG-related targets.

Right now, we are still in the process of analyzing the initial results of the survey while at the same time preparing for data validation at the barangay level.

The Community-Based Monitoring System (CBMS) is an important tool used in localizing the MDGs. We are using the data generated by the system to analyze the current situation as well as to identify positive and negative trends. The CBMS data also serves as a more accurate basis for target setting, planning intervention programs, and computing for the corresponding budget or financial requirements to realize the targets.

In terms of target setting, the CBMS data helps in focused targeting because it is both area- and client-based, thus allowing for efficient use of resources. It also enables us to identify specific areas, barangays, puroks or households which are most in need – towards “giving the right medicine based on an appropriate diagnosis,” as the saying goes.

Needs Assessment Results and Recommended Interventions

To maximize the use of the available CBMS data, different working groups consisting of the MDG Team along with representatives from other LGU offices and Sanggunian members held workshop sessions to produce an initial data analysis, program intervention and corresponding budget requirement which they presented during the last session of the Sanggunian's deliberations for our 2008 budget appropriation.

We can share some of the results of the discussions of these workings groups on MDG concerns, some of the proposed intervention schemes/programs under discussion and an initial estimation of the corresponding budget requirement.

The data shows that Kiangan has a high poverty incidence, twice higher than the national poverty incidence computed for 2003. In Kiangan, 60 percent of the people are poor. The data also reflects disparities across areas and income groups.

In terms of urban-rural disparities, rural areas have higher employment rates compared to urban areas. However, rural areas have higher rates of poverty incidence. Income disparity is also wide. According to the data, in terms of income quintile or grouping, the top earners get an average of about PhP300,000 per annum — an amount ten times higher than the PhP25,000 per annum of the low income group. The main source of income in Kiangan is farming (with 65 percent employed in agriculture); yet, annual income from farming is a mere PhP14,000 per annum or around PhP1,200 per month.

Since the main source of livelihood is related to farming, it is important to address the needs of the agriculture sector. Some of the proposed interventions seek to address the following:

- agri-infrastructure development;
- productivity improvement;
- marketing improvement;
- additional sources of livelihood; and,
- technical services.

The Working Group on Education found alarming trends in the educational situation in Kiangan. The data revealed that 10 percent of children 6-16 years old were not attending school. More than 10

percent of children age 6-16 years old were not attending school in six barangays. The most frequently cited reasons for not attending school are related to financial constraints and/or economic needs. Thus, despite the presence of schools in all barangays, the number of children not attending school was high. In addition, illiteracy rate was also high at 10 percent of those aged 10 and above. These non-schooling and illiterate children are found mostly in far-flung barangays.

Based on an analysis of the education situation in Kangan, the Working Group recommended the following intervention schemes to achieve MDG Goal 2 — universal primary education:

- completing the elementary schools and adding more mobile teachers;
- providing more livelihood opportunities for parents;
- promoting/strengthening the Alternative Learning System (ALS);
- providing skills trainings for drop-outs; and,
- providing supplemental feeding.

The Working Group on Health Concerns noted that there were no recorded maternal deaths for 2007, although there were 4 infant deaths. In addition, the data also revealed that forty three percent (43%) of lactating mothers practiced exclusive breastfeeding for 4 months. The Health Group attributes these positive findings to the strong Mother and Child Program of the municipality. Kangan had actually been recognized several times in the past as the Most Child-Friendly LGU in the 4th-6th class municipality category. The recognition is for promoting the rights and welfare of children through the formulation of plans, passage of local legislation and provision of adequate funding in the implementation of programs and projects for children. Kangan also received the Nutrition Green Banner Award several times and was recognized as an Outstanding Nutrition Program Implementor for its effective, efficient and well-coordinated implementation of the Philippine Plan of Action for Nutrition.

Also among the recommended actions of the Working Group on Health is sustaining efforts towards zero infant and maternal mortality, considering that the data also revealed the presence of:

1. abortions, miscarriages and stillbirths in the past 5 years at 23 occurrences per year; and,
2. teenage pregnancies; currently there are 17 pregnant teens among the 15-19 year old age group.

The Health Group actually generated a very long list of specific interventions – including initiatives to address the water and sanitation situation in Kiangan since our rural areas have a high percentage of people who have no access to potable water and sanitary toilet facilities.

Now what do we intend to do next? First, we intend to maximize the use of CBMS data for project proposal writing, advocacy for MDG attainment, and as a tool for development activities in the Municipality. Second, we will continue to conduct a deeper data analysis at the municipal level and validate the data at the barangay level. Third, we will discuss and share the MDG report with the provincial and other municipal LGUs in Kiangan. Fourth, we will build up a multi-sectoral advocacy group of stakeholders and constituencies for the MDGs within the municipality. And lastly, we will integrate the MDGs in our local development plans and investment plans.

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Achieving the MDGs in Barangay 186 of Pasay City with the Help of CBMS Data¹

Hilario Trestiza

I am Barangay Chairman Hilario Trestiza of Barangay 186 of Pasay City, Metro Manila. Barangay 186 is one of the 201 barangays of Pasay City. It is part of Zone 19 of the Maricaban Area of Pasay City.

I have been tasked to talk about achieving the MDGs in my barangay with the support of data obtained through the Community-Based Monitoring System (CBMS).

The Millennium Development Goals (MDG) were first brought to the attention of our Barangay Council in year 2004. However, this was given attention only when a city-wide CBMS survey was conducted for Pasay City.

We used the results of the CBMS survey as a tool for implementing projects that would be appropriate for and responsive to the needs of our constituency in our barangay.

Through CBMS, we were easily able to obtain the necessary information about the problems faced by our community and the specific needs of our constituency so that we can properly attend to them – considering the availability of data on the population and other indicators of their conditions in the community.

The CBMS is a good measure of the situation of the people in a locality because it captures information about the following:

¹ An edited transcript of the presentation of Brgy. Chairman Hilario Trestiza, Barangay 186, Zone 19, Maricaban Area, Pasay City, Metro Manila.

- Income and employment;
- Health and nutrition;
- Education;
- Access to safe drinking water; and,
- Access to sanitary toilet facilities.

Through CBMS, we are also able to see the community's primary problems which should be given priority attention by our barangay local government unit (LGU). In our barangay, these consist of the following:

- 221 people who are unemployed.
- 123 households that live below the poverty threshold.
- 50 households that live below the food threshold.
- 151 children 6-12 years old who are not going to school.
- 185 children 13-16 years old who are not going to school.

So what are the programs that our barangay implemented to address these problems? One of the programs implemented by our barangay is the Pledge of Commitment towards achieving the MDGs. We are implementing this program through the community's basic unit – which is the family — because we believe that the well-being of the family is the key to our country's progress. Relative to this, we are undertaking the following barangay projects to achieve the MDGs:

1. Feeding program;
2. Medical mission;
3. School supplies for 60 day care children;
4. Livelihood training for income augmentation for 24 mothers;
5. Environmental awareness seminar for children — conducted by the Solid Waste Management Office (SWMO);
6. Strengthening Life Skills for Positive Youth;
7. Health behavior (120 out-of-school youths as participants);
8. 125 scholarships on skills development training by the Technical Education and Skills Development Authority (TESDA):
 - a. 50 persons to train as butchers for overseas placement;
 - b. 50 persons to train as welders for overseas placement;and,

- c. 25 persons to train as call center agents for local employment.

Our barangay LGU believes that we can easily achieve the MDGs if we focus on the welfare of every family in our country because if the foundation for each and every family is stable and strong, then the foundation for governance is also stable and strong.

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Monitoring the National Budget Through Local CBMS Windows¹

Leonor Briones

Social Watch Philippines (SWP) is known for having a special interest in the budget and for engaging the national government on the budget. We believe that after we monitor, after we count the poor, the mothers, the babies, and so on, the next step is to provide budgetary support and implement actual programs.

But one of the lesser known activities of Social Watch is helping bring the Millennium Development Goals (MDGs) down to the local level towards ensuring the localization of the MDGs.

I think by this time, all of us know and are strongly convinced about how useful the Community-Based Monitoring System (CBMS) can be for both local governments and civil society organizations (like Social Watch) since both groups have the same commitment to fulfill the MDGs as well as other development goals of the country. It is also useful for academics including graduate students in conducting comparative situational assessments across provinces.

Earlier, we listened to three presentations on the respective CBMS experiences of a fairly large municipality (Municipality of Orion, Province of Bataan), a slightly smaller municipality (Municipality of Kiangan, Province of Ifugao) and a barangay (Barangay 186, Pasay City, Metro Manila).

Social Watch actually works with the Philippine Rural Reconstruction Movement (PRRM) in Orion and Kiangan. We were

¹ An edited transcript of the comments of Prof. Leonor Briones, Convenor, Social Watch Philippines (SWP), on the presentations during the session on *Localizing the MDGs Using CBMS*.

involved in the capacity-building and training in the use of CBMS in these areas. The experience has been very gratifying for us because it is at the ground level where you really see the usefulness of the CBMS tools. The case of Orion, for example, has shown very clearly that while CBMS was originally conceived to track poverty and its extent, its usefulness goes beyond poverty tracking. For example, the municipality used its CBMS results in preparing its investment plans and in shaping the priorities of its budget. As a result, these priorities were stated very clearly.

Likewise, Kiangan used CBMS as a basis for deciding on its priorities. The Kiangan local government unit (LGU) has realized that since funds at the local and even at the national levels are most often insufficient, then choices have to be made and programs have to be based on the most urgent needs.

Comparing the cases of Orion, Kiangan and the Pasay City barangay, we can see that different communities have their own particular and specific sets of needs even as they may also share similar needs.

What happened in the Pasay City barangay is also very impressive because one of the main issues that all of us are worried about is the prevalence of maternal mortality, and to learn that zero maternal mortality at the barangay level can be achieved is really very gratifying.

We also noticed that both Orion and the Pasay City barangay have the same water- and sanitation-related problems — as revealed by the CBMS data. The confirmation of the existence of these problems prompted the LGUs in these communities to respond to these needs.

In the case of the Pasay City barangay's malnutrition problem — a problem which is also apparent at the national level, it may suggest that one of the MDGs faces the risk or probability of not being attained by 2015. This suggests that we really have to exert more effort in order to address this problem, starting at the barangay level.

Moreover, as I was looking at the data from the three aforementioned LGUs, it occurred to me that their data can also be used even in a small way to help validate the aggregate findings — considering that our problem is always relating the data collated at

the national level with what is actually happening in the field — which is where CBMS is.

These three varying experiences of a large municipality, a small municipality, and a barangay clearly illustrate and reaffirm the usefulness of CBMS. Moreover, they also show that CBMS can be a politically useful tool since ensuring good economics and social development makes for good politics. I am very sure that all the others who have been using the CBMS also have their own experiences to share, and those who are not yet into it would probably now like to give it a try.

So after CBMS, what are the next steps that we can possibly take? From our point of view at Social Watch Philippines and considering our gratifying experience with CBMS, we are very much interested in expanding it. Our role usually is to convince LGUs to take on worthy causes and also to be actively involved in their capacity-building. I do not know if the Department of the Interior and Local Government (DILG) has already endorsed this proposal or move but there's no harm in spreading the good news as good news is always welcome and we are in dire need of good news at this time.

Of course, we can expect some problems to surface along the way. A major problem which we at Social Watch have encountered in the process of convincing LGU officials to adopt/expand CBMS is the problem of financing the survey part. Even for small municipalities, the financing required would go up to as much as six (6) figures because you need to hire interviewers and enumerators and also process the data — which I think is the bigger cost component. We have had experiences in which LGU officials backed out because of the difficulties they encountered in raising the funds required to conduct the study itself. Apparently, the hardest part is conducting the study because you have to ensure that things are done professionally and the data is accurate. Usually, however, LGUs know that the data has to be accurate otherwise they would, in a sense, only be fooling themselves if they tamper with it. So this is one problem we encountered among LGUs — some of which believe that CBMS is more expensive than other monitoring tools.

The other problem — and I do not know if this should be considered a problem — has something to do with the fact that LGUs sometimes face the need to choose which monitoring scheme to adopt

among various monitoring schemes being sponsored by different funders. One LGU official was hesitant to adopt the CBMS because he had been informed that another monitoring scheme is better, is less complicated, asks less questions, and so on and so forth compared to the CBMS. I think this problem has to be resolved once and for all so that LGUs do not become confused in the face of all these competing packages, especially at this time when funders seem to “love” local governments – not in the sense that they love the national government less, but in the sense that the focus now is on local governments. Thus, LGUs receive a lot of such offers.

But for us at Social Watch, we opted for CBMS. As you know, we monitor poverty, we have sectoral interests, and we look at the budget very carefully. But instead of coming up with our own competing monitoring and survey system and “ignore CBMS”, we decided not to reinvent the wheel. Instead, we just added to the CBMS questionnaire our own set of questions or queries tailored-fit to our specific interests. We really did not see any point in reinventing the wheel when such a tool is already available, is technically sound and is very useful. So maybe this is what others can do – build on CBMS and add whatever specific items they want to study or learn about.

My last comment is that after all the monitoring — after counting all the babies who have survived, all the mothers who are nursing their babies, all the malnourished and undernourished children, the water pumps and toilets that have been built, etc., the whole process should eventually always lead to action. And our position is that we should initiate the action at the local level.

From monitoring at the local level – from the barangays to the municipalities to the provinces, we also have to move up to monitoring the national budget so that we can help harmonize the trends in allocation. As you know, the Bicameral Committee has just passed the national budget, and Social Watch actively participated in these initiatives. We at Social Watch have been insisting that we should monitor the national budget especially now that there are significant increases in the budgets for health, education, agriculture and the environment. The budget for health has been doubled, while a very substantial increase in the education budget has been achieved. Social Watch also succeeded in convincing both Houses of the Legislative to partially correct the debt service because of the appreciation of the

peso, and use whatever extra money (generated from the debt service adjustment) to augment the appropriations for health, education, the environment and so on. And we hope and insist that these additional allocations should trickle down to the local government level. We want to ensure that these developments do not end up as mere political statements or propaganda but are actually translated into specific programs and projects that are brought down to the local level. While Social Watch monitors these increases at the national level, it would be most helpful if the LGUs can validate these increases at the local level.

It may interest LGUs to know that there are opportunities for added sources of financing and assistance for local governments. You know, of course, that the Internal Revenue Allotment (IRA) has increased very significantly – even new cities want to get bigger shares of it. The President has PhP141 billion pesos in un-programmed funds and there is one line in it which says “Social Projects and Infrastructure” amounting to PhP30.5 billion. That might be an interesting area to tap. If you look at the national budget, you can see that there is great interest in the barangay, as well as in health and insurance. We want these to trickle down to the LGUs.

As I have said, it is good to monitor. You have an excellent instrument for monitoring. You have a basis for your budgets. You have a basis for asking for additional allocation from the national government because of the CBMS. But in the final analysis, monitoring should lead to action. As I have also said at the start of my commentary, we at Social Watch Philippines believe that after we monitor, after we count the poor, the mothers, the babies, and so on, the next step is to provide budgetary support and implement actual programs. And in these tasks, we seek and encourage your support and cooperation.

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Adopting CBMS to Identify Indigent Families for Enrollment in PhilHealth's Sponsored Program¹

Ernesto Beltran

The Philippine Health Insurance Corporation (PhilHealth) was created by virtue of Republic Act No. 7875, otherwise known as “An Act Instituting a National Health Insurance Program for all Filipinos and Establishing the Philippine Health Insurance Corporation for the Purpose”, which was signed in February 1995, and amended eventually by Republic Act No. 9241 which was signed in February 2004.

Section 2 of the Law has a provision known as the Means Test which is defined as:

“A protocol administered at the barangay level to determine the ability of individuals or households to pay varying levels of contributions to the Program, ranging from the indigent in the community whose contributions should be totally subsidized by government, to those who can afford to subsidize part but not all the required contributions for the Program.”

I guess everybody is aware that the contributions in the PhilHealth’s Sponsored Program can be paid from any of the following:

1. it can be wholly paid by the barangay government;
2. it can be paid fully by the municipal government, congressmen and senators; and,

¹ An edited transcript of the presentation of Mr. Ernesto Beltran, Senior Vice President, Philippine Health Insurance Corporation (PhilHealth).

3. it can be paid by NGOs and other individuals who have the capacity to take care of the poorest of the poor in their community.

As far as PhilHealth is concerned, the history of the Means Test started with the Health and Management Information System (HAMIS) which was developed with the assistance of the German Technical Cooperation or GTZ. This was undertaken during the formation years of PhilHealth immediately after its incorporation.

However, issues were raised concerning the following:

1. the survey was conducted by a private organization;
2. there was a remarkable delay in the release of the results; and,
3. it was very expensive.

Hence, after an experiment of one year, HAMIS was discontinued. Immediately thereafter, PhilHealth adopted the Community-Based Information System – Minimum Basic Needs Approach (CBIS-MBN) using the Family Data Survey Form (FDSF) to provide the profile of the members of the family to be enrolled under the Sponsored Program.

However, the issues on this current methodology involve the household eligibility which is mainly based on income, and as a result, poor families in “non-poor” barangays are excluded from the program (exclusion problem).

There is also a leakage problem in which benefits leak to “non-poor” or “non-eligible” persons or households as a result of the manipulation of income data.

And of course, there is the enumeration cost. We are paying twenty pesos (PhP20) per family. And this is very expensive on the part of PhilHealth. The twenty pesos could have been used to upgrade certain medical and laboratory expenses needed by the member or his dependents. And since these are validated and updated annually, a family that is considered indigent this year can have an Overseas Filipino Worker (OFW) member the next year, hence there is a need to adjust the classification of that family. It's very expensive and labor-intensive.

These are the grounds for considering an alternative system for identifying indigent families to be enrolled in the Sponsored Program

of the National Health Insurance Program (NHIP). And the alternative system is the Community-Based Monitoring System (CBMS).

And why use CBMS? I can cite three good reasons:

1. There are 14 Core Indicators that are being measured to determine the welfare status of the population. These indicators capture the multidimensional aspects of poverty, namely: health, nutrition, shelter, water and sanitation, education, income, employment, and peace and order.
2. It involves the complete enumeration of all households, hence it would provide proper segmentation of the LGU population as to eligibility to the various NHIP membership programs.
3. It would also provide basis to equitably distribute the national government subsidy among the LGUs.

The LGUs take the lead in the data collection and processing, serve as the repository of the database, and use the data in the formulation of annual development and investment plans. The LGU can use a mapping software (Natural Resources Database or NRDB) to generate CBMS-based poverty mapping and to store and display household- and individual-level information, thereby putting faces to the statistics. In military parlance, with CBMS, we have on-time intelligence.

The basis for the adoption of the CBMS emanates from various directives of different government agencies. These include the following:

1. *Department of the Interior and Local Government (DILG) Memorandum Circular 2003-92* issued in April 2003
 - Setting policy guidelines for the adoption of the 13 Core Local Poverty Indicators for planning.
2. *DILG Memorandum Circular 2004-152* issued in November 2004
 - Encouraging LGUs to intensify efforts towards the achievement of the Millennium Development Goals (MDGs).
3. *National Statistical Coordination Board (NSCB) Resolution No.6, Series of 2005*

- Recognizes and enjoins support to the CBMS as a tool to strengthen the statistical system at the local level.
 - Directs the NSCB Technical Staff to initiate and coordinate an advocacy program for the adoption of the CBMS by the LGUs, through the Regional Statistical Coordination Committees (RSCCs), the technical arms of the NSCB Executive Board in the regions.
4. *Social Development Committee or SDC (under the National Economic Development Authority or NEDA) Resolution No. 3, Series of 2006* issued in July 2006
- Adopting the Community Based Monitoring System (CBMS) as the prescribed monitoring tool for the generation of the core local poverty indicator database.
5. *PhilHealth Board Resolution No. 982, s. 2007* issued in February 2007
- Adopting the Community Based Monitoring System (CBMS) and other LGU-based poverty monitoring tools and systems as the sources of data in identifying the indigent families for enrollment to the Sponsored Program.

For the information of everyone, 19 out of 29 provinces are implementing CBMS with NHIP enrollment. The 19 provinces are: Ilocos Sur, Bulacan, Bataan, Palawan, Marinduque, Romblon, Camarines Norte, Masbate, Siquijor, Eastern Samar, Biliran, Leyte, Southern Leyte, Northern Samar, Zamboanga del Sur, Camiguin, Bukidnon, Agusan del Sur and Agusan del Norte.

At present, we are at the stage of finalizing the guidelines. The soft implementation will start in 2008 starting with LGUs implementing the CBMS, while full implementation will start in 2009-2010.

Managing Health Service Delivery Using CBMS¹

Ben Mabansag

The Municipality of Maydolong is the next town to the south of the City of Borongan, the capital of the Province of Eastern Samar. Our municipality has been a 4th class municipality for almost 57 years after its creation in 1951. It has a land area of 41,380 hectares. Based on the 2000 census, it has a population of 12,312 packed into 2,359 households.

Our municipal government implemented the CBMS in 2006 and the following are just some of the findings under this project:

- 68.5 percent of the households in our municipality have incomes below the poverty threshold.
- 6.7 percent of our households still have no access to safe drinking water.
- 14.7 percent of our households have no access to sanitary toilet facilities.
- 38 percent of the total population of children 13-16 years old are not attending school.
- A 1.8 percent death rate was recorded for the total population of children 0-5 years old — suggesting that our municipality is wanting in terms of social welfare and health services.

¹ An edited transcript of the presentation of Mr. Ben Mabansag, Municipal Planning and Development Coordinator (MPDC), Municipality of Maydolong, Province of Eastern Samar.

As a pilot municipality in the implementation of the 6th Country Programme of the United Nations Population Fund (UNFPA) in Eastern Samar, our municipality — together with the two other pilot municipalities of Llorente and Sulat — started its CBMS program implementation in 2005. This year, eight (8) more municipalities have been selected as expansion areas. The Programme revolves around three major components: Reproductive Health, Gender, and Population and Development.

After we conducted the CBMS survey in 2006, the UNFPA came to our municipality to implement the intervention programs on the basis of the partial CBMS data. We were actually able to finish the full processing of the whole CBMS data only late last year.

We now use the CBMS data as model benchmark data for our current programs. We also used this data for targeting our clientele under the UNFPA-assisted projects.

As a result of these projects, our municipality was able to evolve our very own best practice for health in terms of a Safe Motherhood Program catering to the needs of our mothers. The program covers pregnant and lactating mothers, as well as post natal care. In addition, it provides emergency transport from upland barangays to the health clinic — for which we consider ourselves fortunate for being the recipient of a Hi-Lux vehicle for this purpose. We have a waiting home for mothers who are expecting to deliver. Community volunteers serve as rural health sentinels (RHS) who encourage our mothers to avail of our health clinic's services — including bringing the mothers to the hospital to where they are referred by our Municipal Health Officer (MHO). We also have a main service birthing or lying-in clinic that functions 24 hours a day, seven days a week.

The next step we will take in our CBMS project is to update our data, although we finished our processing only late last year after conducting our enumeration in 2006. Hopefully, we will have a new or updated set of data before the next election exercises.

Properly Identifying Beneficiaries of PhilHealth's Sponsored Program Through CBMS¹

Lluis Vinyals

Other presenters before me focused their discussions on the benefits of having CBMS – how and why CBMS is good and useful for priority setting, program budgeting, planning, etc.

On my part, I will focus instead on how CBMS data can be used for identifying the beneficiaries of the Sponsored Program of the Philippine Health Insurance Corporation (PhilHealth).

From my ground experience, I found out that CBMS gives us a lot of data and information. After implementing CBMS, you get a huge database and lots of data. But there's a huge bridge that we need to cross in order to transform the data into information that can help us make informed decisions. And I think that mayors and governors supporting CBMS should be aware that once we have the nice maps and database, we need to transform the information so we can make informed decisions.

Theory dictates that we must completely enumerate all the households in any area and then rank the people from the richest to the poorest. Then we apply the National Statistical Coordination Board (NSCB) poverty threshold so we can identify the people who are entitled to become members of PhilHealth and receive subsidy under the Sponsored Program. After that, the national government and local government units (LGUs) pay their shares and the indigents get their

¹ An edited transcript of the comments of Mr. Lluis Vinyals, Health Financing Expert, European Commission Technical Assistance to the Department of Health (DOH) and the Philippine Health Insurance Corporation (PhilHealth), on the presentations during the session on *Managing Health Service Delivery Using CBMS*.

cards. That's how it should be. But as PhilHealth Vice President Ernesto Beltran pointed out earlier in his presentation, they have discovered leakage and exclusion problems.

What is the leakage problem? This problem is about people who do not deserve to receive subsidy from the government as Sponsored Program members. The exclusion problem, on the other hand, pertains to the real poor who are not subsidized. Unfortunately, these problems exist until now. This is the reason why PhilHealth wants to work in partnership with LGUs to fix this problem.

When I went to Capiz with PhilHealth Region 6 personnel, we cross-matched the list of Sponsored Program members and the list generated by their tool which has the same characteristics as CBMS. Consequently, we found out that the presence of every quartile from the richest to the poor was the same – 25 percent on the Sponsored Program. This means that rich people are subsidized by the LGU and the national government. Inversely, some poor people are not covered.

I want to share with you the current approach that we are trying to promote in order to fix this problem. Our idea is to put in the guidelines so that this cross-match will become systematic. This means that we are not going to accept people who are not properly identified by CBMS. Our goal is to facilitate and promote the proper use of CBMS data. I would like to explain a bit how we intend to do that. We want to give time to LGUs to conduct the CBMS. I do not know if you are aware that it takes time and cost to implement the system. Once the LGUs already have their CBMS database, our idea is to show their data to PhilHealth, and once the people who are entitled to be in the Sponsored Program are determined and verified, we will automatically enroll them. By doing so, we will already solve the problem of exclusion.

But then you might say that it would be very difficult to convince local chief executives (LCEs) to stop subsidizing some of their constituents. For example, in Capiz, the people there told me that they enroll their barangay volunteers as well as personnel who serve as traffic aides. Although there is actually room to subsidize them, our primary aim is to solve the problem of exclusion – to enroll the true poor who deserve to be enrolled under the Sponsored Program. Then we can open the membership to other possibilities – but only

after the truly deserving beneficiaries have been enrolled in the program first and foremost.

Let me also share two more concerns. One is the time required for conducting CBMS. Biliran and Eastern Samar took around two years to conduct their CBMS. There are four CBMS modules that they underwent -- data collection, encoding, data processing, etc. Thus, we need to put the tool on the ground as soon as possible – especially because we are planning – starting in year 2009 – to stop accepting in the Sponsored Program would-be enrollees who have not been properly identified through the CBMS.

The other concern is the cost. Once, when I went with some PhilHealth staff on a mission to Nueva Vizcaya, we found out that it is possible to fund CBMS with an estimated amount of about PhP20-25 per household. I think this is a good estimate of the amount we should use in costing CBMS implementation – meaning: the total number of households multiplied by PhP20-25 equals the amount needed to fund all the four steps of CBMS implementation.

Finally, I would like to mention that despite the fact that the European Commission (EC) is supporting CBMS implementation, it is neither the EC's priority goal nor mandate to decide which tool better fits the needs of any province in identifying Sponsored Program members. In fact, we are also supporting other tools, as long as these tools use assets and living conditions as indicators.

Apart from supporting provinces in the implementation of tools (like CBMS) that identify poor households, the EC is also giving extra money (as part of a grant) to those provinces that are identifying Sponsored Program members properly. Right now, the EC is supporting 16 provinces in various ways. I don't know if you are aware of the Formula 1 for Health? It is basically a Health Sector Reform policy of the Department of Health (DOH). And there are 21 more rollout sites. This can be a carrot or incentive to address the exclusion problem in the PhilHealth Sponsored Program.

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The Creation, Uses and Future Direction of CBMS in Agusan del Sur

*Maria Valentina Plaza**

Introducing the CBMS

The introduction of the Community Based Monitoring System (CBMS) in Agusan del Sur established a catalytic foundation that has enabled the province to adopt a coordinated local-level approach to data and information collection, analysis and dissemination as a support system to policy, plan, program and project formulation, implementation and monitoring.

Implemented by virtue of Executive Order No. 15-04, the CBMS was initiated in Agusan del Sur in 2005 through a survey on the welfare status of the province's population of 549,946. The survey collected household and individual data that served as the basis for a comprehensive set of poverty and welfare measures. The set of measures consisted of 13+1 Core Indicators and 23 Non-Core Indicators . That there is a good number of indicators (37 in all) utilized to assess poverty only reflects the fact that poverty has many facets and occurs in different degrees for any particular area, thus requiring a multidimensional approach if it is to be alleviated and/or eradicated. Corollary to this is that: the alleviation or eradication of poverty requires various programs and initiatives that must be undertaken at all levels of local governance.

The CBMS of Agusan del Sur makes demographic, socio-economic and statistical information and data easily and immediately available and accessible at the provincial, municipal, and barangay

* Governor, Province of Agusan del Sur

local government levels for policy, program and project development, formulation and implementation purposes. Additionally, household level data is also available when required — such as in selecting a project's or program's target beneficiaries.

Characteristics of the CBMS Repository in Agusan del Sur

The reference year for Agusan del Sur's CBMS data is 2005 – the year the first survey was conducted. The survey covered the entire population of Agusan del Sur — consisting of 14 municipalities that composed the province, further broken down into 314 barangays. A total of 109,123 households composed of 549,946 individuals served as respondents.

The major indicators utilized were 13+1 Core Poverty Monitoring Indicators and the 23 Non-Core Poverty Monitoring Indicators. The Core Indicators included such parameters as income levels, unemployment, child mortality, malnutrition, access to safe water and sanitary toilets, etc., while the Non-Core Indicators classified/characterized individuals as disabled persons, senior citizens, solo parents, indigenous people, OFWs, etc., and households according to livelihood activities engaged in, material possessions, among others.

Other household member details were also obtained by the survey to serve as buffer or additional data that can be later processed and reprocessed for specific research and analytical purposes.

The format of information available in the CBMS repository consist of maps, reports, graphs/charts, and a locally developed website (which will be discussed in the next section).

How CBMS is Being Utilized in Agusan del Sur

On the basis of the 13+1 Core and the 23 Non-Core Indicators, municipalities or barangays have been ranked by the CBMS team according to the severity of their conditions in relation to a particular poverty/welfare indicator. This ranking facilitates the process of prioritizing which areas/localities should be targeted as beneficiaries ahead of the rest for any particular local government program/project.

Based also on these basic indicators, the CBMS team can provide specific household level information, so that even households throughout the province can be prioritized as the neediest or the most

critical sectors in relation to any particular criteria (or poverty indicator).

Through data-querying and data-mining, the CBMS teams at the provincial and municipal levels are able to process complex requests from users, and these have proven to be powerful tools for identifying beneficiaries of poverty alleviation programs in Agusan del Sur.

Essentially, there are six basic ways that CBMS is being utilized throughout the province. What follows is a brief discussion and illustration of each.

1. Establishing/enhancing databanks

Computerized CBMS databanks including comprehensive maps have been established in all component municipalities of Agusan del Sur.

CBMS has enhanced the provincial Information Executive System (IES) for government officials. This system aims to provide easy, user-friendly access to data on a range of development indicators. It is a one-stop decision-support system incorporating key sectoral data including Socio-Economic & Demography, Agriculture, Environment & Natural Resources, Infrastructure, Project Monitoring & Evaluation, and Human Resources. CBMS has provided socioeconomic attributes to the IES.

CBMS has been used to enrich the Peace Process database of the Office of the President (OPAPP Program). The information has been utilized in negotiations by providing profiles of conflict and non-conflict areas in Agusan del Sur.

With the help of CBMS data, Municipal Health Offices (MHOs) have updated their municipal records on the mortality and morbidity rates of malnourished children, and also on water & sanitation conditions.

The Department of Education (DepEd) has integrated municipal data in its annual improvement plan and enhanced its data on school participation and dropout rates at both the elementary and high school levels.

2. Preparing socio-economic profiles/development plans

The provincial socio-economic profile – which defines the poverty and human development condition in the province

and identifies who are the poor and where they are located – sources an estimated 80 percent of its information from CBMS data consolidated at the provincial level.

Agusan del Sur's CBMS repository of data, information, summary reports and indicator maps from the provincial down to the barangay level are of great relevance and importance to the Provincial Planning & Development Office (PPDO) and the respective Municipal Planning & Development Offices (MPDOs) in fulfilling their plan formulation and project implementation and monitoring responsibilities.

CBMS reports served as invaluable inputs in the recent Provincial Strategic Planning Process for 2007-2010. The provincial summary of core and non-core indicators, as well as the municipal and barangay rankings of these indicators were particularly relevant, indicative and useful.

Likewise, CBMS data is used as inputs in drafting Municipal Socio-Economic Profiles, Municipal Development Plans and Municipal Annual Investment Plans throughout the province. Likewise, CBMS data is used as baseline data in preparing Barangay Development Plans, Barangay Socio-Economic Profiles, and Barangay Annual Investment Plans.

NGOs such as the Environmental Science for Social Change (ESSC) have used CBMS data to enhance resource profiling of environment project sites in Agusan del Sur.

3. *Formulating appropriate interventions*

CBMS provides inputs for the Convergence Development Program (CDP) planning and prioritization of geographic areas. The CDP aims to pool together local resources and formulate a focused, integrated strategy for maximizing the impact of programs and projects towards ensuring equitable economic and social development in the province. Currently being targeted are 32 barangays, and individuals with monthly incomes of PhP2,000 and below.

In formulating its 5-Year 'F1' Strategy, the Provincial Health Office, which spearheads the program, availed of CBMS information during its planning stages. Agusan del Sur is fortunate to be one of the country's few (only 16)

provinces selected to implement ‘F1’ — which is essentially designed to fast-track major health improvement projects.

The Mindanao Rural Development Program (MRDP) has made use of CBMS outputs, particularly the barangay ranking of indicators in selected municipalities (Santa Josefa and Prosperidad).

The National Commission on Indigenous Peoples (NCIP) utilized CBMS data on Indigenous Peoples in selected areas (municipalities of Talacogon, Rosario and San Luis) in deliberating on applications for Certificate of Ancestral Domain (CADT).

The Provincial and Municipal Agriculture Offices have made use of summary CBMS statistics, such as information on households engaged in livestock production.

CBMS served as reference in the design of a Scholarship Program (established through Ordinance No.14-06) that seeks to assist persons with disability, as well as in the selection of its beneficiaries.

CBMS provided data for the Support to Emergency and Livelihood Assistance Program (SELAP), and the Caraga Integrated Development Program (CIDP) which used the information in selecting beneficiaries of the goat and carabao distribution program.

The Agusan Malaria Reduction Program drew information on selected barangays regarding their overall welfare status.

The Child-Friendly Movement Program drew on child demographic data plus indicators on the welfare status of children in Agusan del Sur.

At the municipal level, the Department of Agrarian Reform (DAR) utilized data to identify support services required by farmers in Agrarian Reform Community (ARC) areas.

Additionally, some municipalities reported that projects had been created to strengthen the delivery of basic health services on the basis of CBMS results.

The Department of the Interior and Local Government (DILG) used CBMS information as inputs for its Municipal

Level Executive and Legislative Agenda (ELA) and Millenium Development Goals (MDG) Program.

In some areas (notably, the municipality of Veruela), additional information was gathered for the purpose of facilitating the resolution of peace and order issues.

4. *Identifying beneficiaries of programs and projects*

CBMS has facilitated targeting by providing information to help identify eligible beneficiaries for specific programs.

Some examples are:

The Municipal Social and Welfare Development offices used CBMS data in selecting PhilHealth beneficiaries and other poor sectors eligible for healthcare support.

The Convergence Development Program (CDP) used CBMS data in determining beneficiary farmers (those with monthly per capita income of less than PhP2,000) in target barangays.

Additionally, CBMS facilitated identification of indigent families eligible for Conditional Fund Transfer (CFT) in target municipalities.

The Department of Education (DepEd) availed of CBMS data in conducting “literacy mapping” in some municipalities to identify beneficiaries of its literacy program.

In the municipality of Veruela, CBMS identified barangays prone to disasters and in need of relief operations.

5. *Preparing project proposals for external funding*

Barangay profiles have been utilized by the Provincial Agricultural Office in preparing a concept paper for a Provincial Food Terminal project.

CBMS spot maps have guided the Provincial Engineering Office in identifying barangays and households in need of water facilities, and related development project proposals.

Provincial CBMS summary data analysis was used by the Agusan del Sur Economic Research & Business Center (ASERBAC) and the Provincial Employment Services Office (PESO) as a basis for drawing up employment generating activities.

The Department of Trade & Industry (DTI) availed of barangay-level data in the municipalities of Bunawan and San

Luis in formulating a packaging project proposal to the New Zealand Assistance for International Development (NZAID).

6. *Validating existing data/information from other sources*

Some offices have utilized CBMS data to validate their existing arsenal of data/information. In some cases, participatory assessments have been conducted with CBMS serving as the baseline reference.

The basic rationale for this approach is that data and information from various sources tend to “interrogate” each other, paving the way for either a validation of existing data or a data overhaul, re-checking or re-gathering. If a validation results, this adds credibility and depth to the initial findings gleaned from CBMS data and statistics.

To recap, CBMS is being utilized in the province of Agusan del Sur in six ways: (1) to establish/enhance data banks; (2) to prepare socio-economic profiles/development plans; (3) to formulate appropriate intervention programs; (4) to identify program/project beneficiaries; (5) to prepare project proposals for external funding; and, (6) to validate existing data/information from other sources.

There is a seventh use, however, which was not discussed, but will be mentioned briefly here. This pertains to the impact monitoring of projects and programs that have already been implemented. But then, this involves comparative data, and requires proper assessment and evaluation of parameters and variables after the implementation of projects/programs, and comparing them with previous measures as captured by the data and information in the reference year (2005).

In sum, with the aid of CBMS, the province is addressing the complex and varied needs of development by undertaking parallel activities that respond to these needs.

CBMS information allows for clear identification of priority concerns at the local government level towards targeting them for appropriate resource allocation and the creation of the necessary action plans. Through the support of CBMS, decisions are reached based on an empirical analysis of hard facts and evidence, thus ensuring that needs are first properly identified and prioritized before they are addressed. This makes good economic sense especially considering that countryside government resources are normally often scarce and

limited, while needs are multifarious, and thus, judicious, prudent and equitable allocation of resources is imperative.

Indeed, many evidence-based decisions, when added up over time, tend to have a stronger, longer lasting positively desired impact on the target beneficiaries in particular, and in general, on the province's prospects for growth and development. That is because, with the support of CBMS, the Province of Agusan del Sur, for example, will be able to respond to real problems through realistic solutions that can really deliver tangible benefits for its people.

Update on CBMS Initiatives in Agusan del Sur

Two years after the implementation of CBMS in Agusan del Sur, the local government continues to pursue CBMS-related activities. In 2007, some of the noteworthy developments include:

- Drafting and approval of Resolution No. 256-07, calling for the adoption of a consolidated provincial data by the Sangguniang Panlalawigan;
- This led to the consolidation and harmonization of CBMS data at the provincial level;
- The Provincial Strategic Planning for 2007-2010 endorsed the incorporation of CBMS findings into Programs and Projects; and,
- Provincial and Municipal CBMS units continue to service the data requirements/requests coming from concerned offices, agencies, NGOs.

Additionally, authorized government officials can now log-in to the provincial government's in-house website (internet address: <http://192.168.2.47/cbms>) to quickly obtain secure, detailed level information. Otherwise, general information, not requiring confidentiality, is available to the public. The website is intended to serve as a gateway to a comprehensive set of maps and data from the provincial down to the household level. This site is currently a work-in-progress, developed in-house by the Provincial Information Technology Unit (PITU) – which welcomes comments and suggestions for improvement.

The Future Direction of CBMS in Agusan del Sur

With the establishment of its CBMS databank, Agusan del Sur today faces the major challenge of ensuring that local government policy and decision making in the years to come will continue to be based firmly on available evidence provided by the CBMS repository.

In recognition of this formidable challenge, the incumbent Provincial Government of Agusan del Sur has reaffirmed its support for CBMS. It will focus efforts on: (a) strengthening capacities to respond to data generation and servicing data requirements; (b) maximizing the utilization of CBMS outputs in order to enhance the quality and impact of projects and programs; and, (c) fully availing of opportunities for policy advocacy.

The provincial government is also aware of the need to constantly look for improved and innovative practices and processes which lead to effective utilization of data and information that underpin the CBMS.

To strengthen the management of internal processes, CBMS personnel were made to undergo intensive training in database management. This is yielding benefits in terms of enhanced knowledge and skills not only in ascertaining and evaluating the quality of data, but also in data management. In the future, this collective enhancement of knowledge and skills will boost the on-going development of CBMS in the province, and improve overall quality of information and its accessibility by users. The support and presence of a volunteer knowledge management adviser has also brought about a positive spin off on general data management and the strengthening of staff capabilities.

To meet the increasing demand for detailed level data, the local government must address the challenge of not only providing the information more quickly, but also protecting its constituents — whose personal information and details are held in the CBMS repository. Indeed, since the needs of constituents should come first, they must necessarily be assured that details regarding them are kept strictly confidential.

Some of these aforementioned challenges will be met with the introduction of a local legislative ordinance — entitled “*An Ordinance for Institutionalizing the Community-Based Monitoring System (CBMS) in the Province of Agusan del Sur, Providing Funds Therefor and For Other Purposes*”. Together with its Implementing Rules and

Regulations (IRR), the ordinance will ensure that appropriate mechanisms are firmly established in planning and development activities, and that CBMS will be linked with resource allocations and expenditures. It will also help protect Agusanons while seeking ways to upgrade their welfare condition.

Sta. Elena CBMS Repository: Lessons Learned

*Bimbo Doria**

Profile of the Municipality of Santa Elena, Camarines Norte *Location & Boundaries*

The municipality of Santa Elena in the province of Camarines Norte lies at the southern portion of the Luzon island in the Philippines. Santa Elena lies at the frontier of the Bicol Region and is situated at the northernmost part of the Bicol Peninsula. It is bounded in the north by the Municipality of Capalonga, (also in Camarines Norte), in the south by the municipality of Calauag, Quezon, in the east by the municipality of Labo, Camarines Norte, and in the west by the Basiad Bay of the Pacific Ocean. The town proper (Poblacion) is 263 kilometers south of the Metro Manila.

Land Area

The municipality of Sta. Elena has a land area of 19,935 hectares — the seventh largest area in the province, and accounts for 6.1% of the provincial area of 211,250 hectares.

Political Subdivision

Created as the eleventh of the twelve municipalities of Camarines Norte, Santa Elena is a 3rd class municipality composed of nineteen (19) barangays, namely: Basiad, Bulala, Don Tomas, Guitol, Kagtalaba, Kabuluan, Maulawin, Patag Ibaba, Patag Ilaya, Plaridel, Pulong-guitguit, Rizal, Salvacion, San Lorenzo, San Pedro, San Vicente, Santa Elena (also known as Poblacion), Tabugon and Villa

* Municipal Planning and Development Coordinator (MPDC), Municipality of Santa Elena, Province of Camarines Norte

San Isidro. Of the 19 barangays, San Pedro has the smallest land area, while Villa San Isidro has the largest area where most of the remaining forest cover of the province can be found.

Economic Opportunities

Copra and other coconut products constitute one of the major products of the municipality. Total area planted to coconut is 2,966 hectares, with a total of 213,284 bearing (187,734) and non-bearing (25,550) trees as of the 1999 data of the Philippine Coconut Authority (PCA).

The municipality produces some 2,572.54 metric tons of rice. This comes from 597 hectares of physical rice areas, of which 359 hectares are irrigated and 238 hectares are rain-fed.

Fruits produced in the municipality are mostly of the citrus specie, particularly the sincome variety. More than three hundred (300) hectares have been planted to citrus — that are marketed mainly in Metro-Manila for juice extract. Other fruits produced in the municipality are: banana, papaya, mango (Indian and carabao), watermelon, singkamas, guava, pineapple, jackfruit, avocado, star apple, atis, and guyabano.

Livestock and poultry production in Santa Elena is in the hands of backyard raisers.

Corn is a small scale or underdeveloped crop in the municipality, with production mainly for local consumption.

Fish and other marine resources are considered a future potential growth area in Santa Elena whose eleven (11) coastal barangays are located at the Lamon Bay (along the Pacific Ocean area) — which is among the major fishing grounds in the country.

Although Santa Elena is only No. 6 among the municipalities of Camarines Norte in terms of the number of coastal barangays, yet it ranks NO. 2 in terms of fish production, with a total production of about 3,684.96 metric tons, despite not having the developed fish port facilities that Mercedes (No. 1 in fish production) and other municipalities in the province can boast of.

The municipality also ranks second in brackish-water fish production — at 489.6 metric tons. However, its capability has remained largely under-developed despite having the largest potential fishpond area in the province at 789.34 hectares, out of which 568.82 hectares are developed productive (497.28) and unproductive (71.54)

fishpond areas, while 220.52 hectares are undeveloped fishpond areas.

The province has identified sites suitable for seaweed culture with an estimated area of 150.34 hectares – the second largest in the province. Shellfish such as oysters and mussels are also potential sea farming products in the coastal barangays.

Santa Elena CBMS Survey Results for 2003 & 2006

CBMS Implementation Brief

We first had the opportunity to work with Micro Impact of Macroeconomic Adjustment Policy (MIMAP) Team on the Community Based Monitoring System (CBMS) in March of 2003. We were able to establish a social sector database that was suitable to our budget and needs. It was both affordable and comprehensive enough in ascertaining poverty incidence across sectors.

We were also able to utilize a Geographic Information System (GIS) or map-based component which is appreciated by our decision makers (the Mayor and the Sangguniang Bayan) due to its digitized map feature that served as an additional tool in project proposal analysis and presentation.

We conducted data collection in May 2003, encountered minor problems in the process, utilized more than fifty (50) enumerators, and completed the data gathering by end of August of the same year. The 2003 CBMS database contained 7,521 household data.

Using savings from capital outlays, we invested in an additional computer to be used for the database processing (Excel) and the mapping component (Natural Resources Data Base or NRDB). With two computers at hand, we were able to utilize two encoders. However, said encoders and computers were utilized not only for the program, but for other office work as well.

The second round of the data collection was conducted in February 2006, generating 7,848 household data, which included some data pertaining to agriculture and environmental concerns (waste management).

This time around, data processing utilized a different CSPro software (using MS Access database) as well as a customized questionnaire that had been agreed upon as per CBMS experience from other municipalities (such as those in the province of Bulacan).

Barangay workers (barangay officials, day care workers, health workers, etc.) served as enumerators. Basically, two encoders were tasked for the project. It was noted, however, that familiarization with the new software was needed not only for the encoders but more so for the database administrators. Encoders were compensated on a per questionnaire basis.

Implementation Cost (First & Second Rounds)

The financial cost component is the foremost or key concern in maintaining a municipal repository or database. Database with GIS feature offered today in the market for a third class municipality is priced at more than a million pesos (PhP1,000,000). Other considerations include repository management (e.g., software, product versions & structure), versatility of the data gathering system and its “user-friendliness”.

Project cost was relatively manageable considering that data would be used for a three-year period. The average cost was pegged at less than ten pesos (PhP10) per household per year.

Outputs

Our experience in the two rounds of the CBMS survey allowed us to gain a better perspective and deeper insight into the municipality's poverty status using the 13+1 Core indicators as measures. It also enhanced our capability to address problems that were not apparent in the initial survey.

The succeeding tables show the comparative CBMS data for the municipality of Santa Elena for survey years 2003 and 2006.

a. Demography

In 2006, decreases in population were noted particularly in coastal barangays. In Barangay San Lorenzo, for example, the devastating typhoon Milenyo in December 2005 washed away logs from Aurora province (such as from the municipality of Dingalan) down to the fishing areas of Santa Elena, making it necessary for fishermen in the municipality to temporarily transfer their operations (and their families) to the unaffected municipality of Mercedes, Camarines Norte.

The population growth rate for the said period registered at 0.57 percent — which is relatively low

Table 1. Cost of CBMS Implementation, 2003 & 2006

Activity	Fund Source	2003 Amount (PhP)	Fund Source	2006 Amount (PhP)
CBMS Trainings	Dev. Fund	30,000	Prov'l. Aid	25,500
Capital Outlay	Brgy. Fund	15,000	Dev. Fund	81,000
Encoding	Dev. Fund	35,000	Dev. Fund	20,000
Forms/supplies	Gen. Fund	48,000	Dev. Fund	35,000
Misc. Exp.	Gen. Fund	22,000	Dev. Fund	30,000
Total Proj. Cost		150,000		175,000

compared to the historical growth rate of 2.35 percent as determined in previous NSO Census survey.

b. Health and Nutrition

· *Nutrition*

The increase in the incidence of malnutrition among 0-5 year old children – from 285 cases (or 4.57 percent) in 2003 to 552 cases (or 9.26 percent) in 2006 – was a surprising revelation because supplemental feeding programs were being conducted during the said time period by the municipality's local government unit (LGU) in collaboration with the Department of Education (DepEd) the Kapit-bisig Laban Sa Kahirapan (KALAH) Program focusing on Grade I students.

This finding would later serve as guide for a renewed feeding program that will instead prioritize children in the 0 to 5 year old age bracket.

· *Child Deaths*

As shown in Table 4, the incidence of child deaths declined from 59 cases in 2003 to 38 in 2006.

· *Maternal Deaths*

Since the incidence of maternal deaths was not included in the Core indicators in the 2003 CBMS survey, a comparative analysis cannot be undertaken. Nevertheless, the 2006 survey showed 6 cases of maternal deaths — one (1) case in each of the six barangays.

Table 2. Population by Barangay, 2003 & 2006

Barangay	2003		2006	
	Total No. of Households	Total Population	Total No. of Households	Total Population
SANTA ELENA	7,521	38,091	7,848	38,745
Basiad	494	2,607	483	2,417
Bulala	332	1,802	382	1,986
Polungguitguit	337	1,685	353	1,672
Rizal	445	2,309	467	2,321
Salvacion	133	643	157	748
San Lorenzo	1,191	6,074	1,128	5,463
San Pedro	295	1,561	311	1,564
San Vicente	208	1,010	220	1,135
Santa Elena (Poblacion)	1,559	7,690	1,652	8,258
Villa San Isidro	61	329	68	363
Don Tomas	432	2,254	433	2,201
Guitol	117	614	128	607
Kabuluan	390	1,806	434	1,939
Kagtalaba	226	1,144	231	1,179
Maulawin	442	2,296	463	2,422
Patag Ibaba	126	596	122	556
Patag Iraya	106	524	116	556
Plaridel	297	1,475	323	1,459
Tabugon	330	1,672	377	1,899

Source: CBMS Survey 2003 & 2006

c. Water and Sanitation• *Access to Safe Water*

The number of households without access to safe water increased from 2,875 in 2003 to 3,078 in 2006 – a difference of 203. The increase is particularly evident in the coastal barangays of Basiad, Pulongguit-guit and Salvacion.

Water project proposals for eight barangays were submitted in February 2006, one of which (for barangay Kagtalaba) has already been implemented. Similar projects for the other seven barangays were approved for implementation in 2008.

• *Access to Sanitary Toilet*

All barangays posted declines in the number of households without access to sanitary toilets. A Municipal Health Office-supervised program for the provision of toilet seats was cited as the

Table 3. Malnourished Children, by Barangay, 2003 & 2006

Barangay	2003			2006		
	Children 0-5 Years Old	Malnourished Children 0-5 Years Old*		Children 0-5 Years Old	Malnourished Children 0-5 Years Old*	
		Magnitude	Proportion**		Magnitude	Proportion**
SANTA ELENA	6,243	285	4.57	5,961	552	9.26
Basiad	439	7	1.59	360	13	3.61
Bulala	318	38	11.95	345	51	14.78
Polungguitguit	283	22	7.77	238	12	5.04
Rizal	321	27	8.41	352	46	13.07
Salvacion	115	11	9.57	125	24	19.20
San Lorenzo	1,082	31	2.87	980	137	13.98
San Pedro	247	0	0.00	236	2	0.85
San Vicente	171	2	1.17	164	21	12.80
Santa Elena (Pob.)	1,245	9	0.72	1,254	119	9.49
Villa San Isidro	48	1	2.08	43	7	16.28
Don Tomas	388	0	0.00	206	5	2.43
Guitol	107	14	13.08	105	2	1.90
Kabuluan	242	29	11.98	301	37	12.29
Kagtalaba	222	14	6.31	186	13	6.99
Maulawin	404	38	9.41	402	15	3.73
Patag Ibaba	100	0	0.00	89	1	1.12
Patag Iraya	90	10	11.11	85	15	17.65
Plaridel	220	25	11.36	207	9	4.35
Tabugon	251	7	2.79	283	23	8.13

*Malnourished children 0-5 years old or children who are moderately or severely underweight

**Number of malnourished children 0-5 years old over total number of children 0-5 years old

Source: CBMS Survey 2003 & 2006

Table 4. Child Deaths, by Barangay, 2003 & 2006

Barangay	2003			2006		
	Children 0-6 Years Old	Children 0-6 Years Old Who Died*		Children 0- 5 Years Old	Children 0-5 Years Old Who Died	
		Magnitude	Proportion**		Magnitude	Proportion**
SANTA ELENA	7,389	59	0.80	5,961	38	0.63
Basiad	532	4	0.75	360	1	0.28
Bulala	363	1	0.28	345	0	0
Polungguitguit	336	1	0.30	238	3	1.24
Rizal	389	1	0.26	352	0	0
Salvacion	131	1	0.76	125	3	2.34
San Lorenzo	1,250	7	0.56	980	8	0.81
San Pedro	285	0	0	236	1	0.42
San Vicente	204	0	0	164	1	0.61
Santa Elena (Pob.)	1,484	32	2.16	1,254	8	0.63
Villa San Isidro	60	0	0	43	0	0
Don Tomas	405	0	0	206	0	0
Guitol	128	0	0	105	0	0
Kabuluan	298	0	0	301	0	0
Kagtalaba	265	0	0	186	0	0
Maulawin	480	9	1.88	402	7	1.71
Patag Ibaba	116	0	0	89	0	0
Patag Iraya	107	0	0	85	3	3.41
Plaridel	266	1	0.38	207	3	1.43
Tabugon	290	2	0.69	283	0	0

*Children 0-5 years old who died during the reference period

**Number of children 0-5 years old who died over the total number of children 0-5 years old

Source: CBMS Survey 2003 & 2006

Table 5. Maternal Deaths, by Barangay, 2006

Barangay	Number of Child Births (less than 1 year old)	Women Who Died Due to Pregnancy-Related Causes*	
		Magnitude	Proportion**
SANTA ELENA	888	6	0.67
Basiad	49	0	0
Bulala	63	0	0
Polungguitguit	26	1	3.7
Rizal	72	0	0
Salvacion	23	0	0
San Lorenzo	147	0	0
San Pedro	40	1	2.44
San Vicente	22	0	0
Santa Elena (Pob.)	193	1	0.52
Villa San Isidro	3	0	0
Don Tomas	15	0	0
Guitol	10	0	0
Kabuluan	48	1	2.04
Kagtalaba	11	1	8.33
Maulawin	59	1	1.67
Patag Ibaba	8	0	0
Patag Iraya	19	0	0
Plaridel	37	0	0
Tabugon	43	0	0

*Women who died due to pregnancy related causes

**Number of women who died due to pregnancy related causes over the combined number of live births and women who died due to pregnancy related causes

Source: CBMS Survey 2003 & 2006

Table 6. Households Without Access to Safe Water, by Barangay, 2003 & 2006

Barangay	2003			2006		
	Number of Households	Households Without Access to Safe Water	Magnitude	Number of Households	Households Without Access to Safe Water	Magnitude
SANTA ELENA	7,521	2,875	38.23	7,848	3,078	39.22
Basiad	494	264	53.44	483	305	63.15
Bulala	332	73	21.99	382	60	15.71
Polungguitguit	337	124	36.80	353	204	57.79
Rizal	445	112	25.17	467	138	29.55
Salvacion	133	128	96.24	157	155	98.73
San Lorenzo	1,191	262	22.00	1,128	185	16.40
San Pedro	295	272	92.20	311	290	93.25
San Vicente	208	61	29.33	220	46	20.91
Santa Elena (Pob.)	1,559	332	21.30	1,652	201	12.17
Villa San Isidro	61	59	96.72	68	62	91.18
Don Tomas	432	145	33.56	433	254	58.66
Guitol	117	94	80.34	128	103	80.47
Kabuluan	390	46	11.79	434	274	63.13
Kagtalaba	226	194	85.84	231	66	28.57
Maulawin	442	201	45.48	463	394	85.10
Patag Ibaba	126	48	38.10	122	114	93.44
Patag Iraya	106	102	96.23	116	105	90.52
Plaridel	297	216	72.73	323	33	10.22
Tabugon	330	142	43.03	377	89	23.61

*Number of households without access to deep/artesian well or community water system over total number of households

Source: CBMS Survey 2003 & 2006

contributing factor for the ten percent decrease in the number of households without access to sanitary toilets. This development is expected to lead to improved health conditions of target households.

e. Housing

- Informal Settlers*

A slight increase in the incidence of squatters was noted in 2006. Although this problem is still at manageable levels, programs have already been initiated to address this concern particularly in barangays Poblacion & San Lorenzo — the most populated areas in the municipality.

- Makeshift Houses*

The number of households living in makeshift housing increased from 251 in 2003 to 315 in 2006. This can be attributed not only to possible

Table 7. Households Without Access to Sanitary Toilet Facilities, by Barangay, 2003 & 2006

Barangay	2003			2006		
	Number of Households	Households Without Access to Sanitary Toilet Facilities		Number of Households	Households Without Access to Sanitary Toilet Facilities	
		Magnitude	Proportion*		Magnitude	Proportion*
SANTA ELENA	7,521	3,074	40.87	7,848	2,311	29.45
Basiad	494	240	48.58	483	141	29.19
Bulala	332	142	42.77	382	126	32.98
Polungguitguit	337	181	53.71	353	152	43.06
Rizal	445	59	13.26	467	49	10.49
Salvacion	133	113	84.96	157	115	73.25
San Lorenzo	1,191	561	47.10	1,128	507	44.95
San Pedro	295	108	36.61	311	50	16.08
San Vicente	208	52	25.00	220	30	13.64
Santa Elena (Pob.)	1,559	151	9.69	1,652	144	8.72
Villa San Isidro	61	44	72.13	68	12	17.65
Don Tomas	432	221	51.16	433	65	15.01
Guitol	117	92	78.63	128	64	50.00
Kabuluan	390	140	35.90	434	103	23.73
Kagtalaba	226	176	77.88	231	167	72.29
Maulawin	442	280	63.35	463	272	58.75
Patag Ibaba	126	116	92.06	122	106	86.89
Patag Iraya	106	100	94.34	116	56	48.28
Plaridel	297	142	47.81	323	70	21.67
Tabugon	330	156	47.27	377	82	21.75

*Number of households with no access to closed pit or water-sealed toilet facility over total number of households

Source: CBMS Survey 20003 & 2006

migration from other municipalities, but also to the increase in population.

f. Basic Education

- *Elementary School Participation*

Elementary school participation of children between 6 to 12 years old increased slightly from 78.75 percent in 2003 to 79.58 percent in 2006.

- *High School Participation*

The high school participation rate improved by 11.09 percent – a positive impact of the continuing program to establish additional high schools in barangays (such as San Pedro, Bulala & Tabugon) during said period.

- *Illiteracy*

The illiteracy incidence for persons 10 years old and above more than doubled — from 336

Table 8. Households who are Squatters/Informal Settlers, by Barangay, 2003 & 2006

Barangay	2003		2006	
	Number of Households	Households who are Squatter/Informal Settlers		Number of Households
		Magnitude	Proportion*	
SANTA ELENA	7,521	224	2.98	7,848
Basiad	494	27	5.47	483
Bulala	332	0	0	382
Polungguitguit	337	94	27.89	353
Rizal	445	3	0.67	467
Salvacion	133	0	0	157
San Lorenzo	1,191	30	2.52	1,128
San Pedro	295	0	0	311
San Vicente	208	0	0	220
Santa Elena (Pob.)	1,559	45	2.89	1,652
Villa San Isidro	61	0	0	68
Don Tomas	432	2	0.46	433
Guitol	117	0	0	128
Kabuluan	390	3	0.77	434
Kagtalaiba	226	1	0.44	231
Maulawin	442	13	2.94	463
Patag Ibaba	126	0	0	122
Patag Iraya	106	0	0	116
Plaridel	297	1	0.34	323
Tabugon	330	5	1.52	377

*Number of households with rented/owned house or lot, or rent-free house or lot without consent of the owner over total number of households

Source: CBMS Survey 20003 & 2006

Table 9. Households that Live in Makeshift Housing, by Barangay, 2003 & 2006

Barangay	2003			2006		
	Number of Households	Households that Live in Makeshift Housing		Number of Households	Households that Live in Makeshift Housing	
		Magnitude	Proportion*		Magnitude	Proportion*
SANTA ELENA	7,521	251	3.34	7,848	315	4.01
Basiad	494	11	2.23	483	5	1.04
Bulala	332	24	7	382	53	13.87
Polungguitguit	337	2	0.59	353	32	9.07
Rizal	445	6	1.35	467	8	1.71
Salvacion	133	1	1	157	1	0.64
San Lorenzo	1,191	57	4.79	1,128	63	5.59
San Pedro	295	24	8	311	37	11.90
San Vicente	208	2	1	220	2	0.91
Santa Elena (Pob.)	1,559	57	3.66	1,652	58	3.51
Villa San Isidro	61	3	5	68	1	1.47
Don Tomas	432	8	1.85	433	12	2.77
Guitol	117	15	13	128	2	1.56
Kabuluan	390	3	0.77	434	0	0.00
Kagtalaba	226	1	0.44	231	1	0.43
Maulawin	442	16	3.62	463	2	0.43
Patag Ibaba	126	0	0	122	24	19.67
Patag Iraya	106	0	0	116	2	1.72
Plaridel	297	12	4.04	323	1	0.31
Tabugon	330	9	2.73	377	11	2.92

*Number of households with rented/owned house or lot, or rent-free house or lot without consent of the owner over total number of households

Source: CBMS Survey 20003 & 2006

persons (accounting for 1.24 percent of the total number of persons in that age bracket) in 2003 to 775 persons (2.73 percent of the total) in 2006.

g. Peace & Order

- *Victims of Crime*

A slight increase in the number of crime victims was noted – from 84 in 2003 to 96 in 2006. Barangay San Lorenzo recorded the highest number of crime victims in both surveys.

h. Income

- *Poverty Incidence*

Poverty incidence in the municipality declined by 4.39 percent — from 70.83 percent in 2003 to 66.44 percent in 2006.

Eight (8) barangays registered increases in poverty incidence, while 11 barangays showed improvements during the period.

Table 10. Children 6-12 years old who are not Attending Elementary School, by Barangay, 2003 & 2006

Barangay	2003			2006		
	Number of Children 6-12 Years Old	Children 6-12 Years Old who are not Attending Elementary School		Number of Children 6-12 Years Old	Children 6-12 Years Old who are not Attending Elementary School	
		Magnitude	Proportion*		Magnitude	Proportion*
SANTA ELENA	6,673	1,418	21.25	7,788	1,590	20.42
Basiad	488	80	16.39	493	87	17.65
Bulala	304	62	20.39	414	89	21.50
Polungguitguit	332	83	25.00	374	94	25.13
Rizal	413	79	19.13	458	103	22.49
Salvacion	124	24	19.35	157	35	22.29
San Lorenzo	1,068	242	22.66	1,148	259	22.56
San Pedro	248	49	19.76	282	58	20.57
San Vicente	175	30	17.14	206	33	16.02
Santa Elena (Pob.)	1,372	312	22.74	1,679	318	18.94
Villa San Isidro	59	18	30.51	71	14	19.72
Don Tomas	347	76	21.90	422	67	15.88
Guitol	95	25	26.32	134	35	26.12
Kabuluhan	275	53	19.27	322	48	14.91
Kagtalaba	224	61	27.23	241	39	16.18
Maulawin	427	115	26.93	510	141	27.65
Patag Ibaba	92	8	8.70	113	20	17.70
Patag Iraya	94	20	21.28	117	28	23.93
Plaridel	244	39	15.98	296	53	17.91
Tabugon	292	42	14.38	351	69	19.66

*Number of children 6-12 years old not attending elementary school over total number of children 6-12 years old during the survey

Source: CBMS Survey 20003 & 2006

Table 11. Children 13-16 years old who are not Attending High School, by Barangay, 2003 & 2006

Barangay	2003			2006		
	Number of Children 13-16 Years Old	Children 13-16 Years Old who are not Attending High School		Number of Children 13-16 Years Old	Children 13-16 Years Old who are not Attending High School	
		Magnitude	Proportion*		Magnitude	Proportion*
SANTA ELENA	4,023	2,205	54.81	3,852	1,684	43.72
Basiad	280	145	51.79	244	96	39.34
Bulala	218	136	62.39	202	87	43.07
Polungguitguit	214	118	55.14	184	125	67.93
Rizal	70	34	48.57	231	83	35.93
Salvacion	194	94	48.45	81	54	66.67
San Lorenzo	120	83	69.17	526	280	53.23
San Pedro	251	153	60.96	165	65	39.39
San Vicente	56	30	53.57	123	51	41.46
Santa Elena (Pob.)	55	34	61.82	778	294	37.79
Villa San Isidro	143	64	44.76	37	25	67.57
Don Tomas	166	118	71.08	222	105	47.3
Guitol	226	105	46.46	47	23	48.94
Kabuluhan	69	50	72.46	188	46	24.47
Kagtalaba	661	408	61.72	120	64	53.33
Maulawin	167	94	56.29	233	122	52.36
Patag Ibaba	110	47	42.73	56	20	35.71
Patag Iraya	790	372	47.09	48	20	41.67
Plaridel	192	87	45.31	143	49	34.27
Tabugon	41	33	80.49	224	75	33.48

*Number of children 13-16 years old not attending high school over total number of children 13-16 years old during the survey

Source: CBMS Survey 20003 & 2006

Table 12. Illiteracy Rate, by Barangay, 2003 & 2006

Barangay	2003			2006		
	Persons 10 Years Old and Above	Illiterate Persons 10 Years Old and Above*		Persons 10 Years Old and Above	Illiterate Persons 10 Years Old and Above*	
		Magnitude	Proportion**		Magnitude	Proportion**
SANTA ELENA	27,026	336	1.24	28,342	775	2.73
Basiad	1,817	11	0.61	1,771	37	2.09
Bulala	1,268	24	1.89	1,397	43	3.08
Polungguitguit	1,157	20	1.73	1,213	40	3.3
Rizal	1,692	12	0.71	1,712	38	2.22
Salvacion	432	12	2.78	528	24	4.55
San Lorenzo	4,229	41	0.97	3,855	127	3.29
San Pedro	1,142	5	0.44	1,183	25	2.11
San Vicente	703	19	2.70	853	18	2.11
Santa Elena (Pob.)	5,470	51	0.93	6,053	96	1.59
Villa San Isidro	240	4	1.67	284	1	0.35
Don Tomas	1,645	32	1.95	1,734	87	5.02
Guitol	438	4	0.91	421	13	3.09
Kabuluan	1,354	23	1.70	1,451	33	2.27
Kagtalaba	755	8	1.06	863	8	0.93
Maulawin	1,579	33	2.09	1,721	98	5.69
Patag Ibaba	427	4	0.94	397	16	4.03
Patag Iraya	372	5	1.34	408	25	6.13
Plaridel	1,074	16	1.49	1,084	20	1.85
Tabugon	1,232	12	0.97	1,414	26	1.84

*Persons 10 years old and above who cannot read/write simple messages in any language or dialect

**Number of illiterate persons 10 years old and above over total number of persons 10 years old and above

Source: CBMS Survey 20003 & 2006

• *Subsistence Incidence*

The incidence of households with income levels below the food threshold declined by 5.33 percent — from 52.39 percent in 2003 to 47.06 percent in 2006.

In particular, 11 of the 19 barangays showed improvements in household incomes vis-à-vis the food threshold.

• *Food Shortage*

Although indices of poverty and incomes above the food threshold showed improvements during the period, a reverse trend was evident in the number of households who experienced food shortage. From 299 households who experienced food shortage in 2003 (or 3.98 percent of total

Table 13. Victims of Crime by Barangay, 2003 & 2006

Barangay	2003			2006		
	Population	Victims of Crime *		Population	Victims of Crime *	
		Magnitude	Proportion**		Magnitude	Proportion**
SANTA ELENA	38,091	84	0.22	38,745	96	0.25
Basiad	2,607	0	0.000	2,417	0	0
Bulala	1,802	1	0.055	1,986	0	0
Polungguitguit	1,685	20	1.187	1,672	0	0
Rizal	2,309	2	0.087	2,321	3	0.13
Salvacion	643	0	0.000	748	3	0.4
San Lorenzo	6,074	40	0.659	5,463	48	0.88
San Pedro	1,561	0	0.000	1,564	0	0
San Vicente	1,010	0	0.000	1,135	0	0
Santa Elena (Pob.)	7,690	0	0.000	8,258	24	0.29
Villa San Isidro	329	0	0.000	363	0	0
Don Tomas	2,254	0	0.000	2,201	0	0
Guitol	614	0	0.000	607	0	0
Kabuluan	1,806	2	0.111	1,939	0	0
Kagtalaba	1,144	0	0.000	1,179	0	0
Maulawin	2,296	19	0.828	2,422	0	0
Patag Ibaba	596	0	0.000	556	0	0
Patag Iraya	524	0	0.000	556	2	0.36
Plaridel	1,475	0	0.000	1,459	14	0.96
Tabugon	1,672	0	0.000	1,899	2	0.11

*Persons who are victimized by murder, rape, physical injury, theft, etc.

**Number of victims of crime over total population

Source: CBMS Survey 2003 & 2006

households), the number went up to 580 in 2006 (7.39 percent).

Eight (8) barangays posted double digit numbers of households that experienced food shortage, with barangay San Lorenzo registering the most at 247 households.

- *Unemployment*

The employment situation in the municipality improved in 2006 — with the unemployment rate declining by 4.85 percent — from 14.16 percent in 2003 to 9.31 percent in 2006, despite the fact that the labor force increased by 952 persons in 2006.

4. Innovations

Conducting the CBMS survey was not without problems. But the experience gained provided the Team important lessons in innovation in the implementation of the project.

Table 14. Poverty Incidence, by Barangay, 2003 & 2006

Barangay	2003			2006		
	Number of Households	Households with Incomes Below Poverty Threshold *		Number of Households	Households with Incomes Below Poverty Threshold *	
		Magnitude	Proportion**		Magnitude	Proportion**
SANTA ELENA	7,521	5,327	70.83	7,848	5,214	66.44
Basiad	494	425	86.03	483	370	76.60
Bulala	332	290	87.35	382	346	90.58
Polungguitguit	337	229	67.95	353	215	60.91
Rizal	445	282	63.37	467	341	73.02
Salvacion	133	125	93.98	157	136	86.62
San Lorenzo	1,191	826	69.35	1,128	726	64.36
San Pedro	295	165	55.93	311	169	54.34
San Vicente	208	172	82.69	220	152	69.09
Santa Elena (Pob.)	1,559	911	58.43	1,652	970	58.72
Villa San Isidro	61	42	68.85	68	59	86.76
Don Tomas	432	369	85.42	433	242	55.89
Guitol	117	85	72.65	128	110	85.94
Kabuluan	390	230	58.97	434	215	49.54
Kagtalaba	226	204	90.27	231	152	65.80
Maulawin	442	294	66.52	463	332	71.71
Patag Ibaba	126	116	92.06	122	114	93.44
Patag Iraya	106	96	90.57	116	54	46.55
Plaridel	297	219	73.74	323	229	70.90
Tabugon	330	247	74.85	377	282	74.80

*Households with incomes below poverty threshold. Current thresholds are estimated, when the official is not applicable to the reference period, by projecting the official NSCB thresholds using prevailing prices. The currently used poverty thresholds are: PhP13,453 (Rural) and PhP17,483 (Urban).

**Number of households with income below poverty threshold over total number of households during the survey period.

Source: CBMS Survey 20003 & 2006

a. *Master List Matching in Rounds 1 and 2 of the Survey*

A significant challenge facing the Team in conducting the second round of the survey was to ensure that a household surveyed in the first round and whose corresponding data is tagged a particular Household Control Number (HCN) is the same household that is surveyed in the second round. The rationale for this is to be able to capture or track the changes that that particular household has undergone in its status with respect to any particular Core indicator.

Thus, households were matched in both surveys and assigned the HCN previously assigned to it.

A new HCN is assigned for new households and for households in which significant changes have

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Table 15. Subsistence Incidence, by Barangay, 2003 & 2006

Barangay	2003		2006			
	Number of Households	Households with Incomes Below Food Threshold *		Number of Households	Households with Incomes Below Food Threshold *	
		Magnitude	Proportion**		Magnitude	Proportion**
SANTA ELENA	7,521	3,940	52.39	7,848	3,693	47.06
Basiad	494	376	76.11	483	297	61.49
Bulala	332	252	75.90	382	305	79.84
Polungguit	337	149	44.21	353	127	35.98
Rizal	445	194	43.60	467	264	56.53
Salvacion	133	109	81.95	157	122	77.71
San Lorenzo	1,191	540	45.34	1,128	489	43.35
San Pedro	295	92	31.19	311	118	37.94
San Vicente	208	157	75.48	220	122	55.45
Santa Elena (Pob.)	1,559	576	36.95	1,652	598	36.20
Villa San Isidro	61	30	49.18	68	43	63.24
Don Tomas	432	320	74.07	433	152	35.10
Guitol	117	55	47.01	128	95	74.22
Kabuluan	390	153	39.23	434	101	23.27
Kagtalaba	226	170	75.22	231	80	34.63
Maulawin	442	200	45.25	463	247	53.35
Patag Ibaba	126	107	84.92	122	104	85.25
Patag Iraya	106	81	76.42	116	33	28.45
Plaridel	297	173	58.25	323	188	58.20
Tabugon	330	206	62.42	377	208	55.17

*Households with incomes below food threshold. Current thresholds are estimated, when the official is not applicable to the reference period, by projecting the official NSCB thresholds using prevailing prices. The currently used food thresholds are: PhP9,200 (Rural) and PhP11,011 (Urban).

**Number of households with income below food threshold over total number of households during the survey period.

Source: CBMS Survey 20003 & 2006

Table 16. Households that Experienced Food Shortage, by Barangay, 2003 & 2006

Barangay	2003		2006			
	Number of Households	Households that Experienced Food Shortage *		Number of Households	Households that Experienced Food Shortage *	
		Magnitude	Proportion**		Magnitude	Proportion**
SANTA ELENA	7,521	299	3.98	7,848	580	7.39
Basiad	494	6	1.21	483	73	15.11
Bulala	332	15	4.52	382	5	1.31
Polungguit	337	0	0.00	353	55	15.58
Rizal	445	0	0.00	467	32	6.85
Salvacion	133	14	10.53	157	72	45.86
San Lorenzo	1,191	39	3.27	1,128	247	21.90
San Pedro	295	83	28.14	311	2	0.64
San Vicente	208	1	0.48	220	0	0.00
Santa Elena (Pob.)	1,559	11	0.71	1,652	52	3.15
Villa San Isidro	61	17	27.87	68	12	17.65
Don Tomas	432	49	11.34	433	0	0.00
Guitol	117	0	0.00	128	0	0.00
Kabuluan	390	16	4.10	434	12	2.76
Kagtalaba	226	21	9.29	231	1	0.43
Maulawin	442	0	0.00	463	9	1.94
Patag Ibaba	126	0	0.00	122	0	0.00
Patag Iraya	106	5	4.72	116	4	3.45
Plaridel	297	10	3.37	323	3	0.93
Tabugon	330	12	3.64	377	1	0.27

*Households with incomes below food threshold. Current thresholds are estimated, when the official is not applicable to the reference period, by projecting the official NSCB thresholds using prevailing prices. The currently used food thresholds are: PhP9,200 (Rural) and PhP11,011 (Urban).

**Number of households with income below food threshold over total number of households during the survey period.

Source: CBMS Survey 20003 & 2006

Table 17. Unemployed Members of the Labor Force, by Barangay, 2003 & 2006

Barangay	2003			2006		
	Members of the Labor Force	Unemployed Members of the Labor Force*		Members of the Labor Force	Unemployed Members of the Labor Force*	
		Magnitude	Proportion**		Magnitude	Proportion**
SANTA ELENA	12,357	1,750	14.16	13,209	1,230	9.31
Basiad	769	190	24.71	766	119	15.54
Bulala	579	87	15.03	576	36	6.25
Polungguitguit	752	120	15.96	628	60	9.55
Rizal	240	41	17.08	855	99	11.58
Salvacion	607	73	12.03	257	37	14.40
San Lorenzo	323	30	9.29	1,743	181	10.38
San Pedro	808	95	11.76	543	52	9.58
San Vicente	190	47	24.74	430	32	7.44
Santa Elena (Pob.)	183	37	20.22	2,797	187	6.69
Villa San Isidro	534	115	21.54	152	15	9.87
Don Tomas	557	52	9.34	801	81	10.11
Guitol	773	110	14.23	211	13	6.16
Kabuluan	213	26	12.21	687	71	10.33
Kagtalaba	1,877	178	9.48	381	26	6.82
Maulawin	470	80	17.02	916	49	5.35
Patag Ibaba	350	37	10.57	169	17	10.06
Patag Iraya	2,426	322	13.27	208	4	1.92
Plaridel	576	91	15.80	472	87	18.43
Tabugon	130	19	14.62	617	64	10.37

*Unemployed members of the labor force. Labor force members includes all members 15 years old and above who are currently working or actively seeking work.

**Number of unemployed members of the labor force over total number of members of the labor force.

Source: CBMS Survey 20003 & 2006

occurred (such as having new occupants in the same household; or in cases where household members transferred to other puroks, barangays or locales). Before encoding, we had to device a Master List as reference for household status changes that could be utilized as panel data and as a possible development program evaluation and analysis tool.

b. Use of GPS

Even in the first round of the CBMS Survey, the Team utilized the Global Position System (GPS). This is the tool used by the local fish warden to read relative positions on earth — or geo-reference in latitude and longitude readings also known as global coordinates. We utilized the GPS to map out the road network in the municipality. This served as a validation for the

acceptable accuracy of the digitized map using the NRDB software. We were able to digitize the municipal base map since local government units (LGUs) make decisions that involve land- or geographically-related issues ranging from land development to environmental, health, peace and order, or basic service delivery.

The Geographic Information System (GIS) is beneficial for LGU planning since it combines geographic data (the locations of man-made and natural features on earth like houses, streets, rivers) and information (like names, addresses, classification, coordinates) to generate maps for visualization and analysis.

With the advent of new developments in information technology (IT), the GIS can now visualize maps – and in this case, digitized maps. Data is more emphasized in a digitized map presentation, and by experience, is more readily appreciated and probably better understood by decision makers and laymen as well.

In a CBMS Program utilizing the NRDB or mapping software, it is important to create a map of an area (in our case, a municipality) which is reliably aligned with the global coordinates.

- c. *Utilizing other maps (satellite & contour maps)*
In the course of using the CBMS Database and digitized map, we have learned other uses for the NRDB mapping software. We have managed to overlay contour maps (as provided by the National Mapping and Resource Information Authority or NAMRIA) which could be used in preliminary engineering works for roads and in mapping municipal water systems.

Latest Google satellite maps (available on the internet) can be overlaid to show, for example, existing fishpond areas, potential coral reefs and the vegetation conditions in the municipality.

Programs Utilizing CBMS Data

1. Presidential Priority Program for Water System (P3W)

The National Anti-Poverty Commission (NAPC) has a program for waterless barangays. In February 2006, we submitted a proposal for eight target barangays under the Presidential Priority Program on Water. Even though Santa Elena operates a municipal water system, the CBMS database and maps were very useful in targeting household clusters that do not have access to safe drinking water, as well as in conducting preliminary engineering for a communal faucet pipe network.

At present, the Kagtala Barabangay Water and Sanitation Association has a communal water system worth PhP0.9 million, while the other 7 barangays have projects (costing PhP5.5 million) that are already scheduled for implementation. It is expected that benefits from the water system would be noted in the next CBMS Survey in year 2009. All 8 barangays shall cover 651 households and more than 3,500 residents.

2. Sixth Country Program for Children

The Sixth Country Program for Children (CPCVI) is a UNICEF program catering to the promotion of Child Rights. Its coverage range from Health and Nutrition, Early Child Care and Development (ECCD), and Children in Need of Special Protection.

The CBMS is helpful in identifying projects for fund convergence, and in prioritizing which children's needs should be addressed first.

The ECCD, a 3-year program currently on its second year of implementation, focuses on two barangays per cycle in the areas of improving Health Centers, Day Care Centers and other child related programs. With a total project cost worth PhP1.2 million a year, said program is based on a 30 percent LGU counterpart share, while UNICEF contributes the remaining 70 percent.

Kapit-bisig is a partnership program between the Department of Education (through elementary schools) and the LGU. It initiated a supplemental feeding program for all

undernourished Grade 1 students in the municipality. The program has evolved from a six-month program to an eight-week school-based program for an average of 450 beneficiaries per cycle. Results showed 65 percent nutrition status improvement in the first round, and 75 percent improvement in the second round. It is currently on its third round of implementation. Lessons learned from the program will be utilized for the expansion of the program to focus on the 0-5 age group in response to the results of the 2006 CBMS survey.

Nutrition programs are now converged to draw in the participation of agencies, such as the Department of Education, the Social Welfare Office and the Health Office thru their municipal counterparts towards crafting and implementing more cohesive nutrition programs in accordance with the needs of their specific target beneficiaries. Thus:

- The Municipal Health Office covers the nutritional needs of unborn (or from age zero) to 2-year old children, covering pregnant mothers as well.
 - The Municipal Social Welfare Office, which supervises Day Care Services, monitors nutritional levels of in-school children 3-5 years old.
 - The DepEd through its schools caters to in-school children 6-12 year old.
3. *KALAHICIDDS*

On the basis of the CBMS data and findings, the municipality of Santa Elena was identified as one of Camarines Norte's two municipalities targeted for a development package under the Kapit-bisig Laban sa Kahirapan (KALAHICIDDS). The Department of Social Welfare and Development (DSWD) provides a similar 30-70 LGU-National Government counterpart sharing scheme to address poverty. The project, which allots PhP 5.7 million per year for three years, is currently on its second cycle. Development projects are identified by the barangays in pursuit of a community-centered empowerment strategy. Four barangays are the initial

beneficiaries, namely: Kabuluan, Bulala, San Lorenzo and Plaridel. Eligible sub-projects range from access road improvement to school buildings and agricultural infrastructure.

4. *NGO-Led Programs*

In 2005, we were invited to participate in the Infrastructure for Rural Productivity Enhancement Sector (InfRES) Project which funds initiatives that will:

- increase agricultural productivity by improving road accessibility to develop additional agricultural areas; and,
- alleviate poverty thru increased economic opportunities.

As an offshoot of the intervention, the municipality qualified to avail of the livelihood project component of InfRES, under the condition that it will be implemented by an accredited non-government organization (NGO). The said NGO was the Socio Pastoral Council Foundation, Inc. (SPACFI), which fully utilized the CBMS database for the InfRES livelihood projects for fisherfolk. At present, it has three ongoing projects in the municipality with funds from various funding agencies. Aside from the InfRES projects, currently ongoing are: the Coastal Resource Management Project (CRMP) for which a Fish Sanctuary shall be established, and a communal water system for barangay Salvacion. In the pipeline are proposals for a Coco Fiber Plant project from InteRED of Spain, as well as reforestation projects.

5. *Agrarian Reform Program*

The Department of Agrarian Reform (DAR) conducted a needs assessment forum in 2005 for the Agrarian Reform Communities Project II (ARCPII) through which the Asian Development Bank (ADB) will fund critical infrastructure projects (roads, irrigation, farm inputs). CBMS data was utilized in assessing the needs of the two Agrarian Reform Communities (ARC) — barangays Santa Elena & Rizal. Unfortunately, the two barangays ran out of time in meeting the requirements of the program.

An opportunity emerged in December 2007 when we were informed that the municipality, due to the assessment conducted earlier, had been identified as one of the two municipalities in the province and one of six in the Bicol Region considered for a similar program – the Agrarian Reform Infrastructure Support Project (ARISP) — to be funded by the Japan Bank for International Cooperation (JBIC). Eligible under the program are projects for Irrigation, Farm-to-Market Roads, Post Harvest Facilities, Rural Water Supply, Institutional Development and KARZone Development. Under this program, a municipality can avail of up to PhP50 million funding under a 50-50 counterpart sharing scheme. Flexibility is allowed depending on the financial capability of the LGU.

6. Other Related Uses

a. Disaster Preparedness

Disaster preparedness can be enhanced by utilizing an overlay of identified Geo-Hazard areas for zoning consideration and Disaster Contingency Management Planning. A more immediate use of CBMS data is projecting Disaster Relief Operations. This is possible through a more accurate digitized mapping and geo-referencing of households.

b. Preparation of Project Proposals/Feasibility Studies

As a planning tool, CBMS database can also be used to enhance Landuse Planning, Project Feasibility Preparation, Project Evaluation and Project Monitoring. Most of all, the map tool serves as a helpful medium in conveying to decision makers or target clientele the need for proposed interventions.

Next Steps

1. Development Project/Program Tracking System (Data- & Map-Based)

Through the continuing familiarization with and use of the CBMS database and all its tools, it may be possible to establish a simple Development Project/Program Tracking System with Digitized Map Enhancement. Initial works are promising, and

the flexibility of the system encourages another way of presenting project status and area gaps, thus highlighting disparities in project prioritization.

2. *Household Location Utilizing GPS System*

For the sustainability of the repository and ease of identifying household locations across survey cycles, GPS coordinates can be assigned to households as another unique identification system. However, this strategy may be feasible only for rural municipalities — where households number only in the thousands, making it possible to institutionalize building permits with GPS locations. We might integrate this proposal in the next CBMS survey. By geo-referencing all households in the digitized map, we can further validate the accuracy of said map and derive more interesting and instructive insights from its analysis.

3. *Panel Data Generation*

A data set containing demographic and socio-economic observations over multiple time periods is called Panel Data. The generation of two sets of data (for years 2003 and 2006) creates an opportunity for Panel Data analysis, and in our case, for the municipality of Santa Elena. Various studies and research materials could be generated from the comparative 13+1 social indicators of the CBMS data from the two surveys. We hope to collaborate with the academe and other research groups not only to better understand the various dimensions of poverty, but also how to optimize the use of limited financing capability and resources towards addressing the multifarious needs of the community.

4. *Utilizing CBMS & Other Database (LGPMS) in Improving Fund Utilization and Governance Efficiency*

A recent tool introduced to LGUs is the Local Governance Performance Management System (LGPMS). With its pre-defined benchmarks on resource utilization as defined into Input, Output and Outcome, the LGPMS serves as a guide for LGU's in assessing their annual performance. Assessments cover five (5) performance areas: Governance, Administration, Social Services, Economic Development and Environmental Management. CBMS indicators can guide the

LGU in mapping out performance areas that need improvement, and in assessing if previous programs had a positive impact on intended beneficiaries. If properly utilized, it can guide local officials as well as service departments in setting and in achieving their targets in succeeding years.

Conclusion

1. Considering the benefits that can be derived from the CBMS Program, the need to maintain and thereby sustain the CBMS repository is a foregone conclusion. Also working in favor of CBMS are: its affordability for lower class municipalities, the comprehensiveness of the database it can generate, and its usefulness as a mapping tool.
2. Thus, decision makers and stakeholders of the community must continue to appreciate the value of a well-maintained municipal repository by preserving the interval of the survey (or sustaining the survey cycle), and most importantly, by institutionalizing it.
3. Granting that the CBMS repository can be established, maintained and possibly institutionalized at the LGU level, another challenge to address is to integrate the administrators of the repository into the LGU system by giving them plantilla positions with the responsibility of sustaining the system in a continuing cycle.
4. There is no doubt that as LGUs accumulate more experience in maintaining a CBMS repository, the lessons and insights they can derive from it would, in the near future, reach that critical mass level that would enable our municipalities to finally reverse the vicious cycle of poverty — a goal that we have for so long collectively aspired to attain.

The Mariveles Experience with CBMS

*Floro Roco**

Introduction

The availability of information is one of the most important determinants in making sound managerial decisions. Without this, we are like blind men groping in the dark — making decisions based on hunches and pure guesswork, which will not produce efficient, consistent and effective results.

Fortunately, the Municipality of Mariveles is way past this situation — thanks to the Community-Based Monitoring System (CBMS) and the group who authored it.

We all know that a CBMS database enables us to access specific information that will help us determine not only the specific condition a community is in, but also the type of intervention it needs to be provided.

Brief Profile of Mariveles

Just three hours away from Manila by car or an hour away by ferry boat, Mariveles lies at the southernmost tip of Bataan Peninsula. It has a land area of 15,930 hectares, with mountainous terrain dominated by Mt. Mariveles.

The municipality hosts the First Special Economic Zone, the Bataan Economic Zone, as well as petrochemical and other big

* Municipal Planning and Development Coordinator (MPDC), Municipality of Mariveles, Bataan

industries like San Miguel food companies, Asian Terminal and Herma Ship Repair yard.

Historically, it is the site where General Jonathan Wainwright surrendered to the Japanese forces; thus, it is significantly known as the starting point of the infamous Death March.

The municipality is politically subdivided into 18 barangays, and based on our CBMS survey, it has a total population of 90,528 (the largest in the whole Province of Bataan) with 21,068 households.

Facts and Figures About CBMS in Mariveles

The CBMS was introduced in the Province of Bataan by our 2nd District Representative, Hon. Abet Garcia, and its implementation was strongly supported by our Provincial Governor, Hon. Enrique ‘Tet’ Garcia. When CBMS was launched in Mariveles, it was also fully supported by our Mayor, Dr. Jesse I. Concepcion.

We conducted the survey for a period of about 4 months – during which the Team encountered a lot of difficulties in the process. Nevertheless, we successfully finished the project and generated the reports which we are now using.

We allocated an amount of PhP1.65 million for the purchase of computer equipment and for paying the 70 enumerators we hired to conduct the survey. We also stationed 4 enumerators at the Municipal Planning and Development Office (MPDO) to do the encoding, digitizing and mapping of the captured data.

Benefits Derived from CBMS

The use of CBMS data yields the following advantages and benefits:

1. it facilitates the production of a socio-economic profile of the municipality;
2. it allows convenient access to basic indicators pertaining to each barangay;
3. it facilitates the location of areas of concern in the digitized map;
4. it eases the generation and reproduction of reports; and,
5. it serves as guide in addressing issues and concerns confronting specific areas with the use of reports on basic indicators.

Content and Coverage of Mariveles CBMS

The questionnaires/forms used for the CBMS survey covered the following information from each household:

- personal and individual data: name, age, sex, relationship and civil status;
- educational attainment and literacy;
- employment, occupation or trade;
- other details such as: single parent, disabled, senior citizen, victims of crime, board passer, tenure, death, family planning, sources of income, engaged in farming/fishing activity, business registration, waste disposal system, food shortage, members working abroad (OFW).

Uses of CBMS as Experienced in Mariveles

On August 2007, the results of our work in the CBMS project were presented to the newly elected officials and all local department/office heads. Appreciating the importance of this project, they unanimously agreed to use the CBMS database as reference in planning and formulating our Executive and Legislative Agenda (ELA).

Summarized in Table 1 below are the differences between the type of ELA we previously formulated and the present ELA formulated with the help of CBMS.

It may also be helpful to take a look at the Programs, Projects and Activities (PPAs) formulated in the Mariveles ELA for the period 2008-2010 (see Table 2). It is apparent from the list that due to CBMS, initiatives have been tailored-fit to address specific sectors needing intervention.

Table 1. Pre- and Post-CBMS Executive and Legislative Agenda (ELA)

Pre-CBMS ELA	Post-CBMS ELA
Plans and programs were not based on actual situation in the community.	CBMS provided the real/actual situation in the community where interventions could be properly planned and delivered.
Several programs, projects & activities undertaken were less beneficial to the people.	PPAs were properly distributed in areas where they were needed most.

Table 2. Programs, Projects and Activities (PPAs) Formulated in ELA 2008-2010

Service Area	Target 2008-2010	Plans, Programs and Activities
Households with members 6-12 years old not attending elementary school	Reduction in number of children 6-12 years old not attending elementary school by 10%	Construct additional school buildings to satisfy required number of students per classroom. Construct primary school buildings within residential areas. Encourage active participation of PSO and NGO in promoting educational and scholarship programs.
Households with members 13-16 years old not attending high school	Reduction in number of children 13-16 years not attending high school by at least 15%	Construct additional government school buildings for secondary level in urbanized areas. Allocate of additional budget for State Colleges and Universities to accommodate more enrollees.
Households without access to safe water	Reduction in number of households without access to safe water by at least 12%	Encourage water district (LWUA) to expand service areas. Construction of municipal deep wells in remote areas. Promote educational campaign on proper filtering and treatment process of river/spring water.
Unemployment	Reduce unemployment by 10%	Provide additional skill enhancement training program for unemployed household members in the community. Introduce a study now-pay later scholarship program in vocational/technical courses. Promote agricultural livelihood projects to provide other means of income. Promote and legislate investment incentive ordinance.
Households with incomes below poverty and food thresholds	Reduce poverty & subsistence incidence by at least 10%	Promote self-financing program through the establishment of cooperatives in every barangay. Promote Mariveles as an eco-tourism destination to generate additional employment. Strengthen and sustain the KISLAP LOAN PROGRAM of the municipality that provides soft loans to all cooperatives in the area.

Other Uses of CBMS

After the presentation of the CBMS results to all elected officials and department heads, several requests for data report generation have been forwarded to our office for appropriate action or consideration.

For example, our Municipal Social Welfare and Development (MSWD) Office made the following request:

1. *List of disabled persons, causes and types of disability:*

In response to this request, we provided MSWD with a Total Disability Report we generated from the CBMS database. This is the list of all disabled persons in all barangays of our municipality. It provides the names and addresses of disabled persons, but treated this information in utmost confidentiality to protect the dignity of the concerned families. It may be worth mentioning here that our municipality only has a small number of disabled people as a percentage of the total population, and that most of these cases were brought about by incapacitating ailment.

2. *List of single parents and underlying reason:*

For this request, we provided the MSWD with a Single Parents Report (on a per barangay basis). With the help of our CBMS data, we found out that “Death of Spouse” and “Separated” were the predominant reasons for solo parenthood, and that most of the single parents were noted in more highly urbanized barangays of our municipality.

Future Plans for CBMS in Mariveles

Given the wide range of benefits and usefulness of the CBMS, what therefore are the future plans of the LGU of Mariveles for its database?

For one, we intend to update our CBMS database every 3 years. Secondly, we will be conducting regular orientation and educational training for barangay staff/personnel who will be put in-charge of record keeping and maintenance of the CBMS database. And thirdly, we will conduct periodic educational training of all personnel involved in the CBMS programs.

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Establishing a Municipal Database to Measure MDG Localization

Madeleine M. Ong*

On September 8, 2000, the Philippines, as a member of the United Nations, signed the Millennium Declaration which called for concerted efforts towards:

1. eradicating extreme poverty and hunger;
2. achieving universal primary education;
3. promoting gender equality and empowering women;
4. reducing child mortality;
5. improving maternal health;
6. combating HIV/AIDS and other diseases;
7. ensuring environmental sustainability; and,
8. promoting global partnership for development.

All these eight Millennium Declaration Goals (MDGs) are supposed to be achieved within a fifteen-year time frame.

It must be pointed out, however, that achieving these goals is not just about having a presentable set of socio-economic statistics and earning “bragging rights” in the international community.

Rather, achieving the MDGs means providing decent food, shelter, livelihood, quality education and equal access to opportunities to millions of people, not to mention preserving the environment for future generations.

* Chapter President, LMP Northern Samar, Presidential Adviser for Gender & Development and, President, Lady Municipal Mayors Association of the Philippines (LMMAP)

For a developing country such as the Philippines, the importance of achieving the MDGs is not difficult to understand. Why?

Almost seventy percent (70%) of our population live in poverty; informal settlers and urban poor in slum areas, out-of-school youths, mendicants and overcrowded hospitals – to name a few — are but a familiar and regular sight for most of us. In fact, many of us may have become so immune to these daily sights that we have “learned” to take them for granted. Unfortunately, these harsh economic realities do not simply go away, and may in fact worsen if they remain unattended.

It is for this reason that we must strive to achieve the MDGs in the Philippines. And while achieving the MDGs may seem dramatic, its bottom line is really to save and improve the lives of millions of marginal Filipinos and give them a better future.

A lot of initiatives have already been mounted to mainstream or incorporate the MDGs in various government programs and projects.

While the National Government is responsible for directing and monitoring the overall progress of attaining the MDGs, the Herculean task of implementing plans and programs supportive of these goals falls on the shoulders of local government units (LGUs).

And that is because all of these goals are actually in line with the mandates of the LGUs in accordance with the Local Government Code of 1991. The line from the movie “Spiderman” — “With great power comes great responsibility” — aptly captures the challenge facing our LGUs in this regard, considering their huge numbers and capacity to influence the course of development in our municipalities, particularly in the vast countryside.

Thus, whether or not the Philippines can keep its commitment to achieve the MDGs by 2015 is the call of our LGUs. That is precisely the reason why it is imperative to educate LGUs and enable them to localize the Millennium Development Goals.

The League of Municipalities of the Philippines (LMP) has played a big role in advocating for the localization of the MDGs. Comprising the bulk of the LGUs in the country, the municipalities are really at the vantage position to contribute to the country’s success or failure in attaining these goals.

In 2006, the LMP was, in fact, selected by the United Nations Development Programme (UNDP) as the party responsible for

localizing the MDGs. Towards this end, the LMP has undertaken several projects and activities aimed at enabling the LGUs to localize the MDGs. It has realized that in order to effectively track the progress of the localization of MDGs, a comprehensive monitoring tool has to be in place. Having already recognized and appreciated the value of the Community-Based Monitoring System (CBMS), the LMP advocated the use of CBMS among its member-municipalities.

In 2006, as a bonus to its commitment to the UNDP to localize the MDGs, the LMP participated in the training on the adoption and utilization of the CBMS for its twelve (12) pilot municipalities. These were: Aparri, Cagayan; Luna, Apayao; Narra, Palawan; Jordan, Guimaras; Ajuy and Concepcion in Iloilo; Malalag, Davao del Sur; Kabacan, North Cotabato; Sto. Niño, South Cotabato; Lantawan, Basilan; and Kapatagan, Lanao del Sur.

Also in the same year, the LMP entered into an agreement with the Department of the Interior and Local Government (DILG), the National Anti-Poverty Commission (NAPC), and the PEP-CBMS Network Coordinating Team to establish the Municipal Poverty Database (MPD) which was envisioned to contain the poverty-related data of municipalities generated through the use of CBMS.

As the repository of the CBMS data of all municipalities, the LMP was to assume the responsibility of assisting in monitoring the progress gained towards achieving the MDGs in the various municipalities.

In addition to this, the LMP was also tasked to look into inter-LGU programs and projects on health and education, local economic development and the environment, and use the data to lobby for further support to meet the 2015 set of goals.

However, while this agreement looks promising, various issues still need to be settled in order for it to completely push through.

For one, the CBMS data that the LMP has in its repository needs to be updated. Presently, the data with the LMP is not even half of the total data that has been generated from the municipalities. This could be addressed through the following possibilities.

First, we need to determine once and for all the ownership of this CBMS data. Being the official organization of all the municipalities in the country, the LMP should have easy and complete access to the CBMS data.

Second, we need to establish a clear and logical process by which data can be shared among the parties involved in the agreement: LMP, DILG, NAPC and the PEP-CBMS Network Coordinating Team.

While the municipalities have entrusted the LMP access to their CBMS data, it would be tedious, however, for the LMP to collect individual municipal CBMS data. More so, it would be counter-productive to request from each municipality a letter authorizing the LMP to access the former's data. Let us be reminded that not all municipalities have access to a speedy communication system.

To resolve this, the PEP-CBMS Network Coordinating Team — being the CBMS data processing center — should provide complete and updated CBMS data, both raw and processed, to the LMP.

Moreover, the LMP Secretariat should be capacitated to interpret the CBMS data. As mentioned earlier, the LMP will look into and utilize the data as inputs for its advocacies towards developing municipalities into high quality service providers in the countryside.

Indeed, if the LMP can provide a real picture of what is going on in our municipalities, it would be in a better position to network with and mobilize National Government Agencies (NGAs) to assist in addressing the concerns of our municipalities.

Concerns have also been raised regarding the possible "use" of CBMS data for "political purposes". This is probably because the CBMS could generate valuable demographic information including the number of households and the voting population in every barangay, municipality and province. But then, even in the absence of the CBMS, such types of data can easily be accessed because they constitute public information possessed by public offices.

With regards to the extent of unemployment, child and maternal deaths, malnourished children and other information on local development, the LMP does not see any reason why such data should be kept from public view.

In fact, the extent to which these issues have been addressed should very well serve as: (1) the basis for determining whether or not our local leaders have done well during their terms of office; and (2) the basis by which the people should elect their leaders.

The LMP, has in fact considered the idea of pushing for performance-based incentives for LGUs, using the data from CBMS for such purpose. Indeed, if we are to consistently promote

transparency and accountability in public service, then we should be more than willing to share this key information without much concern for its being used for “politicking”.

The LMP through its Mayors’ Development Center (MDC) has recently conducted a monitoring and evaluation of the Local Governance Performance Management System (LGPMS). The main agenda of the LMP was to push for reforms in the system designed to measure the performance of municipalities and other LGUs. Some of the key issues pertained to the ownership of the information, the process by which information is processed and shared, and the use of several instruments by different institutions to monitor LGU performance.

Prior to the conduct of this project, the LMP through the MDC, had already anticipated such concerns from our municipalities. For this reason, the idea of putting up our own municipal database and performance assessment system has remained an option to this date.

We want our municipalities to be freed from inconsistent, repetitive and costly monitoring systems.

In its stead, we want a system that can be used as the basis for securing development assistance. This may be costly and time consuming, but if nothing positive happens to the current situation, the LMP and MDC will have no other option but to push through with the plan and bring order among its members.

At this point, we are still giving the agencies behind this monitoring system enough time to consider our previous comments and suggestions.

In the case of the CBMS, the LMP is confident that further arrangements with major stakeholders can be creatively forged in order to push through with the database.

Only seven years remain before we will be judged as having succeeded or failed to achieve the MDGs in our own country.

If indeed CBMS will serve as the basis by which MDG localization is measured, we should waste no time in taking the necessary courses of actions.

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Success Factors in CBMS Implementation and Updates on NAMRIA Initiatives¹

Linda SD Papa

Success Factors in CBMS Implementation

Most of the experiences discussed and shared by the presentors in this Conference are about the successful applications of the Community-Based Monitoring System (CBMS). And what is the reason for this success? The primary reason lies in the full use of data across sectors. I think in most of the successful CBMS cases, the local government units (LGUs) provided the national government agencies (NGAs), non-government organizations (NGOs), the academe and even the private sector full access to their data.

This suggests that at least for the CBMS application, a lot of people are already using data for a very good purpose. I should say this is a positive development because I know for one that a lot of people love collecting data. But where does their data stay? It stays in the filing cabinet! And this is especially true among Filipinos – who, if they have data, have a tendency to be selfish and try to keep the data just to themselves.

So as I said, at least for the CBMS data application, you see a different picture now. As the League of Municipalities of the Philippines (LMP) pointed out earlier, even if the data is used for political purposes, that would still be acceptable. Why? Because if the politicians are able to use the data, that means they are using it to achieve good governance.

¹ An edited transcript of the presentation of Director Linda SD Papa, Information Management Department, National Mapping and Resource Information Authority (NAMRIA), on the presentations during the session on *Presentation of CBMS Repositories*.

There is actually a hierarchy in the sharing and utilization of the collected data. The region asks for data from the province, the province asks for data from the municipalities, while the municipalities ask for data from the barangays. There's top-to-bottom utilization of data. At the same time, however, barangays also try to get data from the municipal or provincial LGU so that they would be aware of the thrusts of the municipal or city or provincial government. On top of these would be the NGAs using all these data for their planning and policy formulation processes. And it is really good that from top to bottom, the data is being used.

Let me touch a little bit on the matter of legislation for funding of continuous operationalization of projects. A lot of projects remain in effect only for as long as the funds remain available. Unfortunately, project sustainability becomes a problem once funds run out – whether they come from the Canadian International Development Agency (CIDA), the United States Agency for International Development (USAID), or the World Bank (WB) as foreign assistance. Thus, for LGUs to be able to pass an ordinance (whether provincial or municipal) on the funding of projects would be most helpful in ensuring the continuous operationalization and continuing success of projects.

Of course, there are other factors for the success of CBMS implementation.

First, it would be advisable to have both continuing human resource development and technological upgrading. We are at a technological stage when a lot of new developments and trends in technology are constantly evolving rapidly everyday. Thus, the technology you are using today may be good now, but not anymore or necessarily so for tomorrow. If you use a certain system today but stop training your people so that they remain at that level of technological capability, your organization will eventually be left behind. So human resource development and technological upgrading must both move forward hand-in-hand.

Moreover, continuing human resource development will ensure that you will always have people to run the system you put in place. The reality is people you have trained may leave even after only a year. If you are based in the province, the people you trained may go

to Manila. If you are in the city, then they may go abroad. Indeed, it would be a pity if you have a good system but nobody runs it.

Second, you must continue to review and improve your processes, methodologies and policies. This is imperative because your needs and requirements change through time. Definitely, your processes, methodologies and policies should follow so that you can also upgrade your level of operations.

Third — and this is the most important factor for your success in CBMS implementation — is political will. You may have the equipment, the system, the process, the data and the trained personnel, but if nobody supports you from upper management, then your project will not succeed. I have heard earlier that a lot of the participants here are city and municipal planning and development coordinators (CPDCs and MPDCs), among others. But I think there are a lot of local chief executives (LCEs) — governors and mayors — around here as well. And their presence here suggests that these LCEs who represent the upper management understand the value of CBMS. That they are here also suggests that they are involved in a lot of hands-on CBMS exercises going on in their areas, and that they know where they can use the CBMS data, how to use the data, and if their data is right or wrong. And because they know the value of CBMS data, they give CBMS their political support. This augurs very well indeed for local governance.

Now, let me elaborate on the issue of data access among users — especially considering that the technology for communication and networking is already available. The reality is: the technology is expensive and requires qualified personnel who can implement it. But this is something that we need to consider. Networking is really the way to connect fast. That is why we encourage the use of websites and the internet because it is only there where you can get data fast.

However, some considerations are in order, and that is: the decision to provide the data lies in the hands of those who hold the data. In most cases, the provider or producer of the data is normally the owner and custodian of the data. Of course, we must always give due respect and recognition to those who provide the data — the LGUs.

Understandably, the LGU data for any particular area would be most useful first and foremost to the people in that particular

community. The most detailed data (meaning, household level data) should be utilized primarily by people who live in that area. Understandably too, Provincial Governors or Regional Directors who need a barangay or municipal LGU's data will require only the aggregate levels because data needed at a higher level is different from what is needed at the barangay level. Given these considerations, LGUs have the right to decide on what type of information about their respective areas of jurisdiction to make available to different users who want access to their data. One should not just provide data to anyone who is asking. Naturally, one should ask "for what purpose?" One needs to consider providing data based on how it will be used.

Even for us at NAMRIA, if someone approaches us to ask if they can be given digital data, the first thing I ask them is for what application? I ask this so I would know whether to give them a 10,000 or a 50,000 scale map. Second, I ask about the software they use. If they look at me blankly, then that means they do not need digital data. So there is a need to look into the user's need and purpose. Normally for us Filipinos, we tend to just get and get data especially if it is given freely.

In this regard, there is a need to establish clear and logical guidelines by which data can be shared amongst concerned parties. It was also mentioned that it will be very difficult to coordinate with each and every LGU – especially in the light of the plan of the LMP people to establish their own municipal CBMS database, and their need for full access to LGU data. Again, as I said, there is a need to establish a clear and logical process or set of guidelines that will govern such arrangements. You can come up with Memorandum of Agreement (MOA), a Memorandum of Understanding (MOU), and so on regarding what type of data can be provided easily or accessed. Of course, everyone is aware that household-level information cannot be provided because of the Confidentiality Act. In general, the most that LGUs can freely provide are barangay aggregates. But then again, that depends on the custodian or owner of the data.

Regarding the PEP-CBMS Network Coordinating Team, there is no question about the legitimacy of its right to have full access to LGU data because the Team monitors and looks at LGU performances. Nevertheless, the Team is bound – in the data utilization and

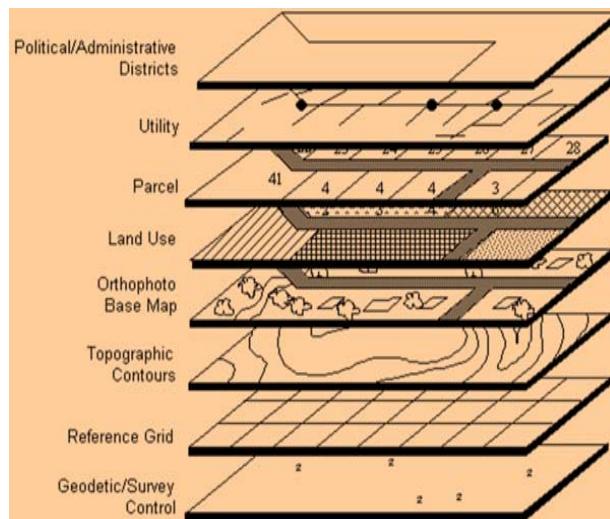
disposition – to honor and protect the confidentiality of the data entrusted to it by the LGU.

Updates on NAMRIA Initiatives

Let me now discuss with you some perspectives from the National Mapping and Resource Information Authority (NAMRIA). Note that at the start, our information system was a mess. A lot of us either had disorganized data or no data at all. But with the CBMS and other application systems that are being undertaken by government agencies, we now have clear and organized information. Indeed, as a lot of LGUs would attest, you get really good data through CBMS.

Note that in the work that you are doing, there is a lot of data overlaying. You would note in Figure 1 that the information at the bottom is fundamental data that is primarily produced by NAMRIA. We have been focusing on the establishment of the National Common Spatial Database (NCSD). We are going spatial. Simply put, it is the updating of the national map.

Figure 1. Fundamental Data



The following are the objectives of the NCSD:

- create for public use a national common database of geographic information on the Philippine's whole land area; this will consist of geo-spatial data and attribute database;
- establish a comprehensive information network to enable the above-mentioned common database to be mutually used among the government departments and agencies, as well as local government units and the private sector by means of current Information Technology (IT) innovation; and,
- build a system that will enable government and other users to retrieve high quality information from the national common database, and arrange a training program on how to use it.

Note that the keyword here is “common”. This means consistency is a key consideration. You see, our problem is we get data from different sources and government agencies — such as from the Department of Agriculture (DA) and the Department of Environment and Natural Resources (DENR). Unfortunately, when we overlay them, the problem surfaces – sometimes they do not jibe or fit in well together. So you have to do a lot of stretching and somewhere along the way, you lose a lot of data. However, do not let that stop you. Remember, since we are using maps for planning purposes, having only indicative information is permissible. After all, if you are located in the area you are mapping, you should be at the vantage position to determine if the place or feature indicated in the map is right or wrong. Besides, you cannot have a one hundred percent accurate map because a map is just a representation – which should suffice for planning and monitoring purposes.

Actually, we have ongoing efforts to come up with more accurate and updated information that is already in digital form – so that you do not need to do the digitizing yourself and thus save time. Unfortunately, if the assigned cartographer or draftsman is tensed while doing the task, you may find something wrong when you overlay the various outputs. That is a common situation even in NAMRIA.

The expected outputs of the NCSD are the following:

- Topographic digital maps (political boundaries, roads, railways, rivers, topography, land use)

- Ortho-rectified photo maps
- Digital terrain model
- Geo-coded data base

On a national scale, we are coming up with the National Spatial Data Infrastructure (NSDI) which is a network of digital databases. This network of databases will provide the fundamental data and information we need to be able to formulate the appropriate strategies for achieving the country's economic, social, human resource development and environmental objectives. It is a national initiative to provide better access to essential and consistent geographic information produced and maintained by different agencies or custodians.

Note that in the middle of the NSDI is the NCSD because — as I pointed out — it is the very fundamental data for all agencies or GIS developers. Note also that at the national scale, the different departments would come up with their own data (e.g., DPWH can come up with its own data on road networks). Each agency maintains its own data and updates it accordingly at the same time that other users have access to it. This is at the national level. You can also do it at the provincial or municipal levels. Which means if you are based in the province, your possible network would consist of municipalities. The concept of networking is something that you can bring down to your level. This may be a bit difficult initially and not immediately realizable. But this is something that you can consider as a vision — that all of you are connected to and accessing information from one another.

For your information, as of 2004, out of the 1,689 LGUs, only 322 can be considered GIS-capable (Table 1). We are now updating our information base so we can have a better look at our progress in terms of GIS development and application.

Table 1. Inventory of GIS Capability of LGUs (as of 2004)

Stages	Municipalities		Cities		Provinces		Total
	#	%	#	%	#	%	
Acquaintance	1,284	86	46	39	37	47	1,378
Gestation	172	12	33	30	20	25	225
Developmental	34	2	23	20	18	23	75
Operational	5		13	11	4	5	22
Subtotal (LGUs with GIS)	215	14	69	61	42	53	322 (20%)
Total LGUs	1,495		115		79		1,689

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Some Prescriptions on the Use of CBMS in LGU Planning¹

Emma Ulep

The outputs of Community-Based Monitoring System (CBMS) are mainly in the form of tables and maps. These tables and maps are part of the socioeconomic profiles which can be inputted into Comprehensive Development Plans (CDPs). So how do we relate the outputs of the CBMS to CDP? The CBMS will be the basis for prioritizing programs, projects and activities (PPAs) which are contained in the CDP. Let us also anchor the results of the CBMS to higher plans like Comprehensive Land Use Plans (CLUPs), provincial plans and higher (regional and national) plans.

To me, the CBMS is a very timely initiative and will definitely benefit local government units (LGUs) especially because government agencies require LGUs to submit a lot of documents such as the Executive-Legislative Agenda (ELA), CDP and other types of plans.

I believe that the sharing of data — which is being advocated by the PEP-CBMS Network Coordinating Team and the Department of the Interior and Local Government (DILG) — is indeed a right step in the right direction specially as LGUs have set a very good example on how CBMS data can be utilized and shared among the various levels of government.

It is also important to note the importance of data management within the LGU itself, with or without CBMS. Data management involves storing, retrieving data, the many conventions of your files

¹ An edited transcript of the comments of Ms. Emma Ulep, Head, Information Technology Group, Housing and Land Use Regulatory Board (HLURB), on the presentations during the session on *Presentation of CBMS Repositories*.

and maps, the importance of metadata and knowing the value and timeliness of your data. For example, if you have a newcomer in your LGU, he must be able to know and appreciate the importance of your data. Otherwise, he might end up just ignoring the data for the simple reason that he does not know that it is valuable for a particular application.

Being organized is a key determinant of your ability to retrieve your data efficiently. So for those who are not yet implementing CBMS, I would suggest that you explore the use of Excel as a creative method for your tables because it is a good tool for converting your tables into charts and graphs especially if you do not have a Geographic Information System (GIS) yet. Of course, a GIS provides a similar picture of the information you want to convey. Nevertheless, the pie charts and graphs will also help you in transforming your data and information.

If LGUs have computers, they can initially encode the data, and later, this can be imported into the CBMS database. If you have a simple GIS software and maps available, you can also import them into the CBMS database. For those who are trained in CBMS and who are already used to the system, you might be interested to invest in a good GIS software which is compatible with CBMS. Why? Because a good GIS can be beneficial for analyzing spatial data for the Socioeconomic Profile (SEP) and ecological profiling and for identifying suitable areas for urban development.

It is not really a question of who will actually host the CBMS repository. You have to consider the capability of the organization in terms of Information Technology (IT) staff, equipment or the server that will hold your database, and the level of access to information and confidentiality.

Since the LGU's goal is to be able to respond to the needs of the community, the CBMS will definitely be a good tool for processing data and information for planning purposes. Data can be transformed into information, information into knowledge, and if you have knowledge, you have power.

Rest assured that the Housing and Land Use Regulatory Board (HLURB) will support the DILG's programs because our goal is really to assist LGUs in preparing their plans towards improving the quality of life of their constituents.

Welcome Remarks

Why CIDA Appreciates CBMS Implementation

Frances Tanner*

Thank you and welcome back to the second day of this extremely rich and well-packed 5th Community Based Monitoring System (CBMS) National Conference.

I would like to very warmly welcome back the representatives of 249 local government units (LGUs), 15 national government agencies (NGAs), 6 Non-Government Organizations (NGOs), 6 bilateral and multilateral donor organizations and the 2 universities who have kindly joined this 3-day Conference.

I would like to convey very deep appreciation to the Angelo King Institute for Economic and Business Studies (AKIEBS) of the De La Salle University (DLSU) for organizing and hosting this Conference, particularly to Dr. Celia Reyes, CBMS Network Project Leader, and her PEP-CBMS Network Coordinating Team, for their hard work that has paved the way for this three-day Conference of learning and exchange of information, knowledge and insights among all of us.

The Canadian Government — through the International Development Research Centre (IDRC) - Canada and the Canadian International Development Agency (CIDA) — is very proud to support on a global scale the Poverty and Economic Policy (PEP) Research Network for its continuing efforts to put developing country researchers at the heart of resolving poverty issues. It is not sufficient

*First Secretary, Canadian International Development Agency (CIDA) Philippines

for people to come from the outside and make quick diagnoses on poverty. The research has to be grounded in the realities of your own analyses and deep understanding of the issues surrounding poverty conditions in any particular community.

At the domestic level, here in the Philippines, we are even prouder of the fact that one of the PEP's subnetworks -- the CBMS Network -- has actually extended its coverage to assist 27 cities, 382 municipalities and nearly 10,000 barangays all over the country in establishing their own respective CBMS databases. I should say that these numbers are significant and reflect that you have already achieved a critical mass compared to the coverage achieved during the 1st National Conference. And this assistance is already moving on towards covering a quarter of the country.

Those of you who are actively practicing CBMS can now serve as beacons to your neighbors in how useful the CBMS can be in collecting the necessary data and information that will enable you to allocate resources intelligently, to budget, to plan and to target your LGU activities, and then to monitor the effects of what you do so that in your cycle of planning, implementing and monitoring and re-planning, you get successively smarter and better in performing these tasks.

We are proud to note that the CBMS is showing the way to a convergence approach to poverty reduction not only in the Philippines but also in 6 other countries in Asia and 7 countries in Africa. Indeed, the learning experiences that you document here will be helping people in all of these other countries that will be undertaking their own CBMS projects.

Thank you once again for your presence here today. Your active contributions during the discussions by sharing your own respective actual development experiences are of great importance to all of us. We are here to listen to how you have met the challenge of raising awareness and accelerating initiatives of local government units to localize the Millennium Development Goals (MDGs) and make sure that the Philippines meets its targets by 2015.

Thank you for your kind attention.

Keynote Address

Missing Dimensions, Missing Indicators

W. Randy Spence*

Good morning. Since this Conference seems to be a place for confessions, let me start with a few of my own.

The first confession I want to make is that people give me too much credit for the Community-Based Monitoring System (CBMS). But the truth of the matter is, many years ago, I heard a very good idea from Dr. Celia Reyes, Dr. Ponciano “Pons” Intal and others to whom I had the good sense to say “*that’s a very good idea!*” At that time, I had the good fortune of working for the International Development Research Centre (IDRC) of Canada, and this allowed me to say “*let’s do it, we will help you in every way we can.*” But I must give credit to all the work that had been done initially, the designs formulated by Celia and Pons, their team and some other really good people, including the inspiration from the Governor of Palawan at that time — Governor Salvador P. Socrates, and subsequently Governor Joel T. Reyes, and, of course, the rest of the collective effort coming from all of you. I have to say that all of you are actually my heroes! Indeed, I am very proud to be associated with CBMS, and I admire what all of you are doing to foster the CBMS cause.

My second confession is: I do have a presentation although it does not have any pictures or maps in it. So I am sorry, I am a bit behind all of you in that respect.

*President, Economic and Social Development Affiliates (ESDA), Canada

And my final confession is that every time I come to the Philippines, I get a generation older. I started off as the father of Micro Impacts of Macroeconomic and Adjustment Policies (MIMAP), and then the grandfather of Poverty and Economic Policy (PEP), and I think I am now the great-grandfather of CBMS. And I am planning to come back here for the 7th PEP General Meeting this coming December, so I am hoping that we can settle for something like “ancient ancestor”.

The theme of this Session is “*Improving Planning and Budgeting Through CBMS*”. I would suggest that whatever it is that you are planning and budgeting for should be geared in general towards improving the wellbeing of the individual and the community, and in particular, towards:

1. strengthening of individual capabilities;
2. growth of incomes and wealth;
3. provision of public and social services; and,
4. other targeted and developmental approaches, particularly poverty reduction intervention.

From the outset, CBMS has been taking a multi-dimensional approach to understanding and analyzing wellbeing and poverty. Thus, like other multi-dimensional approaches, CBMS actually already has in it some considerable proportion of the indicators that I am going to talk about – so I am not in any way suggesting that CBMS is deficient. For example, it has survival dimensions — using indicators related to health, nutrition, and water and sanitation. It has security dimensions – which are measured by indicators relative to shelter and peace and order. It also has enabling dimensions which employ indicators pertaining to income/livelihood, basic education and literacy, and participation (such as involvement in community organizations or the electoral process).

However, there may be one or two other things that may be considered in CBMS to measure wellbeing and poverty.

Where am I coming from? I was trained in welfare economics and public finance, which together provide an analytical framework that I think you all know pretty well. That framework indicates that people’s wellbeing is a result of the goods and services that they consume. We measure the value of what people produce and consume,

and we aggregate them for the whole economy to arrive at the Gross Domestic Product (GDP) or the National Income — which is the sum or total value of all the goods and services produced by society.

At the individual level, we can also do surveys and employ other means to measure the value of what people produce and consume. Admittedly, existing measures of individual wellbeing are a little bit incomplete at this point. If income is the measure of your wellbeing, you have to believe that Bill Gates is a million times or so better off than the rest of us. However, even as I am willing to admit that he is somewhat better off than the rest of us, saying that he is a million times better off seems to be a considerable exaggeration.

We do not in fact do a very good job at measuring the wellbeing of people by using the traditional framework. That is because there are some central dimensions of wellbeing that are not generally measured. And because they are not measured, neither are they targeted.

For example, we talk about utilities, but we do not actually ever measure utility. In terms of public services, we also do not actually measure that. We seldom look at the value of public services that people avail of and the wellbeing they derive from these services.

Fortunately, there are some newer approaches. To begin with, there is the human development or capability approach – which I have learned a lot more about since I had the good fortune of meeting Amartya Sen seven years ago, and of working with him and his colleagues since then.

The capability approach emphasizes that people's wellbeing depends upon their capabilities, their functionings and their freedoms. These three are interrelated. Capabilities allow people to function in different ways, and both give them freedom. Capabilities and functionings have both intrinsic (in themselves) and instrumental (to achieve other things) values.

Amartya Sen's concept of development as freedom suggests that there are five (5) main categories of freedom: first, economic; second, political; third, social; fourth, ethical; and the fifth, we will refer to as security, for lack of a better overall word.

Some of these, like economic freedom, are more familiar than the rest, and perhaps, even the capabilities approach would permit that the value of economic freedom can be reasonably approximated

by the value of what people produce and consume. Nevertheless, there are a lot more things that are valuable to people and are part of their wellbeing.

The capabilities approach looks at development not as economic growth (like the welfare economics approach does), but as a building up of a society's capabilities, individual capabilities, social systems and social institutions. Development is the increase of what society knows how to do and is able to do. It is quite a different approach. Part of what a society knows how to do is to generate and sustain markets and private enterprises, and that leads to economic growth. It is quite a different approach. Part of what a society knows how to do is to generate and sustain markets and private enterprises, and that leads to economic growth.

There is actually a big debate going on in the world today about these approaches. The predominant paradigm of the growth people essentially says that growth is pretty much all that matters and everything else comes along if you have growth. I think that is demonstrably not true. Nevertheless, growth is an important part of development. Market growth is the part that enables societies to finance public services and other things that they want to achieve. My view is that they go together. You do not, in fact, ever have one without the other. There is no such thing as disembodied growth.

In the capabilities approach, there are some new dimensions of wellbeing beyond utilities of goods and services. I will give you the specifics in just a minute.

But first, let me mention another approach which is very well summarized in a recent book entitled "*Happiness: Lessons from a New Science*" published in 2005 and written by Richard Layard who was the head of the Institute for the Measurement of Performance of Societies (IMPS) at the London School of Economics (LSE). It sounds a little flaky for some people – because, come to think of it — can we really talk about measuring happiness? In his book, Layard recounted some very interesting things, summarizing a lot of research that has been done on the subject. For one, he said that it appears that happiness can be quantitatively measured. It can be measured by asking the right questions, by experimentation, and, in fact, also by monitoring the brain activities of people. Now, I am not going to suggest that the

brain activities of Filipinos be monitored across the country, although I think that would really be very interesting.

Layard's research also points out that happiness depends upon a number of measurable factors. His book suggests that the factors, in the order of importance, are: (1) family relationships; (2) financial situation (which again comes back to the welfare economics framework, although beyond a certain level, it is the security of people's financial situation that matters to them); (3) work (quality and security of work); (4) community and friends; and, (5) health. Underlying these five factors are personal freedoms and personal values. So I will certainly recommend this book because it introduces some hard evidence for some additional dimensions of wellbeing that are not found in the welfare and capability approaches.

So there are really many possible ways of going about defining or formulating dimensions of wellbeing and poverty — dimensions that are commonly not yet being specifically measured.

I have also been working for several years with a group of people who recently initiated the Oxford Poverty and Human Development Initiative at Oxford University. The head of that group is a woman named Sabina Alkire, a friend of Amartya Sen and who, like Celia Reyes, is a very committed person. So they brought together experts in this field and determined what they thought were the most important missing dimensions of wellbeing. Very briefly, their list includes the following:

- Physical safety; security from violence to property & person, perceived violence;
- Agency and empowerment: the ability to advance goals one values and has reason to value;
- Dignity or the ability to go about without shame; freedom from shame, stigma and humiliation;
- Employment, including both formal and informal, with particular attention to the quality of employment; and,
- Psychological and subjective wellbeing, to emphasize meaning, satisfaction and their determinants.

For each of these, the group has developed a set of questions (indicators, essentially) and survey modules which are now being piloted or are under discussion for piloting in the wings of international

Demographic and Health Surveys (DHS), the Multiple Indicator Cluster Surveys (MICS) of the United Nations Children's Fund (UNICEF), etc. Now, we are discussing with Celia and others about piloting these new indicators in the CBMS.

Let me just go through this fairly quickly. Each of these missing dimensions has a number of sub-areas where the indicators lie, and these are related to public services.

For example, you can talk about security and you can talk about security services in society — but they are not quite the same thing. Security services can be used either to liberate or to oppress people. When we talk about personal security of people, we are talking about what it is in terms of their wellbeing or poverty. So in terms of security, we have these three (3) main areas:

- Incidence & frequency of general violent crimes, and conflict-related violence against property (including thefts);
- Incidence and frequency of general violent crimes, and conflict-related violence against person;
- Perception of threat(s) to security and safety, now and in the future.

The last one is important because people may be objectively secure, but if they are living in fear of insecurity, this has a large effect on their wellbeing.

I might add here that the CBMS already contains some indicators of security such as: (1) proportion of households living in makeshift housing; (2) incidence of crime; and, (3) incidence of armed encounter. So, again, CBMS is not really different from what the capability people are doing.

Under Empowerment, we have identified four (4) areas:

- Power Over/Control; control over personal decisions;
- Power To/Choice; household decision making and domain-specific autonomy;
- Power From Within/Change; changing aspects in one's life (individual level);
- Power With/Community; changing aspects in one's life (community level).

Under Dignity or its opposite — which, for lack of a better word, is referred to as Shame, we have identified five (5) areas:

- Stigma of poverty;
- Proneness to/experience of shame;
- Perceptions of disrespectful, unfair, prejudiced treatment;
- Perceptions of ethnic, racial or cultural discrimination (affecting access to employment, services, education); and,
- Levels of accumulated humiliation.

Under Employment, we have six (6) areas:

- Informal employment;
- Income from employment & self-employment;
- Occupational hazards (accidents, illnesses, workplace exposures);
- Under/over employment (prefer to work more/less?);
- Multiple activities (number of income generating jobs); and,
- Discouraged unemployed (prefer to work but have stopped searching).

The CBMS collects information on income, employment and underemployment — so we are not very far away.

In looking at all these approaches, it is clear that:

- There are many ways of formulating the missing dimensions of wellbeing and the questions involved in finding out about them.
- These dimensions tend to be fairly society-specific.
- And because of that, part of the challenge for the capability approach (or people) is to come up with indicators that can be used in local, national and international data collection exercises.
- Most importantly, the indicators should be comparable across countries.

From the perspective of the capability and freedom approach, if you do not measure something, it can not get the attention it deserves. And if you cannot measure it consistently and well over time, then it will not be part of society's planning and targeting process.

data collection efforts including the Living Standards Measurements Survey (LSMS), Core Welfare Indicators, Quick Indicators,

So how does this relate to CBMS? As mentioned, CBMS currently includes some of these typically missing dimensions. The PEP-CBMS Network Coordination Team and the Oxford Group have proposed that they design and pilot the use of some of these indicators in the CBMS. Considering that some of these indicators are already there, the next step to take is to expand the security and employment indicators of CBMS and to add the empowerment and dignity indicators. A proposal has already been formulated and basically agreed on, and it seems that the pilot will now be put in place. The results of that pilot will go back to you because we will need you to guide and advise us in determining if the indicators are valuable to the work you are doing in CBMS, how they are useful to you, and what other indicators would you still be needing.

The people who are doing this are hoping that the use of some new indicators will increase the power of CBMS (being an aggregated database across individuals, households, and districts, up to the provincial and national levels) as a tool used by communities and local government units (LGUs) for planning and budgeting, for providing social services, for targeting interventions, for ensuring transparency, and all the other reasons you have been talking about in this Conference.

In addition, it is hoped that further insights can be gained from analyzing the link between the current dimensions in CBMS and the new indicators.

Finally, we hope to use the existing and the new indicators together to improve the process of identifying the poor at the local and national levels. As I have only recently learned, you have only one composite indicator for the identification of poverty. Fortunately, both the PEP-CBMS Network Coordinating Team and the Oxford Group are in fact quite adept at deriving new aggregate measures. I will also refer you to a work that will be forthcoming from Sabina Alkire and James Foster who are studying the matter of Country and Multi-dimensional Poverty Measurement. So I think the partnership between the PEP-CBMS Network Coordinating Team and the Oxford Group will strengthen the available collective analytical ability in the use of CBMS data. That is our hope.

It is anticipated that additional information on security, employment, dignity and empowerment will: (1) be useful to and will be used by communities; (2) help improve the design and effectiveness of local government budgets, services and programs; and, (3) help provincial and national governments not only in their program design & delivery, but also in their support interventions for communities and LGUs.

The pilot will hopefully determine the extent of added value in relation to the cost of data collection for use of the new indicators in CBMS, and enable refinement and simplification of indicators for potential use in the Philippines and other CBMS countries.

Indeed, this is a potentially low-cost and very useful addition to CBMS in the Philippines and other CBMS countries. It is also an important step in monitoring and enhancing the wellbeing of people globally.

My main reason for talking to you this morning is to emphasize to you that we will need your advice and guidance as the pilot is conducted. We will also need your feedback on the information that is generated — what is its particular value to you given the objectives of CBMS and given the considerations of simplicity – meaning: high coverage, fast-speed and low cost.

So I am grateful for this opportunity, and I look forward to working with you on the missing indicators towards enhancing the value of CBMS for the work that you do.

Thank you very much!

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Introduction to the Rationalized Planning System¹

Manuel Q. Gotis

Introduction

When I received the invitation from Dr. Celia Reyes for me to make a presentation on the Rationalized Planning System (RPS), I wondered about the relationship of RPS to the Community-Based Monitoring System (CBMS). After giving it some thought, I realized that CBMS is indeed essential for achieving a rational and efficient planning and budgeting system in this country.

That is why as I have been telling Dr. Reyes, I will always be a champion for the CBMS cause. I am doing this not as a function of my responsibilities as one of the directors of the Department of the Interior and Local Government (DILG) — which is mandated to localize the Millennium Development Goals (MDGs), but because I believe it should really be our objective to ensure that the local planning system in this country is anchored on a very good and well-established database.

I really appreciate the initiative of PEP-CBMS Network Coordinating Team in sharing with us the CBMS technology. For your information, we have 300 municipalities that are already conducting CBMS in various stages of implementation. In fact, some local government units (LGUs) have fully funded the implementation of their CBMS – as in the case of the LGU of San Nicolas, Ilocos Norte.

¹ An edited transcript of the presentation of Director Manuel Q. Gotis, Bureau of Local Government Development (BLGD), Department of the Interior and Local Government (DILG).

Current State of Local Planning in the Philippines

What is the current state of local planning in the Philippines? This feedback came from the local planners themselves:

1. Inactive local development councils.
2. Indifferent or unsupportive Sanggunians.
3. Lack or total absence of vertical linkages (whether at the regional and provincial levels, or at the barangay and city/municipality levels).
4. Lack or total absence of horizontal linkages among sectoral concerns.
5. Weak plan-to-budget linkage.
6. Multiplicity of plans.
7. Only 11 out of 27 non-government association- or NGA-mandated plans can be recalled by LGUs.
8. 38 percent of NGA-mandated plans have not been formulated.
9. Disaster Management Plan and the Solid Waste Management Plan were considered most useful.
10. Local Poverty Reduction Action Plans (LPRAP) and Gender and Development (GAD) Plans were consistently mentioned as unnecessary.

The Need for a Rationalized Planning System

Why do we need to rationalize our planning system? We have to rationalize our planning system because we have to be faithful to the provision of the Local Government Code (LGC). We need to implement the full implications of the LGC pertaining to planning.

Why “planning system”? The answer is based on the dual function of the LGU. As a political unit of the national government, LGUs are in charge of the management of its entire geographical territory for and in behalf of the national government.

As a corporate body, an LGU is a frontline institution for delivering basic services. Basically, according to Sections 16-17 of the LGC, an LGU is responsible for:

1. representing its inhabitants;
2. delivering basic services and facilities to enable its inhabitants to develop fully into self-reliant communities; and,

3. promoting the general welfare among the inhabitants within its territorial jurisdiction.

Concomitant to an LGU's devolved functions is the increase in its budget allocation from the Internal Revenue Allotment (IRA).

Planning is an integral part of governance. We cannot dissociate planning from governance. The old notion of planning is it is a technical responsibility that is the purview of local planners and department heads, perhaps.

But planning is also a political responsibility. Why? Because the plan cannot be passed by the Sanggunian without the budget. Likewise, it is also the political component or the Sanggunian that approves the budget.

Components of the Planning System

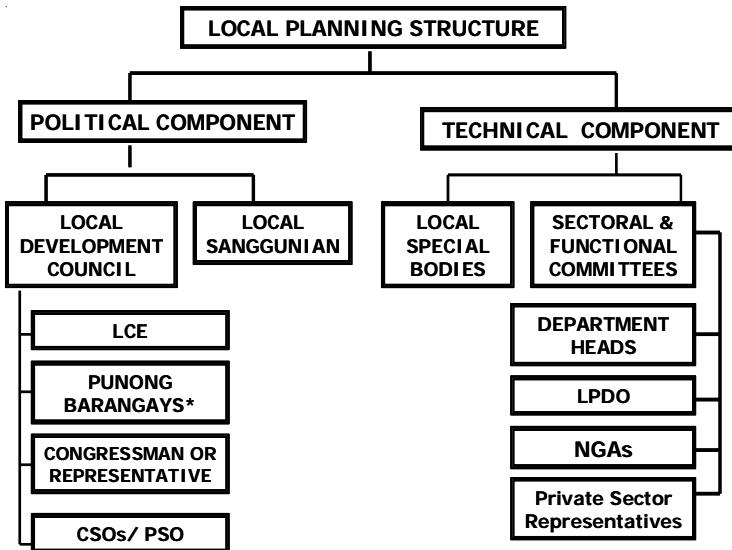
Who should be involved in planning? Why should LGUs plan? How are plans prepared? How can LGU plans be implemented?

The local planning structure in the RPS is very important. I have earlier mentioned its political and technical components:

1. *Political Component* – is the policymaking body that defines the content and direction of local government. Its principal function is to deliberate, make decisions or lay down policies. Chart 1 shows that the Political Component consists of the Local Development Council (LDC) and the Local Sanggunian. In turn, the LDC consists of the local chief executive (LCE), the Punong Barangays, the Congressman or Representative, and others.
2. *Technical Component* – supplies the technical content and process of local planning. It generally has no decision making powers. Chart 1 shows that the Technical Component consists of Local Special Bodies and Sectoral and Functional Committees. The latter group is composed of Department Heads, the Local Planning and Development Officer (LPDO), the non-government associations (NGAs) and private sector representatives.

The next chart (Figure 2) shows the structure of the Local Development Council. Under this structure, Sectoral Committees and Functional Committees report to the Executive Committee.

Figure 1. The Local Planning Structure



* In case of the City/municipality; members of the Sanggunian in case of the Barangays; mayors in case of the Province

Composition of Sectoral Committees

I would like to put a little more focus on the composition of sectoral committees. On the social sector, there should be a Technical Working Group (TWG). It could be expanded upon the desire of the local government. But this can be a full-blown sectoral committee as shown in Figure 3.

Local Development Planning and Development Model

As shown above, we have the Comprehensive Land Use Plan (CLUP) which has a time frame of 12-15 years. It covers settlement policies, protection land policies, production land policies and infrastructure policies. We do not change this very often unless the local government notices rapid development occurring in the locality, due, for example, to high in-migration or high inflows of investments.

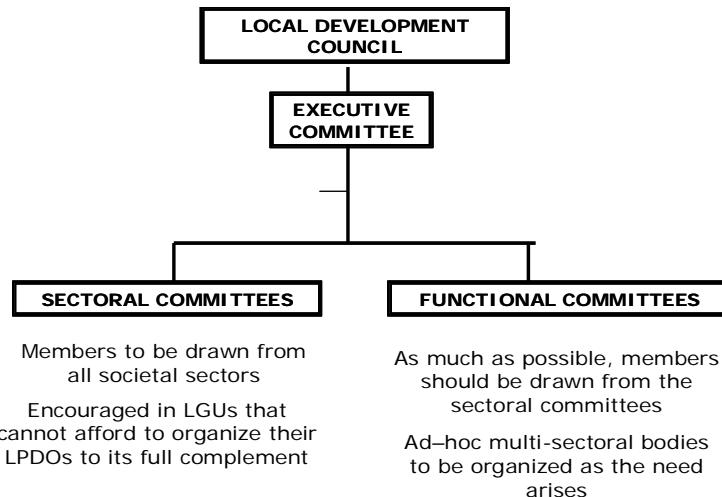
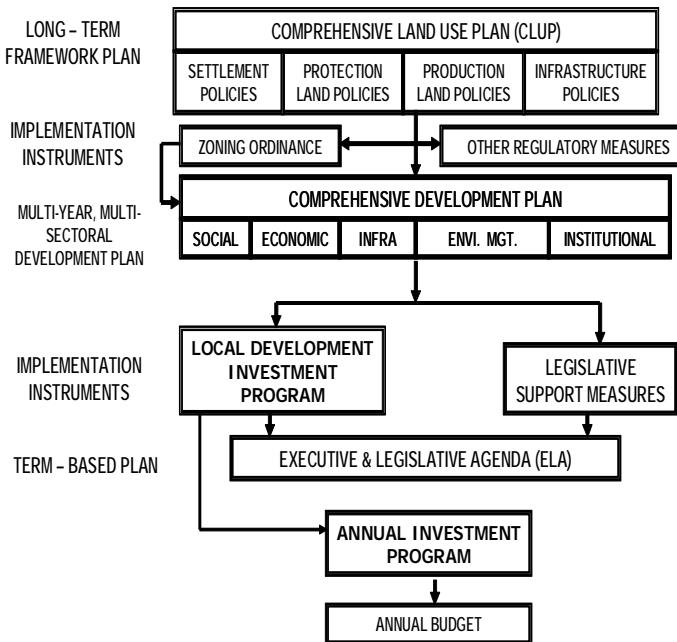
Figure 2. The Structure of the Local Development Council**Figure 3. Composition of Sectoral Committees: Social Sector**

Figure 4. Local Development Planning and Development Model



We have the Comprehensive Development Plan (CDP) with a time frame of 6 years. This Plan covers social, economic, infrastructure, environmental management and institutional concerns.

The Executive and Legislative Agenda (ELA), on the other hand, has a time frame of 3 years. Is ELA a plan? Actually, it is not a plan; it is just the agenda of the local chief executive and the local legislature. Why do we come up with an ELA? Because we have cases in which the mayor is not in good terms with the Sanggunian. If they are at odds with each other, it would be difficult, for example, for the mayor's office to plan and get budgets approved. So we thought of this ELA whose formulation requires a total of 12 steps before it can be finalized. Thus, when newly elected officials assume office, they can go through the process of ELA formulation so that from the discussion and brain-storming process they have to go through, they can reach a consensus on what to do over the next three years.

The Importance of CBMS as a Tool for Planning

In the rationalized planning system, we put emphasis on the use of data, local development indicators and other data generation tools.

In the local planning processes, we utilize CBMS and the Local Governance Performance Management System (LGPMS). These are tools which are very important for us for planning purposes. LGPMS is a tool that will allow local governments to see their strengths and weaknesses in terms of institutional capability to provide basic services. CBMS, on the other hand, is very important because it validates whether the data and information generated from the LGPMS have helped make a significant difference in the lives of the people.

The conclusion is: we now have several tools that can enable our LGUs to put in place a rationalized planning system and, as a result, be able to formulate excellent plans.

With the onset of Information Technology, the time has come for us to do away with the “shotgun approach” to planning. Do you know what this approach suggests? It suggests firing a gun but not aiming at anything in particular. In the planning process, that is tantamount to making plans but having no definite direction. And that is because in the “shotgun approach” to planning, there is no data to work with in the very first place.

But through CBMS, we are able to determine the exact situation of a locality — such as the level and extent of poverty and the specific needs of different households — as manifested by the Core Local Poverty Indicators (CLPIs) that are measured in the CBMS survey.

Through CBMS, a barangay can pinpoint the precise requirement for intervention even at the household level. That is why even if some donors have mentioned that CBMS is very expensive because it costs PhP30 per household, still we say that if you really want to have good plans, then CBMS is worth the cost.

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CBMS Planning and Budgeting Module for LGUs¹

Aniceto Orbeta

Introduction

This paper is based on a presentation that is culled from a couple of days of training local planners – as jointly undertaken by the PEP-CBMS Network Coordinating Team and two local government units (LGUs) from Negros Occidental: the LGU of Escalante City and the LGU of the Municipality of E.B. Magalona. The specific objective is to improve the empirical basis of local planning and budgeting through the strategic use of CBMS data.

Benchmarking

The first procedure we want to introduce is benchmarking. Basically, benchmarking is one of the simplest ways of identifying and prioritizing major development problems objectively.

Benchmarking is basically comparing numbers pertaining to the performance of a city/municipality/barangay with: (i) other cities/municipalities/barangays; (ii) past performance; and, (iii) planning standards.

Benchmarking involves (i) identifying relevant indicators; (ii) generating/gathering the indicators; and, (iii) comparing indicators. It is as simple as that.

¹ An edited transcript of the presentation of Dr. Aniceto Orbeta, Senior Research Fellow, Philippine Institute for Development Studies (PIDS).

Where do you get relevant indicators? Relevant indicators are basically determined by your development goals and objectives. For instance, you have the CBMS 13+1 Core Indicators. If you do not have specific indicators in mind, you can use the Global Millennium Development Goals (MDGs) or the National Development Goals (NDG) and objectives from the Medium Term Philippine Development Plan (MTPDP).

Where do you get benchmarking information? Of course, since benchmarking involves comparisons, the first thing to ask is — whom are you going to compare yourself with?

You can also generate data from similar national, regional, provincial and municipal indicators from national censuses and representative surveys. If you have already conducted several CBMS rounds, you can compare your performance records over time. Or if you happen to have planning standards for certain sectors, you can also use them.

The PEP-CBMS Network Coordinating Team has developed a module — the Statistics Simulator — which automatically generates the CBMS 13+1 Core Indicators. If you have encoded the data, you just have to click on a couple of buttons to generate this data at the barangay or purok level. If you are adventurous enough, you can process public-use files of national censuses and surveys. Oftentimes some of these indicators are actually available from the summary tables on the NSO website.

The subsequent illustrative exercises consider the CBMS 13+1 Core Indicators as the desired set of development indicators. The LGUs can have a slightly or completely different set of development indicators in the future, but for now, let us use this as a starting point.

Table 1 shows an example of benchmarking for nutrition. What is indicated for nutrition? We have the proportion of malnourished children 0-5 years old. On the third column, you have the totals for the city — where you can also see the best and worst case scenarios for the city. On the last column is the benchmark — basically, the national indicator for malnutrition — which can be compared with the CBMS indicator. Meanwhile, Table 2 gives you the same analysis for education.

Table 1. Benchmarking Illustration: Nutrition in Escalante City, Negros Occidental

Area	Indicator	Survey Estimate	Benchmarks
Nutrition	Proportion of malnourished children 0-5 years old	<p><i>Escalante City</i></p> <p>Total 6.07 Male: 5.24 Female: 6.99 <i>Brgy. Alimango</i> Total: 19.81 Male: 15.98 Female: 24.03 <i>Brgy. Jonobjonob</i> Total: 0.69 Male: 0.20 Female: 1.17</p>	<p>Underweight children 0-5 years old</p> <p><i>National (2003, NNS)</i></p> <ul style="list-style-type: none"> · Total: 27.6 · Boys: 27.2 · Girls: 28.1 <p><i>Regional (2001 Update)</i></p> <ul style="list-style-type: none"> · Total: 35.2 <p><i>Provincial (2001 Update)</i></p> <ul style="list-style-type: none"> · Total: 42.6

Table 2. Benchmarking Illustration: Education in Escalante City, Negros Occidental

Area	Indicator	Survey Estimate	Benchmarks
Education	Proportion of children 6-12 years old not attending elementary school	<p><i>Escalante City</i></p> <p>Total 24.36 Male: 26.27 Female: 22.32 <i>Brgy. Binaguiohan</i> Total: 31.86 Male: 34.45 Female: 28.97 <i>Brgy. Washington</i> Total: 16.63 Male: 18.76 Female: 14.63</p>	<p>Children 6-12 years old who are attending elementary school</p> <p><i>National: 90.6 (APIS 2004)</i></p> <p><i>Socioeconomic Groups</i></p> <ul style="list-style-type: none"> · Bottom 30%: 91.4 (APIS 2004) · Higher 70%: 90.1 (APIS 2004)

What does benchmarking in this example tell us? It tells us that:

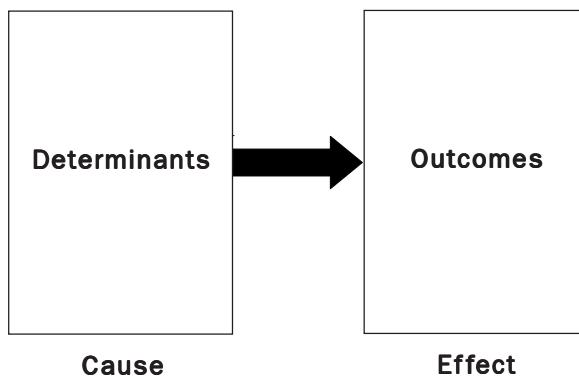
- Nutrition is not a pressing problem for Escalante. The worst case scenario for the city is even better than the national average. But it should be noted that in Escalante, girls have higher malnutrition incidence than boys.
- School attendance a big problem in the community; in addition, boys have higher non-attendance rates than girls, particularly at the secondary level.

The above exercise tells you what the pressing problems are. The next thing you want to know is what to do with these problems.

Analytical Frameworks

Frameworks are very simplified structural representations of development realities. Why use frameworks? We use analytical frameworks for three reasons: to enrich situation analysis, to enrich strategy formulation, and to organize data into useful summaries. The simplest framework is shown in Figure 1. It suggests that one can identify determinants for specific outcomes.

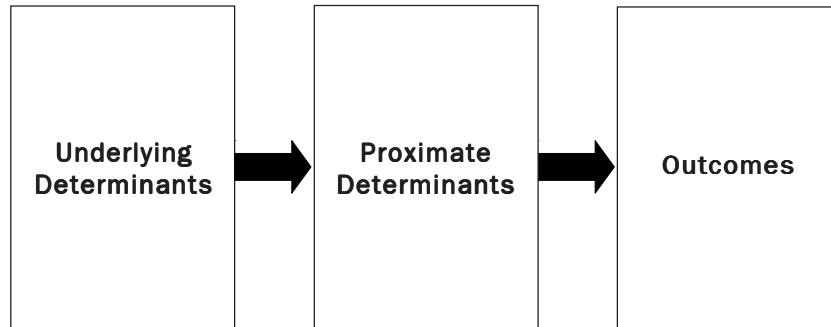
Figure 1. Determinants Framework



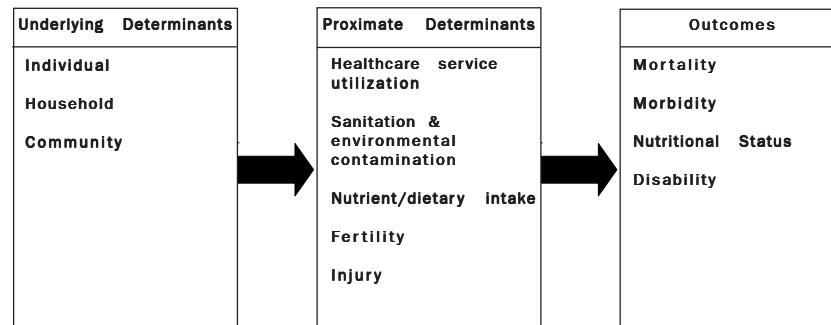
We can further expand this to a Proximate Determinants Framework as shown in Figure 2.

The basic feature of the proximate determinant framework is the separation of “direct” determinants from the “indirect” determinants. The latter group affects the outcomes through the direct or proximate determinants. The proximate determinants may be considered as the “technical” (in the sense of a production function relationship) determinants. The key characteristic of proximate determinants is their presumed stable relationship with the final outcomes.

Figure 3 shows an example of the proximate determinants framework applied to health. If you look at a community’s health

Figure 2. Proximate Determinants Framework

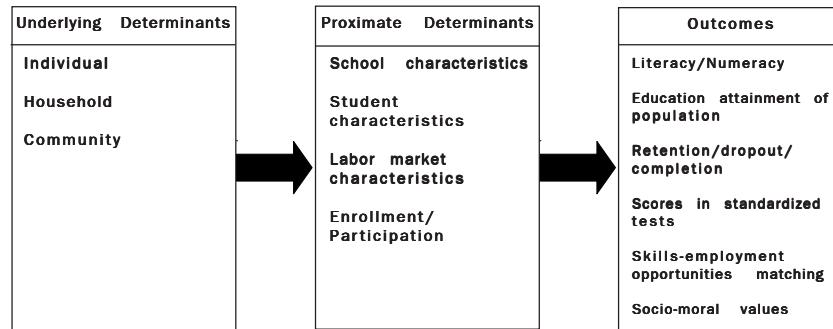
Davis and Blake (1955-1956)

**Figure 3. Determinants of Health Outcomes:
Proximate Determinants Framework**

situation, you have individual, household and community characteristics. But in the middle, you have direct determinants like health and service utilization, sanitation and environmental contamination, nutrient/dietary intake, fertility and injury. These proximate determinants are the things that you have to look out for if you want to analyze mortality, morbidity, nutritional status and disability.

Figure 4 shows the same analysis for education.

**Figure 4. Determinants of Education Outcomes:
Proximate Determinants Framework**



This framework also suggests that there are other determinants besides obvious direct determinants. For example, people may wonder why the nutrition status of a particular community's children is still not improving even after the implementation of a nutrition program. The reason for that is — because they are looking only at the implementation of feeding programs per se (which is an obvious direct determinant), but not at other factors or proximate determinants that may also affect not only the nutrition status of the children, but also the effectiveness of the feeding program being implemented.

Another example pertains to school attendance – which is determined not only by education variables (e.g. availability of a school in the vicinity) but also by other factors such as the health status of children, attitudes of parents towards schooling, etc. Thus, we need to examine these other determinants as well. We can use the determinants framework to identify important determinants of outcomes of interest as well as the needed components of intervention programs/projects.

Often, more in-depth information and details on the determinants (and how important they are) can only be generated from Focus Group Discussions (FGDs), with frameworks as guides on what questions to ask for specific issues.

For example, there are common perceptions about development problems such as:

- Malnourished children are from households that have low incomes, experience food shortage, and have unhealthy surroundings.
- Non-attending school-age children are from households with low incomes, parents with low educational status, and homes not conducive for studying.
- Poor households have working-age members who are unemployed.

From the two tabulated results of the CBMS data and Statistics Simulator using the determinants framework (Tables 3-8), it may be concluded that:

1. Malnutrition is:
 - negatively affected by income and poverty status, family size, education of reference person;
 - positively affected by health condition in the home (water supply, sanitation).
2. School Attendance (elementary) is:
 - affected by status of settlement and presence of electricity;
 - but is not hindered by the educational status of reference person, income and poverty status.

Disaggregation by Socioeconomic Groups

The other thing that we can look into is disaggregation by socioeconomic groups. It helps you understand the disparities in your locality. You can also improve the effectiveness of your targeting by looking at the many differences among the poor households in a community (Tables 9-10).

The disaggregation by income classes shows that income is a consistent source of disparity in outcomes except in the case of informal settlers. There seems to be a higher incidence of informal settlers even among the higher income groups.

Table 3. Malnourished Children and Household Characteristics (Per Capita Income, Household Size, Access to Safe Water and Sanitary Toilet Facilities), Jonobjonob, Escalante City, 2006

Mainnourished Children 0-5 Years Old	Number	Proportion	Mean Per Capita Income	Mean Household Size	Proportion of Households Without Access to Safe Water Supply	Proportion of Households Without Access to Sanitary Toilet Facilities
Jonobjonob	149	100	20772	5	39.6	56.3
Households With Children 0-5 Years Old	646	43.7	184129	6	38.2	58.5
With Mainnourished Child	5	0.3	4,393.9	7	40.0	60.0
Without Mainnourished Child	640	43.3	18,592.35	6	38.3	58.6
Households without Children 0-5 Years Old	834	56.4	22,621.8	4	40.6	54.6

Table 4. Malnourished Children and Household Characteristics (Makeshift Housing, Informal Settlers, Poverty & Subsistence Incidence and Food Shortage), Jonobjonob, Escalante City, 2006

Mainnourished Children 0-5 Years Old	Proportion of Households Living in Makeshift Housing	Proportion of Households who are Informal Settlers	Proportion of Households with Incomes Below the Poverty Threshold	Proportion of Households incomes Below the Food Threshold	Proportion of Households who Experienced Food Shortage
Jonobjonob	11.0	30.6	53.1	36.6	0.6
Households With Children 0-5 Years Old	10.1	26.2	63.9	45.4	0.8
With Mainnourished Child	40.0	0.0	10.0	80.0	0.0
Without Mainnourished Child	9.8	26.4	63.8	45.2	0.8
Households without Children 0-5 Years Old	11.5	33.8	44.7	29.9	0.5

Table 5. Malnourished Children and Household Characteristics (Employment, Literacy and Educational Attainment of Household Reference Person), Jonobjonob, Escalante City, 2006

Mainnourished Children 0-5 Years Old	Employment Rate	Proportion of Household Reference Persons who are Literate	Proportion of Household Reference Persons with at Least Elementary Education	Proportion of Household Reference Persons with Secondary Education	Proportion of Household Reference Persons with Above Secondary Education
Jonobjonob	99.7	95.5	52.9	29.7	17.8
Households With Children 0-5 Years Old	99.7	96.7	59.3	34.4	19.2
With Mainnourished Child	100.0	100.0	60.0	20.0	0.0
Without Mainnourished Child	99.8	96.9	59.4	34.5	19.4
Households without Children 0-5 Years Old	99.7	94.4	47.8	26.1	16.7

Table 6. School Participation and Household Characteristics (Per Capita Income, Household Size, Members 6-24 Years Old and Access to Safe Water Supply), Jonobjonob, Escalante City, 2006

Elementary School Participation	Number	Proportion	Mean Per Capita Income	Mean Household Size	Household Members who are 6-24 Years Old	Household Members 6-24 Years Old	Proportion of Households Without Access to Safe Water Supply
Jonobjonob	1,479	100	20,777.2	5	43.5	39.6	
Households With Children 6-12 Years Old	714	48.3	14,703.8	6	52.1	39.2	
With Child not Attending	470	31.8	15,952.9	6	50.4	37.7	
All Children Attending	244	16.5	12,247.8	6	55.0	42.2	
Households without Children 6-12 Years Old	765	51.7	26,432.2	3	29.8	40.0	

Table 7. School Participation and Household Characteristics (Access to Sanitary Toilet Facilities, Makeshift Housing, Informal Settlers, Access to Electricity and Poverty Incidence), Jonobjonob, Escalante City, 2006

Elementary School Participation	Proportion of Households Without Access to Sanitary Toilet Facilities	Proportion of Households Living in Makeshift Housing	Proportion of Households who are Informal Settlers	Proportion of Households with Electricity	Proportion of Households with Incomes Below the Poverty Threshold
Jonobjonob	56.3	11.0	30.6	45.5	53.1
Households With Children 6-12 Years Old	57.8	11.1	28.6	45.9	66.4
With Child not Attending	56.6	11.3	29.6	51.7	63.4
All Children Attending	60.2	10.7	26.6	34.8	72.1
Households Without Children 6-12 Years Old	54.9	10.7	32.3	45.1	40.8

Table 8. School Participation and Household Characteristics (Subsistence Incidence, Food Shortage and Educational Attainment of Household Reference Person), Jonobjonob, Escalante City, 2006

Elementary School Participation	Proportion of Households with Incomes Below the Food Threshold	Proportion of Households who Experienced Food Shortage	Proportion of Household Reference Persons with at Least Elementary Education	Proportion of Household Reference Persons with Secondary Education	Proportion of Household Reference Persons with Above Secondary Education
Jonobjonob	36.6	0.6	52.9	29.7	17.8
Households With Children 6-12 Years Old	49.0	0.6	53.4	30.5	18.3
With Child not Attending	44.3	0.6	57.2	35.1	21.1
All Children Attending	58.2	0.4	45.9	21.7	13.1
Households Without Children 6-12 Years Old	25.1	0.7	52.4	29.0	17.3

Table 9. Income Classes and Household Characteristics (Per Capita Income, Child Deaths, Malnourished Children, Makeshift Housing and Informal Settlers), Escalante City, 2006

	Number	Proportion	Mean Per Capita Income	Proportion of Child Deaths 0-5 Years Old	Proportion of Women Deaths Due to Pregnancy-Related Causes	Proportion of Malnourished Children 0-5 Years Old	Proportion of Households Living in Makeshift Housing	Proportion of Households who are Informal Settlers
City of Escalante	18,937	100	15,056.47	0.5	0.4	6.1	4.9	8.3
Poorest	3,790	20	1,741	0.5	0.5	6.8	6.5	7.9
Lower Middle	3,790	20	4,595	0.6	0.0	6.4	6.0	5.5
Middle	3,790	20	7,588	0.5	0.7	6.8	4.6	8.2
Upper Middle	3,790	20	12,532	0.8	0.9	4.9	4.6	9.2
Richest	3,791	20	48,116	0.0	0.0	3.4	3.0	10.7

Table 10. Income Classes and Household Characteristics (Access to Safe Water Supply and Sanitary Toilet Facilities, School Participation, Unemployment and Victims of Crime), Escalante City, 2006

	Proportion of Households without Access to Sanitary Toilet Facilities	Proportion of Households without Access to Safe Water	Proportion of Children 6-12 Years Old Not Attending Elementary School	Proportion of Children 13-16 Years Old Not Attending High School	Proportion of Children 6-16 Years Old Not Attending School	Unemployment Rate	Proportion of Persons who were Victims of Crime
City of Escalante	49.5	59.4	24.4	52.9	20.0	0.9	0.1
Poorest	58.4	69.1	28.8	59.8	23.4	1.1	0.2
Lower Middle	57.5	70.3	25.7	57.7	22.9	0.9	0.1
Middle	50.8	66.5	22.8	54.7	19.5	1.0	0.1
Upper Middle	47.3	59.1	19.5	47.5	16.8	0.9	0.1
Richest	33.6	31.7	19.1	31.9	9.7	0.7	0.1

By using the tool of disaggregation by income classes, you will be able to tell whether your program is hitting the people you are targeting, whether the program is hitting the poor if it is intended for the poor. As may be noted in Table 11 (which details a population's access to a program by income classes), the program is apparently reaching more poorer households than richer ones. Is this information important for you to know as a local planner? If so, then disaggregation by income classes is the tool to use.

Table 11. Access to Program by Income Classes, Escalante City, 2006

	Members			Number of Member Beneficiaries by Income Group by Sex					
				Magnitude			Proportion		
	Total	Male	Female	Total	Male	Female	Total	Male	Female
City of Escalante	86,581	44,350	42,218						
Poorest				7,310	3,797	3,513	8.4	8.6	8.3
Lower middle				7,941	4,101	3,840	9.2	9.3	9.1
Middle				6,475	3,334	3,141	7.5	7.5	7.4
Upper Middle				5,620	2,848	2,772	6.5	6.4	6.6
Richest				4,962	2,416	2,546	5.7	5.5	6.0

As to gender-responsive planning/budgeting, gender parlance is already mainstreamed into CBMS – with all individual indicators disaggregated as male or female.

Using the CBMS Data for Budgeting

After planning, how do you use CBMS data for budgeting? Let me now show you how to use CBMS for budget preparation and expenditure program configuration. Since CBMS data will be available for officials who review and authorize the budget, they can also review your assumptions and your computations. In the same way that you can prepare plans using the CBMS database, the Sanggunian can also look at the same CBMS database to review your budget.

Improving the results-orientation of the budget process through an Outcomes-Output Framework is a key concept which CBMS is trying to utilize. This involves not only aligning Programs, Projects and Activities (PPAs) with objectives and strategies, but also specifying performance indicators and performance targets. This is also a means

for improving plan-budget link – in which CBMS data plays a big role.

What follows is a cursory review of the proposed Development Fund (20 percent of the Internal Revenue Allotment or IRA) budget in the light of CBMS results. The first thing that we did was to look at the allocation of the 20 percent Development Fund for Escalante City (see Table 12). Then we compared it with the problems of Escalante (see Table 13). Benchmarking using core indicators shows that the main problems of the city are:

- High incidence of poverty (74 percent versus the national poverty incidence rate of 24 percent).
- High school non-attendance rates are twice higher than the national non-attendance rate.
- Low access to safe drinking water and sanitary toilets (rates for both indicators are more than twice the national incidence rate).

From these observations, we can assess the priorities expressed in the Annual Investment Plan (AIP) allocations, as follows:

- There are big allocations for housing projects (e.g., Site Development allocation amounting to PhP1 million and Land Banking allocation amounting to PhP5 million) although housing is not a problem.
- Given a very high poverty incidence, economic development allocations may need to be increased, with particular attention to sources of additional income as unemployment is already very low.
- There is no apparent allocation for education interventions despite the fact that the school non-attendance rate is very high.
- Projects for improving access to safe drinking water sources and sanitary toilet facilities may need more allocations.
- The large allocation for the health program needs clearer justification since malnutrition as well as child and maternal deaths are not problem areas.

I am not saying that the priorities reflected in the AIP are wrong. That is not for me to say. However, I would like to use CBMS data

Table 12. Annual Investment Plans of Escalante City, 2006 & 2007

	2007			2006		
	Amount	Amount	Share	Amount	Amount	Share
I. Loan Amortization		16,750,000	39.6		16,350,000	47.0
Land Bank Loan Amortization	12,750,000			13,800,000		
LOGOFIND Loan Amortization	4,000,000			2,550,000		
II. City Development Assistance Fund		10,500,000	24.8		10,500,000	30.2
CDAF (P500,000/Brgy x 21)	10,500,000			10,500,000		
III. Special Funds of Elective Officials		1,500,000	3.5		1,500,000	4.3
Mayor (P400,000)	400,000			400,000		
Vice Mayor (P200,000)	200,000			200,000		
12 SP Members (P75,000/member)	900,000			900,000		
IV. Economic Development		4,250,000	10.1		3,400,000	9.8
Cooperative Development Assistance	200,000			500,000		
Investment and Trade Promotion	300,000			200,000		
Tourism Dev't Program	400,000			500,000		
Agriculture Development Program	1,000,000			1,200,000		
Job Center Kiosk	100,000					
Construction of Farm to Market Roads	1,000,000			1,000,000		
Energization Project	1,000,000					
Const. of Rear Canopy & GI Louvers (Public Market)	250,000					
V. Social Development		7,940,000	18.8		2,250,000	6.5
Health Program	1,000,000			600,000		
Water System Development	380,000			300,000		
Coastal Resource Dev't Program	200,000					
Solid Waste Management Program	200,000			200,000		
Clean and Green Program	100,000			100,000		
Nursery Project	60,000			50,000		
Site Development (Gawad Kalinga)	1,000,000					
Land Banking	5,000,000			1,000,000		
VI. General Public Services		1,340,000	3.2		800,000	2.3
Human Resource Development	1,000,000			800,000		
CBMS	200,000					
Acq. of 3 units GPS	140,000					
Total	42,280,000	42,280,000	100.0	34,800,000	34,800,000	100.0

Table 13. CBMS Core Indicators, Escalante City, 2006

Indicator	Population					
	Magnitude			Proportion		
	Total	Male	Female	Total	Male	Female
Demography						
Population	86,581	44,350	42,218	100	51.2	48.8
Average Household Size						
Children 0-5 years old	11,401	6,006	5,395	13.2	13.5	12.8
Children 6-12 years old	15,108	7,799	7,309	17.4	17.6	17.3
Members 13-16 years old	9,239	4,797	4,442	10.7	10.8	10.5
Members 6-16 years old	24,947	12,596	11,751	28.1	28.4	27.8
Members 10 years old and above	66,430	33,843	32,586	76.7	76.3	77.2
Members of the labor force	28,463	19,274	9,189	32.9	43.5	21.8
Health and Nutrition						
Children 0-5 years old who died	60	24	36	0.5	0.4	0.7
Women who died due to pregnancy-related causes	6			0.4		
Malnourished children 0-5 years old	692	315	377	6.1	5.2	7
Housing						
Households living in makeshift housing	4,389	2,248	2,129	5.1	5.1	5
Households who are squatters	7,020	3,586	3,422	8.1	8.1	8.1
Water and Sanitation						
Households without access to safe water	43,482	22,582	20,888	50.2	50.9	49.5
Households without access to sanitary toilet facility	52,764	27,637	25,144	61	62.3	59.6
Basic Education						
Children 6-12 years old not attending elementary school	3,680	2,049	1,631	24.4	26.3	22.3
Children 13-16 years old not attending high school	4,885	2,927	1,958	52.9	61.0	44.1
Children 6-16 years old not attending school	4,865	2,945	1,920	20.0	23.4	16.3
Income and Livelihood						
Households with incomes below the poverty threshold	68,575	35,372	33,202	79.2	79.8	78.6
Households with incomes below the food threshold	58,299	30,065	28,233	67.3	67.8	66.9
Households who experienced food shortage	2,706	1,437	1,269	3.1	3.2	3
Unemployed members of the labor force	256	160	96	0.9	0.8	1.0
Peace and Order						
Victims of Crime	94	45	91	0.1	0.1	0.2

towards a more informed discussion on the appropriateness of the prioritization which determines the allocation. Without the CBMS data, it would be difficult to argue for or against the allocation of resources into specific PPAs in specific locations. In fact, in the absence of CBMS, it would be easier to simply perpetuate previous PPAs and adopt them again into the current or future AIPs. But with CBMS data, one can argue with confidence — even for a seemingly unpopular allocation.

How do we veer away from lump-sum allocation into evidence-based targeting? In particular, how can CBMS data help in the process? The PPA can be configured using frameworks with CBMS data to validate what goods and/or services need to be delivered. After identifying the interventions, the next step is to cost them. Basically the budget is just the number of clients multiplied by coverage multiplied by unit cost. The number of clients can be provided by CBMS data, (e.g., numbers of malnourished children, households without safe water supply, households without sanitary toilets, etc.); while coverage (i.e., how many/much will be covered for the budget year) is determined by the LGU's financing capability. On the other hand, unit cost can be determined from administrative records.

The following is a sample unit cost computation for a nutrition program. It is taken from worksheets which are cross-linked and are designed to automatically fill up forms from the Updated Budget Operations Manual (UBOM) for LGUs (2005) and Budget Operations Manual for Barangays (BOMB) (2006).

Table 14. Sample Unit Cost Computation for a Nutrition Program

Nutrition Program	
Unit:	Malnourished Child
Personnel (BHW) up to 20 children	3,000
Time in the project	0.25 (1/4 time)
Salary per month	4000
Months	3 (program will last for 12 weeks)
Material per child	
Food	1,500
Food (per day)	20
Cooking gas (per day)	5
Number of days/week	5
Number of weeks	12
Capital Equipment	
Cooking equipment	2,000
Acquisition value	10,000
Useful life (years)	5

The foregoing example shows the strategic use of CBMS data in budgeting, in particular, in identifying the number of beneficiaries of specific PPA. To facilitate this process, a budget workbook has also been prepared.

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Facilitating Gender-Responsive Planning and Budgeting (GRPB) with CBMS: The Escalante Experience¹

Celia Flor

Introduction

One cannot talk about Gender-Responsive Planning and Budgeting (GRPB) without looking into gender mainstreaming and its vision. And what is the vision of gender mainstreaming? The vision of gender mainstreaming is: women and men equally participating in and benefiting from development. The entry point to gender mainstreaming are the following: policies, people, enabling mechanisms within the local government units (LGUs) and their programs, projects and activities.

The compliance to Gender and Development (GAD) Planning and Budgeting has actually been low and slow. Actually, after a decade of advocacy it has only reached about 40 percent of LGUs, and we have observed that support for it has actually been waning.

If you may have noticed from the presentation of Director Manuel Gotis of the Bureau of Local Government Development (BLGD) of the Department of the Interior and Local Government (DILG), some LGUs (and I wonder which ones?) are saying that GAD Planning and Budgeting is unnecessary. Is it really unnecessary? This is why I asked Mr. Godofredo Reteracion, City Planning and Development Coordinator (CPDC) of Escalante City if they were part of this survey, but they said no. I asked the CPDC of Bacolod

¹ An edited transcript of the presentation of Ms. Celia Flor, Councilor, Bacolod City and Executive Director, Development for Active Women Networking (DAWN) Foundation.

City the same question and the answer was likewise no. So I do not really know where the DILG people have been getting their data saying that LGUs consider GAD Plans as unnecessary.

Maybe there is a lack of appreciation for GAD Plans because people and the LGUs themselves do not seem to know the mechanisms and processes for GAD Plan implementation. But then, I think it is the DILG's role to assist LGUs in facilitating Gender-Responsive Planning and Budgeting (GRPB).

Some other challenges in the implementation of GAD Planning and Budgeting include:

1. lack of local level gender disaggregated data;
2. the resistance of LGUs to "outsiders" looking into their budgets and where these go; and,
3. lack of appreciation on the part of LGUs for the concept and processes of gender mainstreaming.

As Director Gotis said, LGUs are burdened with so many plans such that GAD planning and budgeting is complied with as a token planning with weak links to the database on the local situation of women and men, girls and boys.

Inputs Needed for Gender-Responsive Planning and Budgeting (GRPB)

What are the needed inputs to Gender-Responsive Planning and Budgeting (GRPB)? These are the following: (1) sex-disaggregated data; (2) situational analysis or a look at conditions of women and men, girls and boys; and, (3) a look at the positions/status of women and men.

The standard CBMS looks at household conditions which can be linked to manifestations of gender bias. On the other hand, the enhanced GRPB-CBMS does not only take a look at positions/status of women and men, girls and boys, but also looks, to an extent, at the power relations and influence in decision-making.

So under this concept, we look at household roles. We look at the behavior pattern differences between women and men, girls and boys within the household to determine what reproductive roles are being performed by both women and men within the household. So that if you have a basic data on these, then you can monitor how the

patterns change so that eventually, you may be able to put interventions so that roles can be balanced within the household and free women from multiple burdens. We also looked at asset ownership as well as community and political participation.

Results of the Survey

These are some of the results of the survey:

Health indicators

- Almost half (49.59 percent) of the household population does not have access to safe water.
- 59.42 percent of the household population does not have access to sanitary toilets.
- Only 6.9 percent of female children and 5.24 percent of male children aged 0-5 years old are malnourished — attesting to the positive results of a meaningful feeding program by the City Health Office.

Education indicators

- 22.32 percent of girls (1,631) and 26.27 percent boys (2,049) aged 6-12 years old are not attending elementary school.
- 44.08 percent girls (1,958) and 61.02 percent boys (2,927) aged 13-16 years old are not attending secondary school.
- 6.42 percent females (2,091) and 6.91 percent males (2,339) aged 10 years old and above are illiterates.

During the community validations, the primary reason given for non-attendance in schools is both male and female children's roles in helping the family earn/augment the family income. While more male children skip school, the more pressing issue here is that both (86.79 percent) are forced to skip school in order to help the family earn. With their right to be in school hampered, these children's opportunity to develop themselves is also jeopardized.

Violence against women and children (VAWC) and other crimes

Responses to this indicator have not been encouraging as expected, as some deal with sensitive issues touching on personal relations within the households. A look at the Department of Social Service and Development (DSSD) and Police reports as well as FGDs (focused

group discussions) reports gave a better picture of the issue of VAWC incidence.

Household activities by sex

While we used the main household profile questionnaire (HPQ) for all households in Escalante City, we picked two barangays as pilot areas for the added gender rider through which we inquired about the household activities of both women and men members of the household.

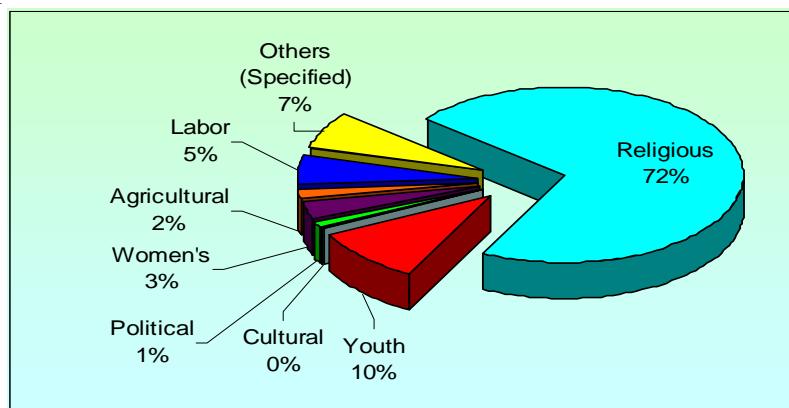
Household activities by sex, Barangay Jonobjonob and Old Poblacion

Despite all the gender advocacy and gender sensitivity trainings that have been undertaken not only for LGUs but for other sectors as well, females within the households, whether adults or children, are still having more reproductive functions at home.

Community and political participation

- 96.7 percent of the registered voters in Escalante voted in the last election. In terms of sex of voters, there were more males than females.
- About 96.4 percent of registered voters among females voted in the last election.
- 97 percent of the registered voters among males voted in the last election.
- Women's group participation in terms of organization is only 3 percent.

Figure 1: Distribution of Community & Political Participation in Escalante City



Asset ownership

- Asset ownership is an indicator of control of resources and benefits, and may be linked to power relations and decision-making capacities for women.
- Respondents' answers seem to reflect the sense of "right to ownership" of both women and men to properties and assets within the home even as owner registration/titles to such were not determined by the survey.

Economic participation

- Data shows that women are contributing to the economy as wage earners, skilled and unskilled workers, employees, entrepreneurs, etc; at the same time, they are still burdened with more of the reproductive work in the households.
- Sex disaggregation of data on employment, income and skills helped "visibilize" women's contributions to the local economy.
- The data should also help the LGU identify where the women are in the economic arena (especially the more marginalized and those who are more in need of skills development). It should also help LGUs create policies/programs that would help women develop their capabilities and capacities, be better equipped as economic development partners, and be in control of the fruits of their labor.

Employed persons by type of occupation

- Laborers and unskilled workers constitute the highest percentage (40 percent) of employed persons in the labor force.
- Most employed females are engaged as laborers and unskilled workers (33.4 percent), service/shop/market sales workers (28.6 percent), and farmers, forestry workers and fishermen (14 percent).
- Most employed males work as laborers and unskilled workers (43 percent), and farmers, forestry workers and fishermen (27.5 percent).

Employed persons by industry group

- Concentration of employment in Escalante City is in the agriculture, hunting and forestry sectors.
- Most working females are engaged in agriculture, wholesale and retail trade and private household employment.

- Most working males are engaged in the agriculture, fishing and transportation and communication sectors.

Table 1: Distribution of Employed Persons, by Occupation and Sex, in Escalante City

Occupation	Employed Members of the Labor Force					
	Total	%	Male	%	Female	%
Total	28,213	100	19,118	100	9,095	100
Officials of Government & Special-Interest Organizations, Corporate Executives, Managers, Managing Proprietors & Supervisors	781	2.8	478	2.5	303	3.3
Physical, Mathematical & Engineering Science Professionals	1,215	4.3	486	2.5	729	8.0
Technician & Associate Professionals	270	1.0	212	1.1	58	0.6
Clerks	327	1.2	111	0.6	216	2.4
Service Workers & Shop & Market Sales Workers	4,404	15.6	1802	9.4	2602	28.6
Farmers, Forestry Workers & Fishermen	6,532	23.2	5,263	27.5	1269	14.0
Trades and Related Workers	1,283	4.5	899	4.7	384	4.2
Plant/Machine Operators & Assemblers	1,098	3.9	1059	5.5	39	0.4
Laborers & Unskilled Workers	11,274	40.0	8,237	43.1	3037	33.4
Special Occupations	818	2.9	456	2.4	362	4.0
Missing	211	0.7	115	0.6	96	1.1

Table 2: Number of Wage Earners and Average Wage Per Annum in Escalante City

	Total	Male	%	Female	%
Number of wage earners	20,418	13,877	68.0	6,541	32.0
Average wage per annum	PhP30,731.85	PhP30,893.87		PhP30,388.38	

The Barangay Profile Questionnaire (BPQ)

The BPQ looked at the existence in barangays of facilities, structures, services and enabling mechanisms to gender mainstreaming such as GAD Focal Point, GAD Budget, GAD Plan [although this list should be expanded to include more Gender-Responsive LGU (GeRL) tool indicators]. It also added in the list the existence of women's center/desk, day care center, health center (although this should include

checklist on reproductive health services, etc.). It was deemed proper that a city/municipality questionnaire (probably using GeRL tools) should also be administered.

Out of 21 barangays, only 13 have accomplished the BPQ forms. All claimed to have appropriated GAD Budgets, and have GAD Focal Points. Still, all have not produced GAD Plans (which should be the basis of the GAD Budgets and serve as a means to mainstreaming). The city was made to accomplish the GeRL tool as a complement to the BPQ.

Focus Group Discussions (FGDs)

The FGDs were an additional feature to the validation process. It has six objectives:

1. to validate the delivery of programs and services from the municipal and barangay units to the constituents.
2. to “self assess” the impact of these programs and services in terms of:
 - improving the quality of life of the constituents.
 - improving conditions (basic utilities such as water for health, schools for education, etc.).
3. to assess gender responsiveness of the planning and budgeting process (extent of gender mainstreaming done).
4. to validate incidence of crimes against women and children.
5. to validate and discuss patterns of work in the household, ownership of real properties and how this may affect decision making in the household.
6. to discuss political participation of women and men in the barangays and in the city.

Highlights of the Results of the Focus Group Discussions (FGDs)

Table 3 presents the highlights of the results of two sets of Focus Group Discussions (FGDs) – one with members of the community, and the other with local officials.

The FGDs enhanced the CBMS results by asking and discussing gender responsiveness-related and other sensitive questions which cannot be asked during validation exercises held in a larger, broader LGU assembly.

Table 3. Highlights of the Results of the Focus Group Discussion

Delivery of social services	<ul style="list-style-type: none"> • participants benefited from the following programs: <ul style="list-style-type: none"> - Free general examination for employees which started last year [X-ray, FBS (fasting blood sugar), bone scanning, hepatitis, urinalysis, ECG, cholesterol, liproviral, lipid profile, body-mass index (BMI)]. The examination is also available to the barangays for a minimal charge. - Improved farm-to-market roads helped in the fast transport of our farm products.
Improving conditions of women and men	<ul style="list-style-type: none"> • In our implementation of Republic Act No. 9262, there is a heightened awareness of the law among men; thus, we observed the minimized number of VAWC cases. • There is an improved participation of women in community affairs. • With the improved condition of the roads, cases are easily and immediately acted upon. • The district is represented by both boys and girls in terms of promotion; they are given equal chances in terms of hiring. We adhere to the policy of DepEd order that we select without biases to sex. • They can now vote on their own as they are now literate. • There are adults who expressed their willingness to go to school. • Yes, now women are helping their husbands earn more. • The center helped me a lot in my work as I am able to put up my visual aids. Professionally, I attended seminars and there is an increase enrolment of the preschoolers. The children have a play area. • The support for the fisher folks, particularly the giving of motors, helped them lessen their stress in fishing as they are no longer using oars. They are also able to go farther and look for more catch. • The socialized housing projects will give security to the beneficiaries particularly those who have long been squatters. More so, the beneficiaries now are farmers.
Participation in the planning and budgeting processes	<ul style="list-style-type: none"> • In my district, I have not been asked about the budget. • In our department, we confide at the district level; we involved all the school heads in the planning and implementation of the different programs. The school heads were there and we meet regularly once a week for follow-up and monitoring. • We were not involved in the legislative as the budget came from the office of the vice mayor, and it is all prepared when submitted to the executive. • Only our head was involved in planning and budgeting. • Being members of the city development council, barangays are consulted in planning for the 20% Development Fund. • In our office, it's already a practice to solicit from each one of us contributions to the plans, programs and budgeting; but I cannot speak for other departments if they do the same thing.

Table 3 (Cont). Highlights of the Results of the Focus Group Discussion

Incidence of and reporting of VAWC	<ul style="list-style-type: none"> • Yes, last March 4, 2007. • A participant admitted to be a victim of domestic violence. • Yes, just last night. • Not all incidence of violence are reported. • There is a system of reporting, however, because if the victims do not want to report the incident, neither do we report. We would only report when the woman will shout for "help"; • We report the incident to the tanod, then to the Kapitan, and to DSWD. • Sometimes, the parties involved would refer the reporting to a barangay leader; being perceived as their personal or family friend contributes to low number of reported cases before the authorities. • A participant would only report if the incident referred to her happens again. • There is a different protocol in reporting a rape case. It is directly referred to DSWD, or only selected officials are called to help in facilitating the case.
Household patterns	<ul style="list-style-type: none"> • All participants think that there is a need to balance the work or role of men and women, boys and girls in the household. • The wife is not present all the time to attend the needs of the family. • After all, there is no work exclusive to each sex.
Asset ownership	<ul style="list-style-type: none"> • Yes, men tend to decide on the disposal of properties even though they're owned by both husband and wife; • Between men and women, it is expected that men have the "say" in property matters. • My husband ordered me to leave the house although I owned it. • If it is registered under the name of both husband and wife, the woman has a sense of security that her husband will not easily sell the house.
Political participation	<ul style="list-style-type: none"> • Men and women need to have equal participation in politics so that women have opportunity to deal with their problems just like men do. • To give meaning to fairness. • We would like women not to be burdened; we (men) will be the ones to earn for them. I would still like to see more men than women in politics.

Recommendations

Based on the experience of Escalante City in the implementation of the GRPB-CBMS initiative, we recommend the following:

- Gender Sensitivity Training (GST) for the Technical Working Group (understanding of concepts would help "sensitize" questionnaires, processes of data gathering, etc.).

- Train only regular LGU personnel so transfer of knowledge is sustained.
- Sustained advocacy with the LGU executive and legislative bodies.
- Gender and Development (GAD) assessments of sector budgets and programs should be part of the process.
- Strengthen participation of sectors, particularly women, in all phases of the planning and budgeting processes.
- Strengthen the organization of women groups and other marginalized sectors of the community.

In the light of the upcoming Rationalized Planning System (RPS) for LGUs, an engendered CBMS as basis for planning would facilitate gender mainstreaming and integration of all other sectoral concerns within the system.

Improving LGU Planning and Budgeting Capabilities Through CBMS in Escalante City

*Godofredo Reteracion**

Profile of Escalante City

Created seven years ago on 28 February 2001, the city of Escalante is one of the 13 cities of Negros Occidental. It is located at the northeastern tip of the province, some 95 kilometers away from Bacolod City, the provincial capital.

It is a coastal town with a land area of 192.76 square kilometers — equivalent to the combined land areas of the cities of Quezon, Pasay and Pasig in the National Capital Region. It has a population of 86,580, which is 18 times smaller than that of the City of Manila. Its municipal waters constitute an area of 230 square kilometers, more or less.

One of its comparative advantages is the presence of port facilities, making it one of the two gateways of Negros Occidental to the Island of Cebu.

Neither the full implementation of the Comprehensive Agrarian Reform Program (CARP), nor its conversion into a city has changed the complexion of Escalante's local economy. Economic activities are still mainly agricultural, with 47 percent of the city's total labor force engaged in agriculture. Among its agricultural activities, sugarcane production, as in most part of the province, continues to predominate. In fact, roughly 60 percent of the total arable land of the city is devoted to sugarcane farming.

* City Planning and Development Coordinator (CPDC), Escalante City, Province of Negros Occidental

It is not surprising then that 53 percent of its employed labor force have seasonal, temporary or piecemeal employment, rendering them unemployed during off-season, which lasts from five to six months each year.

Other gainful economic activities in the City are fishing, aquaculture, and wholesale and retail trading. The manufacturing sector is insignificant, with an employment share of only 3 percent — compared to the City Government's share of roughly 3.5 percent of the total labor force of 28,213.

CBMS Implementation in Escalante City

A. Rationale

Data is a basic ingredient in the planning, budgeting and impact monitoring processes. This basic ingredient must be available in order for a local government unit (LGU) to efficiently and effectively allocate its limited resources, design responsive programs, projects and activities, and monitor and evaluate their program/project impact on their constituents.

Like most other LGUs, the LGU of the City of Escalante lacks this basic planning ingredient. It did attempt in 2004 and 2005 to generate by itself the required information but failed, mainly due to lack of expertise and the absence of effective software for data processing, analysis and interpretation.

The entry of the Community-Based Monitoring System (CBMS) into the picture — when Escalante was chosen as a pilot area for the implementation of its enhanced instruments and training module for local planning and budgeting — was a welcome development for the city's LGU.

B. Start of Implementation

The CBMS implementation in Escalante started in March 2006 when the City Council through Resolution No. 06-048, dated March 6, 2006, approved the Memorandum of Agreement (MOA) between the City and the PEP-CBMS Network Coordinating Team.

To help implement the project, the Team engaged the services of a local NGO, the DAWN Foundation, which

insisted on and secured the inclusion of “Gender” as one of the areas to be assessed in the project.

C. CBMS Questionnaire

Both parties agreed upon a 12-page questionnaire designed to capture comprehensive data on the socio-economic conditions of the residents. To capture desired data on Gender, a two-page questionnaire prepared by the DAWN Foundation was added to each regular questionnaire to be administered in target areas.

D. CBMS Coverage

The project aimed to gather data from each of the estimated 19,000 household population (18,935 to be exact) in all the 21 barangays of the city. This process was intended to serve as a census enumeration, rather than a survey.

Moreover, a 2-page questionnaire on gender was administered in only two barangays among the 21 – namely, Old Poblacion, a coastal barangay, and Jonobjonob, an inland barangay.

E. Data Enumerators

The City utilized the city/barangay health workers to do the actual data gathering. The health workers were numerous, coming from the *sitios/puroks* where they were assigned. Being in this position, they knew most if not all of the target respondents.

To capacitate them in data gathering, a 3-day orientation seminar was conducted for the pre-selected health workers, together with barangay midwives. Those found capable were selected as enumerators. Each one was to be given an incentive of PhP15 for every properly-filled up questionnaire. The midwives, who were tasked as field supervisors to review the filled-up questionnaires submitted by health workers, were to be given a PhP3 incentive per questionnaire.

F. Project Cost

The project cost was a shared responsibility. The City Government shouldered the cost of questionnaire reproduction, the incentives of data gatherers and field supervisors, the wages of data encoders, and other related operating expenses. The city appropriated a total of

PhP720,000 to ensure proper project implementation and completion. Computed on a per-household basis, the project cost for the City was PhP38 per household.

G. Data Encoding

A distinct advantage of the city in this regard was its Barangay Computerization Project through which each barangay was given a computer set together with a city-paid computer operator. The encoders were provided appropriate trainings on CBMS software, including map digitizing. Thus, the data encoding aspect of the project implementation did not meet any serious hitches.

H. Data Validation

To validate the data generated, CBMS results per barangay were presented in public hearings that were held in the respective barangays. Attendance of barangay officials was required, while sitio/purok leaders, school heads or their representatives, health workers, and other community leaders were urged to attend.

After the completion of the barangay validation process, the results were consolidated into one city-level report. The report was again presented in a public hearing with city officials, Department of Education(DepEd) officials, representatives from the Civil Society and Private Sector Organizations, and other stakeholders who were invited to attend. After corrections were effected here and there, the City CBMS Report was finalized.

Main Issues/Problems in CBMS Implementation

One issue in the CBMS project implementation in Escalante pertained to the use of English as the language for the questionnaire. This issue stemmed from the fact that most of the data gatherers — the city/ barangay health workers had low educational attainment. Most completed only secondary education, some reached only the elementary level, and only a handful reached college level. So it was highly probable that many of them had encountered the problem of properly understanding the content of the instrument. The 3-day orientation seminar and training, as well as the questionnaire's

vernacular (translated) version given to each data gatherer as reference did help, but did not entirely solve the problem.

The other issue was the length of the questionnaire. At 12 pages long, the questionnaire, on the average, took 40 minutes for the respondent to answer. This was seen as simply too taxing for both the interviewer and the interviewee. It was felt that the information sought should have been reduced to the basic minimum.

Still another issue pertained to the data gatherers. Although the distinct advantage of utilizing the health workers was well appreciated, it was felt that the selection process should have been more stringent, and the training longer to ensure data gathering accuracy.

Key CBMS Results

A. *On Population Growth*

The results showed that the city population was increasing by no less than 1,200 a year, or at a rate of 1.58 percent annually. This confirmed our misgivings against the National Statistics Office (NSO) data for 2000 — which showed a negative population growth for the city. The 830 decrease in the city population per the 2000 Census meant a reduction in Escalante's Internal Revenue Allotment (IRA) share from the National Government by no less than PhP8 million a year since 2003.

B. *On Poverty Incidence*

The data on poverty incidence came as a shocking revelation: at 74.4 percent, the city's poverty incidence was 3 times higher than the national average of 24.4 percent.

This "revelation" reflected something else. Although admittedly poverty incidence in the City is definitely high, it should not have been as grave as how the data depicted it. There could have been something amiss somewhere. Or it could have been the mindset of the respondents — as people in rural areas are not usually keen about the monetary unit of measure. Thus, it was highly probable that many of the non-cash income they generated or received and consumed directly might not have been taken into account in their "measures" of monetized income. Thus, in this case, people may not really have been as "poor" as they "thought".

C. On Education

The survey results showed that the literacy rate of the city improved from 88 percent in 2000 to 93 percent in 2006 (the year the survey was conducted). Of the 7 percent illiterate, or a total of 4,174 individuals, there were more males than females.

Data by age bracket was also interesting. In the age bracket of 65 years old and above, there was a higher percentage of female illiterates than male. However, as the age bracket became younger, the percentage of female illiterates became smaller. This could be interpreted to mean that in our locality, there has been a positive shift in the education of women. In other words, more and more women are gaining greater access to educational opportunities over time.

The enrollment rate for children 6-16 years old was disturbing. Some 24 percent of children 6-12 years old were not attending elementary school, while 53 percent of children 13-16 years old were not attending high school. Overall, of children 6-16 years old, 20 percent were not attending school. This suggests that if this trend is not arrested, illiteracy rate in the city will be increasing instead of decreasing.

It would also be instructive to point out that one of the major reasons for school non-attendance is poverty. Among poor families with uneducated parents, a nine-year old child or younger is normally perceived not as a "potential student to educate" but as a "pair of hands" that can help earn money to augment the meager family income. So, child labor is not uncommon in poor rural communities. A child has to work (instead of going to school) in order for the family to survive.

D. On Health and Environmental Sanitation

The survey showed that 49.6 percent of the city's household population had no access to safe water. This was two and a half times worse than the national average. The real problem here is not so much the scarcity of potable water sources as the lack of measures to improve existing or develop new sources of potable water.

On sanitation, 59.4 percent of the total household population had no access to sanitary toilet facilities.

Unsafe water, dirty surroundings, and poverty have a collective adverse impact on the health and lives of inhabitants. Data on morbidity shows that the top ten leading causes are related either to poverty or to unsanitary living conditions, such as upper respiratory tract infection, diarrhea, pneumonia, anemia and abdominal disorders.

The same observation applies to mortality. Among the top ten leading causes of death are pneumonia, tuberculosis, diarrhea, measles and delivery, which are all related either to poverty or unhealthy living conditions.

E. *On Shelter*

The CBMS results confirmed one major problem in the city and adjacent areas – squatting. Roughly 63 percent or more than 6 out of 10 households did not own the lots they occupied but were merely squatting on them (with the tolerance or “tacit consent” of the landowners, of course).

The comprehensive land reform program has made but a small dent in arresting the city’s squatting problem. In addition to insecurity of tenure, 5 percent of the total household population lived in makeshift structures, and roughly 35 percent in temporary shelters.

The city’s shelter program, implemented in collaboration with the National Housing Authority (NHA) and various housing NGOs like Gawad Kalinga, Habitat for Humanity and the Negros Economic Development Foundation (NEDF), has made some headway, but still has a long way to go.

F. *On Employment*

Based on the CBMS data, the unemployment rate was unbelievably low — at one percent (1%) or less. The reason for this may have had something to do with the period when the data enumeration was conducted — which was from September to December 2006. This happened to be the milling season when most if not all of the city’s labor force were gainfully employed — mainly in the harvesting of sugarcane not only in the city but in rest of the province as well.

By industry groups, agriculture accounted for 47 percent of the employed labor force, manufacturing for 3 percent, trade and commerce for 2 percent, and the services sector for the rest.

By status of employment, 46 percent of the employed had permanent jobs, while 54 percent had seasonal, short-term or day-to-day employment.

Forty percent (40%) of the labor force fell into the unskilled category. Female members of the labor force appeared to be better off than their male counterparts — only 33.4 percent of female workers fell into the unskilled category versus the 43 percent for the male workers.

Interestingly, males outnumbered females in the labor force – accounting for 67.8 percent or more than two-thirds of the labor force, versus the females' share of 32.2 percent or less than one-third.

One dimension of the employment data generated thru the CBMS pertained to the city's overseas worker. Two percent (2%) of our labor force — or 570 workers — had employment outside the country. Of this number, 29 percent (166) were employed as domestic helpers and caregivers (all women of course); 16 percent as seafarers, 4.4 percent as factory workers, and the rest (50%) as professionals or skilled workers. Overseas employment brings in fresh money from outside the country, and better financial conditions for the respective families, but it exerts some adverse social effects on women and children.

G. On Peace and Order

Escalante is a relatively peaceful city. This was reflected in the CBMS statistics showing that only 1.08 crimes were committed per thousand population during the survey period. But of the crimes committed, 51 percent were committed against women, and 8.7 percent against children. Of the crimes committed against women, spousal abuse ranked first with a share of 32 percent, followed by rape with 17 percent.

Interestingly also, the CBMS figure on crime and violence appeared smaller than the actual figure reported to the City Social Welfare and Development Office. The reason for this

is that household members, particularly women, tend to hide such information during data gathering.

H. On Women Empowerment

The CBMS results showed that only 3 percent of women in the city were members of women organizations. Most (72%) of them, however, are members of the city's religious groups which tend to promote women's welfare.

Use of CBMS Results in Planning and Budgeting

The CBMS in Escalante City has been helping its LGU in identifying priority areas of concern, which include the following:

1. Poverty Reduction
2. Provision of Basic Education
3. Delivery of Basic Health Services (including greater access to safe water and sanitary toilet facilities)
4. Capacity Development
5. Provision of Security of Tenure and Decent Shelter (with bias for women as direct beneficiaries)
6. Women Empowerment

Moreover, the Escalante City LGU has undertaken some policy shifts as a result of the CBMS data analysis. For example, with respect to the 20 percent Development Funds of the City, the new administration has made it a requirement to utilize at least 50 percent of the PhP10.5 million allocation for Barangay Development Assistance.

Likewise, a bigger budget allocation has been earmarked under the 20 percent Development Funds for year 2008 for water system development, cooperative development and farm-to-market roads.

The city has also made it a policy to ensure that the 5 percent Gender and Development (GAD) Budget be spent in accordance with the GAD Plan that was formulated with the assistance of the DAWN Foundation.

The CBMS data on "Gender" has influenced planners into thinking of better ways to promote women's welfare, even in little ways such as:

- Providing a greater number of toilet facilities for women than for men; and,

- Establishing Minding Centers in public buildings for lactating mothers and mothers with infants and small children.

The stark economic realities brought to light by the CBMS results motivated the City's LGU to craft its own Development Agenda towards appropriately responding, wholly or partially, to the many challenges confronting the people of Escalante City. This Development Agenda is encapsulized in the acronym "**HEALERS**" with each letter representing:

Human Resource Development
Economic Growth and Development
Asset Growth and Development
Livability Enhancement
Environmental Protection and Renewal
Responsible Leadership and Citizenry
Social Justice and Equity

Conclusion

The CBMS is a power tool for generating household-based data. But there are some aspects in the data-generating instrument that needs to be improved so that it is able to capture valid, accurate and relevant information.

In spite of its minor weaknesses (which represent areas for improvement), CBMS should nevertheless still be employed by LGUs to establish or improve their data banks, and as their ultimate planning and budgeting tool towards effectively responding to the real issues and problems of their respective constituents.

Insights into CBMS: Some Present Caveats and Future Possibilities¹

Susan Rachel Jose

The National Economic and Development Authority (NEDA) is the national government agency tasked to coordinate the formulation of national and regional development and physical framework plans with local plans as major inputs. Thus, it is important for us to keep abreast of good planning practices at the local level.

We are about to complete the updating of the Medium Term Philippine Development Plan (MTPDP) and the Medium Term Regional Development Plans (MTRDP). In both plans, poverty reduction remains to be a core national development agenda in the next three years. And we recognize that local government units (LGUs) are in the frontline in meeting the poverty reduction targets given their responsibility to plan, allocate resources and implement social and economic services.

All four presentations pointed out the importance of the Community-Based Monitoring System (CBMS) as a tool for generating statistics and information needed for addressing poverty through local planning particularly at the barangay, municipal and city-levels and for analyzing LGU expenditures and budgets as a mechanism for integrating the gender aspect into government budgets.

In particular, the presentation on the experience of Escalante City in implementing the CBMS showed how the system helped in

¹An edited transcript of the comments of Director Susan Rachel Jose, Regional Development Coordination Staff (RDCS), National Economic and Development Authority (NEDA), on the presentations during the session on *Local Level Planning and Budgeting*.

identifying the city's priority areas and concerns and in bringing about policy shifts particularly in the use of the 20 percent development fund and five percent Gender and Development (GAD) Budget.

The presentations have shown that the CBMS provides empirical footing to local plans and budgets. LGUs are able to identify programs and projects as well as allocate resources according to the actual needs of their constituents — taking into account their sector, age, ethnicity, among others. In the process, the use of CBMS data strengthens local government decisions on allocating resources to where these are needed most.

CBMS provides a guide for poverty diagnosis and targeting of poor localities and households. Aside from this, it can be used by communities in conducting needs assessment, planning, monitoring and evaluation of development projects. CBMS data can also be aggregated with municipal, city, and provincial data and/or with national poverty monitoring systems towards crafting better informed pro-poor policies and resource allocation strategies.

Indeed, as local stakeholders are involved in data collection, the process even brings about or enhances the confidence of communities in local governance.

Some caveats, though, are worth citing. While CBMS can be considered a tool for identifying development interventions for the poor, you have to consider the cost of acquiring and maintaining the system -- which is a considerable amount for low-income class LGUs.

The system also serves investment programming. The CBMS can provide information to guide decisions on where to focus government resources and interventions. The information generated will be crucial in program/project prioritization and fund sourcing. Among oversight agencies, this process falls under the investment programming stage that serves to link planning and budgeting. In the future perhaps, the conceptual framework of CBMS can highlight the investment programming process which the Joint Memorandum Circular (JMC) among oversight agencies of the government has already adopted. As it is now, the process of programming funds seems to be done on an annual basis only and this becomes part of the budget process as discussed by Dr. Orbeta.

As we shift to multi-year expenditure planning, it would be good for the CBMS framework to also look into this possibility so that LGUs can plan better in terms of programming their resources. This is where the aspect of resource mobilization comes in. If the budget is insufficient and CBMS results show that several households are still in need of a particular service, then LGUs should not only rely on what their annual budgets can provide but look for other sources of revenues. This is true for Escalante City where 86 percent of the budget is still sourced from the Internal Revenue Allotment (IRA).

As far as development plans are concerned, CBMS serves to enhance situational analyses or socioeconomic profiles. But other factors need to be considered as well — such as population, industry, resource endowments, etc. Why? If we only look at the indicators and at what is visible on the ground right here, right now without clearly understanding what are the visible symptoms and what are the real problems these symptoms are indicative of, we might just be coming up with interventions that would only address the symptoms and not the real problems themselves.

An example pertains to the housing problem. If we just look at shelter as a deficiency in the community, we might just be building shelters. But we have to take into account that some factors that affect people's access to housing could be their incomes. So in order to come up with a rational shelter program, we should complement this with livelihood and financing assistance.

We also believe that when CBMS data aggregation from all different LGU levels up to the national level is complete, data accuracy, validity and consistency will be ensured. Likewise, frequency of data collection can be properly determined and set. But in cases where data aggregation is incomplete, comparison of data will be limited and use of information may be confined to a particular locality only.

At this point, I would just like to mention NEDA's current initiative on local planning – Provincial Planning and Expenditure Management (PPEM). This paves the way for provinces to more effectively plan, identify, prepare and prioritize critical programs and projects and raise and allocate resources to finance their projects. We can see that CBMS will be most useful among the development processes covered by the PPEM guidelines. Its results can substantiate the definition of the planning environment and to some extent,

influence the strategies and priorities of the province. CBMS mechanisms such as aggregation of data and community participation enhance local governance and the vertical linkages of planning. These will facilitate the translation of development goals into programs, projects and activities (PPAs). Assuming its availability at the municipal level, information from CBMS can serve as input in planning and investment programming. Municipalities will be able to determine the needed development programs which they can fund and those that will be elevated to provinces for possible funding assistance or proposed for external funding.

In conclusion, we recognize that the analysis of the planning environment depends on data availability. Ideally, data should be available, consistent and comparable at all levels. Nevertheless, planning decisions are bound to be made despite incomplete data or information. Thus if data is limited, comparisons are acceptable. If data is incomplete or unavailable, information gaps may be filled through local knowledge and stakeholder inputs. Data insufficiency should definitely not stop provincial or local planning from taking place. But it would be best for us, of course, to progressively move on towards a more evidence-based decision-making as more LGUs adopt the CBMS.

Comparing Gender-Responsive Budgeting Initiatives in Selected Countries

*Nancy Spence**

Introduction

My discussion will dwell on the initiatives of selected countries in Gender-Responsive Budgeting (GRB). In the process, we will be looking at the status of GRB initiatives in these countries, noting similarities or differences in approaches. Likewise, we may be able to think of possible modifications to suggest so that the Community-Based Monitoring System (CBMS) can better serve as a tool in gender-responsive budgeting.

In the interest of time, I will be selective as to the global models I will cite for purposes of comparison. For those who are interested, these models can be found more fully in the Gender Budget website (www.undp.org/unifem/gender_budgets/index.html) and the Commonwealth Secretariat website (www.thecommonwealth.org/gender/). Both sites biannually collect data on the progress achieved by Finance Ministries in their gender responsive budget initiatives.

Seven Characteristics of CBMS-GRB Tool

The seven characteristics that make the CBMS-GRB tool attractive and potentially replicable are:

1. its local level application;
2. it front ends the process of responding to felt needs; it is proactive not reactive;
3. it specifically targets and adapts to that targeting;

*Director, Economic and Social Development Affiliates (ESDA), Canada

4. it is participatory;
5. it can target sectoral area budgets that matter to women (health, education and home affairs);
6. it can be issue-oriented; and,
7. it can be broadened to serve as a development tool.

I will now describe each of these characteristics in more detail and cite examples of other GRBs in other countries with similar or different approaches and scopes.

1. Its Local Level Application

The value of CBMS as a policymaking tool has been highlighted especially in decentralized countries where local governments have been handed over enormous control and responsibilities in terms of governance functions, government services, policy formulation and efforts to chart their own road to development. The CBMS infuses an empirical footing to local plans and budgets.

Other Models:

Different? Largely, GRBs are seen at the national level with the primary players being the Ministries of Finance in over 54 countries (20 of which are Commonwealth according to the latest Commonwealth report from the Finance Ministers Meeting or FMM). GRB usually takes the form of a Ministry of Finance Call Circular (as in Tanzania and Malaysia) or a Gender Budget Statement for ensuring that gender equality (GE) is taken into consideration by government departments. There is a possibility that the number of Finance ministries getting involved may only be “window dressing” by some countries. Nevertheless, South Africa and India stand out.

Similar? GRB work in Morocco started in 2002 with an assessment study of the possibilities. The assessment report stressed the importance of working with and building on other reform processes, rather than seeing GRB as a separate initiative. The GRB initiative has engaged in capacity-building

and training activities for senior planners and budget professionals from the Ministry of Finance and other line ministries in the areas of gender analysis and GRB. It has published and disseminated a guide on GRB and performance budgeting, and a handbook on GRB for parliamentarians and non-governmental organizations (NGOs). The initiative has also supported the development of gender-sensitive indicators as part of the performance-oriented budget reform. In 2005, workshops were conducted with the participation of the Ministries of Health, Education, Finance and Agriculture and Rural Development to encourage the development and use of gender-disaggregated data throughout the policy and budget cycles. Special emphasis was given to monitoring and evaluation. One of the highlights in 2005 was the production by the Ministry of Finance of a Gender Report. This was presented as an Annex to the Annual Economic and Financial Report for Year 2006 which accompanied the presentation of the Bill of Finance (the Budget Law). The Ministry aimed to institutionalize the Gender Report as part of the budget documents by expanding the work each year until it would cover all sectors. In 2006, the Gender Report covered the following policy areas: Education, Health, Agriculture, Justice, Family, Water, Infrastructure, Energy, Transport, Housing, Employment, Planning and Finance. During its first years, the Gender Report focused on the sectors considered most important in achieving the Millennium Development Goals (MDGs).

Different? India Gender Budgeting Cells: Several years of sustained advocacy and partnerships between the Department of Women and Children, UNIFEM (United Nations Development Fund for Women) and women's organisations encouraged India's national government to reaffirm the importance of gender budgeting. For the 2006-2007 Union Budget, the gender budget statement was expanded to 24 demands for grants of 18 ministries. Each ministry identified two categories of allocations. The first type consisted of allocations solely targeting women or girls. The second type

consisted of allocations of which at least 30 percent was targeted at women or girls. Meanwhile the number of gender budget cells was expanded from the earlier 18 to 32 ministries. In Karnataka, another state, elected women representatives in the city of Mysore used gender budgeting to prevent a proposed budget cut targeting women's programs. They ended up securing a 56 percent increase in funding instead, and started advocacy for more transparent public information in the future.

Similar? Uganda Tracking of Debt Financing Poverty Action Fund:

In 1997-1998, after Uganda joined the HIPC (Heavily Indebted Poor Countries), the government created the Poverty Action Fund (PAF) as a way of ensuring that the resources released through debt relief would be spent on priority sectors for reducing poverty. PAF funds are provided to districts in the form of conditional grants and are meant to be spent according to guidelines issued by the central Ministries. In 2000, the Uganda Debt Network (UDN) started establishing grassroots structures, called Poverty Action Fund Monitoring Committees (PAFMCs), to ensure that these funds were being received by districts and used properly. The committees are made up of volunteers from civil society groups. In 2005, UDN was supporting PAFMCs in seven districts of the country, and this number continues to grow.

Several Latin American Models: Working with UNIFEM, a number of local level models have emerged in Latin America using NGOs working with local government units. Some examples include:

- In Cuenca, Ecuador, local authorities issued a decree that makes it a priority to hire women for infrastructure projects. The city's budget for the past three years has included specific funds to foster women's equality and to back or support a law entitling pregnant women and newborn babies to free medical care; for its part, the government has joined local women's groups in programs seeking to curb violence against women (VAW).

- Another municipality, Esmeraldas, has set up a fund for local women's micro-enterprises and created an Equity Council to give advise on and monitor municipal gender policies.
- Similar models exist in Bolivia, Brazil and Argentina.

2. It Proactively Front Ends the Process for Responding to Felt Needs

Considering all the efforts being taken to look at how CBMS can be fine-tuned for planning and budgeting purposes, and the way governments — with the use of CBMS — prepare, itemize and focus budgets to directly relate them to priority sectors, issues, investment areas and the strategies to be employed — all these suggest that CBMS is proactive, not reactive.

The current CBMS methodology has been successfully aiding in program planning, resource allocation, poverty diagnosis, beneficiary identification and impact monitoring. It pinpoints the priority areas and the targeted beneficiaries in the lead up, not analyzing after the fact like arm chair quarterbacking. The examples of mismatched housing and health expenditures versus real needs clearly show that CBMS is a tool that can be used to adjust proactively to local-level expressed needs. Its methodology can help systematically identify local issues that need to be prioritized, to identify who among the prospective beneficiaries should be prioritized, and how programs should be designed to address the problem.

Other Models: Most models are at different stages: involved in tracking COSTS, "following the monies" but "after the fact".

Different? Examples: HIV/AIDS & HOME-BASED CARE (HBC) — Botswana, Mozambique and Zimbabwe. In 2003, UNIFEM funded and coordinated research in Botswana, Mozambique and Zimbabwe on the time and money cost to government, organisations and carers in organisations and

households of the Home-Based Care model of dealing with HIV/AIDS-afflicted individuals. The research was planned and implemented by a combination of government representatives, people from NGOs involved in HBC, people from NGOs who have done budget work, representatives of women's organisations and representatives from the academe. The researchers calculated the value of the work done by a typical HBC worker (all women, no men) in her country by multiplying the number of hours worked by the average wage paid to nurse aides, domestic or similar workers. The monthly value was 270 Pula in Botswana, US\$130 in Mozambique and Z\$403 550 in Zimbabwe. However, researchers felt that using the wages of nurse aides and domestic workers trivialises the work of the HBC workers, given the range and variability of HBC tasks and considering as well the psychological and other stresses involved in the job. In addition, they noted that the wages for all these jobs are based on assumptions about women's work. Unfortunately these assumptions generally tend to undervalue the work done by women — whether in the market or at home.

3. It Specifically Targets and Adapts Tools to That Targeting

Analyzing government budgets through a gender lens allows planners to examine and formulate them effectively – with a particular focus on how the budget affects or will affect women and men, girls and boys differently. This has meant extensive use of sex-disaggregated and customized outputs with considerable adaptation of existing core poverty indicators both in substance and in process.

This has been undertaken through: very detailed adjustments in adaptations including modification to questionnaires and processes; incorporating a special module on local planning & budgeting and training & capacity building; pilot testing; enhanced information and data bases and partnering; redeveloping a framework, rider, data collection encoding and digital consolidation; focused group validations to determine more root causes; and, benchmarking models & refinements of indicators.

Other Models:

Different? I have not seen any other form of a people's dedication to the application of CBMS tools and its adaptation to peculiar characteristics of different local communities like what I have seen in this country. The collective Philippine example appears unique, that is why a lot of lessons can be learned from it – especially considering the various difficulties with different levels of complexities that have been encountered by barangay stakeholders in the process.

4. It Is Participatory — It Utilizes Civil Society

The use by CBMS of rider questionnaires and focused group discussions (FGDs) means that qualitative aspects and perceptions can be integrated in the survey to overcome often special inhibitions or dominant conservative community players and reactions. This is invaluable in gender-responsive budgeting as it can draw out deeper gender-based root causes and men's and women's personal perceptions in ways that usual tools cannot.

Other Models:

Similar? Working in close partnership with women's organisations and scholars, UNIFEM has helped pioneer cutting-edge work on GRB that is being picked up by both local and national governments. Advocacy and training for government officials, parliamentarians and women's groups, the development of budget analysis tools and wide sharing of knowledge on what works have helped the concept catch on, resulting in changes in a number of countries.

In Bolivia, the Law of Popular Participation of 1994 established participatory development of local development plans (LDPs) and vigilance committees as two of the main citizenship participation mechanisms at the local level. The Instituto de Formación Femenina Integral (IFFI) of Cochabamba has mobilized and trained members of local

women's organizations to use these opportunities to bring a gender perspective into local public policies. As a result of the advocacy campaign organized by the IFFI, an article was introduced in the municipal budgetary guidelines to oblige municipalities to allocate budgetary resources to programs that promote gender equality and provide services for women victims of violence.

In Mexico, extensive mobilisation of women's groups, spearheaded by UNIFEM partners, persuaded the government in 2003 to earmark 0.85 percent of the total national budget for programs to promote gender equality. Since then, 14 ministries have been required to report quarterly on these programs. In the states of Morelos, Queretaro and Chiapas, the Ministry of Health has used a guide for integrating gender issues in health budgets — produced by the national health ministry with UNIFEM assistance — to improve the health services it offers to women and to channel more resources into priority health needs.

In 2001, Recife (Brazil) created the post of women's coordinator to assist in addressing women's demands for gender mainstreaming in the municipality and to promote the participation of women in public politics. Women who attend public assemblies have called for budgets to address issues of violence against women, women's poverty, participation, racial inequality, and safe abortion care.

5. It Can Target Rights (in Sectoral Areas Important to Women) by Its Disaggregated Data and Beneficiary Impact

Models:

Similar? Mexico Budget-Related Rights Work. “*Dignity Counts*” uses the health budget in Mexico as a case study to illustrate how budget and rights work can be combined. The analysis focuses on government's obligation with respect to:

- progressive achievement of the right to health;

- full use of maximum available resources to achieve fulfilment; and,
- specific guarantees in the health-related article (number 12) of the International Covenant on Economic, Social and Cultural Rights (ICESCR).

"In terms of progressive achievement, analysis showed that the federal government increased the amount allocated to health between 1998 and 2001, but that by 2002, the amount had fallen back near to the level of 1998. The Mexican NGO Fundar then disaggregated the total amount into the different institutions as each type of institution serves a different part of the population. They found out that in 2002, 65 percent of total health spending went to people who fell under the social security system, despite the fact that these people accounted for only half of the total population. In terms of use of maximum available resources, Fundar found out that spending on health had decreased relative to the Gross Domestic Product (GDP) and relative to total government spending. In contrast, they found out that spending on areas not directly related to human rights (such as Finance, Foreign Affairs and Tourism) had increased.

For the ICESCR analysis, Fundar looked at what government had allocated for the reduction of stillbirths, infant and child mortality; for prevention and treatment of diseases; and for creating conditions to ensure that health services and care were available. Regarding the program which covers maternal health, the organisation found out that the budget allocations were biased against the poorest states. Fundar has a project which focuses on budgets and maternal mortality. It works on this project in alliance with women's organisations which focus on reproductive health and rights. The alliance has achieved very concrete results. In the first year of the project, decentralised (state) allocations for maternal health increased by 900 percent.

6. It Can Be Issue-Oriented in Interventions

The CBMS-GRB methodology can be used to facilitate the assessment of the gender responsiveness of LGUs from the way they create development plans to the equity of the interventions to suit the divergent needs of their constituents.

Other Models:

Budgets that focus on money costs can overlook costs that do not have automatic price tags attached. One model has been tracking “hidden costs associated with unpaid work”—a huge issue to women as it: (1) disguises the real contribution women make to national accounts; (2) acts as a burden to their time spent on productive tasks; and, (3) masks the subsidization that their labour gives to government initiatives. There are, nevertheless, many ways in which government budgets are subsidised by unpaid work. For example, when government cuts back on public budgets for health services, it is people (mostly women) in the home who have to make up for the shortfall. This care may appear “free” to government, but imposes a cost on those who provide it and on their families. A World Health Organization (WHO) pamphlet designed for nurses and midwives suggests that as much as 90 percent of care for those who are ill is provided in the home.

Example: Peru: The Glass of Milk Programme

A UNIFEM-funded GRB initiative in the municipality of Villa El Salvador, Peru calculated the value of the unpaid work done by women in delivering what the municipality calls “self-managing” services. One example of such a service is evident in the Glass of Milk program. In this program, the municipality pays for basic materials and the milk, but women in the community provide the labour involved in organising the program and in distributing the milk to beneficiaries. This program accounted for more than a third of the municipal budget, or US\$3 million, at the time of the research. The research team interviewed women beneficiaries to find out how much time they spent working on the

program. They then multiplied the number of hours by Peru's minimum wage. When they compared this amount with the total budget for the Glass of Milk program, they discovered that if the women's work had been paid for, it would have added 23 percent to the total budget. This unpaid care work contribution was in addition to contributions by the community to cover expenses such as fuel, sugar and utensils. In effect, the women involved in this program were subsidising the government budget. If they were not prepared to offer their services for free, government would have needed to employ staff to do the work. Similar subsidisation happens when women provide health care to other members of their households and the community. Had this care not been provided free by women as part of their family and community duties, those who were ill would have been more likely to consult government health services for care, and thus would have increased the burden on the government budget.

Example: Addressing VAW in South Africa

Non-government organization (NGO) examination of budget allocations for Gender-Based Violence (GBV) started in the second year of South Africa's Women's Budget Initiative (WBI), with a chapter that looked at how the budgets of the Departments of Safety & Security (Police) and Justice catered to this problem. In 1999, South Africa enacted a new and improved Domestic Violence Act. In June 1998, the Gender Advocacy Program (GAP) organised an information session for NGOs about the WBI and how government budgets are allocated. At a second workshop, GAP and its partners agreed that research was needed to see how much government was allocating to implement the new Act. The research found that some new money was allocated to orient and train police officers and court officers on the new Act. The government also allocated money to produce posters and brochures, and for other publicity and awareness-raising campaigns. A huge amount of the money for these purposes was provided by donors. Three years later, the NGO Centre for the Study of Violence and Reconciliation (CSV) did research in which

they asked police officials how much money they allocated to implement GBV-related work. Again, the allocations were mainly for training and awareness-raising. But there were also some general allocations, for example, for infrastructure that – police said – would help in implementing the Act. In 2005, CSVR decided to find out how much money ought to be allocated to implement the Domestic Violence Act. They did this by asking all the different government officers involved in implementation how long they spent on a typical case. The time was then multiplied by the relevant salary, and the total amount for a single case (R28) multiplied by the estimated number of cases in the country (26,000 orders for protection). They discovered that the South African government had completely under-funded the needs of the programme by up to 75 percent.

7. It Can Be Broadened to Serve as a Development Tool

CBMS has been identified as an aid to decision-makers in policymaking and development. It has gained recognition as a tool that can help in monitoring the achievement of MDGs, in formulating Poverty Reduction Strategy Papers (PRSPs), as well as in facilitating the implementation of international, national and local development initiatives.

Other Models

Different? A PRSP presents the overall poverty reduction plan of the government and should cover all sectors of government, the economy and society. The PRSP should usually be a focus of GRB work in any country which has such a strategy. Because the PRSP is meant to provide the overarching framework for government action (and action of non-government players as well), it should also be the driving force behind the shape of the budget. For GRB, this means that if gender is not adequately incorporated in the PRSP, it will be difficult to achieve a gender-responsive budget. But Gender analysts and activists have also criticised many PRSPs for not mainstreaming gender issues. The World

Bank's gender unit produced a detailed Sourcebook describing how to ensure the gender-sensitivity of PRSPs. Many PRSPs will describe some gender problems, such as lower female enrolment or high maternal mortality. But most neither systematically look at the gender differences across all sectors nor build gender into the proposed solutions. Worst, they are decidedly gender-blind despite the high preponderance of women below the poverty lines.

Similar? Rwanda's PRSP, for example, is generally seen as having been successful in mainstreaming gender, largely as a result of the concerted effort of the country's women. One part of this work focused on collecting and incorporating sex-disaggregated data for use in the report. Later, this became part of the government's budget.

Tanzania's PRSP utilized the Tanzania Gender Network Program (TGNP), a well-respected women's organization, to assist in defining gender issues within the PRSP in Tanzania. TGNP eventually forged a partnership with the Ministry of Finance.

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GAD Plans Must Not Be Taken For Granted¹

Emmeline Versoza

The theme of this session is “*Monitoring the Achievement of the Millennium Development Goals (MDGs) Using CBMS.*”

I think the Community-Based Monitoring System (CBMS) and its gender-responsive dimensions make it possible for us to hope that “*promoting gender equality and empowering women*” would not remain only as Goal Number 3 in the MDG, but would actually cut across all other MDGs. The basic availability of sex-disaggregated data of the CBMS will allow us to track whether we are progressing in achieving this in all the MDGs.

For example, we often advocated with the National Statistics Office (NSO) to sex-disaggregate poverty statistics because they are usually aggregated by households. We have to see that poverty has a woman’s face and if you really make use of the data that is collected, then you should be able to track whether or not poverty indeed has more of a woman’s face or not.

Our problem is when data available at the barangay level, for example, is submitted up to the municipality, city, provincial and regional levels, the resulting collective data becomes aggregated again. So my appeal is please provide us sex-disaggregated data so that we have something to use in improving our planning process.

¹ An edited transcript of the comments of Ms. Emmeline Versoza, Executive Director, National Commission on the Role of Filipino Women (NCRFW), on the presentations during the session on *Local Level Planning and Budgeting*.

Which brings me to the issue of "*Is Gender and Development (GAD) planning really necessary or not?*" The Department of the Interior and Local Government (DILG) reported to us that there are 688 local government units (LGUs) as of year 2006 who have produced their GAD plans. But whether their GAD plans are being submitted for compliance or are actually being used for revising the interventions, programs and services of the different departments to address what the data shows are two different matters.

For example, it has been shown in the case of Escalante City that there are more malnourished girls than boys. We have been seeing this in the Food and Nutrition Research Institute's (FNRI) statistics. But what interventions are being developed to equalize the numbers? Do we still need, for example, one more kilo of rice per child who goes to school or should we give two more kilos to the girls so they can catch up in terms of nutrition? These are the things that we sometimes take for granted.

Packaged programs from national government agencies (NGAs) sometimes just trickle down to the LGUs but do not really do much to address the specific problems faced by communities. The challenge is to have data at the local level and make use of such data through the analytical framework that Dr. Aniceto Orbeta of the Philippine Institute of Development Studies (PIDS) had earlier shown us. These frameworks should be used for revising broad plans and adapting them to the specific situations and needs of any particular community.

Another statistical trend glaring at our faces is the dropout of boys in education. But we have long known that more boys (than girls) tend to and are in fact dropping out of schools. So what interventions should we use to keep them in school? Addressing this situation is particularly important because if we look long term, we do not really like to have a growing number of uneducated or ignorant boys in our population.

Dr. Orbeta showed cross-tabulations — relating different factors together, all of which are very important if we are to have a gender perspective in the analysis of our programs.

So are gender plans necessary? I think GAD plans are necessary and we should be able to analyze through gender lenses the importance of addressing specific women concerns as well as gender equality concerns.

We must also mention the *GERL (Gender-Responsive LGU) Ka Ba?* program. This is a self-assessment tool developed by the NCRFW in cooperation with the Local Government Academy. This tool can actually complement the CBMS.

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Using CBMS for Program Targeting and Impact Monitoring in Minalabac, Camarines Sur¹

Leovigildo Basmayor, Jr.

I am tasked to discuss the topic “*Using CBMS for Program Targeting and Impact Monitoring*”. My discussion will focus on the experiences of my municipality of Minalabac as a pilot area for the implementation of the Community-Based Monitoring System (CBMS) in the Province of Camarines Sur.

Prior to our participation in the CBMS, it was extremely difficult for the Minalabac local government unit (LGU) to zero in on its particular areas of concern because of the mere scarcity of data if not outright unavailability of needed information. Of course, in the past, we used to have the Minimum Basic Needs (MBN) survey, but as everybody here knows, the MBN data is not recognized by national government agencies (NGAs). It has always been said that for us planners and local chief executives, it is a must that we squarely respond to the unmet needs of our people – to what the people truly need — rather than to what the leaders want for their political ends, ambitions or political posturing.

We have samples of CBMS data that we gathered and collated to illustrate the importance of CBMS as a planning and monitoring tool. Let me present to you the case of Barangay Del Rosario in the Municipality of Minalabac, Camarines Sur. In this barangay, we have always encountered health problems year in and year out. Our CBMS data shows that in this barangay, we have a large number of inhabitants

¹ An edited transcript of the presentation of Mayor Leovigildo Basmayor, Jr., Municipality of Minalabac, Province of Camarines Sur.

who have no access to potable drinking water. This is the reason why water-borne diseases are prevalent in this barangay almost all the time. This data was our basis for allocating money for a potable water system. We are already in the process of implementing our Level 3 Water System. The affected areas as identified through the CBMS survey constitute our priority areas for project implementation.

When Typhoon Milenyo ravaged our town towards the end of year 2006, a diarrhea outbreak was spotted and confirmed to have affected one of our coastal barangays. More than eighty percent (80%) of the households in two “sitos” or “puroks” were immediately identified as areas of concern. Referring to our CBMS data, we noted that a substantial number of households did not have sanitary toilets. Our Municipal Health Officer (MHO) confirmed the report that the unsanitary disposal of human wastes was the culprit. After showing our CBMS data to the United Nations Children’s Fund (UNICEF) representative who responded to our call for help, we were given sanitary toilet bowls. The LGU helped the residents in the construction of their toilets. That solved this particular problem.

Two months ago, my town was chosen as a pilot area for the Alternative Learning System (ALS) of the Department of Education (DepEd). A team of ALS teachers from Region 6 accompanied by representatives from the DepEd Central Office came to my office for assistance. They told me that they wanted to conduct a house-to-house inventory of illiterates in one barangay to address the growing problem of illiteracy. They were surprised when I provided them a detailed list of illiterate residents in the identified barangay as well as the list of school-age children who dropped out of school — including their names, ages and household addresses which we culled from the CBMS data. We also showed them our digitized map which they could use in validating the information.

Other agencies and organizations who also requested information culled from our CBMS database are shown on Table 1.

In formulating our local budget – which includes our priorities for the Special Education Fund (SEF), we identify the pertinent items for funding and monitoring purposes with the aid of our CBMS data.

On malnutrition, all our barangays have earmarked a certain amount of money from their respective annual budgets to address their malnutrition concerns, again using CBMS data.

Table 1: Agencies and Organizations who Requested Information from CBMS Database

AGENCIES / ORGANIZATIONS	REQUESTED DATA
1. InfRES Project Office	List of affected person in the subproject areas; income, tenurial status, etc. – used as baseline data on the implementation of the farm-to-market road (FMR) project
2. Save the Children	List of children age 3-12, health status, educational attainment, etc.
3. Kapit-bisig Laban sa Kahirapan-Comprehensive & Integrated Delivery of Social Services [KALAHII-CIDSS]	13+1 Core Indicators
4. National Statistics Office (NSO)	Number of households and total population by barangay
5. World Vision [through the Department of Social Welfare & Development (DSWD)]	List of household head names – for typhoon Reming beneficiaries
6. International Federation of the Red Cross	List of household head names – for typhoon Reming beneficiaries
7. Philippine Charity Sweepstakes Office (PCSO) [through DSWD]	Handicapped Persons
8. PBN TV 5 [through DSWD]	Handicapped Persons (cleft palate)
9. ABS-CBN [through DSWD]	List of household head names – for typhoon Reming beneficiaries
10. Department of Education [DepEd]	Out-of-School Youth, educational attainment – for DepEd National Report
11. Religious Organizations	Household head names, population by religious affiliation
12. Philippine National Police [PNP]	Out-of-School Youth – for PNP report
13. DSWD Province	Number of children 1-6 years old, health status – for project proposal
14. Food Agriculture Office [FAO]	13+1 Core indicators
15. Barangay Officials	List of household head names – for typhoon Reming beneficiaries
16. Businesswoman	List of household heads – for renewal of NFA license
17. Teachers	13+1 Core Indicators – for School Improvement Plan
18. Students	13+1 Core Indicators – for Research Paper and Senior Project

We are proud to tell you that with CBMS data, we now have in our databank the information we need for our planning and monitoring processes. In fact, our database served us very well when we

negotiated for the Infrastructure for Rural Productivity Enhancement Sector (InfRES) Project of the Asian Development Bank (ADB) and the Department of Agriculture (DA). Now, we are ready to implement a PhP91 million rural road project under a seventy percent (70%) grant and thirty percent (30%) LGU-funded sharing scheme.

Meanwhile, we were also able to obtain assistance from the several agencies for our priority projects which had been identified through CBMS (see Table 2).

Table 2. Agencies That Served as Sources of Assistance for Priority Projects

AGENCY	ASSISTANCE
InfRES Project	Farm-to-Market Road worth PhP91 Million
Save the Children	Educational Materials, Toys, Rehabilitation of 3 Day Care Centers worth PhP250,000.00 and Trainings (re: Early Child Care and Dev't., Safe Space – Rehabilitation of Children who are Calamity Victims, Parent Education Session, etc.)
DepEd	Alternative Learning System (ALS)
UNICEF	82 units Toilet Bowls and materials for construction, medicine, mineral water
KALAHII CIDSS	Infrastructure Project (re: Water System, Solar Dryer, Sea Wall, Drainage, Bridge etc.) and Livelihood Projects
Agriculture Social Support & Environment Facilities (ASSEF)	Educational Materials and Utensils and related equipment for Nutrition
International Federation of Red Cross	Food for Work, Housing Assistance (240 units) and Toilet Bowls (34 units)
Philippine Charity Sweepstakes Office (PCSO) [thru DSWD]	1 unit wheel chair
PBN 5 (through DSWD)	Cleft Palate Restoration
Office of the Congressman, 1st District of Camarines Sur	Training on Cellphone and Watch Repair – supplies and materials (Kabuhayan showcase)
United Nations Population Fund (UNFPA) [through the Municipal Health Center]	Reproductive Kit
DSWD Province	Food/Cash for work
ABS-CBN [through DSWD]	Relief goods
World Vision	Relief goods
Student	Web Site

So far, we can honestly say that our CBMS data has been very useful for our planning and monitoring purposes.

Let me again take this opportunity to thank the PEP-CBMS Network Coordinating Team and other concerned agencies — government or otherwise — for helping us. What we are doing together is an honest-to-goodness job to alleviate the plight of the poor and the needy by aiding us first: the planners and implementers. With CBMS, now there is light!

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The CBMS Experience of Pasay City¹

Merlita Lagmay

Introduction: Implementing the CBMS

The City of Pasay started implementing its Community-Based Monitoring System (CBMS) in 2004. It came at a very opportune time for us since we had been in dire need of first-hand information that would help us improve our performance of our governmental responsibilities and functions — especially in planning, targeting, and monitoring. This was the first time that CBMS was pilot-tested in a highly urbanized city. We initially pilot-tested the CBMS in one of our barangays. And when we learned the ropes in the implementation of CBMS, we decided to conduct it city-wide.

In the following year, in March to December 2005, we were able to finish the city-wide implementation of CBMS — covering the 201 barangays of Pasay City.

In March 2006, we were able to release the official results of CBMS during a City Development Council Meeting. All the barangays were given a copy of their CBMS data. Each data package included the results pertaining to the 14 CBMS Core Indicators as well as the analysis of these results. Consequently, the barangays were able to identify their priority problems.

In 2007, we were already able to utilize CBMS data for planning purposes; and this year 2008, we intend to conduct our second round of CBMS implementation.

¹ An edited transcript of the presentation of Engr. Merlita Lagmay, City Planning and Development Coordinator (CPDC), Pasay City.

The city-wide implementation of CBMS in Pasay would not have been successful were it not for the Smart Partnerships that we fostered with our development partners. We acknowledge the guidance and support of the PEP-CBMS Network Coordinating Team who assisted us all throughout the process. Our CBMS implementation was made more meaningful with the involvement of faith-based organizations, the full support of all the line agencies of the city government and the cooperation of the barangay officials.

Results of the 2005 CBMS Survey in Pasay City

The following are the results of our 2005 CBMS Survey:

Table 1. CBMS Survey Results, Pasay City, 2005

Demography	Total Number of Households	Population	Male	Female
	65117	270,130	132,704	137,426
Mean household size	4			
Children 0-5 years old		35,370	18,191	17,178
Children 6-12 years old		37,143	19,252	17,891
Children 13-16 years old		19,204	9,511	9,693
Children 6-16 years old		56,347	28,763	27,584
Members 10 years old and above		212,848	103,167	109,639
Members of the labor force		109,734	67,928	41,804

Meanwhile, Table 2 below summarizes the preliminary results of the 2005 CBMS Core Indicators for Pasay City.

Table 2. CBMS Core Indicators, Pasay City, 2005

	Core Indicators	Magnitude	Proportion
1	Children 0-5 year old who died	64	0.20
2	Women who died due to pregnancy related-causes	1	0.02
3	Children 0-5 years old who are malnourished	28	0.10
4	Households living in makeshift housing	4,218	6.50
5	Households who are squatters	2,440	3.70
6	Households without access to safe drinkingwater	1,160	1.80
7	Households without access to sanitary toilet facilities	1,787	2.70
8	Children 6-12 years old not attending elementary school	8,216	22.10
9	Children 13-16 years old not attending secondary school	5,709	9.70
10	Households with incomes below the poverty threshold	8,933	13.70
11	Households with incomes below the food threshold	2,497	3.80
12	Households that experienced food shortage	785	1.20
13	Unemployed members of the labor force	21,760	19.80
14	Persons who are victims of crime	1,260	0.50

Based on the above results, we were able to identify our Top Four priority concerns – which are as follows:

1. Children 13-16 years old not in secondary school.
2. Children 6-12 years old not in elementary school.
3. Unemployed persons in the labor force.
4. Households with incomes below the poverty threshold.

Uses of CBMS

Based also on our CBMS results, we were able to design programs to address our main problems or priority concerns. We created the Fact-Based Intervention Exchange (FBI-Ex). This is a brainchild of Mr. Rolando Londonio, our City Cooperative Officer. For me, this is actually a Fact-Based Intervention Express. Why “Express”? We like to call it “Express” because this is our immediate response to our constituents’ priority needs as identified with the help of CBMS. Through this FBI-Ex, we match our service providers with our people’s needs. This has been helping our service providers act on these problems.

The CBMS has the following general uses for the City Government:

- For building up the capacities of community members to participate in the development planning and monitoring process.
- For diagnosing poverty.
- For formulating appropriate interventions.
- For resource allocation.
- For identifying eligible beneficiaries.
- For impact monitoring.
- For enriching existing databases.
- For enhancing development plans and profiles.

In particular, CBMS data was used for the following purposes:

- as baseline data for the Pasay City/UNICEF Sixth Country Program for disparity barangays.
- as baseline data for Millennium Development Goals (MDG) monitoring.

- as baseline data in preparing the “Hazard-based Risk and Vulnerability Assessment Guidebook” — used in addressing MDG Number 6.
- as baseline information for the United Nations Economic and Social Commission for Asia and the Pacific (UNESCAP) in conducting the survey for its “Strengthening Life Skills for Positive Health Behavior of Out of School Youth (OSY)” program.
- for targeting beneficiaries of Overseas Workers Welfare Administration (OWWA) “Groceria cum Botika” Project.
- for identifying the beneficiaries of Non-Government Organization (NGO) programs.
- for profiling the city’s senior citizens by the Office of Senior Citizens Affairs (OSCA) of Pasay City.
- the City Planning and Development Office (CPDO) used the data in the training of all Pasay City barangay officials in preparing their Barangay Development Plans.
- for identifying the future beneficiaries of the Philippine Health Insurance Corporation (PhilHealth).

The following table presents a comparative profile of the Pasay City LGU’s actual process of designing programs before and after the CBMS was implemented:

Table 3: Comparative Process of Designing Programs: Before and After CBMS

PROGRAM DESIGN	PRIOR TO CBMS	WITH CBMS IN PLACE
Situational Analysis & Problem Identification	2nd hand data Projections Perception Vague	1st hand data Actual survey Personal account Clear
Targeting	Shotgun approach Compliance Repetition	Specific and sure Needs-based
Monitoring	No benchmark Generic Indicators Hard to monitor	With clear benchmark Clear set of indicators Monitoring is easier as program impact can be assessed

As may be noted in the table above, prior to the implementation of CBMS, the Pasay City LGU had to rely on second hand data, projections and vague perceptions in the process of identifying community problems and analyzing the situation. It used the shotgun approach and repetitive targeting practices. And in monitoring performance and results, it used only generic indicators and not benchmarking – thus, finding it difficult to conduct the monitoring process. After CBMS was implemented, the Pasay City LGU benefited from using first hand data based on an actual survey and on personal accounts – and thus was able to clearly identify the community's problems and analyze the situation properly. Its targeting became needs-based, specific and sure. And with clear benchmarks and a clear set of indicators, the LGU found it easier to monitor its performance and assess the impact of the programs it implemented.

Next Steps and Challenges Ahead

For the Pasay City LGU, its next steps and challenges ahead are as follows:

- Implementing the second round of CBMS this year.
- Advocating for a more liberal use of CBMS data in planning, policy and decision making.
- Encouraging the private/business sector to directly help the poor through government linkage, with the aid of CBMS data in identifying possible beneficiaries.
- Using CBMS data in arresting the vicious cycle of poverty in blighted areas.
- Advocating for the legality of using the 20 percent Development Fund for non-infrastructure programs to directly address the problems identified by CBMS.

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Uses of the Community-Based Monitoring System (CBMS) in the Province of Camarines Norte

*Madonna A. Abular**

Profile of Camarines Norte

Found on the northwestern coast of the Bicol Peninsula which forms the southeastern section of Luzon, Camarines Norte is bounded in the north by the Pacific Ocean, in the east by the Pacific Ocean and San Miguel Bay, in the west by Lamon Bay, and in the south by the adjoining provinces of Camarines Sur and Quezon.

It is one of the six (6) provinces that constitute the Bicol Region and is composed of 12 municipalities and 282 barangays.

Its capital, Daet, is 365 kilometers southeast of the City of Manila, a 7-hour trip by land or 45 minutes by air.

It has a projected population for CY 2008 of 533,173 with a growth rate of 1.5 percent per annum. Some 60.46 percent of the population can be found in rural areas, and the remaining 39.54 percent in urban areas.

Its total land area (of about 232,007 hectares) accounts for roughly 13 percent of the region's total area and 0.077 percent of the country's total land area. The province's topography is generally rugged, characterized by rolling hills and mountains in the interior, and fertile plains and valleys along the coast. Its climate is classified as Type II or characterized by no dry season and with a pronounced maximum rain period from November to January.

* Provincial Planning and Development Coordinator (PPDC), Province of Camarines Norte

In terms of opportunities for economic activities, the province has 105,278 hectares of agricultural land, and produces 204,928 metric tons of coconuts, 122,231 metric tons of fruits, 299,892 metric tons of pineapples, 20,672 metric tons of fish, and 14,651 metric tons of seaweeds. It has 125 million metric tons estimated reserves of metallic resources (gold, silver, iron, copper, etc.) and 271 million metric tons of non-metallic resources (silica, marbleized limestone, etc.).

The major industries of the province are mining, fine jewelry making, tourism, fishery and aquatic resources, and “queen” pineapple.

On human development, Camarines Norte ranks 59th in CY 2000 in terms of the Human Development Index (HDI) of 0.500, ranking number 50 out of 77 areas in the country with an HDI of 0.525 in CY 2003. Poverty incidence in the province in CY 2000 was 52.7 percent (ranking number 7 among the poorest provinces) and 46 percent in CY 2003 (ranking number 11). Per Capita Income in CY 2003 was PhP20,376.

Partnership with PEP-CBMS Network Coordinating Team

With the forging of its partnership with the PEP-CBMS Network Coordinating Team headed by Dr. Celia Reyes, the Provincial Government of Camarines Norte adopted the Community-Based Monitoring System (CBMS) as: (a) an organized system of collecting information for policy making and program implementation at the provincial, municipal and barangay levels; (b) an up-to-date information/database on the status of welfare and needs at the community and household levels; (c) a tool for monitoring and evaluating the impact of programmes and projects; and, (d) a tool for better local governance.

The set of indicators being collected corresponds to the minimum basic needs and covers aspects of social welfare, such as: (a) health; (b) nutrition; (c) housing; (d) water and sanitation (WATSAN); (e) basic education; (f) income; (g) employment; and, (h) peace and order.

CBMS fills in the void of information at the local level and supplies disaggregated information that can help diagnose the poverty situation and identify appropriate interventions for targeted beneficiaries at the local level. The project has been adopted by the

12 municipalities in the province, with funding shared by the provincial, municipal and barangay LGUs.

CBMS data has a number of concrete uses particularly in the areas of local governance and poverty monitoring. Specifically, data gathered from CBMS provide inputs for the following areas of LGU responsibilities:

1. *Socio-Economic Profiling (SEP) & Planning at the LGU Level*

CBMS has been incorporated into the various projects of the Provincial Government. The province of Camarines Norte has seen the benefits of CBMS in the preparation of SEP at the barangay, municipal and provincial government levels in the identification of needs/problems and appropriate responses, planning and design of development programs and policy recommendations.

2. *Capacity Building*

The province organized its pool of trainors through the PEP-CBMS Network Coordinating Team and started its capability building activities with the Municipal Team, specifically on:

- CBMS Data Collection;
- Manual Processing of CBMS Data;
- Computerized Encoding and Digitizing;
- Processing of Encoded CBMS Database (CDPS 2 - Computerized Data Processing System);
- Digitizing Maps using the CBMS-NRDB and Mapping CBMS Indicators; and,
- Preparation of Socio-Economic Profile, Barangay Development Plans and Budgets using CBMS Data.

All these initiatives have empowered the LGUs and communities in data generation, processing, validation, and analysis towards effecting a participatory approach to development planning and monitoring.

3. *Enriched Databases*

CBMS complements existing databases at the various LGU levels. Most often, data generated by the LGU is only up to the provincial and regional levels, like indices of poverty and subsistence thresholds, employment, housing, etc. But

through CBMS, the LGU can now obtain a complete set of household, barangay, municipal and provincial level gender-disaggregated information.

4. Resource Allocation

Most often, the provincial government faces requests from different barangay leaders for funding for development projects like water supply and sanitation facilities, road construction, among others. Constrained by meager financial resources, the Local Chief Executive has tapped the CBMS data in assessing and deciding which projects should be prioritized as well as in choosing the appropriate interventions and eligible beneficiaries. Aside from being used for regular budgeting purposes, CBMS data also comes in handy in securing assistance from donor agencies, as in the following cases:

- Preparation of six (6) project proposals that were submitted to MIMAP-CBMS, with funding support from UNDP. One project costing PhP200,000 was approved — providing Access to Safe Drinking Water in Barangay Bagong Silang II, Labo, for the benefit of 242 households. Counterpart fund of the province amounted to PhP125,000. The project was completed late last year.
- Generation of household lists for 57 barangays in the province that had been identified for enumeration for the Sub-Regional Multi-Indicator Cluster Survey (SR-MICS) undertaken by the National Statistics Office (NSO) with funding support from UNICEF. The goal was to gather data critically needed for establishing 6th Country Programme for Children (CPC 6) benchmark and for tracking progress in disparity reduction.
- Inputs to the Accelerated Hunger Mitigation Program (AHMP), Provincial Action Plan submitted to the National Nutrition Council (NNC) (which is the lead agency); and inputs to the “*Programang Agrikultura para sa Masa*” as submitted to the Department of Agriculture, identifying direct beneficiaries of the programme of about 2 units of existing Dug Wells with Filter Box in Puroks 1 and 4 of 27,000 families.
- Inputs to UNICEF Projects on:
Water and Sanitation

Barangay San Lorenzo, benefiting 35 households; and another 2 units – one in Purok 1 and the other at the Basiad High School in Barangay Basiad, Santa Elena, Camarines Norte, benefiting 35 households and a school population of 500 children. Both projects cost PhP104,000, while the counterpart fund of the province amounted to PhP42,312.

- b. Provision of Access to Sanitation Facilities through the Construction of Communal Toilet with Shallow Well Hand Pump and Water Collection Box at (a) Paracale Elementary School Extension, Bagumbayan, Paracale; (b) Purok 5, Barangay III, and (c) Purok 4, San Roque Mercedes — amounting to PhP140,222 each (or a total cost of PhP420,666) benefiting 130 school children (in the Paracale school) and 171 households in the two Puroks. Total counterpart fund of the province amounted to PhP151,089.
- c. Construction of Level II (Spring Development) Water System for A. Racelis Elementary School, Exciban, Labo – costing PhP152,594 for the benefit of 325 school children as well as 15 households in the area. Counterpart fund of the province amounted to PhP46,414.
- d. Construction of Shallow Well Hand Pumps with Filter Box at the Calangcawan Norte Elementary School, Calangcawan Norte, Vinzons, costing PhP27,000 for the benefit of 317 school children. Counterpart fund of the province amounted to PhP10,968.
- e. Construction of Sanitary Toilets for 300 households without toilets under the Environmental Sanitation Project, costing PhP718,275 for the following nine (9) beneficiary disparity areas:
 - Osmeña, Jose Panganiban
 - Exciban, Labo

- Barangay III, Mercedes
- San Roque, Mercedes
- Bagumbayan, Paracale
- Batobalani, Paracale
- Palanas, Paracale
- San Lorenzo, Sta. Elena
- Calangcawan Sur, Vinzons

Counterpart funds for labor and supervision provided by the province amounted to PhP151,328.

Nutrition

- f. Micronutrient Supplementation Project for 4,950 underweight children 0 to 5 years old for a period of 6 months – costing PhP136,125 for the following nine (9) beneficiary disparity areas:

- Osmeña, Jose Panganiban
- Exciban, Labo
- Barangay III, Mercedes
- San Roque, Mercedes
- Bagumbayan, Paracale
- Batobalani, Paracale
- Palanas, Paracale
- San Lorenzo, Santa Elena
- Calangcawan Sur, Vinzons

Children in Need of Special Protection (CNSP)

- g. Identification of Children in Need of Special Protection (CNSP) for enrolment in vocational courses under TESDA. Ten (10) out-of-school children below 18 years old are now enrolled in Building Electrical Wiring Course with funding support of PhP56,000, including monthly allowance for three (3) months.

Early Childhood Care and Development (ECCD)

- h. Input to the selection of pilot areas for the Construction of Day Care Centers sponsored by Timex Co. and Starbucks Café at San Roque, Mercedes and Bagong Silang I, Labo,

respectively. Cost PhP308,000 each, the Day Care Centers are already being used by the LGUs. UNICEF also provided complete packages of supplies and furniture, and playground apparatus, benefiting 78 day care children at present. Enrollment is expected to increase by next school year.

- i. Proposal for the Construction of two (2) Day Care Centers for communities with Indigenous People (IPs) to be funded by Johnson & Johnson.

Barangay Planning

- j. Conduct of Barangay Training on Action Planning and Monitoring for 19 Disparity Barangays. With no proper turn-over of records to the newly-elected Punong Barangays, the new local administration had to rely on CBMS data for its planning and project formulation process.
5. Preparation of project proposals for possible funding under the CBMS-UNDP Development Grant Program for three (3) barangays with high percentage of households without access to sanitary toilet and safe drinking water. The proposed projects include the following:
 - Provision of Sanitation Facilities (costing PhP245,400) for Barangay Manguisoc, Mercedes.
 - Provision of Sanitation Facilities (costing PhP245,400) for Barangay Hinipaan, Mercedes.
 - A Project (costing PhP266,800) Providing Access to Safe Drinking Water for Barangay Mangcamagong, Basud, Camarines Norte.

Notice of approval for projects b & c were already received. A total of 266 households will benefit from the safe drinking water project and 48 households from the sanitation facilities project.

Commitment to Institutionalize CBMS

In recognition of the proven benefits of the CBMS to LGUs, the Provincial Government of Camarines Norte committed to continue

advocating the use of CBMS as the data collection instrument for poverty diagnosis, as an integral component of development planning and investment programming, and as a local governance tool.

At this point, we would like to extend our gratitude to MIMAP-CBMS for facilitating the transfer of technology through the provision of technical assistance and development of tools for the use of the LGUs.

Addressing the Child Malnutrition Problem in the Municipality of San Vicente Through the Nutri-Pack Production Project

Maria Teresa D. Fabellar*

Introduction

I am the Community-Based Monitoring System (CBMS) focal person for San Vicente, Palawan and I am representing this humble municipality in behalf of our Honorable Mayor Antonio V. Gonzales, and my superior, Mr. Jessie C. Velete, who is the Municipal Planning and Development Coordinator.

It is a great honor and privilege for me to present in this Conference a progress report on my municipality's Nutri-Pack Production Project which was funded under the CBMS-UNDP (United Nations Development Programme) Development Grant Program. We are thankful to the CBMS-UNDP for approving and funding our project proposal through a grant of PhP200,000. Thank you for your trust and confidence in the capability of the local government unit (LGU) of San Vicente to make the best use of the funds for which they were intended, and that is, to address malnutrition problem in the municipality and improve the incomes of the mothers involved in the project. To the PEP-CBMS Network Coordinating Team, and the Provincial Government of Palawan, particularly the Provincial Planning and Development Office (PPDO), our heartfelt gratitude for your support and technical assistance.

* Project Evaluation Officer, Municipal Planning and Development Office (MPDO), Municipality of San Vicente, Province of Palawan

Profile of San Vicente

The Municipality of San Vicente, located in the northwestern side of the main island of Palawan, is 186 kilometers from Puerto Princesa City. It occupies a total land area of 165,797.65 hectares and has jurisdiction over ten (10) barangays namely: Alimanguan, Binga, Caruray, Kemdeng, New Agutaya, New Canipo, Poblacion, Port Barton, San Isidro and Sto. Niño.

Based on the 2005 CBMS survey, San Vicente has a total population of 25,429 with a growth rate of 4 percent. The total number of households is 5,148, with an average household size of 5 members.

Fishing and farming are the two major economic activities in San Vicente. Together, they account for 8,211 or 56.33 percent of total employment. Of this percentage, 29.31 percent are engaged in fishing and 27.02 percent in farming. Rice and coconut are the major agricultural crops, while fish products are adequately produced in the municipality.

The tourism industry, on the other hand, promises a better future for the municipality since there is a great potential in this area. At present, an airport — with a length of 2.4 kilometers and a width of 150 meters — is being developed and is expected to be completed in the next three (3) years, linking San Vicente to other points of destination. We are proud to inform you that the National Government supports our tourism development efforts. Investors keep coming into the municipality for various economic opportunities, including those in tourism.

Brief History of CBMS Implementation in San Vicente

The LGU of San Vicente adopted the CBMS through Executive Order No. 2005-007. This E.O. enjoins all barangay government units in San Vicente to share in the implementation of this data collection system by allocating (counterpart) funds in the amount of five thousand pesos (PhP5,000) for each barangay for the reproduction of Household Questionnaires and Barangay Profile forms.

The Municipality of San Vicente has already implemented CBMS thrice – undertaken separately during the respective terms of office of three mayors who were all very supportive of the CBMS after it was introduced in the Province of Palawan in 1999. The surveys were undertaken in the years 2000, 2003 and 2005 – the most recent one.

But the municipality had already undertaken its second survey by the time the E.O. was enacted.

During the surveys conducted in all those years, some of our enumerators reported encountering interviewees (from various communities) who complained about spending a lot of time for interviews without receiving anything in return. They used to ask, "what benefits can we get out of these surveys you always conduct?"

So when CBMS-UNDP offered a grant of PhP200,000, we took advantage of the opportunity to submit our project proposal.

The Problem

Malnutrition was identified as one of the problems in San Vicente. In 2005, based on the CBMS data results, the Malnutrition Prevalence Rate (MPR) was measured at 7.48 percent. There was a total of 295 malnourished children (0-5 years old) — of which 267 were moderately malnourished and 28 severely malnourished.

In 2006, the number of malnourished children increased to 712. Of this number, 66 cases were classified as below normal to very low (BNVL) and 646 cases as below normal level (BNL). The MPR expanded to 17.5 percent (based on the 3.21 percent growth rate) or 17.36 percent (based on a 4 percent growth rate) — which was a very alarming development.

This poor state of child nutrition compelled the municipality's LGU to propose a project that will help control this problem and reduce the MPR to the lowest rate possible, if not totally eradicate it. Thus, through its Municipal Planning and Development Office (MPDO) and with the assistance of the Nutrition Action Office (NAO), our LGU thought of and prepared our project proposal, the Nutri-Pack Production Project, and submitted it for funding consideration under the CBMS-UNDP Development Grant Program.

The Project - Nutri-Pack Production

The Nutri-Pack Production Project primarily aims to address the malnutrition problem in the municipality of San Vicente, as well as promote good health for the general public. Secondly, it aims to provide livelihood activities for mothers and improve their living conditions. Total budget for the project is PhP200,000 for a one-year implementation.

The project intended to produce insumix, soya power, pulvoron and kropek which have ground soy beans as main ingredient. Ground soy beans are believed to have health-beneficial properties as they help reduce blood pressure and cholesterol.

In the original plan, project implementation was supposed to commence in March 2007 and end in March 2008. However, due to some unavoidable circumstances (such as inclement weather conditions) that delayed the implementation, actual production started only in June 2007, and will therefore end in June 2008.

Insumix and other nutri-pack products are intended for promotion to mothers and others in the communities during the celebration of Nutrition Month in each barangay. Thus, the project was launched when Nutrition Month was celebrated in July 2007.

Considering the municipality's experience of giving insumix to children during supplemental feedings in the past, the insumix porridge was improved to make it really tasty for children.

Through the Nutrition Action Office (NAO), all barangays were encouraged to provide a budget for nutrition, a part of which was used to subsidize the purchase of Nutri-Packs that would then be distributed to mothers of malnourished children in their respective barangays. Now, this is being done yearly.

Serving as project managers are personnel from the Municipal Social Welfare and Development Office (MSWDO), Municipal Agricultural Office (MAO) and Municipal Planning and Development Office (MPDO) who work together in monitoring the activities of the chosen operator of the project — the Mother Vendors' Association (MVA) — in running the Nutri-Pack production operations.

The Beneficiaries

In resolving malnutrition problems, it is understandable that malnourished children 0-5 years old are the primary concerns of the project. However, since good health is also the concern and interest of people in general, we thought of producing Nutri-Packs not only for the purpose of improving the health of the malnourished, but also for making healthy people healthier. The beneficiaries therefore cover not only malnourished children, but also other children, lactating mothers, fathers and senior citizens alike. Moreover, we believe that

nutritious food products should be promoted to all sectors to encourage them to eat healthy to stay healthy.

The MVA was selected to operate the project. This is a group of about twenty (20) mothers from Barangay New Agutaya who were organized in 1999 by a Barangay Environment, Agriculture and Nutrition Scholars (BEANS) assigned in the said barangay. While they were organized that year to resolve the malnutrition problem of their own children, they have remained active through the financial assistance provided by the MSWDO, and established “*talipapas*” where they sold their products by the sidewalks in the barangay. The choice of the MVA as project operator was guided by our belief that since mothers are the ones who take care of children, they play a huge role in resolving malnutrition. The mothers’ involvement in the project was also an opportunity for us to teach them how to be more health-conscious for the sake of their children.

Activities Undertaken from March 2007 to January 2008

On March 15, 2007, our CBMS partners from Vietnam led by Dr. Vu Tuan Anh from the Socio-Economic Development Centre (SEDEC) in Hanoi visited us to conduct a research on CBMS implementation in San Vicente and the various applications of the system.

During a brief orientation we conducted, we shared them our experiences in implementing CBMS, our strategies, the problems we encountered, the lessons we learned and the improvements we initiated. Guiding them were PEP-CBMS Network Coordinating Team members Mr. Kenneth Ilarde and Ms. Anne Bernadette Mandap, and two personnel from the PPDO - Ms. Jo Rabang and Mr. Ronnie Pactanac. We toured our guests around the operation site of our Nutri-Pack Production project and met with the barangay officials of Barangay New Agutaya and members of the Mother Vendors’ Association.

In March 2007, the first tranche (representing 70% of the grant) amounting to PhP140,000 was received. On 5 June 2007, it was withdrawn for the purchase of needed utensils and raw materials so that mothers would have enough time to display their products during the Malagnang Festival in the locality on 18-21 June 2007.

A team building seminar/workshop was requested by the mothers themselves to reactivate their Association and revitalize the group’s

spirit of unity and cooperation. Facilitated by an NGO, the workshop was held on 17-18 March 2007.

Another seminar/workshop was conducted on 12-13 June 2007 as reflected in the project proposal. It was facilitated by the MPDO, the MAO and Department of Trade and Industry (DTI). The activities included an orientation on the Nutri-Pack Production Project on the first day — with the participation of Barangay Captains and other Barangay Officials, BEANS assigned in different barangays and other offices involved in the project's management. On the second day — with MVA members mostly in attendance — an actual workshop demonstration on how to prepare the products (insumix, kropek, pulvoron and soya powder) was conducted and facilitated by the MAO's Agricultural Technologist. The product marketing and packaging aspects, on the other hand, were discussed by a DTI resource person.

During the celebration of the Malagnang Festival, the MVA participated in one of the activities/contests — the Agro-Trade Fair where Nutri-Pack Products were displayed and sold at a booth provided for the mothers. In this contest, the MVA won Third Prize and received one thousand pesos and a plaque. The mothers took advantage of this opportunity to introduce their products to the community.

Production Report

All in all, the Nutri-Pack production lasted for a total period of only two months -- from 15 June to 13 July 2007 and 14 July to 15 August 2007.

Production has been resumed only during the last few weeks of this month, January 2008. A report on production and sales during this period is not yet available.

Within two months of operations, the project generated total sales amounting to PhP43,113 from June to August, 2007 – broken down into PhP21,429 for the June-July period and PhP21,684 for the July-August period. Some stocks were left under the care of some MVA officers.

Problems Encountered

As mentioned earlier, the project implementation lasted only two months – during which, as in any endeavor, problems were encountered that required adjustments to be made along the way. The key of course, was to remain flexible – being open to adopt new ideas when necessary, and discarding those that do not work.

The lack of an electrical rice grinder was one of the causes of the delayed production of Nutri-Packs. Another setback was caused by the continuous heavy downpours during the months from August to November – which made roads muddy and slippery until most of them turned treacherously impassable. This adversely affected the transport and delivery of goods into the municipality. Even when the electrical rice grinder arrived in October 2007, it could not be immediately turned over to the mothers because of very slippery roads. In fact, it was turned over to the MVA only on 11 January 2008. Moreover, during the months of October to December, mothers normally devoted their time to looking for other means of providing for their families' needs, particularly food, by taking advantage of harvest time opportunities.

The Products

As mentioned earlier, all Nutri-Pack products — insumix, soya powder, 3n1 soya drink, pulvoron and kropek — have soy beans as the main ingredient.

The original recipe for producing insumix called for “dilis” and “monggo” as ingredients. However, the MVA decided to produce insumix using ground soy beans, skim milk and brown sugar only because “dilis” was not abundant during the first production period (June-July). Besides, as they eventually discovered, children love the taste and aroma of ground stir-fried soy beans.

Soya powder was produced during the first production period. Accidentally, mothers tried mixing ground soya with skim milk and sugar, and discovered that it made for a good 3n1 soya drink (following the trend of mixed prepared drinks) which is a good substitute for the popular coffee, except that soya is the healthier one.

In the latest production of the mothers, insumix and 3n1 soya drink are processed in similar ways, although insumix is cooked and

prepared like porridge. The mothers tried adding coconut milk in cooking insumix and found that it made for a great tasting snack.

Pulvoron is very saleable to children and adults alike. Although mothers make little profit out of this product, they nevertheless enjoy making easy sales wherever they go. In fact, children and other mothers go to the production site just to buy pulvoron. The MVA mothers used to supply fifty (50) packs of pulvoron to one big store in their own barangay, and even displayed some at an elementary school a few steps from the project site.

The Impact

The Malnutrition Prevalence Rate (MPR) in the Municipality of San Vicente was measured at 7.48 percent in 2005 based on CBMS data results, then more than doubled to 17.5 percent in 2006. In 2007, it declined to 15 percent (based on a NAO report). For a municipality with a high MPR, even a 2 percent decrease is already something to rejoice about because it shows that the efforts of the LGU to resolve the problem of malnutrition have somehow begun to pay off.

Indeed, the LGU of San Vicente is bent on resolving this problem. In fact, another project that was implemented during the last few months of year 2007 was the establishment of a dairy farm where fresh milk is produced. Everyday, malnourished children are provided free fresh milk courtesy of the farm.

Within the two-month period of Nutri-Pack project implementation, each MVA mother increased her income by an average of PhP300 per month. This is measured by the amount they are paid for their labor. A total of PhP6,534 was paid to the mothers during the first month of operation. For these mothers therefore, working hard means more income for their families, so the more time and effort they devote to producing Nutri-Pack products, the more income they can expect.

Work Plan for the Next 3 Months

Towards the latter part of January, the MVA resumed production of Nutri-Packs such as insumix, pulvoron and 3n1 soya drink.

Since January is considered a summer month, it is favorable for the production of "kropek" (crunchy chips). Kropek was not produced in the initial months of operation (June-July, July-August) because

the weather during that period could not support sun-drying operations, and more so during the months thereafter when the rainy season took its toll. However, the production of kropek can peak from March to May, and thus mothers are currently taking advantage of the sunny days by producing kropek – which now forms part of their work plan for the first five months of the year.

What constitutes the project's work plan for the next three months?

First is to prioritize the production of insumix whenever there is a demand for it especially for the sake of the children — for after all, the project's primary purpose is to address the children's malnutrition problem.

Second is to increase the volume of production and production capacity — not only for purposes of meeting the local demand and replenishing stocks and inventories, but also for market expansion purposes.

Third is to improve the quality (including such aspects as taste, safety, reliability, etc.) of the products, as well as its packaging towards enhancing their over-all market acceptability and attractiveness. Perhaps, initiatives to lengthen the products' shelf-life may also be considered in the long run.

Fourth is to expand the market by exploring possible demand coming from other barangays and municipalities in the province.

And fifth is to develop another product that can be derived from the basic ingredient (soy beans). Possibilities for product diversification may be explored with the assistance and support of nutritionists, culinary experts, food technologists, concerned non-government organizations (NGOs) and private voluntary organizations (PVOs), etc.

Hopefully, with the assistance of project managers from the LGU, this project is hoped to be nurtured and enriched for the whole year and more years ahead.

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Environmental Protection and Ecotourism for Poverty Reduction in Cabucgayan, Biliran¹

Joelous Gonjoran

I am Joelous Gonjoran, President of the Naga Rawis Villa Corro Mangrove Fisherfolks Association (NARAVIL MFA), a small fisherfolk cooperative.

Our barangay is Barangay Looc in the Municipality of Cabucgayan, Province of Biliran. It is four (4) kilometers west of the poblacion of Cabucgayan. Ours is a coastal barangay with a total land area of 675.8974 hectares, a population of 2,163 with 452 households, and an average household size of 5. There are 1,107 males and 1,056 females. Moreover, as per the 2005 CBMS Survey, 266 households are living below the poverty threshold, 195 households are living below the food threshold, 100 children 13-16 years old are not attending secondary school, 147 children 6-12 years old are not attending elementary school, and 363 persons 10 years old and above are illiterate.

In March 2005, with the help of our Municipal Agriculturist, we were able to secure the approval of a project that we proposed for funding to the Biliran Provincial Government. Located in Cabucgayan, Biliran, this project was the “Boardwalk: Environmental Protection and Ecotourism for Poverty Reduction”. The project cost PhP775,000 and involved the construction of a boardwalk and mangrove gardening – as a small ecotourism site. However, our income from

¹ An edited transcript of the presentation of Mr. Joelous Gonjoran, President, Naga Rawis Villa Corro Mangrove Fisherfolks Association (NARAVIL MFA), Cabucgayan, Biliran.

this project was not sufficient in helping our fisherfolks because they did not earn enough from it to provide for the needs of their respective families.

In the year 2006, when Mayor Arnelito Garing announced the approval of the mudcrab production project, we lost no time in asking for the help of our Municipal Agriculturist, and as a result, our association was able to avail of funding from the CBMS-PEF Development Grant Program in the amount of PhP150,000.

To implement the project, we undertook the following:

- Boardwalk Construction: First, we constructed the 300-meter Boardwalk out of lumber, cement, and bamboo. It partially traverses the 2.7-hectare mangrove gardening project that leads to the 2,500 square meter mudcrab production pond - a dream come true for economic sustainability.
- Coastal Cleanup: This was necessary to make the environment hospitable to mudcrab growth and attractive to visitors/tourists.
- Planting of Mangrove Propagules (cuttings, seeds or spores for propagating plants): Previously, the 18-hectare mangrove had been over-fished, over-gleaned, and used as cover for fishing boats during bad weather. Worst, the cutting of mangroves was rampant. The 100 fisherfolk families also engaged in illegal fishing and cutting of trees. This resulted in unstable income generation for the fisherfolks, which in turn led to malnutrition, increase in population, improper waste disposal and inactive social participation as indicated in the 2005 CBMS Survey Result.
- Mudcrab Pond Preparation: We paid for half of the required labor services, and gave the other half as our counterpart share.
- Mudcrab Harvest: We harvested only enough to allow the mudcrabs to re-generate and propagate further, thus sustaining their population.
- Trainings and Meetings: The training covered fish processing, value adding and fishery products.
- Catering: With the assistance of the Regional Fisheries Center (RFC), we were able to obtain a small capital fund to put up a small store where we served or catered food to tourists visiting the Boardwalk.

Analysis and Epilogue

The PhP150,000 grant we availed of augmented our resources for the mudcrab production and fattening project for the benefit of 43 fisherfolk households, thus giving them additional income. While the grant approved was not a big amount, the LGUs of Barangay Looc and even of the Municipality of Cabucgayan provided additional resources for this catalytic project of the fisherfolk community. What really mattered here was not so much the magnitude of the assistance the fisherfolks received from the development project, but the opportunity for all stakeholders including our LGUs to realize that by focusing on the poverty situation and the poor in the community, we are able to bring together different stakeholders to address a local problem.

Our livelihood project was doing well, even as a mudcrab “jailbreak” occurred sometime July 2007 during a high tide. Unfortunately, the prolonged rains sometime in November 2007 destroyed our pond. When we visited the day after a particularly heavy downpour, we saw a big hole through which the mudcrabs escaped. Although this frustrated us, we are still hopeful that we would be given the opportunity to rehabilitate our project. And we also hope that each of us fisherfolk would be given his own capital through micro-lending to re-start our own livelihood activity.

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CBMS Improves Targeting and Delivery of Basic Services: A Perspective from the NAPC¹

Agnes Catherine Miranda

My response will probably just be a reaffirmation of the ideas, concepts and insights presented in Session 5 as well as those presented this morning in Session 4 which delved on “*Local Level Planning and Budgeting*”.

As you can see, our theme for this session is “*Using the Community-Based Monitoring System (CBMS) for Program Targeting and Impact Monitoring*,” and I think that you will agree with me that we cannot dissociate “Planning and Budgeting” from “Program Targeting and Impact Monitoring”.

I became part of the CBMS Team of the National Anti-Poverty Commission (NAPC) only in the second quarter of last year. And as a planner at the national level, I did not find it difficult to be convinced of the significant value and importance of CBMS in planning, targeting and impact evaluation. With this frame of mind, it was easy for me to help NAPC in its advocacy to encourage local chief executives (LCEs) and planners to implement CBMS.

Allow me first to congratulate the presenters in this Conference for their insightful discussion of their experiences. You have brought good news indeed from the grassroots — from where the struggle for development really continues to emanate everyday. The good news you bring balances out the bad news that is so prevalent nowadays.

¹An edited transcript of the comments of Director Agnes Catherine Miranda, Macro-Policy Unit, National Anti-Poverty Commission (NAPC), on the presentations during the session on *Using CBMS for Program Targeting and Impact Monitoring*.

We all know, of course, that resources are perennially scarce so it is indeed important that every investment should produce the desired results. Towards this end, individuals or households that are most in need of development goods and services must be properly identified.

We are also all aware that one of the Millennium Development Goals (MDGs) is to eradicate extreme poverty and hunger. Eradication of poverty remains a core goal indicated in the Medium Term Philippine Development Plan (MTPDP), and this was reaffirmed awhile ago by Director Susan Rachel Jose of the Regional Development Coordination Staff (RDCS) of the National Economic and Development Authority (NEDA).

Several studies have also shown that inefficient targeting is one of the main problems besetting many poverty reduction programs and projects being implemented by many government agencies. Unfortunately, they also employ different approaches in targeting the poor. This has resulted in considerable leakages to unintended beneficiaries.

The experiences earlier presented by the local government unit (LGU) officials involving their respective communities leave no doubt that CBMS is an effective tool for identifying those who are most in need of basic services, especially services geared towards meeting the MDGs.

Targeting, which is an activity in planning, can be improved by utilizing CBMS, since welfare indicators generated on a regular basis can be used by LCEs and other stakeholders for better situational assessment and comprehension of their respective areas. Just like at NAPC, questions pertaining to the poverty situation — who are the poor, why are they poor, where they are, and what are their needs — can be adequately answered by this tool called CBMS. Effective targeting has benefited these LGU grantees in the preparation of project proposals which eventually received funding. The use of CBMS, as their experiences have shown, demonstrates that accurate and reliable data can be used as leverage in requesting funds for development projects. We all know that there are lots of donors who are willing to provide assistance and CBMS data can be an important input or marketing tool we can use in mobilizing resources.

The CBMS also allows for effective impact monitoring by providing clear measures by which the results of the interventions may be evaluated. In the advocacy sorties that we are doing at NAPC, we always tell local officials that the CBMS can be used to measure the difference that they have made in their communities. In which case, the CBMS results can lead to either the re-election or rejection of these officials depending on how they were able to deliver the required services in accordance with the findings of CBMS.

There are some who take this challenge seriously. One of these officials is the young governor of the Province of Lanao del Norte, a first-terminer and one of the fastest among LCEs to take action to install the CBMS in his province. Surely, the effectiveness of the CBMS as a targeting instrument carries with it the bonus of being an instrument for transparency and good governance. The CBMS would also be critical in the implementation of governance reforms by oversight agencies like the Medium Term Expenditure Framework (MTEF) and the Organizations Performance Indicator Framework (OPIF). These reforms enjoin all government agencies and instrumentalities to move up from utilizing an input- and output-based monitoring system to one that is results-based. Of course, we all know this thing about “garbage-in, garbage-out”. Since CBMS provides benchmarks, it therefore improves and enhances the targeting process and gives decision-makers an honest-to-goodness assessment of impacts and results.

I thus enjoin decision-makers to utilize the results of impact monitoring and assessment in order to improve the implementation of programs and projects, and if necessary, to adjust targets, change strategies, or discontinue (for some time) a specific program or project if the assessment shows that it has not been able to deliver the intended benefits.

The CBMS also ensures sustainability in the implementation of programs and projects, regardless of who is the LCE. Having acknowledged the fact that CBMS facilitates beneficiary and impact monitoring, I would like to suggest that the national government use CBMS as an input to program design. Specifically, I would like to suggest that national government-determined programs allocate more funds to LGUs that can make a clear case of effective targeting by showing the results of past or ongoing programs or projects that have

been designed using CBMS data. In other words: LGUs who have impact monitoring reports. This will remove the current focus on the poorest areas and re-channel the focus to those that can demonstrate having achieved substantive results in terms of the development objectives of a specific program. This measure will, in a way, shoot two birds with one stone, so to speak. First, it will increase the effectiveness of national programs by tapping LGUs that have experiences in effective beneficiary targeting. Second, it will provide incentives to LGUs to adopt the CBMS, thereby widening its reach and ensuring its sustainability.

Moreover, developing regular LGU-level information collection should be seen as an investment rather than a cost since it will improve the delivery and targeting of services. Since it also promotes transparency, it ultimately leads to better governance as well. For the planners who are here in this conference, the institutionalization of CBMS will make planning a more rewarding and satisfying experience.

The CBMS is not an end in itself. It is a management tool — a means that will help us attain our objectives. It can be used to the user's advantage or disadvantage. I personally believe that when used properly, CBMS can be a powerful tool for evidence-based planning that will include targeting, project development and prioritization, monitoring and impact assessment, as well as budgeting and resource allocation.

Using CBMS to Respond to Community Issues: A DSWD Perspective¹

Finardo G. Cabilao

The various presentations for this session illustrated the actual use of CBMS as a tool for identifying the needy households, where these households are located, and how LGUs can prioritize their needs based on actual and reliable data.

Because of CBMS, we are now able to target and see the face of the target, particularly those who are actually the poorest in our respective localities.

Allow me to highlight the uses of CBMS in each case.

The Minalabac LGU demonstrated to us how it was able to locate the areas that need its support, how it was able to allocate its resources, and how conveniently it was able to present its proposed projects to potential donors.

The Pasay City LGU presenter related to us how his LGU succeeded in facilitating a collaborative, inter-agency, NGO-faith-based organization initiative. This became their basis for formulating a program strategy principle which they call the Fact-Based Intervention Exchange (FBI-Ex). Among the programs they developed was one that addresses the needs of the Out-of-School Youth (OSY). The CBMS has made it possible for the Pasay City LGU to present its project proposals to donor organizations and come

¹ An edited transcript of the comments of Director Finardo G. Cabilao, Social Technology Bureau (STB), Department of Social Welfare and Development (DSWD), on the presentations during the session on *Using CBMS for Program Targeting and Impact Monitoring*.

up with partnership programs or projects to respond to identified needs.

The Province of Camarines Norte led the way in generating a community database through CBMS and in accessing resources to respond to its people's needs. CBMS also facilitated the identification of priority projects based on the needs of the different municipalities and barangays. Above all, with the support of CBMS, the Camarines Norte provincial LGU provided counterpart funding to match the resources provided by its partners, and at the same time provided provincial government funds for other identified needs in the province.

The case of San Vicente, Palawan provided us a picture of how CBMS was used in identifying priority needs as well as possible projects to respond to these needs. It also illustrated the use of CBMS data to access resources for livelihood projects and to directly engage affected households themselves in implementing the projects. It may be recalled that San Vicente has a high incidence of malnourished children. To respond to this problem, the people there organized the Mother Vendors Association to embark on a Nutri-Pack Project which directly impacts the nutrition problem.

The presenter from Cabucgayan, Biliran related how his LGU was able to mobilize the beneficiaries to come up with a project that utilized their area's indigenous resources.

Let me now briefly touch on the future challenges we face in implementing CBMS. The first challenge we now face is how are we going to spread the use of CBMS? The second challenge is how do we engage more LGUs to utilize CBMS as a tool to guide decision makers in identifying priority problems, in planning programs, in allocating resources and in engaging the beneficiaries themselves in implementing the proposed projects.

In particular, I would like to pose these challenges to the presenters:

- How do we mobilize more LGUs to use CBMS?
- How can the Pasay City LGU mobilize the city's other barangays to use CBMS as a tool? Moreover, we would like to see the use of CBMS in the impact evaluation of the FBI-Ex.

- How are we going to encourage LGUs in Camarines Norte to use their CBMS data?
- With regard to the CBMS design itself, and based on the Biliran experience, how can we include in the data collection process the generation of information pertaining to the environment or topography of a specific area? How can some risks be possibly mitigated?
- For San Vicente, can we check if the targeted households have continued to improve their situation, especially with respect to their malnutrition problem?

On the other hand, this is the challenge for the CBMS Network: how are you going to sustain the gains that we have collectively achieved in the implementation of CBMS?

Finally, from our end at the Department of Social Welfare and Development (DSWD), we are currently undertaking a pilot program called the Ahon Pamilyang Pilipino project. We are testing how to use CBMS in targeting the beneficiaries of this project. We are piloting this in Pasay City and Agusan del Norte – each of which has implemented CBMS city-wide and province-wide, respectively. After the pilot, we hope to be able to share with you how we were able to utilize CBMS as a tool for targeting household-level beneficiaries.

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The PEF Benefits From CBMS¹

Allyn J. Lopez

The Peace and Equity Foundation conducts its own poverty mapping to locate where the poor are. Our battle cry is reaching the poorest communities. For this reason, we really need to find where the poor are located. However, since our resources are limited, we need to set priorities.

The poverty maps that we had produced served as our basis for formulating our strategic plans. The data that we had gathered to produce these poverty maps came from secondary sources, and most often needed updating.

That is why we are very thankful that local government units (LGUs) have been conducting their own Community-Based Monitoring Systems (CBMS). This has made our life simpler because we no longer need to conduct data gathering ourselves. Instead, we just get the data we need from LGUs. We will certainly make use of the LGUs' CBMS data in our poverty mapping and impact monitoring processes.

We would like to congratulate the presenters for showing to us how they made use of CBMS in responding to the urgent needs of their people. Other than the situations in local communities, we are also interested to know about the strategic and tactical plans of LGUs — especially their targets, priorities, and fund sources (how much

¹ An edited transcript of the comments of Mr. Allyn J. Lopez, Regional Manager, Luzon Regional Office, Peace and Equity Foundation (PEF), on the presentations during the session on *Using CBMS for Program Targeting and Impact Monitoring*.

they have and how much they need) towards responding to the needs and concerns raised by the CBMS.

That is why we also want to know — after CBMS, what's next? What are the plans that we can formulate based on the data gathered? Let us look at them so we can assess where the PEF can assist — especially if the area happens to be our priority area.

The PEF has already funded more than 1,000 projects since 2001 — worth around PhP700-800 million. We are hoping to fund more and to continue working together with the LGUs in the near future as partners in development.

CBMS as a Tool for Implementing Development Strategies: With CBMS, There is More to Gain

*Oskar D. Balbastro**

Profile of the MIMAROPA Region

The MIMAROPA Region was created through Executive Order No. 108, issued by H.E. President Gloria Macapagal Arroyo on May 17, 2002, dividing the Southern Tagalog Region into the CALABARZON Region (consisting of the provinces of Cavite, Laguna, Batangas, Rizal and Quezon) and MIMAROPA Region.

MIMAROPA is composed of the five island provinces of Occidental Mindoro, Oriental Mindoro, Marinduque, Romblon and Palawan. It has 2 cities, 71 municipalities and 1,458 barangays. As of 2000, it has a total population of 2.3 million, with 2.67 percent growth rate. Total land area of the region is 27,456.01 square kilometers — representing about 9 percent of the country's total land area.

The region is a major source of agricultural products such as palay, coconuts, bananas, citrus, cassava, vegetables and marine products — all of which can support various food/agri-processing industries.

The region also hosts diverse tourist destinations and natural wonders — which can be tapped for tourism development.

Considering these, the Regional Development Council (RDC) IV-B, the highest policy and coordinating body in the region, adopted the following vision: “*to become the food basket of Metro Manila*

* Regional Director, National Economic and Development Authority (NEDA) Region IV-B Office

and CALABARZON, a gateway to Southern Philippines and a major tourism destination.”

Status of CBMS Application in Region IV-B

The provinces of Palawan and Marinduque are two of various provinces selected as pilot areas for the Community-Based Monitoring System (CBMS) implementation. Presently, they are already in the fourth and second rounds of updating their CBMS, respectively. Romblon, on the other hand, is at the stage of processing its first CBMS data. Oriental Mindoro started its CBMS on February 12, 2008, while Occidental Mindoro is now mobilizing resources to implement CBMS in the immediate future.

Regional Implementation of CBMS

During its 31 August 2005 meeting, the RDC IV-B approved the use of CBMS as a database management system for the region. As a commitment, concerned provincial officials signed a Memorandum of Agreement (MOA) on 29 September 2006 to implement CBMS in their respective provinces. The MOA called for the adoption of CBMS as the common database management system of all local government units (LGUs) in MIMAROPA towards facilitating the generation, processing and utilization of data for development planning and decision-making purposes. It also called for the institutionalization of CBMS to improve data banking system at the barangay, municipal/city, provincial and regional levels.

Region IV-B Customized CBMS Questionnaire

MIMAROPA’s vision — *to become the food basket of Metro Manila and CALABARZON, a gateway to Southern Philippines and a major tourism destination* — served as the basis of the RDC IV-B’s development strategy. This strategy focuses on the development of two resource sectors – agriculture and tourism — which RDC IV-B considers as the region’s twin engines of growth and development. The RDC IV-B believes that focused intervention on these two sectors will maximize their potential to boost the region’s economic development through investment generation and proper resource utilization.

The CBMS questionnaire for MIMAROPA was customized to incorporate agriculture and tourism indicators. Specifically, the Household Profile Questionnaire (HPQ) was modified since most of the households of MIMAROPA Region are located not only in rural agricultural areas but also in areas with high tourism potential. If properly harnessed, these two sectors can catalyze economic progress in the countryside. The customized questionnaires are now being used by Palawan, Marinduque and Romblon. The intention is to establish baseline data and generate situational analyses of the two sectors, and subsequently direct the path of the region's development.

For agriculture, among the additional information requested in the questionnaire are: household/farm income on agriculture; number and size of farms; tenurial status; specific crops, livestock and fishery produced, sold and consumed, and their selling prices; type and amount of expenses incurred; support services required/availed of; technology applied; and equipment and farm implements possessed or utilized.

On tourism, the additional information requested covered the type and number of household visitors; length of stay; and expenses paid by visitors over the past twelve months.

Strategic Relevance of Regional Implementation of CBMS

Currently, CBMS is still the cheapest available and easiest to sustain data repository system for generating household information that can be aggregated from the barangay level up to the provincial, regional and national levels.

CBMS data can serve as the “missing link” between national data and local data. CBMS data can describe the whole region or its component provinces. It has both spatial and statistical dimensions that are useful in physical planning and disaster risk management. As a new region, MIMAROPA is fortunate to use CBMS in development planning.

CBMS also presents an opportunity for local communities and LGUs to work with national line agencies in data generation and development endeavors.

The use of CBMS in MIMAROPA has been of tremendous assistance to the RDC IV-B in fulfilling its regional development planning functions, to wit:

- Preparation, validation and monitoring of development plans;
- Prioritization of resource and investment programming;
- Preparation and evaluation of project proposals and monitoring of development projects;
- Formulation and monitoring of macro/regional policies and strategies with concrete information from the ground;
- Pinpointing specific intervention/services even at household level;
- Serving as basis for targeting sites on hunger mitigation;
- Crafting of a convergence strategy for mobilizing LGU participation in the implementation of national programs on agriculture and tourism;
- Formulation of a human development report;
- Assessing implementation of Millennium Development Goals (MDGs); and in
- Assisting LGUs to monitor the effects of national and provincial government policies and programs on socioeconomic conditions at the local level.

CBMS in Region VIII: Paving the Way for Regional Development¹

*William C. Paler**

Profile of Eastern Visayas (Region VIII)

Eastern Visayas or Region VIII consists of 6 provinces, namely, Biliran, Eastern Samar, Northern Samar, Samar (Western Samar), Leyte and Southern Leyte. The famous San Juanico Bridge connects the islands of Leyte and Samar.

The region has 7 cities (with the inclusion of three newly-created cities, namely: Baybay of the Province of Leyte, Catbalogan of Samar and Borongan of Eastern Samar), 136 municipalities and 4,390 barangays.

Eastern Visayas is primarily an agricultural region with rice, corn, coconut, sugarcane, and banana as major crops. Its total land area is 21,431.7 square kilometers, with 52 percent of its total land area classified as forestland and 48 percent as alienable and disposable land.

Region VIII is inhabited by the Waray-Warays, the country's fourth largest cultural linguistic group. But Cebuanos, from the nearby island of Cebu live in Ormoc City, Western Leyte and parts of Southwestern Leyte.

The primary sources of revenues in Eastern Visayas are manufacturing, wholesale and retail trade and services. Mining,

¹ Presented by Ms. Blanca Cercado, Assistant Division Chief, Technical Services Division, Department of the Interior and Local Government (DILG) Regional Office No. 8, in behalf of Regional Director William C. Paler.

* Regional Director, Department of the Interior and Local Government (DILG) Regional Office No. 8

farming, fishing and tourism contribute significantly to the region's economy.

Based on the 2003 Family Income and Expenditure Survey (FIES) of the National Statistics Office (NSO), Region VIII has poverty incidences of 43 percent for the population and 35.3 percent for the family.

This can be further shown in the respective provinces of the region. Among the six provinces, Biliran has the highest poverty

Table 1. Poverty Incidence, Eastern Visayas

Province	Poverty Incidence Among Population (%)	Poverty Incidence Among Families (%)
Leyte	42.3	34.6
Biliran	55.6	46.5
Southern Leyte	41.2	31.9
Samar	45.9	38.7
Eastern Samar	41.1	33.9
Northern Samar	40.8	33.8

Source: Family Income and Expenditure Survey (FIES 2003)

incidence, both at the population and family levels – at 55.6 percent and 46.5 percent, respectively.

Status of Community-Based Monitoring System (CBMS) Implementation in Region VIII

To comply with DILG Memorandum Circular (MC) 2003-92 on Policy Guidelines for the Adoption of the Core Local Poverty Indicators in Planning, the DILG Regional Office VIII, in collaboration with the Institute for Democratic and Participatory Governance (IDPG), through Mr. Oscar Francisco and the members of the Regional CBMS-Technical Working Group, with technical assistance provided by the PEP-CBMS Network Coordinating Team under the leadership of Dr. Celia Reyes, spearheaded the implementation of the Community-Based Monitoring System (CBMS) in 2005 covering initially 16 pilot municipalities. The implementation was further mandated with MC 2004-152 on Guide to Local Government Units (LGUs) in the Localization of the Millennium Development Goals (MDGs) for which CBMS was identified as the tool to be used for localizing the MDGs to the LGUs.

The accomplishment of Eastern Visayas in the implementation of the CBMS in our region are as follows.

- Biliran — with its 8 municipalities — was the first of the six provinces of the region to undertake a province-wide implementation of CBMS. Likewise, it was the first to consolidate the data at the provincial level. We acknowledge Biliran Governor Rogelio for his major role in the realization of this endeavor, with the support of the Provincial Planning and Development Office, Local Chief Executives, other local officials and functionaries and DILG Provincial Office of Biliran. Because of their commitment, Biliran was first to complete a province-wide implementation of CBMS in the whole Eastern Visayas region.
- Eastern Samar, on the other hand, was the second province to finish CBMS implementation — covering 22 municipalities and the city of Borongan. We also acknowledge the good governor of Eastern Samar, Hon. Ben Evardone, who has been instrumental in fast-tracking the implementation of CBMS in the province, with the support of the Provincial Planning and Development Office, the Local Chief Executives, other local officials and functionaries and DILG Provincial Office of Eastern Samar. They should also all be credited for ensuring the sustainability of the program in the province.
- Northern Samar also conducted a 100 percent or province-wide implementation of CBMS – covering its 24 municipalities. On-going efforts are being undertaken by our LGU partners in the province to fast-track the data processing and poverty mapping.
- Samar covered only 10 out of its 24 municipalities and two cities in the adoption and implementation of CBMS. We are pleased to announce that last week, our local trainors rendered technical assistance on CBMS Module 1: Data Collection to additional LGUs in the province who signified their interest in CBMS implementation. The current 42 percent LGU-coverage is expected to increase by second quarter of this year.

- Meanwhile, 31 municipalities or 78 percent of the 40 municipalities of the Province of Leyte are implementing CBMS in the province. Among these implementing municipalities, 15 percent already have established their CBMS databanks and are now able to produce CBMS poverty maps. Ongoing efforts are likewise being undertaken to fast-track the CBMS implementation in the rest of the province.
- CBMS implementation in Southern Leyte covers 15 out of 18 municipalities or 83 percent. The impressive progress in CBMS implementation in this province may be attributed to the strong interest and commitment shown by our LGU partners both at the municipal and provincial level.
- Out of seven cities in the region, four cities are implementing CBMS, namely, Maasin City of Southern Leyte, Baybay City of Leyte, Tacloban City, also of Leyte and Borongan City of Eastern Samar.

We are pleased to report that as of the first quarter of year 2008, out of 143 LGUs in Eastern Visayas, 114 (or 80%) covering 110 municipalities and 4 cities are already implementing CBMS. These account for approximately 30 percent of the total number of LGUs who are implementing the poverty monitoring system all over the country.

Utilization of CBMS Data in Region VIII

The region's CBMS accomplishment is paving the way for the establishment of a Regional Profile that can help LGUs in Eastern Visayas in identifying who the poor are, where they are and why they are poor.

The CBMS results of San Julian, Eastern Samar (under the leadership of Mayor Erroba) and Cabucgayan, Biliran (under Mayor Arnelito Garing) were instrumental in pushing the Regional Development Council (RDC) to issue RDC Resolution Number 8 A, series of 2006 — *Endorsing the Conduct of Poverty Mapping in all Barangays of the Region Using the Community-Based Monitoring System as a Tool*. This resolution has influenced national government agencies and funding donors to utilize CBMS results for their program implementation.

To pave the way for the utilization of CBMS data in the planning and budgeting functions of the LGUs, the DILG, National Economic and Development Authority (NEDA) and the Population Commission (POPCOM), in cooperation with German Technical Cooperation (GTZ), conducted a Harmonization Workshop on Planning Tools in the identification of Population and Development Indicators in the Province of Biliran. The activity enriched the process of crafting the Municipal Plans and firmed-up the inclusion of such plans at the Provincial level, and eventually at the Regional Plan level of Eastern Visayas.

During the Alliance Building conducted in July 2007, Biliran Governor Espina was inspired by the CBMS Provincial Results and the Local Governance Performance Management System (LGPMS). As a result, he shifted his concern from health-focused Programs, Projects and Activities (PPAs) in his previous term to education-related PPAs for 2008-2010.

The Province of Eastern Samar, under the leadership of Governor Ben Evardone, has chosen the Millennium Development Goal (MDG) No. 1 (Eradicating Extreme Poverty) as the priority concern of his governance. He utilized the Provincial CBMS Data, specifically the poverty maps showing the results of the 2006 survey of the 14 Core Local Poverty Indicators of the 22 municipalities and 1 city during the First Anti-Poverty Summit in the province, as basis for: poverty diagnosis, the determination of eligible beneficiaries and identification of appropriate interventions. This two-day Summit held on 8-9 November 2007 focused on the presentation of the poverty situation in Eastern Samar. The participants included local officials, functionaries, national and local government agencies, non-government organizations, civil society organizations, private sectors, funding institutions and other stakeholders. Gracing the Summit's culmination program was no less than President Gloria Macapagal-Arroyo, from whom the province was able to gather a number of commitments and support.

In the four provinces of Southern Leyte, Samar, Northern Samar and Leyte, CBMS data was utilized in the formulation of the Executive-Legislative Agenda (ELA), specifically in the identification of appropriate PPAs, and in the prioritization of issues and concerns –

are and why are they poor. In these plans, the LGUs were able to focus their targeting, thus maximizing the results of their interventions.

The CBMS in Eastern Visayas has played a key role in helping our LGU partners identify the needs of their constituents as reflected in the CBMS Survey Results and Poverty Maps using the 14 Core Local Poverty Indicators.

The advent of the CBMS data in Region VIII has enabled its LGUs to localize the MDGs and be counted as contributors to the country's attainment of the MDGs.

Furthermore, Region VIII's CBMS accomplishment is gearing the region's LGUs towards the implementation of the Joint Memorandum Circular (JMC) signed by the DILG, NEDA, Department of Budget and Management (DBM), and the Department of Finance (DOF). In the DILG's Rationalized Planning System (RPS), the LGUs with CBMS are now deemed ready to characterize and analyze their planning areas. The plans of these LGUs will be considered in the PLPEMS of NEDA and will be properly funded using the tools of DBM and DOF.

The DILG Region 8, in cooperation with the United Nations Population Fund (UNFPA) of Eastern Samar, conducted a Trainor's Training on the Formulation of Socio-Economic Profile using CBMS data for the three UNFPA pilot areas of Eastern Samar, namely: Sulat, Maydolong and Llorente on 26-28 November 2007.

The experience in these UNFPA areas will be replicated in other municipalities of Region VIII to pave the way for a more significant database that can properly characterize the LGU's role particularly in the MDG-related PPAs.

In effect, this will also influence the Comprehensive Development Plans under the DILG's RPS, the Provincial Plans under NEDA's PLPEMS, the budgeting under the Updated Budgeting Operations Manual (UBOM) of DBM and the Revenue Generation Manual of DOF. All these will have their place in the Eastern Visayas Regional Development Plan which is focusing on alleviating poverty in Region VIII.

Strategies Developed in the Implementation of CBMS

Implementing CBMS in Eastern Visayas has been made possible because of the convergence and collaborative efforts of DILG Region

8 with other national government agencies (NGAs), and non-government organizations (NGOs), the technical assistance of the PEP-CBMS Network Coordinating Team, and more importantly, the interest of our LGU partners.

In particular, DILG Region 8 has in fact employed a set of strategies in order to attain the 80 percent coverage of CBMS implementation in Eastern Visayas. These are:

- *Mainstreaming of the Regional CBMS Technical Working Group_(who worked with the 16 Pilot Municipalities) to the Social Development Committee (SDC) of the RDC.* The DILG 8 continues to strengthen its working relationship with the members of the Regional CBMS Technical Working Group, this time through the working committees of the SDC and the Regional Oversight Committee of the JMC.
- *Convergence of resources among NGAs, NGOs and LGUs.* With the limited resources of the department, the DILG Region 8 continues to conduct advocacy on the utilization of CBMS to other NGAs, NGOs and LGUs and engage in activities that would allow convergence of resources to assist the LGU partners in the realization of establishing a CBMS database at their level.
- *Involvement of the Regional League of Planners (RLP) and League of Municipalities of the Philippines (LMP).* The DILG Region 8 advocated CBMS to the recently Regional Planners' Conference held on 20 September 2007 to encourage, specifically LGUs not yet implementing the same, to adopt the system by showcasing best practices and benefits gained by LGUs who have already established CBMS database. Advocacy activities were also conducted with the LMP to encourage Local Chief Executives to implement CBMS in their respective LGUs.
- *Organization and training of local trainors.* The DILG Region 8 continues to conduct capability building efforts and tap local trainors to assist other LGU partners in fast-tracking the implementation of CBMS. In 2007, with the technical assistance of the PEP-CBMS Network Coordinating Team, we were able to conduct 11 trainings for our LGU partners.

with the results serving as basis for addressing the needs and problems of the members of the community.

- *Designation of program managers for CBMS in DILG Regional, Provincial, City and Municipal Offices.* DILG 8 sees the need and importance of having CBMS Focal Persons to oversee and ensure the sustainability of the program from the regional, to the provincial, city and municipal level.
- *Technical Assistance on the Utilization of CBMS in Project Proposal Making for the Millennium Development Goal (MDG)-Fund.* The DILG Region 8 conducted a Workshop on Project Proposal Making on 14-16 January 2008 for 8 LGUs with CBMS. The LGUs were able to submit to the MDG-Fund a draft Project Proposal.
- *CBMS Orientation for Region VIII Philippine Health Insurance Corporation (PhilHealth) Field Officers.* As a result of this meeting, said agency is considering the 14 Core Local Poverty Indicators as basis for identification of beneficiaries.
- *Advocacy on the utilization of CBMS Indicators in the determination of Population and Development (PopDev) issues and concerns.* This advocacy resulted in the conduct of a training seminar on the formulation of the Socio-Economic Profile for the 3 UNFPA pilot areas of Eastern Samar.
- *Advocacy on CBMS Utilization for Disaster Risk Management under the GTZ-EnRd Program.* Initial activities have been conducted on how to utilize the CBMS in terms of DRM concerns.
- *Sharing of strategies on fast-tracking CBMS implementation with the 3 UNFPA pilot areas of Eastern Samar.* The DILG Regional and Provincial CBMS Focal Persons rendered technical assistance to address the problems that hampered LGUs in establishing their CBMS database.

Initiatives Being Undertaken to Sustain CBMS

To sustain the implementation of CBMS in the region, we have the following ongoing initiatives:

- Strengthening the Regional and Provincial CBMS-TWG membership through convergence of resources between and among NGAs, NGOs, LGUs and other stakeholders;
- Rendering technical assistance to fast-track implementation of CBMS in the region;
- Continuing advocacy for CBMS Implementation;
- Continuing advocacy for the integration of CBMS Data in the formulation of the Comprehensive Development Plan, pursuant to JMC No. 001, series of 2007;
- Putting in place the CBMS data for the MDG Responsiveness Tracking for LGUs; and,
- Documentation of Best Practices.

Conclusion

The DILG Region 8 has reaffirmed its commitment to pursue the implementation of the CBMS program in Eastern Visayas.

With CBMS, our LGU partners, especially our local officials, can derive significant benefits from a database that provides them a comprehensive picture of the needs of our constituents at the grassroots level.

Hence, we bid our local partners to pursue their advocacy to sustain this undertaking towards helping the members of the community who are truly in need of assistance.

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CBMS as a Tool for Developing Regional Development Strategies: The Bicol Experience¹

Blandino M. Macea*

During the 2004 CBMS National Conference, Dr. Ponciano Intal, Executive Director of the Angelo King Institute for Economic and Business Studies, De La Salle University, stated that policy and program designs should be based on hard facts and not merely as products of faith on economic logic.

We would like to add to that statement that relevant and timely information is essential and invaluable to proficient management at all strata of local governance.

Today, our pilot local government units (LGUs) are solid proofs that the Community-Based Monitoring System (CBMS) is indeed a practical tool for setting in place a more efficient governance system. Our LGUs' rich and fruitful experiences in using the CBMS in planning, program formulation and poverty monitoring over such a short period of time serve as a collective validation of what the CBMS actually promises to deliver.

Their experiences point to the following: the CBMS provides for well-coordinated and unduplicated services from key players to LGUs, as well as from the LGUs themselves to their constituency. It has improved service delivery to and by the same LGUs, and as a result, there is greater community satisfaction. Moreover, there is

¹ An edited transcript of the presentation of Mr. Arnel Renato Madrideo, Assistant Division Chief, Technical Services Division of DILG Regional Office No. 5, in behalf of Director Blandino M. Macea.

* Regional Director, Department of the Interior and Local Government (DILG) Regional Office No. 5

better appreciation for the presence of national government agencies (NGAs), People's Organizations and other Civil Society Groups in the community.

The CBMS has also created greater awareness on the development status of the region by giving clear & accurate indicators of poverty and identifiable service gaps. It also provided guidance in planning & budgeting to the LGUs implementing the project across the provinces through the color-coded maps, and reliable, relevant and comprehensive data on the welfare condition of the communities.

It has enabled LGUs to align their Programs, Projects and Activities (PPAs) with urgent developmental needs such that the projects being implemented by these LGUs are now truly responsive to the demands of their constituents because projects are now prioritized in accordance with their degrees of urgency. Moreover, the CBMS serves as a deterrent to the practice of "politicizing" projects.

How are all of these being made possible?

As a tool, CBMS measures the impact of structural adjustment policies on various groups of people. As such, program managers and officials are being guided on the appropriate approach to apply in redesigning particular programs, projects and activities currently implemented by the respective LGUs. Because they have their own database, they are able to accomplish these tasks without having to wait for the national survey results.

When CBMS is used in conjunction with other tools like the Local Government Performance Measurement System (LGPMS), the LGU officials are guided to work on the ground, and when necessary, to redirect the focus of their governance based on available data. Precisely because proposed projects can now be supported by validated survey results, local officials would have second thoughts not to include in their development agenda or investment plans those PPAs which, although not popular, will definitely create greater impact in poverty alleviation. In the process, CBMS results enable LGUs to formulate or reformulate development strategies and facilitate the preparation of the following documents: Medium Term Development Plan (MTPDP), Executive Legislative Agenda (ELA), and Comprehensive Land Use Plan (CLUP). In the case of one particular LGU, CBMS results were used also in preparing its School Improvement Plan.

Since local and national programs require information for selected sectors, the CBMS enables LGUs to generate data effortlessly. Households are easily identified, needs are readily ranked and prioritized, and appropriate interventions are provided on time. In the case of the LGUs I am talking about, they were able to easily identify eligible program beneficiaries for the following:

- Relief operations;
- Infrastructure for Rural Productivity Enhancement Sector (InFRES);
- Kapit-bisig Laban sa Kahirapan - Comprehensive Integrated Delivery of Social Services (KALAHI-CIDSS);
- Save the Children Foundation (SCF);
- Agriculture, Social Support & Environment Facilities (ASSEF), Food and Agriculture Organization (FAO), United Nations Children's Fund (UNICEF), OXFAM and other organizations;
- Distribution of wheelchairs & health cards;
- Gawad Kalinga Program.

In Libon, Albay, the data was useful in the distribution of wheelchairs to 69 differently- abled persons. In the same manner, the LGU there used the CBMS data for the construction of 50 Gawad Kalinga houses in Barangays Pantao and San Isidro, in the Municipality of Libon, Albay. It was also used in identifying beneficiaries of Philippine Health Insurance Corporation (PhilHealth) cards among the indigents of the municipality.

Another positive result of the CBMS is the assistance it provides to LGUs in monitoring the effectiveness of poverty reduction programs of the government. Monitoring the extent of Millennium Development Goals (MDG) localization remained low and slow for those LGUs with no tool to supplement the essential and primary data. For the pilot LGUs, they not only found it a lot easier to come up with comprehensive data on the extent of MDG localization, but were also able to derive accurate information on the implementation impact of other anti-poverty government programs. They were likewise able to track down the policies that had been formulated to respond to identified issues but have not been implemented.

The CBMS results also proved useful for national government agencies as illustrated in the case of Lupi, Camarines Sur – whose CBMS digitized maps served as bases for the preparation of an operational plan and the establishment of detachment areas by the Philippine Army.

The Philippine National Police (PNP) used the CBMS database in finding the relatives of a Lupi, Camarines Sur resident who was apprehended in the Municipality of Daraga. With the help of the database, the person's relatives were identified and located and were consequently informed of the incident.

In the case of Libon, Albay, the data served as one of the prerequisites for the Tindahan Natin Project of the National Food Authority (NFA).

The CBMS data was used in preparing for the adoption of a Municipal ID System in Lupi, Camarines Sur, and in the tax mapping of business establishments in Libon, Albay. The CBMS data was also used during the 1st LGU Education Summit in Libon, Albay, and in the availment of grants in Minalabac, Camarines Sur.

Table 1 below shows the areas in the Bicol Region where the CBMS is being implemented.

Table 1. CBMS Coverage in the Bicol Region

LGU	Technical Assistance
Entire Province of Camarines Norte	PEP-CBMS Network Coordinating Team with the League of Local Planners (LLP)
Entire Province of Masbate	PEP-CBMS Network Coordinating Team, Bureau of Local Government Development (BLGD), Department of the Interior & Local Government (DILG) Region V, National Economic Development Authority (NEDA) Region V, World Bank-Asia-Europe Meeting (WB-ASEM) and United Nations Population Fund (UNFPA)
Pilot LGUs (Albay: Ligao City & Municipality of Libon; Sorsogon: Sorsogon City; Camarines Sur: Iriga City, Municipalities of Lupi & Minalabac)	PEP-CBMS Network Coordinating Team, DILG V, NEDA V, and the National Statistical Coordination Board (NSCB) V
Sipocot, Camarines Sur	PEP-CBMS Network Coordinating Team, DILG V, NEDA V & NSCB V
Tinambac, Camarines Sur	PEP-CBMS Network Coordinating Team, DILG V, NEDA V & NSCB V
1st District of Camarines Sur	PEP-CBMS Network Coordinating Team, DILG V, NEDA V, NSCB V & the Office of the Congressman of the 1st District of Camarines Sur

We are also looking forward to the expansion of the CBMS in the following areas: Tiwi, Albay; Castilla & Pilar, Sorsogon; Area Development Teams of Albay 1 and 2 (comprised of the City of Tabaco, Legazpi City, Municipalities of Bacacay, Malilipot, Malinao, and Sto. Domingo, Daraga, Camalig, Manito & Rapu-Rapu). We expect Bombon, Camarines Sur and Polangui, Albay to adopt the program. We also see a growing number of LGUs in the Bicol Region that actually want to adopt the system, and hopefully they will be able to implement the system by the end of 2008.

These are the things that we want to achieve by 2008 and onwards:

- Holding of a Regional Summit on CBMS to showcase the accomplishments of the pilot LGUs and to serve as a vehicle for convincing other remaining LGUs to implement The system.
- Establishment of regional repository of CBMS data at the respective offices of our partner agencies in the region: NEDA V, NSCB V and DILG V.
- Demand-driven, region-wide implementation of the project.
- Ensuring that 120 LGUs have their respective poverty maps and plans.
- Continuous updating of database of pilot LGUs.
- Documentation of CBMS Best Practices of the Pilot LGUs.
- Continued partnership with NGAs and other stakeholders.

We know that changes in policies affect the implementation of programs. Nevertheless, when there is a need to do so, it should be undertaken with a view towards improving service delivery, governance and, ultimately, the quality of life of the people in the community.

The cumbersome process of getting good projects (such as the CBMS) approved should not remain a sore point between the Local Chief Executive and the Local Sanggunian. Good project proposals must instead be supported by both the Executive and Legislative bodies. At stake is no less than the future of those who elected them to office, and who, if afforded better opportunities, could transform the present social structure around for good.

With the many benefits an LGU can obtain in the implementation of the CBMS project, political leaders should view CBMS more as an investment than as a cost, and thus, should not have second thoughts about its implementation.

Using CBMS in the Implementation of Regional Development Strategies¹

Oscar Francisco

Introduction

For population education (Pop Ed) purposes & as an *aide memoire*, my reaction to the three presentations can be summarized by the acronym: **CBMSS**.

- Context where I come from
- Background as former NAPC Vice Chair
- My lens in looking at the three presentations
- Summary of issues
- Signs of hope

Context Where I Come From

I am basically a non-government worker, and more particularly a community organizer. My perspective is the bottom-up approach (with emphasis on the local as imagined at the barangay-bayan level) with preferential bias for the poor.

Background as former NAPC Vice Chair

As a brief backgrounder, allow me to say that I used to serve as Vice Chair of the National Anti-Poverty Commission (NAPC) for Basic Sectors. Currently, I serve as Gender-Sensitive NGO Representative in the KALAHHI (Kapit-bisig Laban sa Kahirapan) - CIDSS

¹ An edited transcript of the comments of Mr. Oscar Francisco, Managing Trustee, Institute for Democratic Participation in Governance (IDPG), on the presentations during the session on *Using CBMS as a Tool for Implementing Regional Development Strategies*.

(Comprehensive and Integrated Delivery of Social Services) National Steering Committee, as well as Managing Trustee for the Institute for Democratic Participation in Governance (IDPG). These being where I am coming from, my response to the presentations will naturally be influenced by the concerns of these sectors.

Many of the frameworks, concepts, buzzwords and learnings that were reaffirmed in our sharing and exchanges during the past six sessions of this conference are those that I have come to know and appreciate, especially when I was still with the NAPC. Some of these buzzwords that have been repeatedly mentioned by various speakers include the following: participation, convergence, harmonization, synergy, scaling-up, transparency, accountability, etc.

On the other hand, there are various developmental frameworks and concepts that we can employ in understanding what we are doing and in assessing the progress we have made in our CBMS project and MDG localization. I would like to cite the more notable and highly relevant ones here:

- *Sustainable Development*: Back in the 70s, we did not accept the concept of “development” if the qualifier “sustainable” was not attached to it. As we move further into the 21st Century like where we are now, the need for sustainable development strategies has become all the more imperative.
- *The Many Faces of Poverty*: Knowing your enemy is an important weapon in the war against poverty. But the problem with poverty is that it is a difficult enemy to combat. It wears different faces at different times and at different places.
- *Wellbeing*: Robert Chambers (Whose Reality Counts) used the criteria of wellbeing and gave importance to how the poor view their situation, and to listen to and recognize their voices.
- *Improvement of Wellbeing*: I was jolted by Dr. Randy Spence’s presentation this morning on the “Missing Dimensions, Missing Indicators of Poverty”. Dr. Spence stressed that in the Community-Based Monitoring System (CBMS), what is being planned and budgeted is the improvement of the wellbeing of individuals and communities (including taking into account the spiritual dimension and the pursuit of happiness) — which he says can be measured.

- *Freedom, Exclusion and Deprivation:* Amartya Sen's concept of the development of five types of freedom highlights that social exclusion comprises all the deprivations that diminish a person's life and freedom and prevent people from doing valuable things or achieving a valuable state of being.
- *Enlarging Choices:* Human development is the process of enlarging people's choices, the most essential of which are to live a long and healthy life (Kalusugan), to acquire knowledge (Karunungan) and to have access to resources needed for a decent standard of living (Kabuhayan).
- *Peace and Stability:* According to former World Bank President Jim Wolfensohn, without alleviating poverty, there is no possibility for peace and stability.

My Lens in Looking at the Three Presentations

Table 1. Uses of CBMS in Regions IV-B, V and VIII

Region	Uses
IV-B (MIMAROPA)	<ul style="list-style-type: none"> • Physical Planning & Disaster Risk Management • Prioritization of Resource and Investment Programming • Targeting sites for Hunger Mitigation Program • Formulation of Human Development Report
V (Bicol)	<ul style="list-style-type: none"> • Alignment of programs, projects & activities (PPAs) with urgent development needs • Formulation/reformation of development strategies based on the CBMS Results • Identification of beneficiaries for national programs: Relief operations, InfRES, Kalahi-CIDSS, Gawad Kalinga; international NGOs: ASSEF, FAO, UNICEF, OXFAM
VIII (Eastern Visayas)	<ul style="list-style-type: none"> • Identification of PPAs • Formulation of Socioeconomic Profiles • Formulation of Executive Legislative Agenda (ELA)

I am glad that the MIMAROPA Region has something to offer that is new and consistent with Randy Spence's concept of wellbeing such as Physical Planning and Disaster Risk Management.

Two National Programs Implemented in the Regions Using the Community-Driven Development (CDD) Approach

In promoting local level collective action for empowerment and poverty reduction, we subscribe to four key principles: participation, accountability, transparency, and shared responsibility for costs.

On the part of KALAHII, we focus on five key anti-poverty strategies in these three regions: (1) acceleration of asset reform; (2) provision of human development and social services (health and education); (3) livelihood and employment; (4) social protection and security from violence; and, (5) participation of the poor in decision-making.

- KALAHII-CIDSS: Region IV-B (4 provinces, 10 municipalities, 159 barangays); Region V (6 provinces, 25 municipalities, 659 barangays); Region VIII (5 provinces, 32 municipalities, 836 barangays).
- Agrarian Reform Communities (ARCs): Use of principles of connectivity, LTI-PBD (Land Tenure Improvement - Program Beneficiaries Development) integration, ARC, Non-ARC.

Summary of Key Issues

These are just some of my random notes:

- Regional Development Plans formulated by the Regional Development Councils (RDCs) are seldom taken into consideration by local government units (LGUs) because RDPs tend to ignore local development plans (LDPs). RDCs tend to focus on inter-provincial projects, mega-regions, mega projects, and infrastructure. (Where are the poor in all of these?) Thus, LDPs are formulated independently of regional & national development plans.
- Poor coordination between national government agencies (NGAs) and LGUs in planning. Although we are already in a devolved set-up in many aspects of governance, many NGAs act as if there is still no decentralization of government functions. LGUs, on the other hand, say that their responsibilities are increasing.

- While RDC is the natural forum for integrating national and local development plans, many LGU officials feel that RDCs have been reduced to serving as monitors of NGA projects implemented at the local level. Thus, there is a need to reorient RDC as a venue for integrating local & national plans.
- There is a need to strengthen roles of leagues (barangays, municipalities, provinces) in vertical and horizontal linkages and in the scaling up process.
- There is a need to integrate human security framework into peace and development plans in regions and areas experiencing armed conflicts.
- LDPs should influence and inform higher level plans; national and regional plans should serve as broad frameworks, while LDPs must help in fleshing out these frameworks.

Signs of Hope

- NEDA's current efforts to strengthen the local planning process deserve support. The Department of the Interior and Local Government's (DILG) policy and technical assistance capability are important for LGU success. Joint Memorandum Circular (JMC) No. 1 and Enhanced Comprehensive Development Plan (CDP) are cases in point.
- Department of Social Welfare (DSWD) - DILG pilot project "Makamasang Tugon": Harmonization of CDD-LPP (League of Provinces of the Philippines) in 33 municipalities.
- NAPC's Regional KALAHİ Convergence Groups (RKCGs).
- The actions of civil society organizations (CSOs) aimed at strengthening transparency and accountability within the framework of Participatory Public Expenditure Management (PPEM) Cycle should be supported. Some examples include the initiatives of Social Watch Philippines (Alternative Budget Initiative), Procurement Watch, Citizens Report Card, and Road Watch.

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Keynote Address

Developing a Culture of Performance and Accountability Through CBMS

*Austere A. Panadero**

For those of you who have just heard about the Community-Based Monitoring System (CBMS), there is a long story to tell about how we got to this point where we are today.

Three years back, we were still talking about how to launch the CBMS project for our local government units (LGUs) and local communities. There were those who said that this project was not necessary, and there were also those who thought otherwise — that CBMS was extremely necessary especially for our LGUs.

Today, our records show that CBMS has already been implemented in 54 provinces, of which 20 were able to implement it province-wide. I think two more called us up last week to convey their interest to do CBMS on a provincial scale. The 54 provinces covered a total of 422 municipalities, 27 cities and 8,000 or so barangays.

These numbers might look big but are actually very small compared to our total population. For example, the CBMS may have already covered 422 municipalities, but if you compare that with a total number of 1,500 or so municipalities, that means the actual coverage is only 28.3 percent of the whole pie.

In terms of provinces, the CBMS coverage is 54 out of 81 — which may be good enough for the moment. But if we look at the provinces that implemented the CBMS province-wide, of which there

* Undersecretary for Local Government, Department of the Interior and Local Government (DILG)

are only 20, they would account for only 25 percent of the total number of provinces.

The still insignificant coverage becomes all the more glaring if we look at the figures at the barangay level. We are talking of 42,000 barangays all over the country, and so far, only 8,000 barangays plus probably another 2,000 – altogether accounting for only 23.8 percent of all barangays — have implemented CBMS.

I guess helping expand the CBMS coverage is one challenge we face today, so probably a part of this Conference should focus on the benefits gained by the LGUs who have already implemented CBMS. Some of you may have already seen and experienced these benefits in your own communities.

Another challenge that we need to address as we move on in this journey is to find out how we can further encourage other LGUs and partners to help us in scaling up CBMS implementation by LGUs in other parts of the country so that they can also see how CBMS can help them in their local governance process. I think this challenge should be the focus of our discussion this morning.

For this reason, I am glad that we have today many LGU representatives who will share with us how the CBMS has been helpful to them in their daily operations. I am also glad that the League of Municipalities of the Philippines (LMP) is represented here today by no less than its Executive Director to help steer this process of sharing with others how the League members are utilizing the CBMS.

From our perspective at the Department of the Interior and Local Government (DILG), we believe that the CBMS is part of a system that is being put in place to really help develop this culture of performance and accountability. We all know that this is difficult to do and that it is not easy to implement at the local government level. When Filipinos talk about performance rating, the common reaction would be to ask “why should I be rated?” or “why should I be monitored?” But then, this matter of performance and accountability should not be seen that way.

You must have seen that part of the process of improving governance is to be able to really direct your energies to a priority area. And how can you do that if you do not know the magnitude of the problem, and of course, what exactly is the problem in the very first place?

We at the DILG have been telling our LGUs that they need to use a particular tool to help them focus on the problems to which they should be paying attention. One of these tools is CBMS. Maybe for those who have been in local governments for some time, you may have already heard of the Social Reform Agenda (SRA), as well as the Minimum Basic Needs (MBN) – for which we use so many indicators. If memory serves me right, we used to have 42 indicators for the MBN — until some LGUs started complaining that gathering 42 indicators was too costly for them. So they asked if it would be possible to limit the number of indicators to a minimum. It was for this reason that our current set of CBMS indicators was put in place – proving that we at the DILG continue to look for new and better ways of collecting the necessary data that can help support local planning and poverty reduction programs through the proper identification of targets who need intervention the most. CBMS is one of the tools for this purpose and we strongly encourage everyone to use it to help you in your targeting efforts as well as in streamlining the planning processes that you are putting in place.

Yesterday, one of our colleagues was here to explain to you what we call the Rationalized Planning System (RPS). What we are trying to do now is to put in place three major systems with a view towards simplifying things at the local level. What are these three?

1. One of these is **planning**. You may all be aware that there are so many planning systems or documents required of LGUs. The discussion at the national level together with the League is to find a way to simplify the process by adopting just one planning document and finding ways to highlight sectoral concerns in these planning documents. I think we are starting our journey in that aspect. The DILG is trying to really help LGUs synchronize their planning systems not only within towns but also upwards to the provincial level. I guess the Joint Memorandum Circular for this has already been mentioned earlier. At this point, I would like to encourage everyone to take a look at it, and to link up with your provincial planning and development coordinators (PPDCs), provincial budget officers (PBOs) and treasurers so that the planning process can be streamlined, and hopefully we can reduce the 27 or so plans that are required by the national

government agencies from the local level. So this is the system that we are gradually trying to install. We hope that the PPDCs and MPDCs (municipal planning and development coordinators) will continue to study this as well as gradually implement it.

2. The second system is the **performance management system**. And here we are looking at two aspects: the delivery side (the actual process of delivering services to the grassroots), and secondly, the assessment side (checking if the services rendered by government agencies have really been effective in addressing the needs). Some of you may have already been introduced to the Local Government Performance Management System (LGPMS). This is a self-assessment tool that we are gradually installing so that everyone gets to familiarize themselves with performance levels of the different local government units and check whether things are going as planned or need to be improved so that services can be better delivered.
3. And the third major system is **impact monitoring**. This seeks to determine what is really happening in our communities. And for this you need the CBMS. All of us who are concerned with different sectors or problem areas use the CBMS to track whether things are really improving, are deteriorating or have remained at the status quo.

These three systems are not independent from each other but are, in fact, interlinked. If you find out that you have problems in specific areas in CBMS as you are implementing CBMS, then you can feed this into your planning processes so you can find out what is wrong with your delivery system and assess also whether there are things that need to be improved in the different departments of the local government, be it health, social welfare, agriculture and the like. You can also find out what it is that you have to do something about, be it improving the input, the budget, deployment, etc. Or you can also determine why you are not able to meet your targets.

These systems that we have been trying to put in place over the past 2 or 3 years are gradually taking shape on the ground. We are very much encouraged by the kind of interest, commitment and

passion shown by some LGUs to really use them and make things happen.

So another challenge for us today is to spread the good news – about the many LGUs that have undertaken their CBMS already and achieved significant improvements in their performance. In our country, it is difficult to just depend on the spoken word. It is necessary for people to really see tangible results. This may be the reason why it is necessary for our mayors and other local government officials to be here with us today to share with you how they were able to do it. I guess you may have read as well that there are provinces that have greatly improved their performances and have moved up in terms of the Human Development Index (HDI). This is because they were each able to achieve a systematic diagnosis of the poverty situation in their respective areas. For this, I would like to cite the Province of Bohol — where there was really a systematic use of the CBMS tool and data in targeting poverty groups, in planning, in budgeting, in performance monitoring, and in checking whether lives are really improving. These verifiable results make it easier to appreciate the benefits of CBMS. Hopefully, we can cite and underscore these positive developments in the process of encouraging other LGUs to implement CBMS in their respective municipalities or provinces.

Your presence in this Conference is a manifestation of your interest – that is a good start! Find out more about it, learn more about it and eventually advocate for its use in your own LGU. We are working closely with the LMP — whom we would like to thank for helping promote the use of CBMS. As I said earlier, this work is not easy. Mobilizing resources for data gathering is not really a good political move for others. As some mayors would say “Why should I spend that huge an amount for CBMS? I would rather just use the money to build something.” Actually, that approach is also feasible. However, the problem with that approach is, as an LGU moves on, it needs to find out whether the programs it invested on – water systems, roads, basketball courts, etc. — are really responding to the true needs of their constituents. Without CBMS, it cannot answer that question.

Using CBMS also makes for good politics because it allows LGUs to identify which sectors really need what services the most, and allows them to target such sectors for specific programs. Hopefully, such responsiveness would “translate” into votes later. But then, I am

not really sure if it would eventually translate into votes — only our politicians would know that, and I am not one. Nevertheless, I suppose communities can see and recognize the results of the programs implemented by their LGUs, and that can serve as a good determinant in their electoral decisions.

The operational aspect of the system — the time involved in data gathering, the cost entailed, etc. — continues to be a challenge for everyone. But I am sure there are already a lot of lessons learned and experiences gained in this area to guide us as we move on — for instance, on how we can reduce the cost of data gathering, where we can ask for assistance, and who can assist us.

We at the DILG are ready. We have technical staff at our regional offices. We are also developing the capacities of our provincial staff so that they can help you in training your staff and in processing your data. Of course, we just have to work together to find out where to get the budget for the MOOE (Maintenance and Other Operating Expenses) that you can use for the surveys. This is where our partners here can help us. But actually, we do not have to wait until we receive grants before we can start implementing CBMS — which can actually be done and utilized slowly and gradually. Hopefully, somebody can suggest a better idea for a more cost-effective way of collecting data. We have heard of a proposal that involves a cost of only PhP5 per household, but then, we do not know how that would be possible — maybe such proposal does not even have any allocation for data gatherers' refreshments. Anyway, I do not think it should be like that.

These are just a few of the many challenges which we should continue to find ways to address. Nevertheless, they should not stop us from pursuing our CBMS advocacy and getting our principals at the local government to support this endeavor. Because at the end of the day, we know that CBMS will allow everyone to make good decision on how to allocate resources and how to deliver better results. More importantly, I think this is part of the process of creating a culture of performance and accountability that we are all very much concerned about.

I think the topics lined up for today are all very interesting and I will not further belabor the point on the many uses of CBMS. What

I can say to those who want to implement CBMS is that we at the DILG are ready, willing and able to help you in any way we can.

I would like to thank all of you for coming over and showing your interest in the CBMS initiative. We believe that the timing is just perfect as it is just the start of the terms of our mayors. But then, LGU officials have limited time to deliver results — they only have 36 months. So if you want to deliver results, you need to use the tools available to our LGUs — and CBMS is the way.

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CBMS: A Take-Off to Progress

*Alfredo P. Valdez, Jr.**

Rationale

Having its own Community-Based Monitoring System (CBMS) project is a dream come true for the local government unit (LGU) of the Municipality of San Nicolas in the Province of Ilocos Norte.

As a leader, addressing the needs of my constituents must be the first in my priority list of developmental projects. While it is easy to give assistance to people, it is a gigantic task to respond to their real felt needs and to make sure that they are indeed the poorest of the poor. Thus, an authentic and reliable data is needed.

Being a neophyte in the field of politics then, I did not know where to begin until I met a friend, Ms. Nona Londonio, the wife of the Cooperatives Officer of Pasay City, who introduced me to the CBMS Project. Shortly thereafter, CBMS was officially served to me on a silver platter by the Department of the Interior and Local Government (DILG). I did not have any doubt that this was definitely the assistance that I had long been waiting for in order to fulfill my passion for quality service and deliver it to where it should be properly served. That was how our municipality became the pilot for CBMS in the whole province of Ilocos Norte.

This collaboration among the PEP-CBMS Network Coordinating Team, the Bureau of Local Government Development (BLGD), the DILG Region 1 and the Municipality of San Nicolas, Ilocos Norte is in line with the goal of institutionalizing a CBMS to generate a baseline

* Mayor, Municipality of San Nicolas, Ilocos Norte

data that can be used for poverty diagnosis, Millennium Development Goals (MDGs) target monitoring as well as for effective and efficient planning, program formulation, implementation and impact monitoring.

Although addressing poverty issues is already incorporated in our Annual Investment Program (AIP), I have always believed that there is really a lot more that we can do. All our development efforts would be futile unless we go down to the grassroots level and adopt poverty reduction programs that are functional. We may not be able to eradicate poverty right away, but we can certainly alleviate the living conditions of the deprived.

Profile of the Municipality of San Nicolas

San Nicolas is the second smallest town in the Province of Ilocos Norte with a land area of 4,930 hectares or 49.3 square kilometers. It lies on the south bank of Laoag River, at the western central part of Ilocos Norte. The municipality is bounded in the south by Paoay and Batac City; in the north and west by Laoag City; and in the east by the municipality of Sarrat.

It is located approximately 75 kilometers north of Vigan, Ilocos Sur; 214 kilometers from San Fernando, La Union; 271 kilometers from Baguio City; and 485 kilometers north of Manila. It can be reached by both air and land transportation coming from the north and south.

San Nicolas has 24 barangays — 15 urban and 9 rural. From the generated CBMS results, the total population as of 2006 is 31,972 — with 7,113 households, and a voting population of 19,121.

The present administration is being guided by its vision that San Nicolas shall be *a peaceful and progressive agri-industrial community with an ecologically-balanced environment*, and, by its mission of *pursuing socio-economic growth through an efficient and effective governance supported by an empowered, God-loving citizenry and other partners in development*.

San Nicolas is a 3rd class municipality with an Internal Revenue Allotment (IRA) of PhP31,865,570.59. It ranks first in the province in terms of income collection from local sources, with actual collection amounting to PhP18,189,108.79. It is already considered as a sleeping giant with respect to the economic growth. Local and foreign investors

consider San Nicolas as a potential hub for commerce and industry due to its strategic location. It is, in fact, a convergence zone for all the 21 municipalities and 2 cities of the province.

San Nicolas is primarily an agricultural town. However, over the past few years, it has emerged as a haven for multinational and local companies such as Coca Cola Bottlers, Phils., San Miguel Beer, Honda Motors, Nissan, Venvi Group of Companies which includes the newly constructed 365 Plaza, Shell, Petron and Flying V Gasoline Stations, and Magnolia Corporation. In addition, the presence of a crushing and batching plant and a feedmill paved the way for San Nicolas to be known as an agri-industrial town in Ilocos Norte.

The fact that San Nicolas is a culturally-rich town has made the present administration relentless in its pursuit to preserve the culture and traditions of the community as a continuing legacy for the next generation. Such drive is evident in the preservation of the 15th century San Nicolas de Tolentino Parish Church and the old town plaza – both of which are located in the heart of the town, and the centuries-old pottery industry for which the town is famous in the whole province and neighboring provinces as well. The refurbishment of the old plaza has made the town distinct because of the use of old bricks or ladrillo. The plaza, which dates back to the Spanish era, has now become the promenade of local folks and tourists alike. The town boasts of its Damili Street Dance – which is conducted annually during the town fiesta celebration — a must see event as the dance depicts the town's potters at work. With all the 24 barangays of San Nicolas as its participants, the Damili Street Dance has been sponsored by the National Commission for Culture and the Arts (NCCA) over the past two years.

Relevance of the CBMS Experience

For San Nicolas, CBMS is custom-made as an approach to achieve its 7 Point Agenda:

1. Effective and Efficient Governance
2. Economic Development
3. Health and Sanitation
4. Peace and Order
5. Tourism
6. Cultural Development

7. Environmental Rehabilitation

Conducting the CBMS Project in San Nicolas was not an easy task. Discouraging and frustrating setbacks came along. While the planning and training stages for the enumerators were effortless, the barangay immersion stage proved to be otherwise. During this phase, the CBMS Team faced some difficulties that needed immediate action.

At any rate, these were eventually overcome because the LGU's and all other stakeholders' determination and commitment to serve and finish at any cost what they had already started remained firm and strong. The whole team was primarily motivated by the fact that the project's end result would be integrated into local level plans and programs that can improve the quality of life of eligible beneficiaries.

Uses of CBMS

The CBMS in San Nicolas was useful in various ways.

- It improved the data banking system at the municipal and barangay levels through the installation of the computerized CBMS database.
- It created poverty maps of the LGU particularly for the 24 barangays through digitized maps generated from the CBMS database.
- It generated a Municipal MDG Report based on consolidated CBMS results.
- It updated the socio-economic profile and development plans of the municipality.
- Through CBMS implementation, best practices and lessons learned were documented.

Strategies in CBMS Implementation

The LGU of San Nicolas signed a Memorandum of Agreement (MOA) with the PEP-CBMS Network Coordinating Team on 24 May 2006 by virtue of Sangguniang Bayan Resolution No. 19, series of 2006. A local CBMS Team was also created.

The municipality allocated PhP400,000 for the conduct of a training workshop on data collection, consolidation, computerized data processing, data validation, reproduction of survey forms, manuals and 24 barangay maps, honorarium of encoders, data base

management, dissemination of findings, publication of reports, other needed supplies, materials and equipment (laptop and mother computer), and evaluation of future CBMS activities.

The local media (radio stations) was tapped for the information dissemination drive.

In recognition of the fact that Punong Barangays are the key personnel in their respective barangays, a meeting was conducted with the 24 Punong Barangays to introduce them to the rationale and features of the CBMS, and at the same time solicit their support and cooperation for the project. The Punong Barangays also recommended two Barangay Health Workers (BHWs) who qualified as enumerators for the training. They were selected as enumerators due to their familiarity with their constituents and their basic knowledge on data gathering. Each barangay also allocated PhP3,000 to cover the honorarium of enumerators at the rate of PhP10 per accomplished questionnaire. This served as the barangays' counterpart and came from their 20 percent Development Fund. Another commitment was to disseminate information about the project to their respective constituents to minimize problems during the survey.

The provision of technical support was made possible by conducting a training seminar on Data Collection and Field Editing for the benefit of the Local Poverty Reduction Action Team (LPRAT) on 24-26 May 2006. All expenses were shouldered by the LGU.

After the training, the CBMS team reproduced the survey questionnaires (CBMS Form 1) and distributed them to the enumerators to start conducting the survey. The spot maps were given to the Punong Barangays for accomplishment.

A training on CBMS Data Encoding and Map Digitizing was conducted on 19-21 July 2006 at the DILG Central Office Building. Three regular employees and one casual employee comprised the data encoders. The encoders brought along 120 accomplished household profile questionnaires, complete list of barangay household heads and 4 spot maps for the actual computerized data encoding and processing, digitizing of spot maps and mapping of CBMS indicators. The municipality purchased three additional laptop computers in order to achieve the ratio of one computer per encoder.

The encoders edited the accomplished questionnaires and spot maps and returned them to the enumerators for further correction

and validation of the census for the purpose of facilitating a trouble-free data encoding. Furthermore, a meeting with the enumerators was held on 27 July 2007 to thresh out problems related to the encoding of their outputs. The encoders specifically pointed out critical data which must not be omitted such as age, blood type, religion, address (barangay, municipality, province), education (elementary, high school, vocational, college), economic status, etc. They reminded the enumerators that if their data is incomplete, they will not be able to encode any information at all.

With regards to data processing and encoding, the policy followed was one encoder per one complete barangay towards generating a more organized databank. Concatenation proved to be a more complex work and posed some problems when it was not done carefully.

The encoders finished encoding 50 questionnaires over several Saturdays. This proved to be an excellent strategy since the encoders were able to devote their entire time to their encoding work without being distracted by clients – which was normally the case when they would perform their official functions during weekdays.

A repository computer was purchased solely for CBMS to serve 24 barangays. With regards to map digitizing, one of the encoders was commissioned to solely undertake the task towards achieving a more systematic program.

The training on CBMS Data Processing was conducted on 18-20 September 2007 at the Provincial Capitol of Ilocos Norte. This was for mapping CBMS Core Indicators and generation of all the desired outputs needed.

The data validation was conducted on 29 November 2007 with the Punong Barangays and the enumerators as participants. This involved the presentation of processed data (with the end in view of identifying the target beneficiaries in randomly selected barangays) and its validation by the participants. This activity also identified the major problem areas of the community needing interventions for their resolution.

Problems Encountered in CBMS Implementation

During the survey and interview operations, the enumerators encountered some uncooperative households in the community. To

address this, identification cards duly signed by the local chief executive (LCE) were issued to the enumerators for proper recognition that the undertaking was a legitimate program between the LGU and the barangay. Barangay officials were also tapped to help when such problems cropped up.

The delay in the completion of data collection was basically due to the change of enumerators. Naturally, the newly selected enumerators also had to undergo training on data collection. Another cause of delay was the loss of interest on the part of the enumerators in finishing what they had started. The Punong Barangays were forced to finish data gathering in exchange for the non-signing of their monthly reports by the DILG officer.

Mistakes in the accomplishment of the questionnaires were massive in some barangays, thus deterring the encoding. Repeating the survey (as a solution) posed another problem since the process was difficult for the enumerators, especially in the case of remote households that were intermittently situated.

The encoding took months to complete due to: (1) time constraints on the part of the encoders (who had other responsibilities in line with their official functions); (2) incompleteness of data submitted; and, (3) non-submission by some households. With respect to the first problem, the solution – as mentioned earlier – was to conduct the encoding on Saturdays (whole day) over the succeeding months.

Conclusion

In a nutshell, the CBMS survey results for San Nicolas underscored that preferential attention be given to: projects that promote basic education at both the elementary and high school levels; projects that can raise household incomes above the poverty and food thresholds; and projects, that provide households with access to safe water (see Table 1).

Although the results were not alarming, they have helped municipal officials to gain a deeper and better understanding of the need to prioritize social development projects through the use of poverty mapping tools.

The results also served as the LGU's basis for the formulation of its Annual Investment Plan (AIP) for 2008, the Executive-

Legislative Agenda (ELA) for 2008-2010, and the Comprehensive Development Plan (CDP) of the municipality of San Nicolas.

Table 1: CBMS Core Indicators, Municipality of San Nicolas, Ilocos Norte, 2006

	Magnitude	Proportion
DEMOGRAPHY		
Population	31,972	
Household Population	7,113	
Average Household Size	5	
Children 0-5 years old	3,814	
Children 6-12 years old	4,425	
Members 13 -16 years old	2,392	
Members 6 -16 years old	6,817	
Members 10 years old and above	25,564	
Members of the labor force	11,013	
HEALTH AND NUTRITION		
Children 0-5 years old who died	15	0.39
Malnourished children 0-5 years old	0	0
HOUSING		
Households living in makeshift housing	54	0.76
Households who are squatters	81	1.14
WATER AND SANITATION		
Households without access to safe water	228	3.21
Households without access to sanitary toilet facility	37	0.52
BASIC EDUCATION		
Children 6-12 years old not attending elementary	718	16.23
Children 13-16 years old not attending high school	699	29.22
Children 6-16 years old not attending school	478	7.01
INCOME AND LIVELIHOOD		
Households with incomes below poverty threshold	2,038	28.65
Households with incomes below food threshold	1,082	15.21
Households that experienced food shortage	21	0.30
Unemployed members of the labor force	0	0
PEACE AND ORDER		
Victims of crime	75	0.24

The data generated also served as inputs in the formulation of project proposals submitted to different government and non-government organizations (NGOs) for funding purposes.

To date, preventive measures have been put in place to address the gaps identified through the CBMS survey. For example, to

significantly improve the lives of the potters belonging to families with incomes below the poverty threshold, the LGU tried to source out funds for the construction of the potters' kiln. In this connection, a project proposal was submitted to CBMS-UNDP Development Grant for funding considerations.

These measures and future projects will surely make a difference in the lives of underprivileged San Nicoleños.

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Improving Local Governance and Accountability Through CBMS¹

Ibarra R. Manzala

Introduction

When I assumed the mayorship of my hometown in 2007, there was no data available for our decision making process. It was as if I was in an alien land. Having worked for 20 years in the corporate world where decisions are based on empirical data and our forecasts are almost always doable, I found it really difficult as a mayor to have to decide on matters that matter most for our community without the benefit of any data or information whatsoever. How can anybody make intelligent and judicious decisions without data? This is why I can now honestly say that the implementation of the Community-Based Monitoring System (CBMS) was the best thing that ever happened to my hometown.

I learned about the CBMS sometime in September 2007. After attending the first conference at our Provincial Capitol, I found out that our Regional Development Council (RDC) of Region IV-B or MIMAROPA (composed of the provinces of Occidental Mindoro, Oriental Mindoro, Marinduque, Romblon and Palawan) had arrived at a Resolution agreeing that CBMS will be used in the region as a tool for decision-making as far as poverty reduction programs are concerned.

Let me introduce you to my hometown. Our town is a 5th class municipality and it is 96 percent dependent on the Internal Revenue Allotment (IRA). We have a total income of PhP23 million, including

¹ An edited transcript of the presentation of Mayor Ibarra R. Manzala, Municipality of Magdiwang, Province of Romblon.

the IRA, of course. We have a population of 12,010 that is divided into 2,547 households. We have 9 barangays — of which 7 are coastal, while 2 are inland. Our municipality has a land area of 10,900 hectares. The land is characterized by rugged terrain and limited flatlands. The major economic activities of my people are farming, fishing and forestry. We have the best lumber in Sibuyan Island.

It may interest you to know that the mountain you see in the map is the famous Mount Guiting-Guiting. To generations of mountain climbers from all over the Philippines and other parts of the world, this is one of the most challenging mountains to climb. This mountain is the home of more than 1,500 indigenous species — double that of the Galapagos Island where Charles Darwin made his study. This is a protected area as declared by an Executive Order signed by then President Fidel V. Ramos on 20 February 1996.

Implementing the CBMS

CBMS implementation in my town began in February 2007 with the training of enumerators — whose cost was shouldered mostly by my municipality. In October 2007, we began data processing, and after that we had the barangay-level validation.

In January of this year 2008 — or just two weeks ago, we conducted our municipal-level validation. We are now reconciling some of our data to check for inconsistency. For example, when it comes to access to sanitary toilets, some people are ashamed to tell you the truth — so even if they do not have toilets, they would still claim having one. So we have to revalidate the facts.

Results of the CBMS Survey

Table 1 shows the results of the CBMS survey in my municipality. Given these results, it has become clear that my municipality faces several issues and concerns with respect to the extent and causes of poverty — which were unknown to us before due to lack of data.

Uses and Benefits of CBMS

Somebody earlier talked about the shotgun approach to planning and program formulation. This happens to be true not only in my town but in the whole province as well. And I am sure that this is also true for a lot of other provinces. The shotgun approach to planning means

Table 1. Results of CBMS Survey in Magdiwang, Romblon

Indicators	Proportion
Households with incomes below poverty threshold	71.81
Households with incomes below food threshold	59.80
Children 13- 16 yrs. old not attending high school	39.09
Children 6-12 yrs. old not attending elementary school	22.31
Households without access to safe drinking water	21.32
Households experiencing food shortage	14.25
Households without access to sanitary toilets	14.10
Children 0-5 yrs. old who are malnourished	9.26
Households who are squatters /informal settlers	6.32
Households living in makeshift houses	2.51

plans and programs are implemented not on the basis of comprehensive and reliable data, but on pure guesswork and on political considerations – both of which do not address the real problem of poverty. Infrastructure projects tend to be given more importance. In this approach, political influences and pressures rear their ugly heads in local governance.

As a result of the CBMS survey in my municipality, we now have a comprehensive and reliable database which we can use in addressing community needs and problems as identified through our data. The local chief executive (LCE) and other officials are now being properly guided on what appropriate interventions to undertake in order to address inadequacies in the community.

In my administration, only three out of the eight Sangguniang Bayan (SB) Members belong to my party. During our pre-CBMS days, SB decisions were arrived at only after a lot of heated argumentation and debate – especially over those pertaining to money matters. But now with CBMS in place, we have been able to transcend our political affiliations and forge a harmonious relationship. For example, every time I have a poverty reduction program which needs the SB's approval for the allocation of funds, I always make it a point to attend the session and explain the proposed program to the SB members with the aid of our CBMS data. The CBMS really makes it faster, easier and simpler for me to explain the proposed project and for them to understand what it seeks to address. There is no more burden in explaining or in understanding the proposed project because the CBMS data is there, and they do not have to do anything else other

than to approve (or disapprove) the proposed measure. That is the beauty of CBMS.

Our CBMS data also serves as a basis for allocating limited resources (e.g., 20 percent Development Fund) by facilitating prioritization of poverty programs.

Moreover, identification of target beneficiaries for specific programs are now based on CBMS results – and no longer on political allegiance or affiliation.

Programs Implemented Using CBMS Results

The following programs were conceptualized with the use of CBMS data, which was likewise used in targeting the beneficiaries of these programs.

- Selection of Gawad Kalinga Beneficiaries.
- Distribution of Fish Nets and Seaweeds – Department of Agriculture (DA) livelihood programs.
- LGU-Livelihood Assistance for Women.
- LGU-Livelihood Assistance for Pineapple Farmers.
- 700 Households enrolled with Philippine Health Insurance Corporation or PhilHealth (sponsored by the local government unit or LGU).
- Livelihood Loan Assistance to members of the Office of Senior Citizens Affairs (OSCA).
- Free medicines for indigents.
- Distribution of Pamaskong Handog from PGMA.
- Opening of High School Campus in Barangay Agutay, Magdiwang.

Next Steps and Future Plans Using CBMS Results

On the basis of our CBMS results, we are currently updating our Executive-Legislative Agenda (ELA).

Also, we are using CBMS in preparing our Comprehensive Land Use Plan (CLUP) and Municipal Comprehensive Development Plan (MCDP).

We will continue to use CBMS in identifying priority programs and projects, including their beneficiaries; in sourcing out funds from donor agencies; and in identifying the poorest of the poor so they can be given priority in local employment generation programs.

We have a long way to go. But with CBMS, we know we are on the right track and that we will be able to move in the right direction.

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The Sarangani Experience: Community-Based Monitoring System (CBMS) as a Tool for Responsive Governance

*Rene S. Paraba**

Creation of Sarangani Province

Since its creation in 1992, the Province of Sarangani has been like a student fervently learning the dynamics of excellent local governance.

The lessons it has learned from the many challenges it continues to face and its experiences in dealing with its bustling community of people have served as the building blocks for the development of local governance in Sarangani and the emergence of its own unique identity.

Today, Sarangani can boast of:

1. Having its own Semi-Annual Performance Review and Operations Audit – towards improving service capacity and governance.
2. Institutionalization of community and stockholders participation in the planning and decision making processes.
3. Forging of strategic alliances with other local government units or LGUs (Municipalities, Barangays and others) for priority concerns, each with defined responsibilities and accountabilities translated in terms of resources and manpower.
4. Strengthening of multi-sectoral partnerships for joint ventures, resource sharing and co-management in the delivery of development services.

*Assistant Provincial Planning and Development Coordinator, Province of Sarangani

Indeed, despite its years of isolation, the Province of Sarangani — in its own small way — has gained political maturity as manifested by its improved quality of governance. Proof of this is the popular support and active participation of its community in various undertakings.

A Different Picture

Unfortunately, however, national statistics tend to paint a different picture of the province – which is the complete opposite of what is visible from the grassroots. Some of these “findings” include:

- The National Statistics Coordinating Board (NSCB) Official Report in 2003 – reported that Sarangani has a high percentage of poverty incidence in Sarangani, ranking 20th in the country and 9th in Mindanao.
- NSCB Small Area Estimate 2003 – reported a 63 percent poverty incidence in Sarangani, ranking 4th in the country.
- SR-MICS (Sub-Regional Multiple Indicator Cluster Survey), UNICEF 2006 – reported a high incidence of cohort drop-out.
- National Anti-Poverty Commission (NAPC) 2007 – reported a high incidence of hunger in Sarangani.

These compelling “impressions” of the province prompted its local leadership – with Hon. Miguel Rene A. Dominguez at the helm — to reflect on the situation, and arrive at the following thoughts:

- Trends and statistics generated through the national agency do not accurately reflect the real situation on the location, concentration, severity, magnitude and other relevant dimensions of poverty.
- Developmental investments and interventions based on national aggregate data do not guarantee direct trickle-down effect to poverty areas or targeted beneficiaries.
- Public services and developmental interventions are urban-biased and organization-centered, while poverty incidences are household-based and spread out in far-flung rural barangays. Thus, results of interventions may even further widen income/welfare disparities, especially if tribal situations and conditions are not taken into consideration.

Recommended Response: CBMS

In view of these reflections, the Province of Sarangani deemed it only proper and necessary to establish a local databank that can capture a comprehensive characterization of poverty incidence in the province, including the location and concentration of poverty, its nature, dimensions and root causes in order for it to be properly tamed and reduced optimally.

Towards this end, the Provincial Statistics Coordinating Council (PSCC) facilitated a multi-agency consultation to search for and develop a data management system that can address this need.

The search and consultation finally ended on 27 September 2007, when the NAPC, headed by the Secretary himself - Hon. Domingo F. Panganiban, conducted a Community-Based Monitoring System (CBMS) project orientation.

The province's Governor, Vice-Governor, seven Municipal Mayors and other officials responded with overwhelming support to adopt CBMS as a data generation system to aid local policy, planning, and decision making processes in the province towards achieving a responsive local governance.

The following commitments were concluded:

- NAPC was tasked to provide the system software and technical assistance in the generation, formulation and packaging of the final output.
- The Province committed to a share of 70 percent of the total Project Cost (PhP2.8 million of the PhP4 million) and the supervision of the implementation.
- The Municipalities, through their Mayors assumed the remaining 30 percent and the ground implementation of the project.
- The Barangay officials, in later consultations, extended their voluntary support by providing mobility and subsistence support to enumerators and project implementers.

This partnership reflected an urgent and deep concern on the part of all stakeholders to know and verify the real situation in every community in the province towards improving service delivery, reducing poverty, minimizing wastage in interventions, and optimizing their impact on target beneficiaries. All these constitute the essence

of a responsive local governance that the LGU of Sarangani aspires to achieve.

Sarangani's CBMS is scheduled to be completed by April-May of 2008. Expectedly, this shall aid us in our continuing search for a responsive local governance strategy.

Some Implementation Considerations

To ensure the sustainability of the project, the Province has outlined the following initial priority considerations:

- Development projects must be focused on priority concerns and specific target beneficiaries for maximum reduction of poverty incidences; thus, statistical or database analysis must be undertaken.
- CBMS shall be incorporated in LGU periodic data generation, updating and decision making processes.
- Statistical indicators/parameters must be expanded to cover other concerns of the province (resources, agriculture, project reports and others).
- Provincial and municipal statistical coordinating councils must be strengthened to serve as repositories and authorities on local statistics.

Issues and Challenges in the Implementation and Utilization of CBMS in the Two Rounds of its Adoption in the Province of Camarines Norte

*Evaristo G. L. Pandi**

Profile of Camarines Norte

The province of Camarines Norte is found in the northwestern part of the Bicol Peninsula which forms the southeastern section of Luzon. It is one of the six provinces in the Bicol Region and is composed of 12 municipalities with a total of 282 barangays and 102,362 households. It covers a total land area of 232,007 hectares. Its capital town, Daet, is 365 kilometers southeast of Metro Manila, a 7-hour trip by bus or 45-minute trip by plane.

The province's topography is generally rugged — with rolling hills, mountainous terrain and only a small but fertile coastal plain. It is endowed with numerous mountain peaks — of which Mt. Labo is the highest at 943 meters above sea level.

The province's population is unevenly distributed across municipalities, with various rates of growth. Some are growing faster (vis-à-vis the regional and national population growth rate averages), others are growing minimally, and some show diminishing rates of growth. The average household size is about 5.23, and the male-female ratio is 100:105.23 for the whole province.

The province is not only suitable for agricultural and fishery production, but is also endowed with varied mineral resources classified as metallic and non-metallic. Metallic minerals such as gold,

* Municipal Planning and Development Coordinator (MPDC), Municipality of Labo, Province of Camarines Norte

silver, iron, lead, zinc, iron lump, bull quartz and iron in laterite are abundant in the province.

CBMS in Camarines Norte

The Community-Based Monitoring System (CBMS) was initiated in the Province of Camarines Norte in 2003. The Municipality of Labo was the first local government unit (LGU) to adopt the system. Despite the community's limited resources and the various forms of resistance posed by its different agencies, the municipality was able to implement successfully the first round of enumeration in its 52 barangays. From then on, the other municipalities in the province followed suit. However, due to various constraints faced by these other municipalities, their implementation of the project was not completed.

With the support extended by the Provincial Government of Camarines Norte, the second round of implementation of the CBMS took off smoothly — with all municipalities commencing almost simultaneously. From the first module to the last module, all municipalities were able to acquire the basic skills in all aspects of CBMS.

Issues Affecting the Implementation and Adoption of CBMS

Four issues affected the implementation and adoption of CBMS in Camarines Norte.

Acceptance of a new idea was the first of these pressing issues. On one hand, the political leaders and various sectors in the community were resolute in recognizing the advantage and importance of the CBMS. On the other hand, with so many different survey tools being introduced and used in the province, and without enough interventions being provided, the target end-users (the agencies concerned) were afraid that the respondents (beneficiaries) would no longer have faith in these activities.

The volume of work involved was another reason why the system was not readily accepted especially in the rural areas. The matter of Manpower Requirements must deal not only with how many able bodies will do the job, but also about their capability to implement the CBMS effectively in all its aspects and activities.

Availability and Capacity of Equipment constituted the third issue in implementing CBMS in Camarines Norte considering the hundreds

and thousands of data involved that required huge megabytes in computer processing and encoding. Earlier versions of computer programs used in processing CBMS data required a very large computer memory capacity. As experienced in the Municipality of Labo, a very large percentage if not almost all of the encoded data was lost when the town's computers crashed.

The fourth issue pertained to having the Commitment to effectively implement the system. With the exception of the Municipalities of Labo and Santa Elena – two municipalities that were able to complete the first round of the activity, the rest of the municipalities in the province almost failed to implement CBMS due to the interplay of these four aforementioned issues. But because of the persistent and successful efforts of these two municipalities, the provincial government and the other LGUs in the province were able to ascertain the importance and advantage of the CBMS.

Steps Taken to Address the Issues in the Implementation and Adoption of CBMS

1. Addressing the Issue of Acceptance

a. Intensive Information and Education Campaign

- The Local Chief Executive (LCE) of the LGU of Labo, Camarines Norte was invited to attend the 1st National Conference of the CBMS Network Team conducted in the Province of Palawan.
- The CBMS Network Team conducted an Orientation on CBMS for the benefit of the Sangguniang Bayan and the Municipal Development Council.
- Various local leaders (LCEs and Punong Barangays) were invited to attend the National Conferences of the CBMS to give them the opportunity to learn the advantages of CBMS implementation and the best practices adopted by various CBMS practitioners.
- Validation of Data Collected in the Barangay – after the data was collected and processed manually, the CBMS Municipal Technical Working Group went back to the barangay to validate the results and ensure that the data submitted to the Office of the

MPDC reflected or captured the actual status of poverty in the barangay.

- A Radio Program entitled “*CBMS-Labo on the Air*” was aired as part of the continuous advocacy and information and education campaign.

b. Provision of Financial Support to the CBMS Practitioner

- The Municipality of Labo received 8 out of the 14 Grant Programs (at PhP150,000 per project) as provided by the Peace and Equity Foundation to address the various poverty issues in the municipality.
- The municipality of Labo also received PhP200,000 from the United Nation Development Program to finance the Water Supply System of Brgy. Bagong Silang 2.

2. Addressing the Issue of Manpower Requirements

- a. Selection and Utilization of Key Personnel* – the selection and utilization of key barangay personnel to execute the activities in their respective barangays were vital factors in the effective and efficient implementation of the CBMS. Those selected as key personnel were as follows:

- Sangguniang Kabataan Members
- Barangay Health Workers (BWHs)
- Barangay Nutrition Scholars (BNSs)
- Day Care Workers
- Purok Presidents
- Barangay Secretaries
- Barangay Kagawads
- Punong Barangays
- Beneficiaries of the Special Program for the Employment of Students (SPES)
- Job Orders/Practicum Students

An effort to utilize personnel other than the aforementioned, however, proved futile and disappointing, and thus, was not pursued.

- b. Trainings and Workshops* – The above-mentioned personnel went through various training and workshop

activities to acquire the much-needed capability to be effective and efficient in performing the enumeration and data collection tasks. The modules included:

- Module 1: Training-Workshop in Data Collection;
 - Module 2: Training-Workshop in Data Processing (Manual & Computerized);
 - Module 3: Training-Workshop on Processing of Encoded CBMS Data and Building of CBMS Database; and,
 - Module 4: Training-Writeshop for the Preparation of Barangay Socio-Economic Profile and Barangay Development Planning and Budgeting using CBMS Data.
- c. *Financial Remuneration* — in the form of an honorarium was provided to the personnel who conducted the activities. The barangay provided the honorarium in the amount of 15.00/household surveyed.
3. ***Addressing the Issue of Availability and Capacity of Equipment***
- a. *Clustering of Databases* — Due to the limited resources of LGUs, it was deemed helpful to cluster 5 to 10 LGUs/ barangays to establish one common database depository. This arrangement is now in place in the province of Camarines Norte to avoid replicating the unfortunate experience of the municipality of Labo where all data encoded in the first round were lost when the computer crashed due to the low capacity of the equipment. Indeed, the principle of “economies of scale” is at work even in the area of information technology.
- b. *Prioritization of Equipment Procurement and Support Solicitation* — Barangays without computer units have been advised to prioritize the procurement of such equipment. Soliciting the support of kind-hearted political leaders was considered another option for funding the requirement.
4. ***Addressing the Issue of Commitment***
- While accepting the CBMS and committing to it are two different matters, the Province of Camarines Norte managed to both accept and commit to the CBMS.

Some concrete proofs that the Province of Camarines Norte and all its 12 municipalities are committed to the implementation and adoption of CBMS are as follows:

- a. The Provincial Development Council passed PDC Resolution #01-2007, re: A Resolution requesting the MIMAP-CBMS for a six-month extension of its Memorandum of Agreement (MOA) with the Provincial Government of Camarines Norte relative to the implementation of CBMS in the province.
- b. The Provincial Government of Camarines Norte provided financial support in the amount of PhP412,255 as provincial counterpart for the second round of implementation of CBMS in the province.
- c. The 12 Municipalities of the province allocated funds in the amount of P4,030,390.00 as the municipal counterpart for the implementation of the second round of CBMS in the province.
- d. The Sangguniang Bayans of the 12 municipalities adopted resolutions authorizing their respective Local Chief Executives to enter into a Memorandum of Agreement with the Provincial Government of Camarines Norte and the CBMS Network Team for the implementation of CBMS in the province.
- e. The provincial government and the 12 municipalities provided funds to address poverty issues as determined by the CBMS results.

Other Accomplishments Using the CBMS in the Municipality of Labo

Being the first municipality to successfully implement the CBMS, the municipality of Labo has been active in information-education campaign even outside the province of Camarines Norte. The Municipal Mayor, Hon. Winifredo B. Oco, League President of the League of Municipalities (Camarines Norte Chapter) has been actively advocating for the use of CBMS considering its many advantages. He presented the CBMS best practices of the municipality of Labo during the 3rd PEP (Poverty & Economic Policy) Research Network

General Meeting in Dakar, Senegal in June 2004 after implementing the first round of CBMS in Labo.

Through the League of Municipalities of the Philippines (LMP) — in which he now serves as President for the Luzon Cluster, Mayor Oco continuously promotes CBMS to his fellow LCEs. For this, he received a Plaque of Recognition for being the Most Active Advocate of CBMS as awarded by the LMP and the PEP-CBMS etwork Coordinating Team.

On the other hand, the MPDC of the Municipality of Labo (in the person of yours truly) was also one of the primary advocates in the use of CBMS in the Bicol Region. He was behind the adoption by the Bicol Regional Statistics Board of CBMS as one of the official tools in research and survey works in the region. He was also invited by the different LGUs in the Bicol region to conduct a CBMS orientation for Local Leaders and Planning and Development Coordinators.

With their achievements in CBMS, the municipality and local leaders of Labo were recognized for the following :

1. Hon. Winifredo B. Oco: One of the Outstanding Local Chief Executives in the Philippines in 2006
2. Sangguniang Bayan of Labo: Outstanding Sangguniang Bayan in Bicol Region
3. Sangguniang Bayan of Labo: One of the 15 Outstanding Legislative Bodies (Municipal Category) National Level
4. Labo Municipal Disaster Coordinating Council: three-time National Awardee of the KALASAG AWARD – Best Municipal Disaster Coordinating Council
5. Award of Excellence, Cleanest & Greenest Municipality in Region V
6. Plaque of Recognition, Regional Winner: Gawad ng Pangulo sa Kapaligiran
7. Award of Excellence, National Finalist for Gawad ng Pangulo sa Kapaligiran
8. Outstanding Accredited Government Agency (CSC Region V)
9. Outstanding Accredited Government Agency (CSC Central Office)

10. DOH Center for Health & Development (Region V): Sentrong Sigla Award
11. Plaque of Recognition, Regional Winner: Search for Child Friendly Municipality
12. Kabalikat Awardee (TESDA) Region V
13. Plaque of Recognition, Pamilihan ng Rehiyon 2004: Labo Public Market
14. Certificate of Recognition, Best Performing MDCC in the Region
15. Plaque of Recognition for Best MDCC, Given by League of Municipalities of the Philippines
16. Plaque of Recognition, Most Active Advocate of CBMS — from the LMP-PEP-CBMS Network Coordinating Team

Other than receiving numerous awards and recognitions, the LGU of the Municipality of Labo was also the recipient of various grant programs under the PEF and the UNDP (see Table 1).

At the provincial level, CBMS results were used in the following:

1. Generation of household lists of 57 barangays identified for actual enumeration by Multi-Indicator Cluster Surveys (MICS) which aims to gather data critically needed for establishing the 6th Country Program for Children (CPC 6) benchmark and track progress in disparity reduction at the provincial level.
2. Input to the Accelerated Hunger Mitigation Program, Provincial Action Plan submitted to the National Nutrition Council (NCC) in Manila (as lead agency) and inputs to the Programang Agrikultura para sa Masa as submitted to the Department of Agriculture.
3. Inputs to the selection of Pilot Areas for the construction of Day Care Centers sponsored by UNICEF and TIMEX Co. in San Roque, Mercedes and Bagong Silang 1 in Labo.
4. Inputs to UNICEF Projects on:
 - a. Improvement and Protection of 4 units existing Dug Wells with Filter Box in Purok 1 & Purok 4 of Barangay Lorenzo, Purok 1, and the Basiad High School in Barangay Basiad, Sta Elena, Camarines Norte; both projects costing a total of PhP104,000;

Table 1. Grant-Funded Poverty Reduction Projects in Labo, Camarines Norte

Title of Project	Project Site	Amount of Grant	Source
Provision of Access to Safe Drinking Water Facilities	Brgy. Bagong Silang II	PhP200,000	CBMS-UNDP Development Grant Program
Cassava, Corn and Soy Bean Production	Brgy. Tigbinan	PhP150,000	CBMS-PEF Development Grant Program
Cassava and Peanut Production	Brgy. Iberica	PhP150,000	CBMS-PEF Development Grant Program
Decortications of Formosa Pineapple Leaves	Brgy. Malasugui	PhP150,000	CBMS-PEF Development Grant Program
Development of Potable Water Spring System Phase 1	Brgy. Daguit	PhP150,000	CBMS-PEF Development Grant Program
Establishment of Patchouli and Ipil-Ipil Plantation	Brgy. Kanapawan	PhP150,000	CBMS-PEF Development Grant Program
Hacienda Montana Village Water System Project	Labo, Camarines Norte	PhP150,000	CBMS-PEF Development Grant Program
Pineapple Processing	Brgy. San Antonio	PhP150,000	CBMS-PEF Development Grant Program
Potable Water System Development	Brgy. Tulay na Lupa	PhP150,000	CBMS-PEF Development Grant Program

- b. Provision of Access to Sanitation Facilities (Construction of Shallow Well Hand Pump with Water Collection Box at (1) the Paracale Elementary School Extension) in Bagumbayan, Paracale, (2) Purok 5, Barangay III, and (3) Purok 4, San Roque, Mercedes, with each project costing PhP140,222;
- c. Construction of Level 11 (Spring Development) Water System at the A. Racelis Elementary School, Exciban, Labo, Camarines Norte, costing PhP152,594;
- d. Construction of 1-unit shallow well hand pumps with filter box at the Calangcawan Norte Elementary School, Calangcawan Norte, Vinzons, costing PhP27,000;

- e. Construction of 159 RCPR type septic tank for 300 households without sanitary toilets under the Environmental Sanitation Project amounting to PhP718,275;
- f. Micronutrient Syrup Supplementation Program for 4,950 underweight children 0 – 5 years old for a period of 6-months, costing PhP136,125.00;
- g. Proposal for the construction of 2 units Day Care Centers for communities with Indigenous People (IP) to be funded by Johnson & Johnson;
- h. Preparation of project proposals for possible funding under CBMS-UNDP Development Grant Program for three (3) barangays with high proportions of household without access to sanitary toilet facilities and safe drinking water, namely:
 - Provision of Sanitary Facilities in Barangay Hinipaan, Mercedes Camarines Norte, costing PhP245,400;
 - Provision of Sanitary Facilities in Barangay Manguicsoc, Mercedes Camarines Norte, costing PhP245,400;
 - Provision of Sanitary Facilities in Barangay Mangcamagong, Basud Camarines Norte, costing PhP266,800.

Next Steps

With CBMS in place and with its wide acceptance in the province of Camarines Norte, the League of Local Planners and Development Coordinators (LLPDC) is now planning to hold a province-wide training/workshop/write shop in the preparation of Barangay Socio-Economic Profile, Barangay Comprehensive Development Planning and Budgeting and Project Proposal using the results of the CBMS. Through this activity, barangays will have the opportunity to learn how to deal with their respective poverty situations.

Challenges Facing the CBMS

How then do we strengthen popular mobilization initiatives and motivate government to deliver on its promises? What are the best alternatives that work?

Although the CBMS is steadily gaining recognition and acceptance as an effective tool for governance, some CBMS Partners especially in highly politicized areas are apprehensive that this system might not work if their politician bosses continue to engage in the “traditional” way of governance (e.g., palakasan system, etc.).

In this regard, it may be helpful to enact a law decreeing that utilization of the pork barrels of district representatives should be determined by needed interventions, which in turn are determined by CBMS database analysis. While LGUs at the barangay and municipal levels are assessing the poverty situations in their areas, their district representatives must provide the funding requirements to address the needs of their respective constituents.

I am confident that this is the best and most logical alternative way of using the pork barrel.

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Building Up Local Government Capabilities Through CBMS¹

Anna Liza F. Bonagua

Introduction

My presentation will dwell on the importance of the Community-Based Monitoring System (CBMS) in enhancing the capabilities of local governments, particularly in their poverty reduction efforts. My presentation outline is as follows:

1. CBMS as a Tool for Improved Local Governance
 - a. Integration of CBMS in Local Operations
 - b. Uses and Applications of CBMS
2. Status of CBMS Implementation and Various Policy Issuances Supporting CBMS Institutionalization
3. Scaling-Up CBMS Implementation and its Challenges
 - a. Advocacy and Capacity-Building Activities on CBMS
 - b. Collaboration with other Stakeholders

CBMS as a Tool for Improved Local Governance

As demonstrated by the experiences of various local government units (LGUs) as shared with us over the past 3 days, CBMS has definitely contributed to the improvement of the local governance process and the achievement of poverty alleviation.

In particular, the CBMS has become a vital instrument for various phases of local governance – which include:

¹ An edited transcript of the presentation of Assistant Director Anna Liza F. Bonagua, Bureau of Local Government Development (BLGD), Department of the Interior and Local Government (DILG).

- Development planning and budgeting;
- Resource allocation and program targeting;
- Impact monitoring and tracking the progress of poverty reduction efforts including our commitment to the achievement of the Millennium Development Goals (MDGs) and other international commitments; and,
- Evidence-based policymaking and legislation.

The presentations and sharing of experiences by both LGUs and national government agencies over the past three days have clearly illustrated the importance of CBMS as a tool for promoting excellence in local governance. The CBMS has also proven its relevance for all levels of local governments — from the provincial, to the city and municipal, down to the barangay level.

Eventually, we hope that CBMS can be utilized for program targeting and policy direction by national agencies of government.

Utilization of CBMS in Various DILG Programs and Projects

In growing recognition of CBMS, the Department of the Interior and Local Government (DILG) has integrated the utilization of CBMS in its various programs and projects, specifically in donor-assisted projects, since we have fund support from our partner donors. Our list of projects includes:

1. a project on Strengthening LGU Capacity in Poverty Assessment, Mapping and Planning – which is being supported by the WB-ASEM (World Bank - Asia-Europe Meeting);
2. a project on Localizing the MDGs in Cities and Municipalities – which is being supported by the UN-Habitat;
3. another project to localize the MDGs by improving the capacities of LGUs to deliver population and reproductive health information and services – which is being supported by the UNFPA (United Nations Population Fund);
4. a project on tracking and monitoring the responses of LGUs — with the support of the UNDP (United Nations Development Programme); and,
5. a project on rationalizing local planning and budgeting systems – which is being supported in part by the Asian

Development Bank (ADB) and GTZ (Deutsche Gesellschaft für Technische Zusammenarbeit or German Technical Cooperation).

The CBMS has been integrated into these programs. Let me just give you some details of these projects.

CBMS is being used as an instrument in poverty diagnosis and planning under the WB project for which the three provinces of Marinduque, Masbate and Camiguin serve as pilot areas. Under the project, the LGUs were capacitated in assessing the poverty situation within their locality. The provinces were also assisted in the preparation of the poverty maps and the Local Poverty Reduction Action Plan (LPRAD) which will guide them in the implementation of their poverty reduction programs and projects.

In the Province of Marinduque, for example, CBMS results are now being used for targeting beneficiaries of the housing project of Gawad Kalinga. The province also uses the CBMS results in identifying the recipients of educational assistance or scholarship programs and livelihood assistance projects. Likewise, CBMS results are used as basis for the formulation of plans and programs in the province and its component municipalities and cities.

Another example is the Science City of Muñoz which has utilized CBMS data in proposing projects to donor agencies such as the UN-Habitat and UNDP. It has also widely utilized the results of CBMS in the implementation of a housing project, specifically in the identification of its beneficiaries.

The City of Pasay, for its part, has aligned all its efforts along the results of CBMS. It has implemented a family-based MDG localization project and has utilized CBMS results for its barangay development planning activities as well as its disaster management efforts.

As I earlier mentioned, the DILG is also implementing a UNFPA-supported project on localizing the MDGs by improving the capacity of LGUs to deliver population and reproductive health information and services. The project aims to capacitate the LGUs by contributing to the achievement of the MDGs. Under the project, we have integrated indicators on population and development, reproductive health and gender as rider indicators in addition to the 14 CBMS

Core Indicators. These additional indicators will hopefully improve or address the issues on reproductive health, gender and population and development towards improving service delivery along these areas. These are implemented in 10 pilot provinces covering 3 municipalities in each province.

The UNDP-supported project – which I also mentioned earlier — seeks to monitor the responses of LGUs in achieving the MDGs. The project aims to capture LGU initiatives and progress on MDG localization and monitor the desired outcomes under the MDG localization framework which identifies the following desired outcomes at the LGU level:

1. Integration of MDG targets in the local plans and investment programs of the LGU;
2. Increase in budget allocation for MDG-responsive programs, projects and activities (PPAs);
3. Institutionalization of structures and mechanisms in support of MDG localization;
4. Establishment of poverty and benchmarking tool to monitor local MDG progress which is CBMS.

Moving towards another dimension, the CBMS is being used as basis for local planning and budgeting. We are currently pursuing the Rationalized Planning System (RPS) which aims to lessen the number of plans being required from LGUs by national government agencies. In this endeavor, we hope to synchronize and strengthen the linkage between planning and budgeting.

We also hope to integrate the sectoral and topical plans being mandated from LGUs into two Local Government Code (LGC) mandated plans. These are the Comprehensive Development Plan (CDP) and the Comprehensive Land Use Plan (CLUP). In putting these in place, we have utilized CBMS as the source of data/inputs for planning and budgeting. The CBMS, as it is now, can be expanded to serve as the source of information for the formulation of Socioeconomic Profiles or local development indicators as inputs to plans and budgets of LGUs.

Integrating Existing Tools in the Planning Process

In harmonizing our systems and procedures for local planning and budgeting, we have to harmonize existing monitoring tools at the local level. At the DILG right now, we are advocating three tools to serve as inputs for the formulation of the CDP. And these are:

1. the CBMS — which is a tool for monitoring the development condition of the community;
2. the Local Government Performance Management System (LGPMS) — which monitors the performance of the local government unit along 5 areas: governance, administration, service delivery, environment and economic services; and,
3. the System for Capability Assessment for Local Government (SCALOG) — which aims to identify LGU capacities and needs.

All these three monitoring tools have been used as inputs for the formulation of the State of Local Governance Report (SLGR) that is being formulated by LGUs annually. The SLGR shall serve as inputs to the formulation of the respective CDPs of our LGUs.

Status of CBMS Implementation

From the various programs and projects presented earlier, these are the coverage areas of CBMS being assisted by the Bureau of Local Government and Development (BLGD) through the help of the PEP-CBMS Network Coordinating Team:

1. the WB-ASEM-supported areas (Camiguin, Marinduque, Masbate);
2. UNFPA-supported areas;
3. BLGD-UN-Habitat-supported areas;
4. OXFAM-supported areas (a new group) implementing the CBRM (Community-Based Risk Management) projects (implementing CBMS for Disaster Risk Reduction and Management or DRRM); and,
5. areas being supported by BLGD and the League of the Municipalities of the Philippines (LMP).

In addition to these areas, our regional offices are very active in assisting our LGUs implementing CBMS through their own initiatives.

These are in CAR (Cordillera Autonomous Region), Region 1, Region 2, Region 4A, Region 5, Region 7, Region 8, Region 9, Region 10 and CARAGA areas. In these regions, we have readily available trainors to assist our LGUs in the implementation of CBMS.

Of course, we have to work on the other regions in this respect because in the vision of the DILG, we hope to cover all provinces nationwide by 2010.

As of today, the total CBMS coverage is around 54 provinces (20 of which are province-wide), 29 cities, and 422 municipalities — so we have a half more to cover over the next three years to complete the CBMS in all provinces. It is also the vision of DILG to be able to establish the national and regional CBMS repositories and upload these databases to the DILG-LGU portal and website.

Various Policy Issuances Supporting the Institutionalization of CBMS

In scaling up CBMS, there are already quite a number of policies that support the institutionalization and scaling up of CBMS, such as:

- a. *DILG Memorandum Circular 2003-92 (issued in April 2003)*
 - Setting policy guidelines for the adoption of the 13 core local poverty indicators for planning.
- b. *DILG Memorandum Circular 2004-152 (issued in November 2004)*
 - Encouraging LGUs to intensify efforts towards the achievement of the MDGs.
 - Enjoining LGUs to monitor and diagnose the nature and extent of poverty using CBMS.
- c. *NSCB Resolution No. 6, Series of 2005*
 - Recognizes and enjoins support for the CBMS as a tool to strengthen the statistical system at the local level.
 - Directs the National Statistical Coordination Board (NSCB) Technical Staff to initiate and coordinate an advocacy program for the adoption of the CBMS by the LGUs, through the Regional Statistical Coordinating Committees (RSCCs), the technical arms of the NSCB Executive Board in the regions.

- d. *NSCB Approval of the CBMS Instruments (issued in September 2005)*
 - NSCB approval and clearance for the use of the CBMS instruments in monitoring poverty at the local level:
 - NSCB Approval No. DILG 0513-01- Household Profile Questionnaire (HHPQ).
 - NSCB Approval No. DILG 0513-01- Barangay Profile Questionnaire (BPQ).
- e. *NEDA-SDC Resolution 3, Series 2006*
 - Adopting the CBMS as an MDG-monitoring tool by the National Economic Development Authority's Social Development Committee (NEDA-SDC).
- f. *NAPC En Banc Resolution No. 7 (issued in March 2003)*
 - Directive given by the National Anti-Poverty Commission (NAPC) to LGUs to adopt the 13 core local poverty indicators as the minimum set of community-based information for poverty diagnosis and planning at the local levels.

Challenges in Scaling Up CBMS Implementation

With this scaling up of CBMS, we face a lot of challenges. Allow me to emphasize some of these:

1. We need to mount a nationwide campaign on the adoption of CBMS.
2. We need to synchronize the conduct of CBMS rounds to enable aggregation and comparison across LGUs.
3. We need to collaborate with all stakeholders and engage our partners in the implementation and utilization of CBMS.
4. We need to organize more regional trainors to provide assistance to our LGUs that are willing to adopt CBMS. As of now, there are still several DILG regional offices which do not have ready trainors.
5. In order to scale up CBMS, we need to prepare a uniform and standard training module which we can easily disseminate to our trainors.
6. More importantly, we need to harmonize our efforts in the scaling up of CBMS in order to improve governance and assist LGUs in their poverty reduction efforts.

Conclusion

Let me end my presentation by sharing with you our motto at the DILG for reducing poverty and attaining the MDGs:

*Do more than belong, participate.
Do more than share, help.
Do more than believe, practice.
Do more than dream, work.*

Utilizing Donor-Assisted Project Resources for CBMS-Related Initiatives¹

Agueda Sunga

Introduction

My presentation this afternoon will dwell on the following:

1. The Health Situation and Reforms in the Philippines:
Fourmula 1 (F1) for Health
2. The National Investment Plan for Health (NIPH) and the Provincial Investment Plan for Health (PIPH)
3. Aid Architecture in the Philippines
4. Health and the Community-Based Monitoring System (CBMS)
5. Scope of Support to CBMS

Health Situation in the Philippines

Demographic and Health Status

The demographic and health status of the Philippines can be characterized as follows:

1. the population growth rate remains high;
2. half of the population is below 21 years old;
3. the average life expectancy is increasing;
4. the proportion of older persons is growing; and,
5. Infant Mortality Rate (IMR) and Child Mortality Rate (CMR) are declining, but the rate of decline has slowed down.

¹ An edited transcript of the presentation of Dr. Agueda Sunga, Head Secretariat, Technical Assistance Coordination Team (TACT), Health Policy Development and Planning Bureau (HPDPB), Department of Health (DOH).

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2. Burden of Disease

The leading causes of morbidity or death in our country are communicable diseases. On the other hand, the leading causes of mortality are degenerative and other non-communicable diseases – with cardiovascular diseases comprising one group. The double burden of disease places a great toll on the economy. Adding to this is the threat from emerging and resurgent diseases like AIDS and Avian Flu.

3. Health Care Facilities

How do health care facilities respond to the burden of disease?

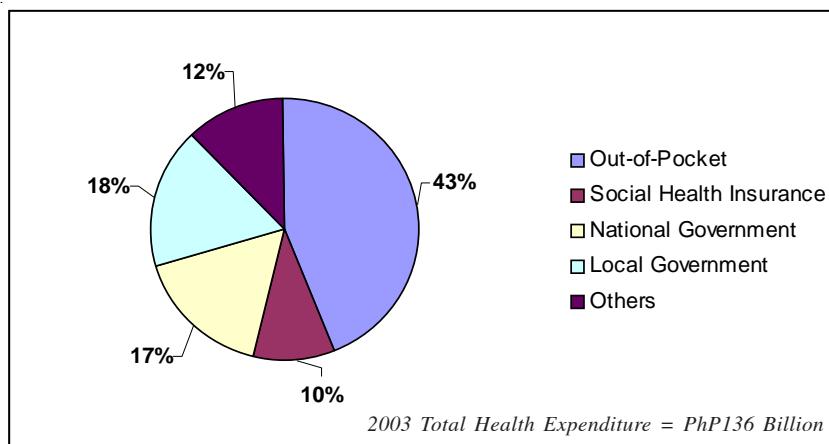
We found out that local health facilities in the Philippines are poorly-equipped. Both national and regional hospitals are congested. Admissions are usually cases of primary diseases like upper respiratory infection, among others.

Health facilities in the public and private sectors are unevenly distributed. Most of them are in the urban areas. In rural areas, the hospital and the rural health center are almost always adjacent to each other. National-local and public-private networking and patient referral systems are also inadequate.

We also found out that local health facilities are poorly-staffed. One cause of this – which many of us know — is the surge of immigration by medical professionals to foreign countries like the United States and the United Kingdom.

4. Distribution of Health Expenditures by Source of Funds, 2003

In 2003, a total of P136 billion was spent on health-related expenditures. Of this, 44 percent or PhP60 billion was taken from out-of-pocket by individual families. This means that

Figure 1. Health-Related Expenditures by Source of Funds

the burden of paying for health care is still predominantly shouldered by individual families instead of by government or insurance schemes. National and local governments spent a total of PhP46.5 billion — accounting for 34.2 percent of the total health expenditures, while social health insurance paid PhP12.9 billion or 9.5 percent. Other sources like private health insurance, community-based financing, and employer's benefits accounted for PhP16.6 billion — accounting for around 12.3 percent.

The above sources of funds reflect different insurance mechanisms with varying degrees of abilities to pool resources and spread health risks. The individual family, through direct out-of-pocket expenditure, is the least effective and most inefficient health insurance institution. A family's income and size limit the resources that can be pooled for health expenses. And since members are often exposed to similar health risks, the family has limited risk-pooling capacity.

Based on a survey conducted in 2000, families — on the average — spend only 1.9 percent of their annual family expenditures on health care. A family's average health

expenditure only amounted to roughly PhP2,660 and ranged from PhP572 to PhP4,430. Of this amount, 46.4 percent was spent on drugs and medicines, 24.1 percent on hospital room charges, 21.7 percent on medical charges including doctors' fees, 3.5 percent on medical goods, and 4.3 percent on combined expenses for dental charges, contraceptives, and other health services.

Fourmula 1 (F1) for Health

Following these findings on inequalities in health care facilities and the burden of disease, the Department of Health (DOH) developed what we call as the Fourmula 1 (F1) for Health.

F1 is synonymous to the speed and accuracy of a racing car — and that is what DOH Secretary Francisco Duque would like to implement. The goals of F1 are the following: (1) better health outcomes; (2) more responsive health system; and, (3) equitable healthcare financing.

We also identified some reform mechanisms by which these F1 goals can be manifested. These are the following:

1. Health Service Delivery – we want to ensure better access and availability of health services.
2. Health Regulation – we want to ensure better quality and affordable health services.
3. Health Financing – we want to have an increased, sustained and better healthcare financing.
4. Good Governance – we want to improve health system performance.

The National and Provincial Investment Plans for Health: NIPH and PIPH

To operationalize the F1, we developed the National Investment Plan for Health (NIPH). Among the major final outputs, we identified critical interventions which we call Flagship Programs. And from this list, we identified performance indicators to monitor.

We also translated the NIPH into the local level. We have identified F1 implementation sites where health reforms can be implemented at the LGU level and asked them to develop their respective Provincial Investment Plans for Health (PIPH).

The 1st batch of F1 sites consist of 16 provinces while the roll-out sites consist of 21 provinces (see Table 1).

We also identified the Medium Time Frame for the program's implementation. By 2010, the F1 reforms shall have been implemented throughout the country (see Table 2).

Table 1. First Batch of F1 and Roll-Out Sites

F1 Sites	Roll-Out Sites
1. Ilocos Norte	1. Isabela
2. Pangasinan	2. Masbate
3. Nueva Vizcaya	3. Sorsogon
4. Oriental Mindoro	4. Zamboanga del Norte
5. Romblon	5. Zamboanga del Sur
6. Capiz	6. Zamboanga Sibugay
7. Oriental Negros	7. Lanao del Norte
8. Biliran	8. Compostela Valley
9. Samar	9. Davao Oriental
10. Southern Leyte	10. Sarangani
11. Misamis Occidental	11. Sultan Kudarat
12. North Cotabato	12. Benguet
13. South Cotabato	13. Basilan
14. Ifugao	14. Lanao del Sur
15. Mt. Province	15. Maguindanao
16. Agusan del Sur	16. Sharif Kabunsuan
	17. Sulu
	18. Tawi-Tawi
	19. Surigao del Sur
	20. Masbate
	21. Albay

Financing Arrangements

How can we achieve all of these without financial assistance? We identified two financing strategies as follows:

Table 2. Time Frame and Performance Benchmarks for F1 Reforms Implementation

Year	Performance Benchmarks
2005	Development of an overall Investment Plan
2006	Availment of grant inputs for the full implementation of F1 for Health
2007	Implementation of PBB in DOH budgeting
2008	Roll out of F1 for Health in the next 15 sites Mid-term evaluation of F1 for Health
2009	Institutionalization of F1 for Health
2010	Roll out of F1 for Health in the rest of the country End evaluation of F1 for Health

1. *Strategy 1*

- Rational use of public subsidies, both national and local.
- Increasing role of social health insurance in paying for the health services of Filipinos.

2. *Strategy 2*

- Use and mobilize available resources from the foreign assistance pipeline.
- Universal coverage of Sponsored Program in the Philippine Health Insurance Corporation (PhilHealth) as a criteria for a European Commission (EC) grant.

Sector Development Approach for Health (SDAH)

Actually, all of these strategies can be unified under a one sector-wide approach for health. Under this globally-used approach, the resources of foreign donors are pooled together into one basket.

In the Philippines, however, we have a modified swap – which we call the Sector Development Approach for Health (SDAH). Under this modified approach, we do not have one basket. Instead, we ask our donors to invest in the flagship programs under our National Investment Plan for Health (NIPH).

The general objectives of the SDAH are: (1) to improve the quality and efficiency of mobilizing and utilizing foreign investments for F1 for Health; and, (2) to harmonize the same with national/local investments. The specific objectives include the following:

1. To reduce the transactions costs of managing foreign investments in health. Before F1, we used to have a separate Program Management Office (PMO) per project. Now, we only have one unified PMO and that is the Bureau of International Health Cooperation (BIHC).
2. To reduce duplication and overlaps of donor initiatives with each other and with existing government programs. This is the reason why the DOH created the Technical Assistance Coordination Team (TACT) of which I am the Head Secretariat.
3. To ensure sustainability of health reforms.

In order to operationalize the SDAH, we have 3 F1 instruments:

1. We have issued 47 policies across the health sector and an Administrative Order for the SDAH.
2. We have developed the NIPH under which we have flagship programs, projects and activities (PPAs).
3. We have translated the NIPH into PPH of the 16 first batch and 21 roll-out F1 provinces.

Aid Architecture in Health

How do donor partners support the health reform program in the Philippines?

The major funding support comes from the European Commission (EC) whose money flows in three forms: budgetary support, trust fund and technical assistance.

Usually, the EC money comes as budget support for provinces which have relatively “good financial management” systems.

Those provinces that do not have “good financial management” systems in place are placed under the trust fund — which is managed by the World Bank (WB).

Donors can also render technical assistance and project support. These are the United States Agency for International Development (USAID), the Asian Development Bank (ADB), the Deutsche Gesellschaft für Technische Zusammenarbeit (GTZ - also known as the German Agency for Technical Cooperation), and of course, the WB.

Health and CBMS

We also requested partner donors to support the Community-Based Monitoring System (CBMS) through technical assistance by providing advocacy to provincial governments to encourage them to implement CBMS, and also to support some components of the CBMS project (training, field work, encoding, analysis, etc.).

The EC gives grants to encourage F1 sites to conduct identification of the poor. Towards this end, it releases its funds via fixed and variable tranches — which are tied up with the performances of the provinces in achieving health-related goals (see Table 3).

Table 3. Performance-Based Fixed and Variable Tranches for Three Provinces

	Agusan del Sur	Biliran	Capiz
EC Fixed allocation (PhP)	31,894,725	17,607,242	35,128,558
EC Variable tranche (PhP)	8,090,042	4,470,684	8,910,299
	20.23%	20.25%	20.23%
Completion of rationalization plan for health care facilities for 2008-2010 that has been concurred with LCEs and is JAC-endorsed and DOH-approved, by 01 December 2007	20	20	20
Identification of Indigent Families through CBMS or any PhilHealth-approved means testing mechanism	15	15	15

A Short Recap of Major Points

I have said so many things already but now allow me to reiterate the following points:

1. The DOH is committed to improve health services for the population, especially the poorest segment.
2. The NIPH has been translated into provincial mid-term plans to improve health outputs and outcomes across the countryside.
3. Health financing reform requires universal coverage of PhilHealth-Sponsored Program (SP) with CBMS as tool to identify beneficiaries.
4. The current systems (questions related to income) are not effective in identifying the most vulnerable segments of the population.
5. The DOH, as the government's lead agency for the health sector, requires mid-term performance evaluation based on output/outcome.
6. The Millennium Development Goals (MDG) monitoring requires a set of indicators (the 13+1) to be included in the CBMS.

Mechanisms to Support CBMS Implementation

What are the mechanisms that the DOH has identified to support CBMS implementation?

One of these is the NIPH – which I have already mentioned several times earlier. This has been translated into the local level through the blueprint which we call PIPH.

These plans are translated into Annual Operations Plan (AOP) – which should be approved by the Joint Appraisal Committee (JAC) that was created by the DOH to review the blueprints. One criterion for plan approval is the identification of the poor – which uses CBMS as the proper tool to identify PhilHealth-SP beneficiaries.

While the DOH expects outputs from these provinces, it does not prescribe them. Instead, the DOH allows the local chief executives (LCEs) to select their performance indicators. These performance indicators are stipulated in the Service Level Agreement (SLA) that is undertaken between the DOH and the LCE. The variable part of the total resources that will be made available to LCEs is attached to their performance, and thus such performance indicators serve as their scorecards.

Some Points to Consider

If the donor partner is funding the CBMS implementation, who should be the responsible owner? And if the donors have a role as facilitators, but provincial and municipal governments have the responsibility as owners, what should now be the role of partners? How long should this initiative or “carrot” be provided? How long should we continue to support this endeavor? These questions which we have to answer eventually are just food for thought.

But just to illustrate my point, let me briefly discuss the indigent coverage in the 16 provinces (who constitute the first batch of F1 sites) as of June 2007. It may be noted in the table below that the province of Capiz has a 46 percent indigent coverage – which is the ratio between the total number of active PhilHealth-SP beneficiaries as of June 2007 (which is 33,847 as shown in Table 4) to the total number of indigent families in Capiz (which is 73,611). Since the total number of active PhilHealth-SP beneficiaries is less than the total number of indigent families, the indigent coverage of 46 percent suggests that there is “exclusion” because not all of the indigent or true poor families are identified and made to benefit from the PhilHealth-SP.

In Ilocos Norte on the other hand, the indigent coverage is 217 percent – which is derived by dividing the total number of active PhilHealth-SP beneficiaries as of June 2007 (which is 73,305 as shown in Table 4) to the total number of indigent families (which is 33,823). Since the total number of active PhilHealth-SP beneficiaries is greater than the total number of indigent families, the indigent coverage of 217 percent suggests that there is “leakage” — in which the families identified as beneficiaries are not the true poor.

And so the challenge is: if we have the tool, how do we ensure that this tool is used properly?

The bottom line is: we should be cautious to prevent incidences of leakages (as in Ilocos Norte) and exclusions (as in Capiz).

Indeed, we should ensure that only the true indigents become the rightful beneficiaries of the health programs that are being implemented for the benefit of indigent families.

Table 4. Indigent Coverage of PhilHealth as of June 2007

Province	2007 Population	2007 Indigent Families	ACTIVE AS OF JUNE 2007				Total Active vs Poverty Incidence
			Regular SP	Oplan 2.5M	June Total		
Agusan del Sur	658,718	78,945	20,716	-	20,716		26%
Biliran	164,580	14,930	24,945	-	24,945		167%
Capiz	745,890	73,611	31,998	1,849	33,847		46%
Eastern Samar	434,497	38,028	31,277	449	31,726		83%
Ifugao	189,000	19,890	24,841	-	24,841		125%
Ilocos Norte	579,319	33,823	73,305	-	73,305		217%
Misamis Occidental	549,053	41,880	63,929	14,894	78,823		188%
Mountain Province	163,854	17,917	18,811	-	18,811		105%
Negros Oriental	1,282,299	125,959	47,958	1,039	48,997		39%
North Cotabato	1,121,181	124,472	14,456	-	14,456		12%
Nueva Vizcaya	422,417	25,223	10,114	43	10,157		40%
Oriental Mindoro	819,084	95,755	50,392	-	50,392		53%
Pangasinan	2,852,394	197,411	70,876	32,137	103,013		52%
Romblon	313,337	31,822	42,13	-	4,213		13%
South Cotabato	1,321,179	91,740	24,022	-	24,022		26%
Southern Leyte	410,318	30,342	11,497	5,882	17,379		57%

Scaling Up CBMS to Achieve the MDGs¹

Rene Raya

Introduction

My presentation for this session will focus on sharing the initiatives undertaken by civil society groups in scaling up monitoring initiatives towards meeting the Millennium Development Goals (MDGs).

But before going into that, I would like to tell you about our organization, Social Watch Philippines (SWP), and also about the cooperation and partnership that is going on among SWP, the PEP-CBMS Network Coordinating Team and the Department of the Interior and Local Government (DILG). And then, I will talk about the options for scaling up the CBMS to achieve the MDGs — based on our own experiences.

Social Watch Philippines

The Social Watch is a global movement of non-government organizations (NGOs). Its mandate is to monitor commitments made by governments in international meetings. One of these commitments is to monitor and mainstream the MDGs. As early as year 2000, we have been active in the promotion of the MDGs both at the national and at local levels.

Social Watch cooperates with the United Nations (UN), the donor community, national agencies and local governments on a varied range

¹ An edited transcript of the presentation of Mr. Rene Raya, Co-Convenor, Social Watch Philippines (SWP).

of developmental issues. It is present in about 83 countries. In these countries, there are groupings of prestigious personalities involved in the different aspects of development work: the academe, NGOs, and even church groups who are active in social development. In many countries, our members are national coalitions.

In Asia, we are present in 13 countries — which include the Philippines. In the Philippines, the Social Watch network was organized in 1997. The SWP is composed of convenors and a network of developmental NGOs. We have regional clusters: North and Central Luzon, Southern Luzon, Central and Western Visayas, and Central and Southern Mindanao. We hope to cover most of the country but we found this to be a very big challenge because of limited partners in some of the areas where we actually need more support because of the high incidence of poverty and the enormous challenges to development these communities face.

The SWP is also involved in monitoring work. We have popularized the Basic Capabilities Index (BCI) or the Quality of Life Index (QLI). This is very close to the Human Development Index (HDI) and approximate the progress of countries in terms of their progress in achieving the MDGs. We note for example that countries in East and Central Asia as well as in the Pacific will be achieving a certain desirable level in terms of quality of life only by 2030. This means that they will be missing most of the MDG targets by 2015. In South Asia — which includes India, Pakistan and Nepal, a desirable level in terms of quality of life will only be achieved by 2047. In Sub-Saharan Africa, this will be achieved by 2108 — or a full century after today!

We want to emphasize that we really need to fast-track our efforts. What we need may not only be Formula 1 but instead Formula 10 so that we can fast-track the process of attending to MDG concerns. And that brings me to a very important point — and that is the need for all stakeholders — government, donors, LGUs, civil society, academe, church and others — to be able to come together for this very important task of addressing poverty and achieving the MDGs. I should note that although the Philippines still ranks quite low in terms of the quality of life, it has moved forward to a higher level. In the Philippines, we also do monitoring work and have even applied the Quality of Life Index for the different provinces to be able to

assess how they are progressing in terms of achieving some of the key human development concerns. We also take note of the disparities across provinces and across municipalities, and that these disparities and inequities are apparently greater in the countryside gives us even more reason to come together to address the MDG concerns in these areas.

The SWP-PEP-CBMS-DILG Partnership

The SWP, PEP-CBMS Network Coordinating Team and DILG partnership formally started in November 2005, although even before that time, there had already been many exchanges between SWP, the local government units (LGUs) who are part of the DILG and the PEP-CBMS Network Coordinating Team on many issues related to monitoring the MDGs.

All three organizations have already undertaken collaborative work on many municipalities including the following:

1. Orion, Bataan (completed);
2. Kiangan, Ifugao (for completion);
3. Tabaco City, Albay (starting);
4. Dumaguete City, Dauin and La Libertad in Negros Oriental (starting); and,
5. Kidapawan, Mlang, and Magpet in Cotabato (will be started).

Next Steps

I would like to emphasize that LGUs have done a really good job, and in fact, a really impressive work along the line of CBMS, and we would like to congratulate both the LGUs and the PEP- CBMS Network Coordinating Team for their partnership in this pioneering initiative.

As we look towards moving on and scaling up, we feel that so many options and opportunities are now open that will allow us to meet the MDG targets. I will not mention all of these now, but instead just focus on what we think are two key strategies from the perspective of civil society. The first strategy is data packaging, and the second is building and strengthening partnerships with civil society and NGOs.

1. Data Packaging

In terms of data packaging, we believe that it is important to transform the available CBMS data not only into knowledge bases but also into effective advocacy tools. Actually, we are

just starting to crack the package of the available database. There is so much that can be done and the available data can be very useful and helpful in so many ways, such as in deepening our analyses about the local situation and also in addressing key development issues and concerns at the local level. Here are some initiatives along this line:

- a. *Producing the Local MDG Reports* – the availability of the CBMS data presents a good opportunity for us to fully develop a more comprehensive analysis of the local situation and identified challenges in any community. Hopefully, these local MDG reports can collectively contribute to a more in-depth and richer MDG reporting at the national level — which is being done regularly by NEDA along with other line agencies.
- b. *Preparing Local Development and MDG Plans* – SWP is also actively participating in the local planning processes, guided by the local data that is made available through CBMS.
- c. *Book Publication on the MDG Monitoring Experience* – SWP has also supported publications on the MDG monitoring experience. This is a good project considering that by documenting the monitoring initiatives at the local government level, others can learn from their experiences. By relating the story about the challenges faced and the progress achieved by a community in the process of addressing poverty and key development goals, the book can also serve as a very good advocacy tool for other communities and LGUs.
- d. *Interfacing with Other Monitoring Systems* – It is a very big challenge to harmonize the different monitoring systems. Along these lines, we are able to simplify some of the reporting requirements and come up with a really respectable database that can guide our planning, budgeting and other initiatives at the local level. Linking up all these systems is a continuing challenge for the National Statistical Coordination Board (NSCB), the National Anti-Poverty Council (NAPC), as well as LGU associations.

- e. *Developing Local Knowledge Emporium* – This is practically a collection of best practices at the local level in addressing poverty, in pursuing health and education goals, etc. There should be active exchanges within and among provinces and throughout the country — especially since we have several local communities and LGUs whose best practices and good projects have made them very successful in meeting some of the MDGs. Also, the pooling of the local databases coming from the CBMS, NSCB, and the National Statistics Office (NSO), for example, can enhance and enrich the development research process if the pooled database is made available to researchers, civil society groups, the academe and others who are interested in studying local phenomena, helping analyze situations in local communities or supporting development studies on them.
 - f. *Brochures, Scoreboards, Websites, Info/Fundraising Campaigns* are also effective advocacy tools.
2. **Partnerships with Civil Society/ NGOs**
- We believe that the partnership, collaboration and cooperation between LGUs and NGOs can go a long way in strengthening CBMS and in mainstreaming the MDGs. LGUs should tap the vast potential of civil society groups to contribute to this initiative. To this extent, SWP is willing to facilitate partnership-building between LGUs and NGOs. Towards this end, SWP has been undertaking the following initiatives:
- a. Sectoral Consultations and People's Assemblies;
 - b. Working with Academe;
 - c. Covenant Against Poverty (LGU-NGO-Private Sector-Community-Donor);
 - d. Anti-Poverty Campaigns (Global Call to Action Against Party [GCAP] or White Band); and,
 - e. Building Local MDG Coalitions.

Closing Note

In closing, I would like to emphasize that SWP is neither a donor agency nor a funding mechanism. Our role is to bring civil society and NGOs to engage and participate in MDG monitoring and

mainstreaming. To that extent, we are able to access and mobilize resources, precisely to support such local initiatives as bringing civil society groups to work and engage with local governments for the purpose of monitoring and mainstreaming MDGs. In Social Watch Philippines, we are open to strategic partnerships that will respond to the great challenge of achieving the MDGs.

Scaling Up Poverty Reduction: The CBMS-PEF Development Grant Program¹

Veronica Villavicencio

Allow me to introduce my organization — the Peace and Equity Foundation (PEF).

The PEF is a non-profit development organization that is committed to poverty reduction in the poorest Filipino communities. We partner with civil society organizations (CSOs), local government units (LGUs), the private sector, the academe and faith-based groups. Through these partnerships, we provide developmental funding and technical assistance for the primary purpose of empowering poor communities.

In an organization such as the PEF, we need to prioritize. One of the tools that we have always been using after we started operations six years ago is poverty mapping. Basically, we have a national poverty map that helps us identify our priority provinces. This puts together official data from the National Statistics Office (NSO), National Statistical Coordination Board (NSCB), Department of Health (DOH) and the Department of Education (DepEd) so that we can generate a ranking or prioritization of provinces based on indicators that are closely correlated to poverty. With our poverty maps, we can identify who are the poor, where they are and what are their situations that need to be appropriately addressed.

In October last year, we put together a 2007 national poverty map of all the provinces – which is now available in CD form or

¹ An edited transcript of the presentation of Ms. Veronica Villavicencio, Executive Director, Peace and Equity Foundation (PEF).

downloadable from our website. Out of all the provinces, we were able to identify 30 for priority assistance. However, we realized that we needed to go down to the municipal level. For this reason, we have been doing provincial poverty mapping to identify the priority 20 percent of the municipalities on which we must focus, at least initially, considering the resources that we currently have as well as those that we can mobilize. For instance, in our Northern Samar poverty map — which follows the Community-Based Monitoring System (CBMS) color coding scheme, the red or orange areas are the municipalities that need priority attention. But then, that is only up to the municipal level. Given these gaps in our poverty mapping, we have realized that we also need to identify which barangays in these priority municipalities need priority attention, and eventually go down to the household level so that we would also be able to identify which households in these priority barangays deserve priority attention. That is how thorough we should be in our poverty mapping process if we are to appropriately conduct the targeting and planning processes for the benefit of the poorest and most vulnerable in these communities.

We have also realized that we need to generate the interest, support and commitment of various stakeholders at the community level because if our objective is to empower the local community, then we need to identify who in the community, what sectors and at what level need to become part of the effort to develop the locality and bring it out of poverty.

In this regard, we see CBMS as a very potent tool for conducting a bottom-up analysis and for formulating strategies based on household level data. As you may already have experienced, having data from the household to the sitio to the barangay to the municipal to the provincial levels is very empowering because concerned stakeholders become properly informed about the situations in specific localities and are therefore able to identify the specific needs that must addressed.

Where do groups such CSOs and NGOs (non-government organizations) as well as LGUs come in?

The LGUs, of course, provide the mechanism. The presentation of Engr. Evaristo Pandi, the Municipal Planning & Development Coordinator (MPDC) of the LGU of Labo, Camarines Norte very

clearly delineated the role of LGUs in initiating and implementing the CBMS and in generating the CBMS data and analysis.

The CSOs, on the other hand, make their presence felt in the community by providing more specific services, since they include organizations involved in health, community mobilization, farmers' issues, livelihood microfinance and others. Thus, CSOs are at the vantage position to encourage the whole community to become more active participants in local development efforts. Because of their close interaction with the community, they are able to drum up in their beneficiaries a stronger awareness of what is being done for the community and what more needs to be done. CSOs' efforts therefore complement initiatives mounted by LGUs.

On the part of the PEF, we first want to take a look at the CBMS situational analysis of a locality, and second, we want to know about the strategies the community is adopting to respond to the situation it is facing. This is how we engage LGUs — primarily at the municipal and provincial levels — in a partnership through which we hope to move both the LGUs and the CSOs towards formulating better strategies for resolving local problems.

Sometimes we encounter a situation where there is a high incidence of undernourished children among poor households. A normal knee-jerk reaction to this would be to add more feeding programs — which, as an immediate response, is feasible. But then, to properly address this problem, we need to look at the overall situation of households. Are they displaced? What are their income-generating activities? Have they been vulnerable to certain adverse situations? And so on. Thus, by using CBMS, we can conduct a deeper analysis of the malnutrition situation in a locality.

Basically, CBMS provides data on magnitude scale and spatial analysis, and a quantified basis for resource mobilization. The experiences shared by LGU participants over the past few days have already confirmed this. The versatility of CBMS in identifying the spatial dimensions and magnitudes of poverty is valuable to an organization like the PEF because our development financing is really geared towards resolving local level problems.

One aspect of our partnership is our involvement in small development projects. Engr. Pandi earlier showed us a list of projects

funded under the CBMS-PEF Development Grant Program. Basically, we went into this aspect of the partnership for the following reasons:

1. to respond to immediate and crucial basic needs;
2. to provide augmenting social, financial and knowledge capital for socio-economic activities; and,
3. to improve governance practices to scale up local poverty reduction program.

From 2005 up to 2007, the PEF has provided small grants of PhP150,000 each for 14 projects (see Tables 1 and 2).

What is the value of our partnership?

First, it allows us to conduct appropriate targeting – pinpointing who should benefit from the development project.

Secondly, it enables us to mobilize the participation of the poor as stakeholders – so that they are able to identify their needs more appropriately and prioritize which areas should be addressed first.

Compared to the limited resources available from development agencies (even if we put them all together), developmental needs are endless. But since we are able to prioritize and identify who are crucially vulnerable in these communities, then we are able to achieve at least part of our objective of contributing to their social and human capital requirements.

The participation of local communities in these efforts enables them not only to identify their own needs but also to analyze their own CBMS data. In the process, they get to realize that they have the power to come together and that they may have the necessary resources after all. If not, we come in to provide the resources and services through the LGUs to help improve their situation. This is what is being reinforced under the CBMS. As an example, when the Tulay na Lupa Water Services Association was created in Labo, Camarines Norte, the people came together and decided on the policies that they should pursue in managing their water system.

And the third value of our partnership is that it reinforces good governance practices: in targeting beneficiaries, in allocating resources, and most especially, in monitoring the results of the implemented project.

As an illustration, allow me to cite one of our latest projects — the Mudcrab Fattening Project in Sitio Naga, Barangay Looc,

Table 2. Approved Projects, CBMS-PEF Development Grant Program 2005

Project Title	Project Site	Amount Approved	Project Type	Beneficiaries
Mount Moriah Water System & Electrification Project	Mt. Moriah, Taytay, Palawan	PhP150,000	Potable Water System	Local households in Barangay Poblacion
Goat Raising Project	Barangay Igabas, Magsaysay, Palawan	PhP150,000	Agricultural Livelihood	Goat-raisers in Barangay Igabas
Cassava, Corn and Soybean Production	Labo, Camarines Norte	PhP150,000	Agricultural Livelihood	Local households in Barangay Tigbinan
Establishment of Patchouli & Ipil-Ipil Plantations	Labo, Camarines Norte	PhP150,000	Agricultural Livelihood	Local households in Barangay Kanapawan
Machine Decortication of Formosa Pineapple Leaves	Barangay Calabasa, Masalong, Mabilo I, Mabilo II and Bautista, Labo, Camarines Norte	PhP150,000	Agricultural Livelihood	Pineapple worker groups in Labo

Table 2. Approved Projects, CBMS-PEF Development Grant Program 2006

Project Title	Project Site	Amount Approved	Project Type	Beneficiaries
Mudcrab Production	Sitio Naga, Barangay Looc, Cabucgayan, Biliran	PhP150,000	Micro-enterprise	43 fisherfolks
Fertilizer & Palay Trading	Brgy. Balaquid, Cabucgayan, Biliran	PhP150,000	Micro-enterprise	50 farmer-members
Credit Services	Capoocan, Leyte	PhP150,000	Micro-enterprise	70 males, 30 females
Potable Water Systems Project	Quezon, Palawan	PhP150,000	Potable Water	150 farmers
Pineapple Processing	Barangay San Antonio, Labo, Camarines Norte	PhP150,000	Micro-enterprise	50 member beneficiaries
Development of Potable Water Spring System	Barangay Daguit, Labo, Camarines Norte	PhP150,000	Potable Water	165 males, 150 females
Phase 1 Hacienda Montana Village Water System Project	Labo, Camarines Norte	PhP150,000	Potable Water	1,016 individuals: 488 male, 538 female
Potable Water System Development	Purok 1-7, Barangay Tulay na Lupa, Labo, Camarines Norte	PhP150,000	Potable Water	5076 individuals: 2546 males, 2530 females
Cassava & Peanut Production	Iberica, Labo, Camarines Norte	PhP150,000	Agricultural Development	17 males, 18 female farmers

Municipality of Cabucgayan, Province of Biliran. The organization involved is a small fisherfolk cooperative and it already has a mangrove boardwalk, a small ecotourism site. The CBMS-PEF Grant it availed of augmented the resources for the mudcrab fattening project to benefit 43 fisherfolk households, thus giving them additional income. While the amount approved under the CBMS-PEF Development Grant Program was only PhP150,000, the LGUs of the Municipality of Cabucgayan and even of Barangay Looc provided additional resources for this catalytic project of the fisherfolk community. What really mattered here, however, was not so much the magnitude of the assistance they received from the development project, but the opportunity for them to see that by focusing on the poverty situation and on the poor in the community, they are able to bring together different stakeholders to address a local problem. And this reinforces good governance.

We were asked: how do you scale up poverty reduction? What and how much would it take?

Let me underscore that improvement in governance is actually the key to scaling up poverty reduction. For me, a good indicator for this is having all these people who are working on the different stages of CBMS and who continue to improve their skills and the system that they have adopted.

But on deeper reflection, what I see as most crucial here is the role played by the CBMS missionaries — some of who I know personally and really admire for their work.

One of them is Ms. Blanca Cercado of the DILG (Department of the Interior and Local Government) Region 8 Office. With the assistance of her group, the provinces of Biliran and Eastern Samar were able to complete their CBMS projects. The Province of Leyte's CBMS project, meanwhile, is nearing completion. The CBMS process has really rolled out to these provinces in a major way – thanks to these missionaries from the DILG.

Another one is Provincial Planning and Development Coordinator (PPDC) Henry Afable of Eastern Samar who brought together the different agencies in Eastern Samar to produce the Eastern Samar CBMS poverty maps. Very substantive and informative, these maps are crucial to the decision-making processes of resource agencies and of national government agencies as well.

And of course, there is Engr. Pandi of Labo, Camarines Norte – whose excellent work I have already cited earlier.

But let us not forget to acknowledge the technical support provided by the PEP-CBMS Network Coordinating Team under the leadership of Dr. Celia Reyes. Were it not for the work, support, and effort of all these people, the CBMS tools and system, and even the resources (although they are small) from the resource agencies would not have been able to generate the very extensive and incisive data and information analyses that are now being translated into development projects that target the poor.

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Adopting the CBMS: Implementation of the Social Development Committee (SDC) Resolution No. 3¹

Erlinda M. Capones

Introduction

I have been requested by my good friend, Dr. Celia M. Reyes, to share with you the status of implementation of the SDC Resolution No. 3. My presentation will cover the following areas:

- The NEDA Board Social Development Committee (SDC) and its functions;
- What is SDC Resolution No. 3;
- The status of CBMS implementation in the country;
- How SDC Resolution No. 3 is being implemented; and,
- Donor assistance for CBMS institutionalization.

The NEDA Board Social Development Committee (SDC)

The Social Development Committee (SDC) of the NEDA Board is an entity that has taken a keen interest in the institutionalization of the Community-Based Monitoring System (CBMS). As the highest policy-making body on social development concerns, the SDC is composed of the Secretary of Labor and Employment, as chairman; the Director-General of the NEDA Secretariat as co-chairman; and the Executive Secretary, and the respective Secretaries of Education; Health; Interior and Local Government; Agrarian Reform; Agriculture; Social Welfare and Development; and Budget and Management, as members.

¹ An edited transcript of the presentation of Director Erlinda Capones, Social Development Staff (SDS), National Economic and Development Authority (NEDA).

The SDC has two levels: the Cabinet Level and the Technical Board (SDC-TB) Level composed of undersecretaries. The SDC-TB is composed of the member agencies as in the cabinet-level plus Technical Education and Skills Development Authority (TESDA), the Commission on Higher Education (CHED), the National Commission on the Role of Filipino Women (NCRFW), the Population Commission (POPCOM), the National Anti-Poverty Commission (NAPC), the Housing and Urban Development Coordinating Council (HUDCC), the Presidential Commission for the Urban Poor (PCUP); the Council for the Welfare of Children (CWC) and the National Nutrition Council (NNC).

The SDC performs the following functions:

1. advises the President and the NEDA Board on matters concerning social development, including education, manpower, health and nutrition, population and family planning, housing, human settlements, and the delivery of other social services;
2. coordinates the activities of government agencies concerned with social development; and,
3. recommends appropriate policies, programs and projects consistent with national development objectives.

SDC Resolution No. 3

On July 19, 2006, the SDC issued Resolution No. 3 – Adopting the Community-Based Monitoring System (CBMS) as the prescribed monitoring tool for the generation of the Core Local Poverty Indicators (CLPI) database.

The SDC, likewise, enjoined the National Anti-Poverty Commission (NAPC), the Department of the Interior and Local Government (DILG) and other government agencies and local government units (LGUs) to closely coordinate with the PEP-CBMS Network Coordinating Team towards fast-tracking and full implementation of the CBMS.

Finally, the same resolution also enjoined the NAPC, DILG and LGUs to enter into Memoranda of Agreement (MOAs) with the PEP-CBMS Network Coordinating Team for the purpose of ensuring collaboration in the orientation, training, data enumeration, processing,

storage and other related activities in institutionalizing the CBMS in the poverty monitoring being conducted by LGUs.

The SDC Resolution reaffirmed the potential of the CBMS as the systematic and cost-effective tool to be applied in the gathering, processing, and reporting of the local poverty indicators nationwide. The SDC also confirmed the usefulness of the CBMS as the objective basis for the programming and targeting of government interventions in poverty reduction, health, education, nutrition, social welfare, housing, among others.

The continuing challenge to both policymakers and program implementors is the scaling up of CBMS to fully cover all provinces. This will allow comparison of poverty situations and characteristics of beneficiary populations across provinces, cities, municipalities and even barangays. Once this challenge is met, an informed means of answering the questions: “Who are the poor?”, “Where are the poor?”, and “What are their needs?” will have been made possible.

The SDC Resolution now serves as an advocacy document and basis for generating national and international support for CBMS expansion.

The SDC continues to monitor concerned agencies and LGUs nationwide in their implementation of and compliance to SDC Resolution No. 3.

Status of CBMS Implementation in the Country

At this point, allow me to give an update on the status of CBMS implementation as of December 2007.

The implementation and institutionalization of CBMS through the coordinated efforts of the national government, LGUs and civil society have produced modest but promising gains. As of December 2007, CBMS is now being implemented in 37 provinces (17 of which are province-wide), 382 municipalities, 27 cities and about 9,860 barangays.

The implementation of CBMS in the country is being undertaken through the joint collaboration of LGUs, the PEP-CBMS Network Coordinating Team and key agencies such as the NAPC, DILG and Social Watch Philippines (SWP).

Adopting the CBMS: Implementation of SDC Resolution No. 3

The Medium-Term Philippine Development Plan (MTPDP) 2004-2010 continues to be supportive of CBMS. The chapter on “Responding to the Basic Needs of the Poor” identifies one strategy as “Promoting the nationwide adoption and implementation of the enhanced Core Local Poverty Indicators Monitoring Systems (CLPIMS) such as the Community-Based Monitoring System and other tools.”

The MTPDP 2004-2010 Strategy Planning Matrix (SPM) – the companion document of the MTPDP that fleshes out the priority activities and targets, as well as the agencies responsible – has identified the following activity to be coordinated by the Department of Social Welfare and Development (DSWD), NAPC, DILG and LGUs: “Promote the nationwide adoption and implementation of the enhanced Core Local Poverty Indicators Monitoring System (CLPIMS) such as the CBMS and other tools.”

The Philippine Development Forum (PDF) is an annual forum where international donors and the Philippine Government discuss and prioritize programs, projects and activities that require official development assistance (ODA). Held on 7-8 March 2007, the Forum reaffirmed CBMS as the much-needed poverty monitoring tool to fast-track the MDGs and social development initiatives. In a presentation by DSWD Secretary Esperanza Cabral, the need for a common, accurate, comprehensive and consolidated system to target the poor was identified as a key issue. In this regard, the following systems will be considered:

- CBMS
- Local Governance Performance Management System (LGPMS); and,
- A system that provides disaggregated demographic data (e.g., gender) to assist national and local governments in the implementation of programs to achieve the MDGs.

During the plenary presentation of the PDF, the following were proposed as key actions over the short- to medium-term:

- Improving targeting and reducing leakages in poverty programs;

- Developing a common harmonized targeting, monitoring and evaluation tool for basic education, health, and social protection; and,
- Improving data collection and data management at the local levels.

And this is where CBMS comes in.

Under the recently approved Government of the Philippines (GOP) - World Bank Development Policy Lending (DPL) Program, CBMS has taken center stage in the thematic thrust on social inclusion: building a well-managed public sector that delivers quality services efficiently, effectively and equitably to intended beneficiaries. More specifically, under the strategy on poverty targeting of social programs and expenditures, the Development Agenda for 2007 includes the "continued advocacy of the CBMS including adoption and use of CBMS in 15 provinces." The expected result is the "increased coverage and use of the CBMS by 50% of the LGUs from 4,000 barangays in 2006."

On the other hand, under the recently approved Government of the Philippines (GOP) - Asian Development Bank (ADB) Development Policy Support Program (DPSP), CBMS has been included in the social inclusion portion with a development agenda for 2008 calling for the "improvement of poverty monitoring, targeting and social programs and expenditure."

The milestone for 2008 is to "continue advocacy of the CBMS for the localization of the MDGs resulting in the adoption and application of the CBMS in LGUs, and adoption of CBMS in the remaining provinces that are still without CBMS."

I must mention that, due to the heightened support and policy pronouncements (such as SDC Resolution No. 3, Resolutions of the NAPC, NSCB and DILG), members of the civil society, particularly the NGOs have also been engaged in implementing CBMS.

Donor Assistance for CBMS Institutionalization

Let me now tell you about the donors who have been providing assistance for the adoption of CBMS.

Since 1996, the International Development Research Center (IDRC) of Canada and the Micro Impacts of Macroeconomic

Adjustment Policies (MIMAP) have been supporting the design and piloting of community-based monitoring and local development systems in seven countries in Asia (including the Philippines) and two in West Africa.

In the second half of 2007, with United Nations Development Programme (UNDP) funding assistance, the NAPC expanded CBMS coverage to three additional provinces: Zamboanga del Norte, Zamboanga Sibugay and Saranggani. Total UNDP assistance to NAPC amounted to PhP4.11 million. It has also provided PhP3.4 million to fund 17 CBMS-based barangay-level development projects nationwide (2006-2007) and an additional PhP1.6 million for eight (8) new grants in 2008.

Under the World Bank-Asia Europe Meeting (WB-ASEM) Project, CBMS has been incorporated in the various projects of the DILG particularly on poverty diagnosis and benchmarking of local MDG indicators. One of these is the “Strengthening Local Government Capacity for Poverty Assessment, Plan Formulation and Monitoring” project under WB-ASEM. A total of PhP3.74 million has been released by the World Bank for the three pilot provinces, namely: Masbate, Marinduque and Camiguin.

We have also proposed a project entitled Poverty Mapping Mindanao using the CBMS for possible external funding assistance from the ADB. The project aims to formulate poverty maps using CBMS for the entire Mindanao while capacitating LGUs on poverty assessment, monitoring and plan formulation for the attainment of the objectives and targets of the MDGs. The total project cost for this two-year project is PhP90.6 million of which PhP49.6 million is being requested from the ADB.

In closing, allow me to underscore that SDC Resolution No. 3 has definitely facilitated the adoption of CBMS. There is now greater demand for CBMS as LGUs have seen its usefulness in their planning, program implementation and impact monitoring activities.

Let us therefore continue to work hard to realize the target of a nationwide implementation of CBMS by 2010.

The Millennium Development Goal (MDG) Fund¹

Helena Habulan

Background and Objectives

It is my privilege to present the Millennium Development Goal (MDG) Fund. The MDG Fund is a Php500 million financing scheme implemented by the Municipal Development Fund Office (MDFO) in partnership with the Department of the Interior and Local Government (DILG). Its objective is to support and fund local government unit LGU initiatives that currently contribute to the attainment of the MDGs.

As a backgrounder, the DILG issued in 2004 Memorandum Circular No. 2004-152 providing the Guide to Local Governments in the Localization of the MDGs. In 2005, the MDFO Policy Governing Board of the Department of Finance (DOF) passed Resolution No. 04-12-22-2005 establishing the MDG Fund and allocating PhP500M for financing local initiatives in support of attaining the objectives of the MDGs. In 2007, the DILG and DOF-MDFO agreed to jointly implement the MDG Fund under a Memorandum of Agreement (MOA).

¹ An edited transcript of the presentation of Ms. Arsenia San Diego, MDG Fund Coordinator, in behalf of Ms. Helena Habulan.

* Executive Director, Municipal Development Fund Office (MDFO), Department of Finance.

Beneficiaries

The MPDO is targeting municipal-level LGUs of 4th to 6th income class municipalities, and all provincial-level LGUs provided their beneficiaries are 4th to 6th income class municipalities.

Fund Components

What are the components of the MDG Fund? These are the following:

1. *Investment Support Component (ISC)* - provides financial assistance for infrastructure and capital investment projects on soft credit scheme.
2. *Institutional Capacity Building Component (ICBC)* - provides technical assistance and advisory services relative to the stages of the project cycle.

Sample LGU Proposals

The MDG Fund will support LGU projects that will fast track the implementation of their MDGs in the following areas: (1) eradication of extreme poverty and hunger; (2) achievement of universal primary education; (3) promotion of gender equality; (4) reduction of child mortality; (5) improvement in women's reproductive health (6) combating HIV/AIDs, malaria and other diseases; and, (7) ensuring environmental sustainability.

Table 1 shows some sample LGU proposals that can be submitted to us.

Implementation Arrangement

As mentioned earlier, the MDG Fund is a joint project between the DILG and DOF.

The DILG will be mainly involved in the marketing/pre-qualification of LGU proposals and it will be providing technical assistance in project development and implementation.

On the other hand, the DOF will be involved in project appraisal, approval and fund management.

Meanwhile, the LGUs are tasked to create their project implementation units.

Table 1. Sample LGU Proposals

MDGs	Sample LGU Proposals
Goal 1: Eradicate Extreme Poverty & Hunger	<ul style="list-style-type: none"> 1. Livelihood programs/projects to include livelihood equipment 2. Seed capital for LGU-led micro-enterprises 3. Related technical assistance 4. Construction of roads & related infrastructure 5. Construction of post harvest facilities, ware-houses, rice & corn mills 6. Women Resource Centers & livelihood centers 7. Health & nutrition program such as supplemental feeding for undernourished children, medical missions, day care sessions, medical, nutrition & sanitation services 8. Integrated social forestry in communal forest
Goal 2: Achieve Universal Primary Education	<ul style="list-style-type: none"> 1. LGU scholarship funds for deserving students 2. Construction/rehabilitation of school buildings/ educational facilities 3. Early childhood development initiatives like reading centers/libraries 4. Procurement of educational materials
Goal 3. Promote Gender Equality	<ul style="list-style-type: none"> 1. LGU scholarship funds for deserving students 2. Improvement of gender sensitive facilities in educational infrastructures like women development centers & livelihood centers 3. Establishment/implementation of programs/projects to monitor & assist survivors of child & women abuses & child labor victims
Goal 4: Reduce Child Mortality	<ul style="list-style-type: none"> 1. Acquisition of health equipment for maternal & child health services 2. Construction & rehabilitation of health facilities 3. Technical assistance on infant & young child feeding initiatives
Goal 5: Improve Maternal Health	<ul style="list-style-type: none"> 1. Acquisition of health equipment for maternal care & delivery 2. Construction/rehabilitation of lying-ins/birthing clinics 3. Construction/rehabilitation of Rural Health Unit 4. Construction/improvement/rehabilitation of health/day care centers, pre-school institutions to include equipment & supplies
Goal 6: Combat HIV/AIDS, Malaria & Other Diseases	<ul style="list-style-type: none"> 1. Procurement of equipment for local health monitoring profiles 2. Technical assistance on advocacy & health education initiatives 3. Conduct of Information, Education & Communication (IEC) about HIV/AIDS and STD including preventive measures such as safe sex campaigns & restricting needle sharing by intravenous drug users 4. Procurement of medical equipment, supplies & equipment for testing
Goal 7: Ensure Environmental Sustainability	<ul style="list-style-type: none"> 1. Upland reforestation/afforestation 2. Assisted Natural Regeneration (ANR) 3. Timber Plantation Establishment 4. Agroforestry Development 5. Community-based forestry management project which includes integrated social forestry in communal forests 6. Enforcement of forest laws, rules & regulations in communal forest or community watershed areas 7. Provision of sites in socialized housing purposes 8. Solid waste management 9. Riverbank stabilization/rehabilitation 10. Construction & rehabilitation of water supply systems 11. GIS procurement & development 12. Ecological park development

Financing Terms

For softer-support projects, the interest rate is 7.5 percent per annum (fixed) and the repayment period covers five years inclusive of a one-year grace period on principal. For heavy equipment, the interest rate is 7.5 percent with a repayment period of 10 years with two years grace period on principal. Meanwhile, for infrastructure projects, the interest is 8 percent per annum (fixed) and the repayment period is 15 years inclusive of a 3-year grace period on principal.

Uniqueness of the Fund

The MDG Fund is unique because of the following:

1. Institutionalization of Design Monitoring Framework (DMF) per LGU project to enhance the success rate and target attainment.
1. No upfront collateral
2. No hold out on Internal Revenue Allotment (IRA)
3. IRA deduction in case of default in repayment
4. Lower interest rate
5. No commitment fees
6. No pre-termination charge

Documentary Requirements

An LGU interested in applying for a loan must take note of the following requirements:

A. *Loan Application:*

Letter of Intent – duly signed by the Mayor/Governor.

1. Sangguniang Bayan Resolution
2. Feasibility study of project proposal

B. *Certification for Borrowing & Debt Service Capacity:*

1. Name of LGU and Income Class
2. Statement of Actual Income and Expenditures for the last three (3) years, duly certified and audited by the local accountant and auditor with the following supporting documents:
 - i. Trial balance
 - ii. Balance sheet
 - iii. Statement of operations
 - iv. Report of revenue and receipts

- v. Status of appropriation, allotments, and actual obligation incurred
- vi. Statement of cash flow
- 3. Current Year Annual Budget
- 4. Annual Investment Plan
- 5. Certification of existing/absence of loans duly certified by the Local Treasurer and/or lending institutions with the following details:
 - i. Kind of loans and other obligations
 - ii. Purpose of loan and other obligations
 - iii. Name of lending institution/s
 - iv. Date of approval and maturity
 - v. Terms and conditions (interest rate and repayment period)
 - vi. Latest balance of loan and other obligations: current & arrearages
 - vii. Annual amortization schedule (segregated into principal & interest)

MDG-Fund Contact Details

For more details about the MDG Fund, please contact the following:

The Executive Director

Municipal Development Fund Office (MDFO)
Department of Finance (DOF)
Podium Level, DOF Building
Bangko Sentral ng Pilipinas, BSP Complex
Roxas Blvd., Manila

The Director

Office of Project Development Services
Department of the Interior and Local Government
A. Francisco Gold Condominium II
EDSA cor. Mapagmahal St., Diliman, Quezon City

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The LPP's Observations on CBMS Implementation¹

Roberto Limbago

In behalf of our President in the League of Provinces of the Philippines (LPP), Governor Loreto Leo S. Ocampos of Misamis Occidental, allow me to extend our deepest thanks to the organizers for inviting our group to this Conference. We hope that somehow, we could be of service in the scaling up of this very noble endeavor.

It is heartening to note the passion of the panel of speakers as they delivered their presentations. I think this passion is the common denominator among the provincial, city and municipal planning and development coordinators (PPDCs, CPDCs and MPDCs). These people serve as our workhorses at the local government level. On them depends the success or failure of our local chief executives (LCEs). They have been trained not only to formulate the plans but also to implement them. They get the blame if there is a problem. So let me congratulate MPDC Engineer Evaristo Pandi for that very good sharing on how he implemented the Community-Based Monitoring System (CBMS) in his municipality of Labo in Camarines Norte.

It is worthy noting that we all have the same sets of problems in the implementation of CBMS. Number one problem is acceptance. This is a reality that most of you had to grapple with in many past endeavors. There had been a proliferation of tools: assessment tools,

¹An edited transcript of the response of Mr. Roberto Limbago, Programme Director, League of Provinces of the Philippines (LPP), on the presentations during the session on *Enriching Partnerships for Scaling Up MDG Initiatives and Poverty Reduction Using CBMS: Action Plan and Future Directions*.

evaluation tools – which many of us have already tried using in the past. At the end of the day, nothing came out of these efforts. This is really the common sentiment.

But seeing all the presentations earlier on how the CBMS was done, I think it holds a lot of promise. Nevertheless, there are other factors to consider in making CBMS successful. Remember that CBMS is just a tool for looking at where the problem really lies. The main concern afterwards is implementing programs in order to address the gaps that CBMS was able to identify. Towards that end, expect more problems to surface. I think some of these factors are beyond local control. But through our concerted efforts – League of Provinces, Cities and Municipalities — we can work together towards increasing budget allocation for local governments.

I am looking at what we are going to do after. And I am looking at the possibility of another activity of this sort being initiated by another donor agency and packaging it for local governments. I hope none would be forthcoming too soon, because we need to make CBMS work first on an even larger scale. I think if we have not yet made CBMS work first, it really does not make any sense to embark onto a new initiative. I hope the National Economic and Development Authority (NEDA) and the rest of the Leagues will be able to tell our donors – please put your acts together for the sake of local governments.

It is really our role in the LPP to advocate and heighten the appreciation of CBMS by our LCEs. In the ultimate analysis, it is really the LCEs who can make critical decisions to move the project forward.

To our friends in the NGO community and civil society groups, thank you very much for the support that you are extending to local government units. Programs and projects will not succeed without the support of all stakeholders.

On the part of the League of Provinces of the Philippines, we are very much willing to render our assistance in making CBMS work. Who knows, the LPP may yet emerge as the missing link to fast-track the scaling up of CBMS.

The LMP's Faith in the CBMS¹

Ramon N. Guico, Jr.

I am informed that the Community-Based Monitoring System (CBMS) seeks to provide policymakers and program implementers at all geopolitical levels an organized system for collecting up-to-date information on the welfare status and needs at the community and household levels, and that it is a tool for monitoring and evaluating the impact of programs and projects, as well as for improving local governance.

I agree with the Social Watch Philippines (SWP) in its observation that CBMS requires the participation of people in the community to collect, process and use the data as it provides information on the welfare conditions of all the members of the community. Thus, its main task is to carry data on pre-determined indicators not only at the municipal level but also down to the barangay level.

We at League of Municipalities of the Philippines (LMP) are very proud of the Municipality of Labo in Camarines Norte which seriously applied the CBMS as a tool to improve the quality of local governance in its locality. As presented earlier, the application of CBMS in Labo brought the municipality to the pedestal of various awards, making Mayor Winifredo Oco one of the most outstanding

¹ An edited transcript of the response of Mayor Ramon N. Guico, Jr., National President, League of Municipalities of the Philippines (LMP), on the presentations during the session on *Enriching Partnerships for Scaling Up MDG Initiatives and Poverty Reduction Using CBMS: Action Plan and Future Directions..*

local leaders in the country. It also made the Municipality of Labo an exemplary model of CBMS in the LMP, not only for the province of Camarines Norte but also for all other municipalities implementing CBMS.

As a consequence of Labo's success story, the LMP issued Memorandum Circular 027-2006 and also 027-2006B — urging our member municipalities to seriously adopt and vigorously sustain the adoption of CBMS as a vital tool for local poverty diagnosis, and to institutionalize the CBMS as part of the system of municipal governance. The LMP also issued three circulars to ensure the incorporation of the Millennium Development Goals (MDGs) targets, and the utilization of the CBMS data in the municipal development plans for focused poverty targeting.

Indeed, I will continuously spread this good news about CBMS to all our membership. I will also have to commend our local officials — most especially the mayors who are here with us.

There is no doubt that the LMP has been very supportive of the CBMS. We firmly believe that through CBMS, we will be able to lead our member municipalities towards fulfilling our commitment to localize the MDGs. The LMP strongly believes in encouraging the municipalities to adopt the CBMS in order for them to have evidence-based plans, enable them to become effective implementers and service providers, and truly become responsive to the needs of the people. Their ability to uplift the conditions of their people and enable them to enjoy the decent life that they deserve hinges on our LGUs' ability to focus on priority concerns and deliver the interventions to the intended recipients.

Our theme for this particular part of the conference is "*Enriching Partnerships for Scaling up MDG Initiatives and Poverty Reduction Using CBMS*." However, there are many specific issues that we need to discuss further in order to facilitate a more active involvement of the LMP in the CBMS program. Based on the Memorandum of Agreement (MOA) that we signed in 2006, the LMP has committed itself to the following:

- Jointly advocate to the concerned local government units (LGUs), especially the member municipalities of LMP, the use of the CBMS as the official instrument in data gathering for poverty diagnosis, planning and monitoring.

- Establish closer cooperation in the conduct of the necessary trainings in CBMS processes and other related undertakings.
- Establish joint technical working groups (TWGs) that shall be tasked to plan and organize joint efforts in the effective localization of the MDGs as well as the effective terms of cooperation on advocacy for the use of CBMS. And,
- Share data inputs/outputs that may be generated through CBMS, set up a separate repository for such data and support the establishment of the data repository that shall be located at the LMP, particularly the financing for the development of the consumer software that will facilitate regular updating and reporting on the progress of the localization of MDGs in the municipalities and localities.

To enrich our existing partnerships, there is a need to assess what we have accomplished so far in order to really move forward. Earlier, Mayor Madeleine Ong, Mayor Dycoco and all our champion mayors not only shared their CBMS experiences but also elaborated on the position of LMP on CBMS. So I will no longer prolong your agony by making you listen to another long presentation. Suffice it for me to say that with the availability and feasibility of CBMS as a tool, the LMP is truly committed to a project on poverty monitoring, localization of the MDGs, uplifting the lives of poor communities, and strengthening municipalities to become effective and responsive service providers and stewards of development.

The LMP has convened a series of meetings on CBMS with the National Anti-Poverty Commission (NAPC), the Department of the Interior and Local Government (DILG) and the PEP-CBMS Network Coordinating Team to further clarify and arrive at agreements on areas of collaboration, and the roles of each agency in relation to the establishment of the national data repository and building the CBMS capability of our participating municipalities. What we need now is to broaden the participation of our municipalities so that we can further establish and enhance CBMS data ownership at the municipal level.

You know, this is already the 5th CBMS National Conference, and from my perspective, nothing much has really happened yet. So those municipalities who have enough funds, maybe you could help the 4th, 5th and 6th class municipalities so that they can conduct and

set up their CBMS projects sooner. As you may be aware, each 4th to 6th class municipality receives an Internal Revenue Allotment (IRA) that is just enough for paying the salaries of its employees. And if these municipalities do not receive any other funds from congressmen, governors, senators, or even the Office of the President, they cannot undertake any other any project.

So if you have enough funds to help support these municipalities, by all means, please lend them a hand so that we can hasten the implementation of CBMS in the 4th to 6th class municipalities. If not, it may take them another 5 years to accomplish it.

CBMS Opens Partnership Possibilities with PBSP¹

Gil Salazar

Based on what I have read, heard and seen, there is no doubt in my mind that the Community-Based Monitoring System (CBMS) can serve as an effective development tool. I consider it a development tool because it is necessary not only for data collection and repository purposes, but more than that — it can be used for decision making. And of course, when we talk about the CBMS as a development tool, it is useful not only for project implementation purposes but also for evaluating what is happening in a particular area or to a particular project.

Personally and on behalf of the Philippine Business for Social Progress (PBSP), I share the view and concern that the localization or popularization of CBMS should be done fast. Quite frankly, I am very encouraged to make that statement because I would like to believe that PBSP will be one of the beneficiaries among many others of an effective CBMS working at the local government level.

Consider the following. As a grant-making organization, PBSP has priority programs as well as priority areas. When we go to a certain area, we spend a lot of time trying to find out about the situation in that particular area. But with CBMS in place, the work of PBSP will certainly become very cost-efficient in the sense that we will no

¹ An edited transcript of the response of Mr. Gil Salazar, Executive Director, Philippine Business for Social Progress (PBSP), on the presentations during the session on *Enriching Partnerships for Scaling Up MDG Initiatives and Poverty Reduction Using CBMS: Action Plan and Future Directions*.

longer be spending money for data collection purposes and instead reallocate the money to — what we call in PBSP as — a direct program cost instead of spending it on building or implementing the system itself. That is why I am joining the call that the popularization or the localization of CBMS should be done fast.

Let me just mention that PBSP is working with a lot of groups in the civil society sector including the Peace and Equity Foundation (PEF), and of course, we also work a lot with the National Economic and Development Authority (NEDA) and the United Nations Development Programme (UNDP) with respect to the Millennium Development Goals (MDGs).

Since our membership is from the private sector, we were given the task of serving as the Secretariat of the business sector with respect to the MDGs. I would like to believe also that if we are talking about possibilities for partnerships with the business sector, these possibilities would not really be in the area of implementing or setting up the CBMS in different areas of the country, but more on possible funding of projects or programs identified through a good CBMS database that has already been installed in any of your respective localities. To me, that would represent a great area for collaboration not only between the LGU and PBSP but also between possible partners from the private sector and the PBSP. These projects or programs must have something to do with the localization of the MDGs and other really specific programs for the betterment of your respective areas.

UNDP Support for the CBMS Project in the Philippines¹

Kyo Naka

I am delighted to take part in this important event where key players of the Community-Based Monitoring System (CBMS) are gathered to discuss and hear success stories and best practices happening on the ground. This Conference is indeed a splendid learning and sharing opportunity that everyone from the national and local government units and agencies, as well as civil society organizations (CSOs) and non-government organizations (NGOs) should look forward to.

As you all know, the United Nations Development Programme (UNDP) has been a staunch supporter of CBMS because we recognize the need for community-based data and information. Likewise, we recognize the value of strengthening local government units (LGUs) as they take the path towards institutionalizing the process of data gathering and analysis while empowering their communities.

Collaborating with the National Economic Development Authority (NEDA), the National Anti-Poverty Commission (NAPC), and the Department of the Interior and Local Government (DILG) in 2002, we supported initiatives that would harmonize all existing local poverty monitoring systems. This resulted in the identification of the Core Set of Local Poverty Indicators (which we now call the 14 Indicators) and the enhancement of LGUs' collective capacity for institutionalizing local poverty monitoring systems. These 14

¹ An edited transcript of the presentation of Mr. Kyo Naka, Deputy Resident Representative, United Nations Development Programme (UNDP) Philippines.

Indicators are consistent with the Millennium Development Goals (MDGs) indicators.

In 2005, upon the request of the PEP-CBMS Network Coordinating Team under the leadership of Dr. Celia M. Reyes, the UNDP forged a partnership with the network to set-up the UNDP-CBMS Development Grant Program which is a mechanism that would provide assistance to LGUs in implementing evidence-based anti-poverty interventions. This partnership between the UNDP and the PEP-CBMS Network Coordinating Team is in recognition of the vital role of LGUs as front-liners in development. The objective of our partnership is to support intervention efforts that would eventually bring about not only empowered communities but also empowered LGUs with a deep sense of commitment to emancipate their poor constituents from poverty.

Since 2005, UNDP has supported through this program a total of 25 CBMS-based small projects of which seventeen (17) are being implemented in various parts of the country. For this year, eight (8) grants will be awarded to eligible and qualified LGUs which have developed sound proposals aimed at empowering the poor and promoting good governance. They have passed the long and tedious screening process. An inter-agency Screening Committee was constituted for this purpose, and it is now in the process of monitoring the impact or results of the interventions rendered to the first 17 grantees. The Screening Committee will be using an impact monitoring methodology that was developed by the PEP-CBMS Network Coordinating Team. Documentation of local government experiences and some of their good practices is expected to be undertaken in the course of this program.

Under its new Medium-Term Strategic Plan (2008-2011), “*UNDP will support countries in accelerating inclusive growth to ensure equitable, broad-based human development. An important part of the work will be to support countries in assessing which state interventions can have the largest impact on reducing persistent inequities in a manner that is consistent with MDG achievement in highly unequal middle-income countries*”.

Within these principles, UNDP will continuously support the empowerment of the poorest and most vulnerable through provision of capacity-building interventions aimed at improving their access to

economic opportunities, enhancing LGUs' capacities to deliver social services to the poorest sectors more effectively and strengthening their capacities for MDG-based planning, budgeting, and monitoring, as well as for promoting and protecting the rights of the poor. Strategic partnerships with key stakeholders, like the PEP-CBMS Network and the LGUs, will allow us to contribute to the global call to make poverty history.

In closing, allow me to commend the PEP-CBMS Network Coordinating Team members for their expertise, hard work and dedication in developing this type of intervention for the poorest and most vulnerable. Together with the PEP-CBMS Network Coordinating Team, we at UNDP share the mission of promoting good governance and greater transparency and accountability in resource allocation through evidence-based needs identification, program design and impact monitoring.

Let me also thank the members of the Screening Committee – the NAPC, the NEDA, the DILG, the Department of Social Welfare and Development (DSWD), and the UNDP Empowerment of the Poor Portfolio – for their active participation and substantive contributions to the various activities leading to this event.

And lastly, let me thank the participating LGUs and congratulate the eight (8) new LGU-grantees for their efforts in designing CBMS-based project proposals.

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Closing Remarks

Consolidating Forces and Looking Forward to Greater Things

Celia M. Reyes*

This 5th CBMS National Conference has been made possible through the invaluable support of our partners such as: the Department of the Interior and Local Government (DILG); the National Anti-Poverty Commission (NAPC); the National Economic and Development Authority (NEDA); the Department of Health (DOH); the Philippine Health Insurance Corporation (PhilHealth); the League of Municipalities of the Philippines (LMP); the Regional Development Councils (RDCs); the NEDA Regional Offices; the DILG Regional Offices which have been providing our pool of trainors in the regions; and Ka Oca Francisco who is an institution by himself — representing the Institute for Democratic Participation in Governance (IDPG), Misereor and other organizations. Let me also cite Social Watch Philippines (SWP) and the Peace and Equity Foundation (PEF).

Among our international donors, the International Development Research Centre (IDRC) has been investing in us for a very long time. In fact, we can now see the many fruits of that very long collaboration. Here with us today representing IDRC is Dr. Evan Due who has been very active in supporting our project. Likewise, we acknowledge the continuing support of the Canadian International Development Agency (CIDA), the United Nations Development Programme (UNDP), the United Nations Population Fund (UNFPA),

* Poverty and Economic Policy (PEP) Research Network Co-Director and CBMS Network Leader

the World Bank and other development partners. We thank all of them.

Making this conference extra special is the participation of our resource persons from abroad: Dr. Randy Spence and Ms. Nancy Spence. Randy may not have been physically present here all the time, but through the years, he has always been providing invaluable guidance.

And of course, we could not have gone anywhere without the support of our partners on the ground - the local government units (LGUs) – who are the ultimate implementers of the CBMS initiative.

Between now and the next conference, we hope to undertake specific activities to enhance the Community-Based Monitoring System (CBMS). For example, due to the clamor for a more user-friendly system, we will be introducing some modifications in the processing system. We understand that even mayors want to have access to CBMS information through their own computers in their local offices. Joel Bancolita, who has been developing our processing system, has been working very hard to upgrade the technology and make the system more user-friendly.

With respect to the planning and budgeting module — which was presented earlier by Dr. Aniceto Orbeta, we will continue to refine it and will be able to share it with you within the next few months so that you can use it in preparing your Annual Investment Plans (AIPs).

We will be preparing a Millennium Development Goals (MDGs) report template to assist LGUs in preparing their own MDG reports to track and show their progress in the localization and achievement of the MDGs.

We all know that many of our CBMS-implementing LGUs have been establishing their respective repositories – and these are being done at the barangay, municipal or city and provincial levels. But it is heartening to note from the presentations during the session on Regional Development Strategies that there is a keen interest at the regional level to develop regional repositories that will be lodged at the Regional Development Councils (RDCs).

In addition, national repositories are also being established at the NAPC, LMP and DILG. For NAPC, this repository is going to be very useful because as an oversight agency, it will be able to use the data to advise other agencies where to locate their projects, which

areas are still underserved, and which households should be given assistance. In the case of LMP, the repository will come in handy for probing inter-municipal concerns and issues, and for that reason, the LMP wants to set up a CBMS database within its own premises. Meanwhile, the DILG will utilize the repository to assist LGUs in putting in place a rational and efficient planning and budgeting system at the local level.

We earlier heard our colleagues from Philippine Business for Social Progress (PBSP) tell us how important the CBMS data is to them. So we take this opportunity to encourage all our other local government partners to send us the CBMS data they have collected so that the PEP-CBMS Network Coordinating Team can assume the responsibility of sharing the collective data with our community of partners. You can also send your data to either the DILG or the LMP because not only do we have a Memorandum of Agreement (MOA) with them, but have also established with them a working group which makes sure that all data will be consolidated in the CBMS repository.

Related to the establishment of repositories is the matter of capacity-building. Once a province or municipality decides to adopt CBMS, the next step is the implementation. For this process, we need to partner with national government agencies (NGAs) and their regional offices, civil society, non-government organizations (NGOs), development partners and the academe to meet the demand for training. While the PEP-CBMS Network Coordinating Team is currently implementing the capacity-building process in partnership with the DILG and the NAPC, I would like to mention that we are also considering the possibility of working with the University of the Philippines (UP) Open University and the Statistical Research and Training Center (SRTC) towards addressing the increasing demand for capacity-building on how to implement CBMS.

In terms of research, we will be focusing more on poverty analysis over the next few months. Given the available data we have now accumulated, we will be working with LGUs to further study the poverty situation in their respective localities, as well as their causes and possible solutions. We will also try to work with data from the repository to be able to examine the poverty situation and analyze the concerns of the basic sectors. However, we still need to gather more information that cover, for instance, our indigenous people.

Because some of you have actually already undertaken more than one round of CBMS, we now have panel data in our CBMS repository. In the near future, we will be providing training on how one can analyze chronic and transient poverty utilizing panel data from CBMS.

We will continue to work on targeting approaches to further improve the design and implementation of our targeted programs. Right now, we are working with PhilHealth, as well as the conditional cash transfer program which is being pilot-tested in Agusan del Sur, Pasay City and two other sites. We will continue to do work in this area so that we can really reach the poorest of the poor.

In this light, it would be most relevant for us to take up the challenge posed by Dr. Randy Spence – and that is to re-examine the sufficiency and adequacy of our list of indicators; and if the list is found wanting, we have to look for ways to be able to monitor the missing dimensions of poverty that we have not yet been able to cover and explore.

Another area of research and analysis that we would like to pursue is the monitoring and evaluation of poverty reduction programs. This is one area where Philippine capability is weak. We do have good program designs, but sometimes in the implementation process, we encounter some of their weaknesses. Unfortunately, we rarely evaluate our programs and projects and as a consequence, we do not know if the results are in accordance with what we intended to achieve, or if a program has been as effective as we thought it would be.

In line with this endeavor, we want to document best practices. So please do not be surprised if we ask you for more information that goes beyond how you have implemented your CBMS. We would, for example, be interested to know about the poverty reduction programs and policies that you have been implementing using the CBMS framework. We would like to share with others how you – frontliners in the fight against poverty – have succeeded in moving people out of poverty.

Thank you.

Closing Remarks

Moving Up to the Next Set of Challenges

Wyona C. Patalinhug*

Distinguished and honorable guests; participants, convenors and co-convenors of the conference; ladies and gentlemen:

Closing Ceremonies are like Commencement Exercises — while they mark the end of one phase, they also signal the start of the next —and in this case, the next phase of challenges. Considering everything we have heard over the past three days, we are ending this Conference on a very positive note and with so much hope for the cause of local empowerment and countryside development.

I think that this 3-day Conference – during which you have discussed a lot of social issues and strategies for attaining development — has given you not only the opportunity to present and share all your projects, views, insights and concerns with respect to the Community-Based Monitoring System (CBMS) and the Millennium Development Goals (MDGs), but has also given you a glimpse of the many opportunities that will challenge you as we all prepare for the next CBMS Conference next year.

The participation in this Conference of national and local planners and executives, policymakers, program implementers and researchers as well as the various partner agencies, supporters and donors, not to mention the many substantive outputs and documents that will eventually be generated from the Conference proceedings — all of

* Vice Chancellor for Research, De La Salle University, Taft Avenue, Manila

these are manifestations that we should indeed celebrate our partnership as a community.

Dr. Reyes has already mentioned and thanked all the many people who have contributed to the success of this Conference. We would like to cite, thank and commend all the participating agencies — the Canadian International Development Agency (CIDA), International Development Research Centre (IDRC) - Canada, United Nations Development Programme (UNDP), United Nations Population Fund (UNFPA), and the Angelo King Institute for Economic and Business Studies (AKIEBS) of the De La Salle University (DLSU) for their support in organizing this Conference in partnership with the National Anti-Poverty Commission (NAPC), Department of the Interior and Local Government (DILG), National Economic and Development Authority (NEDA) and the League of Municipalities of the Philippines (LMP).

On behalf of the organizing team, I would like to thank all of you for your participation.

Directory of Participants

NATIONAL GOVERNMENT AGENCIES

Department of Budget and Management (DBM)

Carmencita Delantar
Director, Regional Operations & Coordinating Service
Gen. Solano St., San Miguel, Manila
Tel no.: 735-4934
Fax no.: 735-1974
E-mail: cdelantar@dbm.gov.ph

Department of Education (DepEd)

Victoria Aguas
Division Superintendent
Department of Education
Tarlac City, Tarlac 2304
Tel no.: 045-9822463

Estela S. Naval
Education Supervisor I
Department of Education
Tarlac City, Tarlac 2304
Mobile no.: 0919-5740462

Department of Health (DOH)

Agueda Sunga
Chief Health Program Officer &

Head of Technical Assistance Coordination Team Secretariat
Tel no.: 743-8301

Lluis Vinyals
Health Financing Expert
European Commission Technical Assistance to the Department of Health (DOH)
and the Philippine Health Insurance Corporation (PhilHealth)
E-mail: lluisvin@hotmail.com
Mobile: 0928-5065271

Department of the Interior and Local Government (DILG)

Thelma Abdulrahman
Bureau of Local Government Development
A. Francisco Gold Condominium II
Mapagmahal St. cor. EDSA, Quezon City
Tel no.: 929-9235 / 927-7852
Fax no. 927-7852

Charity Agbayani
Bureau of Local Government Development
A. Francisco Gold Condominium II
Mapagmahal St. cor. EDSA, Quezon City

Tel no.: 929-9235 / 927-7852
Fax no. 927-7852

Melanie Angulo
Bureau of Local Government
Development
A. Francisco Gold Condominium II
Mapagmahal St. cor. EDSA
Quezon City
Tel no.: 929-9235 / 927-7852
Fax no. 927-7852

Maridel Baquilid
Local Government Officer II
DILG Region 8
No. (053) 3212078
Mobile: 09295904106
Email: maridelbaquilid@gmail.com

Anna Liza F. Bonagua
OIC Assistant Director
A. Francisco Gold Condominium II
Mapagmahal St. cor. EDSA
Quezon City
Tel no.: 925-7852
E-mail: afbonagua@dilg.gov.ph /
annalizabonagua@yahoo.com

Sylvia Carvajal
Bureau of Local Government
Development
A. Francisco Gold Condominium II
Mapagmahal St. cor. EDSA
Quezon City
Tel no.: 929-9235 / 927-7852
Fax no. 927-7852

Mark Archibal Castillo
Bureau of Local Government
Development
A. Francisco Gold Condominium II
Mapagmahal St. cor. EDSA
Quezon City
Tel no.: 929-9235 / 927-7852
Fax no. 927-7852

Evelyn A. Castro
LGOO I
Bureau of Local Government
Development
A. Francisco Gold Condominium II
Mapagmahal St. cor. EDSA
Quezon City
Tel no.: 929-9235 / 927-7852
Fax no. 927-7852

Blanca Cercado
Assistant Division Chief
Technical Services Division
DILG Region 8
No. (053) 3212078
Mobile: 09279875211
Email: dilgr8_cbms@yahoo.com

Lucita L.V. Dela Peña
LGOO III
Bureau of Local Government
Development
A. Francisco Gold Condominium II
Mapagmahal St. cor. EDSA
Quezon City
Tel no.: 929-9235 / 927-7852
Fax no. 927-7852

Manuel Gotis, CESO IV
Director
Bureau of Local Government
Development
A. Francisco Gold Condominium II
Mapagmahal St. cor. EDSA
Quezon City
Tel no.: 929-9235 / 927-7852
Fax no. 927-7852
E-mail: blgd-dilg@yahoo.com

Arnel Renato Madrideo
Assistant Division Chief
Technical Services Division
DILG Region V
Rizal St., Albay District
Legaspi City 4500
Tel no.: (052) 480-1484-86
Fax: (052) 480-1663

Austere A. Panadero, CESO I
Undersecretary for Local Government
A. Francisco Gold Condominium II
EDSA cor. Mapagmahal St.
Diliman, Quezon City 1100
Tel no.: 925-0361
Fax: 925-0347
E-mail: aapanadero@dilg.gov.ph

Rudelita Remoroza
Bureau of Local Government
Development
A. Francisco Gold Condominium II
Mapagmahal St. cor. EDSA
Quezon City
Tel no.: 929-9235 / 927-7852
Fax no. 927-7852

Department of Finance (DOF)

Arsenia San Diego
MDG Fund Coordinator
BSP Complex, Roxas Blvd, Manila
Tel no.: 523-9935
Fax no.: 523-9936
E-mail: hhabulan@dof.gov.ph

Department of Social Welfare and Development (DSWD)

Finardo G. Cabilao
Director IV, Social Technology
Bureau
DSWD Central Office Bldg.
Constitution Hills, Batasan Complex,
Quezon City 1126
Tel no.: 951-8130 / 9517436 /
9317196 loc 317
Fax no.: 931-7196
E-mail: fgcabilao@dswd.gov.ph /
soctech@dswd.gov.ph

Loida M. Villanueva
Planning Officer
DSWD Central Office Bldg.
Constitution Hills, Batasan Complex
Quezon City 1126

Tel. no.: 931-81-30; 0920-5806482
E-mail: loidzmv@yahoo.com

Housing and Land Use Regulatory Board (HLURB)

Emma Ulep
Head
Information Technology Group
HLURB Bldg.
Kalayaan Avenue cor. Mayaman St.,
Diliman, Quezon City 1101
Tel. No. (632) 434-4168 / 927-2698
E-mail: eulep@hlurb.gov.ph

League of Municipalities of the Philippines (LMP)

Li-Ann De Leon
Executive Director
2nd Flr. LMP Bldg.
265 Ermin Garcia St.
Cubao, Quezon City
Tel. no.: 913-5737
Fax no.: 913-5738
E-mail: alliagem@yahoo.com

Ramon Guico
National President
2nd Flr. LMP Bldg.
265 Ermin Garcia St.
Cubao, Quezon City
Tel. no.: 913-5737
Fax no.: 913-5738

League of Provinces of the Philippines (LPP)

Roberto Limbago
Program Director
Unit 2803 Summit Tower
530 Shaw Boulevard
Mandaluyong City
Tel. nos.: (632) 534-2857; 534-6789;
718-4351
Fax no.: Local 108

**National Anti-Poverty Commission
(NAPC)**

Andrea Alforte
Macropolicy Unit
DA-Agricultural Training Institute
Elliptical Road, Diliman
Quezon City
Tel no. 426-5028 loc 124
Fax no.: 426-5228

Milca Añoso
Macropolicy Unit
DA-Agricultural Training Institute
Elliptical Road, Diliman
Quezon City
Tel no. 426-5028 loc 124
Fax no.: 426-5228

Cynthia Arceo
Macropolicy Unit
DA-Agricultural Training Institute
Elliptical Road, Diliman
Quezon City
Tel no. 426-5028 loc 124
Fax no.: 426-5228

Desiree Berjamen
Macropolicy Unit
DA-Agricultural Training Institute
Elliptical Road, Diliman
Quezon City
Tel no. 426-5028 loc 124
Fax no.: 426-5228

Dolores De Quiros-Castillo
Assistant Secretary
3rd Flr. DA-Agricultural Training
Institute
Elliptical Road, Diliman
Quezon City
Tel no.: 426-5263
E-mail: dollydqc@yahoo.com

Sem Cordial
OIC-Director, Localization
DA-Agricultural Training Institute

Elliptical Road, Diliman
Quezon City
Tel no. 426-5228
Fax no.: 426-5263

Leslie Estreller
3rd Flr. DA-Agricultural Training
Institute
Elliptical Road, Diliman
Quezon City
Tel no.: 426-5263
E-mail: dollydqc@yahoo.com

Elmer Gomez
Macropolicy Unit
DA-Agricultural Training Institute
Elliptical Road, Diliman
Quezon City
Tel no. 426-5028 loc 124
Fax no.: 426-5228

Elmer Gutierrez
DA-Agricultural Training Institute
Elliptical Road, Diliman
Quezon City
Tel no. 426-5228
Fax no.: 426-5263

Teresita R. Lalap
Sr. Project Associate
UNDP – NAPC
DA-Agricultural Training Institute
Elliptical Road, Diliman
Quezon City
Tel no. 927-9809

Agnes Catherine Miranda
OIC-Director, Macro Policy Unit
DA-Agricultural Training Institute
Elliptical Road, Diliman
Quezon City
Tel no. 426-5028 loc 124
Fax no.: 426-5228

Domingo F. Panganiban
Secretary and Lead Convenor
3rd Flr. DA-Agricultural Training
Institute

Elliptical Road, Diliman
Quezon City
Tel no.: 927-9838 / 4263652
Fax no.: 426-5249
E-mail: secdfp@info.com.ph

Annalisa Siawingco
DA-Agricultural Training Institute
Elliptical Road, Diliman
Quezon City
Tel no. 426-5228
Fax no.: 426-5263

Hilda Fatima Tantingco
Macropolicy Unit
DA-Agricultural Training Institute
Elliptical Road, Diliman
Quezon City
Tel no. 426-5028 loc 124
Fax no.: 426-5228

Fe Turingan
Administrative and Finance Officer
UNDP-NAPC
DA-Agricultural Training Institute
Elliptical Road, Diliman
Quezon City
Tel no. 927-9809
E-mail: 0918-9036269

Roberto Villa
Director
DA-Agricultural Training Institute
Elliptical Road, Diliman
Quezon City
Tel no. 426-5228
Fax no.: 426-5263

**National Mapping and Resource
Information Authority (NAMRIA)**

Linda S. D. Papa
Director
Information Management Depart-
ment
NAMRIA Bldg. Lawton Avenue
Fort Bonifacio, Taguig

Tel no.: 810-4831 loc 400 / 810-
5463
Fax no.: 810-5463 / 810-5466
E-mail: lindasdipa@hotmail.com

**National Commission on the Role of
Filipino Women (NCRFW)**

Emmeline L. Verzosa
Executive Director
1145 JP Laurel St. San Miguel
Manila
Tel no.:(632) 735-4955
E-mail: edo@ncrfw.gov.ph

**National Economic and Development
Authority (NEDA)**

Oskar D. Balbastro
Regional Director
NEDA Complex, EDSA
Quezon City
Tel no.: 928-5512
Fax no.: 929-64279 / 436-6661
E-mail: odbalbastro@neda.gov.ph

Erlinda M. Capones
Director IV, Social Development
Staff
NEDA sa Pasig Bldg.
12 St. Jose Maria Escriva Drive
Ortigas Center, Pasig City 1605
Tel no.: 631-0945 to 64 / 631-2758
Fax no.: 631-5435
E-mail: EMCapones@neda.gov.ph

Ramon N. Falcon
Social Development Staff
NEDA sa Pasig Bldg.
12 St. Jose Maria Escriva Drive
Ortigas Center, Pasig City 1605
Tel no.: 631-0945 to 64 / 631-2758
Fax no.: 631-5435

Susan Rachel G. Jose
Director
Regional Development Coordination
Staff

NEDA sa Pasig Bldg.
12 St. Jose Maria Escriva Drive
Ortigas Center, Pasig City 1605
Tel no.: 631-0945 to 64 / 631-2758
E-mail: SGJose@neda.gov.ph

Philippine Health Insurance Corporation (PHIC)

Ernesto V. Beltran
Senior Vice President
City State Center, 709 Shaw Blvd.
Pasig City
Tel no.: 637-2672

Philippine Institute for Development Studies (PIDS)

Jennifer P.T. Liguton
Director
Research Information Staff
NEDA sa Makati Building
106 Amorsolo St., Legaspi Village
Makati City
Tel no.: 893-5705
Fax no.: 893-9589
E-mail: jliguton@mail.pids.gov.ph

Aniceto Orbeta, Jr.
Senior Research Fellow
NEDA sa Makati Building
106 Amorsolo St., Legaspi Village
Makati City
Tel no.: 893-9571
Fax no.: 893-9571
E-mail: aorbeta@mail.pids.gov.ph

INTERNATIONAL ORGANIZATIONS

Asian Development Bank (ADB)

Teresa B. Mendoza
Associate Program Analyst
6 ADB Avenue
Mandaluyong City, Metro Manila

Tel no.: 632-4444
E-mail: tbmendoza@adb.org

Canadian International Development Agency (CIDA)

Frances Tanner
First Secretary
Level 7 RCBC Plaza Tower 2
6819 Ayala Avenue
Makati City
Tel no: 857-9121
E-mail:
Frances.Tanner@international.gc.ca

International Development Research Centre (IDRC)

Evan Due
Senior Regional Program Specialist
Regional Office for Southeast and East Asia
22 Cross St. #02-55
South Bridge Court
Singapore 048421
Tel no.: (65) 6438-7877
Fax no.: (65) 6438-4844
E-mail: edue@idrc.org.sg

Economic and Social Development Affiliates (ESDA)

Nancy Spence
Director
8 Annex Lane Toronto, Ontario
M5R 3V2, Canada
Tel no.: 1-416-732-0191
Fax no.: 1-905-248-3104

W. Randy Spence
President
8 Annex Lane Toronto, Ontario
M5R 3V2, Canada
Tel no.: 1-416-732-0191
Fax no.: 1-905-248-3104
E-mail: wrspence@gmail.com

**United Nations Development
Programme (UNDP)****Fe Cabral**

Program Associate
30th Flr. Yuchengco Tower
6819 Ayala Ave. cor Gil Puyat Ave.
Makati City
Tel no.: 901-0249
Mobile: 0915-5101689
E-mail: fe.cabral@undp.org

Kyo Naka

Deputy Resident Representative
30th Flr. Yuchengco Tower
6819 Ayala Ave. cor Gil Puyat Ave.
Makati City
Tel no.: 9010100
Fax no.: 9010200

Corazon Urquico

Program Manager
30th Flr. Yuchengco Tower
6819 Ayala Ave. cor Gil Puyat Ave.
Makati City
Tel no.: 9010100
Fax no.: 9010200

**United Nations Population Fund
(UNFPA)****Rena Dona**

Assistant Representative
30th Flr. Yuchengco Tower
RCBC Plaza Makati City
Tel no.: 901-0314
E-mail: dona@unfpa.org

Ma. Theresa M. Fernandez

Program Officer
United Nations Population Fund
30th Flr. Yuchengco Tower 1
RCBC Plaza Ayala Ave.
Makati City
Tel no.: 901-0309
Fax no.: 901-0348
Mobile: 0917-8594263
E-mail: fernandez@unfpa.org

LOCAL GOVERNMENT UNITS**Agusan del Norte****Decelyn B. Catapang**

Statistician II
Provincial Government of Agusan
del Norte
Butuan City, Agusan del Norte 8600
Tel no.: 085-8151446
E-mail: desay_12@yahoo.com

Agusan del Sur**Ma. Cheril Basan**

Planning Staff
Rosario, Agusan del Sur

George V. Calamba

PDO II / Acting MPDC
Provincial Development Office
San Francisco, Agusan del Sur
Tel no.: 085-8392147

Don Carney

VSO Volunteer
Provincial Government of Agusan
del Sur
E-mail: don.carney@gmail.com

Maria Valentina Plaza

Provincial Governor
Provincial Government of Agusan
del Sur
Tel no.: 085-2423779

Wenilyn A. Ducena

Statistician II
La Paz, Agusan del Sur 8508
Tel no.: 085-2423779 (PDC Office)
Mobile: 0918-3579040

Carl Elias C. Lademora

Municipal Mayor
San Francisco, Agusan del Sur
Tel no.: 085-8392147

Allan J. Santiago
SP Member
Bayugan City, Agusan del Sur 8502
Mobile: 0918-9282547

Albay

Agnes Dycoco
Municipal Mayor
Libon, Albay

Krisel Lagman-Luistro
City Mayor
Tabaco City, Albay
Tel no.: 052-4875238 / 830-0181
Fax no.: 052-4875238
Mobile: 0920-9704216 /
E-mail: krisel1109@yahoo.com

Leonardo Olivarez
Municipal Planning and Development Coordinator
Libon, Albay 4507
Tel no.: 4866101
Mobile: 0919-8816253
E-mail: mylibon@yahoo.com

Lito S. Perillo
Municipal Planning and Development Office
Libon, Albay 4507
Tel no.: 4866101
Mobile: 0919-8816253
E-mail: mylibon@yahoo.com

Apayao

Milflorencio D. Agustin
Municipal Planning and Development Coordinator
Luna, Apayao 3813
Tel no: (078) 824-85-75 (telefax)
Mobile: 0918 3415775
Email: milletagustin@yahoo.com
luna.apayao@yahoo.com

Bataan

Manuel Perez Ambrocio
SB Member
Limay, Bataan 2103
Tel no.: 047-2444467
Fax no.: 047-2445088
Mobile: 0915-5407793
E-mail: welambrocio@yahoo.com

Luz D. Austria
Sanguniang Bayan Member
Orion, Bataan

Andres Avorque
Municipal Planning and Development Coordinator
Orion, Bataan
Mobile: 0928-7814156
E-mail: andyavorque@yahoo.com

Ludivina G. Banzon
OIC-Provincial Planning and Development Coordinator
Provincial Planning and Development Office
65 Burgos St. Poblacion
Balanga City Bataan 2100
Tel no.: 047-237-2414 / 047-2374742
E-mail: ludibanzon@yahoo.com

Rodelito Calara
Municipal Planning and Development Coordinator
Samal, Bataan
Mobile: 0917-4201930

Michelle N. Caraig
Project Development Officer 1
Provincial Planning and Development Office
2nd Flr. Capitol Bldg. San Jose
Balanga City Bataan 2100
Tel no.: 047-237-2414 / 047-2374742
E-mail: chelnuestro@yahoo.com

Jessie I. Concepcion

Municipal Mayor
Mariveles, Bataan

Rigeo De Dios

Municipal Assessor
Mariveles, Bataan
Tel no: 047-9354389
Mariveles, Bataan

Eugenia Galvez

Municipal Planning and Development Coordinator
Bagac, Bataan

Ricardo O. Gigante

Municipal Planning and Development Coordinator
Dinalupihan, Bataan
Mobile: 0915-5577171

Luis Gonzales

Municipal Administrator
Mariveles, Bataan

Marlon Manuel

Municipal Planning and Development Coordinator
Dinalupihan, Bataan
Mobile: 0917-6485661

Antonio Raymundo, Jr.

Municipal Mayor
Orion, Bataan

Leo Allan Renton

Municipal Information Officer
Orion, Bataan
Mobile: 0928-7814156
E-mail: andyavorque@yahoo.com

Floro Roco

Municipal Planning and Development Coordinator
Mariveles, Bataan
Tel no.: 047-9355946
Fax no.: 047-9355252

E-mail: fung_rock@yahoo.com

Antussa H. Santos

Planning Officer I
Orani, Bataan 2112
Tel no.: 047-4317950 loc.1014
Mobile: 0906-2661424

Ernesto Vergara

Municipal Planning and Development Coordinator
Abucay, Bataan
Mobile: 0928-5072536

Batangas**Cesar M. Arcega**

Planning and Development Officer III
Provincial Capitol Bldg.
Batangas City, Batangas 4200
Tel no.: 043-7233286
E-mail: bcesar_arcega@yahoo.com

Biliran**Herbert Bernadas**

Municipal Planning and Development Coordinator
Kawayan, Biliran

Catalino B. Diloy

Municipal Planning and Development Coordinator
Culaba, Biliran, 6547
Mobile no. 0906-6967067

Wilma O. Elairon

Municipal Planning and Development Coordinator
Maripipi, Biliran 6546
Mobile: 0921-5572036 / 0917-7204839

Lorenzo Genoguin

Municipal Planning and Development Coordinator
Cabucgayan, Biliran

Teofilo Gervacio Jr.
 Municipal Planning and Development Coordinator
 Caibiran, Biliran

Leonardo V. Madeja, Jr.
 Municipal Planning and Development Coordinator
 Naval, Biliran 6543
 Tel no.: 053-5009366
 Mobile: 0916-3011852
 E-mail: nardsmpdo@yahoo.com

Bohol

Rogelio T. Alegado
 Head, Project Development & Monitoring Unit / Planning Officer II
 Provincial Government of Bohol
 CPG Ave. Tagbilaran City
 Bohol 6300
 Tel no.: 038-4112088
 Mobile: 0920-5511163
 E-mail:
 roger_alegado2003@yahoo.com

Ednardo A. Avenido
 Municipal Planning and Development Coordinator
 Talibon, Bohol 6325
 Mobile: 0917-7177388
 E-mail: mpdctalibon@yahoo.com

Fermin I. Balili
 Municipal Planning and Development Coordinator
 Carmen, Bohol 6319
 Tel no.: 038-5255607
 E-mail:
 CARMEN_OFFICEMAYOR@yahoo.com

Eutiquio M. Bernales
 Municipal Mayor
 Ubay, Bohol 6315
 Tel no.: 518-0064
 Fax no.: 331-1048

Mobile: 0927-5286883 / 0917-3042277

Dionisio V. Boiser
 Municipal Planning and Development Coordinator
 Ubay, Bohol 6315
 Tel no.: 331-1048
 Mobile: 0919-3089867

Juanario A. Item
 Municipal Mayor
 Talibon, Bohol 6325
 Mobile: 0917-3041895
 E-mail: ja_item@yahoo.com

Manuel R. Molina
 Municipal Mayor
 Carmen, Bohol 6319
 Tel no.: 038-5259000
 E-mail:
 CARMEN_OFFICEMAYOR@yahoo.com

Felipe L. Ramo, Sr.
 Sr. Executive Assistant IV
 Carmen, Bohol 6319
 Tel no.: 038-5259000
 E-mail:
 CARMEN_OFFICEMAYOR@yahoo.com

Josephina J. Relampagos
 Provincial PDS Focal Person
 UNFPA Bohol
 Tel no. 038-4114821 / 038-4113063
 Fax no.: 038-5018898 (UNFPA)

Bulacan

Marcelo SC. Enriquez
 Municipal Planning and Development Coordinator
 Pulilan, Bulacan 3005
 Tel no: 044-6760276

Efren R. Miranda
 MPDC Staff
 Pulilan, Bulacan 3005

Tel no.: 044-6760276

Marvin Reyes

Municipal Planning and Development Coordinator
Hagonoy, Bulacan 3002
Tel no.: 044-7932619 / 793-0016 / 793-0049
E-mail: mpdc_hagonoy@yahoo.com

Cagayan

Elisa Umoso Carodan

Provincial Planning and Development Coordinator
Tuguegarao City, Cagayan 3500
Tel no.: 078-8441708
E-mail: hibernate_2000@yahoo.com

Albina Garen

Project Development Officer IV
Provincial Planning and Development Office
Tuguegarao City, Cagayan 3500
E-mail: abgaren@yahoo.com

Edna L. Ligan

OIC-Provincial Budget Officer
Tuguegarao City, Cagayan 3500
Mobile: 0920-9615071

Ismael V. Tumaru, MD.

Municipal Mayor
Appari Cagayan
Tel no. (078) 888-2001
E-mail: doctamaru@yahoo.com
lguaparriphil@yahoo.com

Camarines Norte

Madonna A. Abular

Provincial Planning and Development Coordinator
Daet, Camarines Norte
Tel no.: 054-7214104 / 054-7214130
Fax no.: 054-5712752
Mobile: 0917-9974310

E-mail: ppdocnorte@yahoo.com

Ricky S. Arciga

Planning Assistant & CBMS Focal Person
Basud, Camarines Norte 4608
Tel no.: 054-4431016
Fax no.: 054-4431017
Mobile: 0919-4563279
E-mail: mpdo-basud@yahoo.com

Bimbo Doria

Municipal Planning and Development Coordinator
Sta. Elena, Camarines Norte
Tel no.: 054-2013405
Mobile: 0920-9260549
Email: doriabimbo@yahoo.com

Jose Ramon Lagatuz

Planning Officer
Municipal Planning and Development Office
Labo, Camarines Norte 4604
Tel No.: 054-5852340

Dominador Mendoza

Municipal Mayor
Sta. Elena, Camarines Norte
Tel no.: 054-2013405

Evaristo GL Pandi

Municipal Planning and Development Coordinator
Labo, Camarines Norte 4604
Tel No.: 054-5852340

Dindo Pardo

Vice Mayor
Labo, Camarines Norte

Camarines Sur

Leovigildo D. Basmayor, Jr.

Municipal Mayor
Minalabac, Camarines Sur
Tel no.: 054-4704068

Pedelyn Benamira

MPDO Staff
Minalabac, Camarines Sur
Tel no.: 054-4704068
E-mail: csayk21@yahoo.com

Gladys Daluro

Municipal Treasurer's Office Staff
Minalabac, Camarines Sur
Tel no.: 054-4704068
E-mail: coquia0238@yahoo.com

Dominador Despacio, Jr.

MPDC
Lupi, Camarines Sur

Raul Matamorosa

Municipal Mayor
Lupi, Camarines Sur

Pepito C. V. Mora

CBMS Focal Person / Planning Officer III
City Planning and Development Office
Iriga City 4431
Tel no.: 054-2991963
Fax no.: 054-6550329
Mobile: 0918-4197035
E-mail:
pittsmora_aden71@yahoo.com

Camiguin**Felicisimo M. Gomez**

Provincial Planning and Development Coordinator
Mambajao, Camiguin
Tel no.: 088-387-1097 loc. 107
Fax no.: 088-387-1022
Mobile: 0905-3140561
E-mail: fmg_ppdo@yahoo.com

Eastern Samar**Henry Afable**

Provincial Planning and Development Coordinator
Borongan, Eastern Samar

Neil Alvarez

Municipal Mayor
Oras, Eastern Samar

Daniel E. Baldono

Municipal Mayor
Maydolong, Eastern Samar 6802
Fax no.: (055) 5711016

Angel Balibag

Municipal Planning and Development Coordinator
Can-avid, Eastern Samar 6806
Mobile: 0920-6257530

Mieda Baris

City Planning and Development Coordinator
Borongan City, Eastern Samar

Maria Nita Cablao

CBMS Coordinator
Provincial Planning and Development Office
Borongan, Eastern Samar
Mobile: 0916-8508095
E-mail: nitzcablao22@yahoo.com

Nedito Campo

Municipal Mayor
Quinapondan, Eastern Samar

Antonio Cardona

Municipal Mayor
Llorente, Eastern Samar

Renato R. Duran

Municipal Planning and Development Coordinator
Sulat, Eastern Samar

Ma. Nenita S. Ecleo
Municipal Planning and Development Coordinator
Guiuan, Eastern Samar 6809
Tel no.: 055-2712253
Fax no.: 055-2712172
Mobile: 0906-5867686
E-mail: n_ecleo@yahoo.com

Fernando L. Encio
Municipal Planning and Development Coordinator
Llorente, Eastern Samar

Ben P. Evardone
Provincial Governor
Eastern Samar

Joann C. Geonzon
Information Officer
Oras, Eastern Samar 6818
Tel no.: 055-5650027
Mobile: 0917-8879052
E-mail: yay.geonzon@yahoo.com

Irene Nenette Gonzales
Municipal Planning and Development Coordinator
Mercedes, Eastern Samar
Tel nos. 09064484531/ (055) 271 - 2366
Email:
irenenenettegonzales@yahoo.com

Rio Jatulan
CBMS IT Assistant
Sulat, Eastern Samar

Leandro C. Loste
Agricultural Technologist
Maydolong, Eastern Samar 6802
Fax no.: (055) 5711016

Benjamin B. Mabansag
Municipal Planning and Development Coordinator
Maydolong, Eastern Samar 6802

Fax no.: (055) 5711016

Eraño A. Macapagao
CBMS Encoder
Guiuan, Eastern Samar 6809
Tel no.: 055-2712253
Fax no.: 055-2712172
E-mail:
eranomacapagao@yahoo.com

Karen Brenda R. Santiago
Municipal Planning and Development Coordinator
Maslog Eastern Samar 6820
Mobile: 0915-5304967 /
09206092837

Joey Tan
CBMS Coordinator
Llorente, Eastern Samar

Joy Valera
Municipal Planning and Development Coordinator
Balangkayan, Eastern Samar

Javier Zacate
Municipal Mayor
Sulat, Eastern Samar

Ifugao

Josh Albert Cecilio Aguana
Municipal Planning and Development Coordinator
Kiangan, Ifugao

Ilocos Norte

Rommel D. Acoba
Draftsman – I
Municipal Planning and Development Office
Bacarra, Ilocos Norte 2916
Mobile: 0921-2108854

Evelyn R. Alonso
 Municipal Budget Officer
 San Nicolas, Ilocos Norte 2901
 Tel No.: 077-7721698
 Mobile: 0917-5101196
 E-mail:
 evelynraguingan@yahoo.com

Rosemarie B. Antolin
 Project Development Officer I
 San Nicolas Ilocos Norte 2901
 Tel No.: 077-772-1698
 E-mail:
 rosemariebondocantolin@yahoo.com

Josita P. Coloma
 Municipal Planning and Development Coordinator
 Pinili, Ilocos Norte 2905
 Mobile: 0915-3183050

Janette P. Duarte
 LGOO V
 Vintar, Ilocos Norte
 Tel No.: 077-7721698
 Mobile 0917-5101191

Luz Cynthia Marie B. Madarang
 Administration Aide IV (Clerk II)
 San Nicolas Ilocos Norte 2901
 Tel No.: 077-772-1698
 Mobile: 0922-9955749
 E-mail:
 lucymariemadarang@yahoo.com

Cherry B. Pedro
 Admin Aide 1
 San Nicolas, Ilocos Norte 2901
 Mobile: 0919-8501198 / 0906-3238528
 E-mail: rech_78@yahoo.com

Edna U. Tolentino
 Municipal Planning and Development Coordinator
 San Nicolas, Ilocos Norte 2901
 Tel. No.: 077-7721698

Mobile No: 0917-5101161

Marilyn U. Tolentino
 Municipal Administrator
 San Nicolas, Ilocos Norte 2901
 Tel No.: 077-7721698
 Mobile: 0917-5101196
 E-mail: mutgelfie@yahoo.com

Alfredo P. Valdez, Jr. M.D.
 Municipal Mayor
 San Nicolas, Ilocos Norte 2901
 Tel. No.: 077-7721698

Dennis M. Villa
 Social Welfare Assistant
 San Nicolas, Ilocos Norte 2901
 Tel No.: 077-7721698
 Mobile: 0920-4084209
 E-mail: dmyship@yahoo.com

Ilocos Sur

Naulie Cabanting
 City Planning and Development Coordinator
 Candon City, Ilocos Sur, 2170
 Tel No. (077) 742-5801 / 742-7777 loc 316
 Mobile: 0917-5683448
 E-mail:
 candon_cpdc2000@yahoo.com

William Padre
 Senior Assistant Administration II
 Bantay, Ilocos Sur
 Tel no. (077) 722-8006
 E-mail:
 mun_bantay_isur@yahoo.com

Hajji V. Ramos
 Computer Programmer 1
 Candon City, Ilocos Sur 2710
 Tel No. (077) 742-7777 loc 308
 Mobile: 0919-2909532
 E-mail: mis_candon@yahoo.com

Marvin Valdez
CPDO-MIS Division
Candon City, Ilocos Sur 2710
Tel No. (077) 742-7777 loc 310
Mobile: 0928-934-1297
E-mail: valdez_marvin@yahoo.com

Jay Villafranco
Municipal Planning & Development
Coordinator
Bantay, Ilocos Sur
Tel no. (077) 722-8006
E-mail:
mun_bantay_isur@yahoo.com

La Union

Susan O. Natividad
Municipal Planning and Develop-
ment Coordinator
Sudipen, La Union 2520
Tel no.: 072-6073115 / 072-6073135
Mobile: 0919-4449010
E-mail: susan_native06@yahoo.com

Segundo A. Sabado, Jr.
Planning Staff
Sudipen, La Union 2520
Mobile: 0915-4398665
E-mail: Cjpeg@yahoo.com

Lanao del Norte

Mohammad Khalid Dimaporo
Provincial Governor
Lanao Del Norte
Tel no. (063) 341-5241 loc 300

Lanao del Sur

Mohammedali A. Abinal
Municipal Mayor
Marantao, Lanao Del Sur
Mobile: 0916-5459028

Soledad Dirumpungan
Municipal Planning and Develop-
ment Coordinator
Kapatagan, Lanao del Sur

Raida Maglangit
Municipal Mayor
Kapatagan, Lanao del Sur

Aida Maradang
Councilor
Bubong, Lanao del Sur

Solaiman Maradang
Municipal Planning and Develop-
ment Coordinator
Bubong, Lanao del Sur

Cairoding Riga
Provincial Planning and Develop-
ment Coordinator
Marawi City, Lanao del Sur
Mobile: 0915-3618350

Mosib D. Sarip Ph.D. LL.B.
Municipal Planning and Develop-
ment Coordinator
Marantao, Lanao Del Sur
Mobile: 0906-8204160

Leyte

Rustico Balderian
Municipal Mayor
Tabontabon, Leyte 6504
Tel no.: 053-3327834

Hilario G. Caadan
Municipal Mayor
Tolosa, Leyte 6503
Tel no.: 053-3226001
Fax no.: 053-3226001

Rodulfo M. Cabias
Municipal Planning and Develop-
ment Coordinator
Abuyog, Leyte, 6510

Tel no. (055) 334-3090
 Mobile: 0921-7874777

Martin Cativo, Jr.
 Municipal Planning and Development Coordinator
 Jaro, Leyte 6527
 Mobile: 0906-2264075

Estela I. Corger
 MLGOO
 Barugo, Leyte 6519
 Tel no. (053) 331-4019

Michael Delima
 LAOO III
 Barugo, Leyte 6519
 Tel no. (053) 331-4204
 Mobile: 0919-6758594
 E-mail: mikel0416@yahoo.com

Rolando G. Hidalgo
 City Planning and Development Coordinator
 Tacloban City, Leyte 6500
 Tel no.: 053-3215864 / 053-3215865

Ismael Laguna
 Municipal Planning and Development Coordinator
 Babatngon, Leyte

Cecilio C. Marilla
 Municipal Planning and Development Coordinator
 Tolosa, Leyte 6503
 Tel no.: 053-3226043/ 053-3226080
 Mobile: 0917-3063781
 E-mail: zaldy77@yahoo.com

Cecile Mae M. Ocaso
 Municipal Planning and Development Coordinator
 Tanauan, Leyte 6502
 Tel No: 053-3224713
 Mobile: 0920-9240866
 E-mail: mae_352001@yahoo.com

Fernando Sarile, Jr.
 Municipal Planning and Development Coordinator
 Javier, Leyte

Maguindanao

Mary Jane Labrador
 Provincial Planning and Development Coordinator

Marinduque

Marian Cunanan
 Project Development Officer IV
 Provincial Planning and Development Office
 Boac, Marinduque
 Tel no.: 042-3111571
 E-mail:
 marian_cunanan@yahoo.com

Victoria Lim
 Municipal Mayor
 Gasan, Marinduque

Chito Valencia
 Municipal Planning and Development Coordinator
 Torrijos, Marinduque

Masbate

Rosita Alegre
 Municipal Planning and Development Coordinator
 Batuan, Masbate

Eduardo M. Andueza
 Municipal Mayor
 Claveria, Masbate

Rebecca Bolonias
 Nutrition Officer I
 Balocawe, Masbate 5403
 Mobile: 0921-5870249

Joseph Bunan
Municipal Planing and Development
Coordinator
Dimasalang, Masbate 5403
Mobile: 0905-3423796

Larry Deinla
Uson, Masbate

Elisa Olga T. Kho, M.D. FPCCP
Provincial Governor
Masbate
Tel no.: 056-3336937

Joshur Judd Lanete II
Municipal Mayor
Placer, Masbate

Roberto S. Leyco
Project Development Officer III
Provincial Planing and Development
Office
Masbate City
Tel no.: 056-3333012
Mobile: 0918-6119354
E-mail: archleycs@yahoo.com

Ramon Marcaida III
Provincial Planing and Development
Coordinator
Masbate City, Masbate

Arthur Merico
Municipal Planing and Development
Coordinator
Aroroy, Masbate

Romson Mijares
Administrator
Palanas, Masbate 5404

Demphna Du Naga
Municipal Mayor
Dimasalang, Masbate 5403
Mobile: 0920-9095601

Fidel G. Olofernes
Municipal Planing and Development
Coordinator
Palanas, Masbate 5404
E-mail: fyde_tonz@yahoo.com
Mobile: 0920-3078699

Felipe U. Sanchez
Municipal Mayor
Uson, Masbate

Rudy Villanueva
Acting – MPDC
Placer, Masbate

Misamis Oriental

Ruth L. Guingona
City Mayor
Gingoog City, Misamis Oriental
9014
Tel no.: 08842-7360
E-mail:
kanna_motoomull@yahoo.com

Marian Kanna S. Motoomull
Secretary to the Mayor
Gingoog City, Misamis Oriental
9014
Tel no.: 08842-7501
E-mail:
kanna_motoomull@yahoo.com

Epifanio Cuerdo Zarate
Project Development Officer II
Gingoog City, Misamis Oriental
9014
Tel no.: 08842(7650)
Mobile: 0921-3406818
E-mail: gudfordhart@yahoo.com

NCR-City Government of Pasay

Maria Norian Alvarado
CPDO Staff
Pasay City Hall
FB Harisson St. Pasay City

Tel no.: 834-0433
 E-mail: malvarado@yahoo.com

Ma. Teresa Castillo
 OIC-CPDO
 Pasay City Hall, FB Harrison St.
 Pasay City
 Tel no.: 834-0439
 Fax no.: 834-0433

Merlita Lagmay
 City Planning and Development
 Coordinator
 Pasay City Hall, FB Harrison St.
 Pasay City
 Tel no.: 834-0439
 Fax no.: 834-0433
 E-mail: mlagmay@pasay.gov.ph

Rolando Londonio
 City Cooperative Office
 Rm 426, Pasay City Hall
 FB Harisson St., Pasay City
 Tel. no.: 551-5233
 E-mail: rlondonio@pasay.gov.ph

Hilario Trestiza
 Barangay Captain
 Brgy. 186, Pasay City

NCR-City Government of Taguig

Hilda Candelaria
 City Planning and Development
 Coordinator
 Taguig City
 Tel no.: 642-1245 loc. 206/205 ;
 642-3637
 Fax: 524-3694
 E-mail: taguigcpdo@yahoo.com

Myrna M. Dela Peña
 Brgy. Chairwoman
 Barangay Upper Bicutan
 Taguig City 1633
 Tel no.: 839-2296
 Fax no.: 838-9265

Mobile: 0919-5563633

Jose Luis O. Llorente, Jr.
 Watchman III
 City Planning and Development
 Office
 Taguig City 1736
 E-mail: boogiellorente@gmail.com
 Mobile: 0919-2246197

Gemma Osano Tresvalles
 Brgy. Kagawad
 Blk. 22 WT12 P-3 Upper Bicutan
 Taguig City 1633
 Tel no.: 837-3776
 E-mail: gemmaosano@yahoo.com

Negros Occidental

Gloria B. Arguelles
 City Development Officer IV
 Bacolod City, Negros Occidental
 Tel no: 034-4337041
 E-mail: glorielle@hotmail.com

Manuel V. Arias, Jr.
 Economist I
 Escalante City, Negros Occidental
 Tel no. 034-4540080
 E-mail: mvaj400@yahoo.com

Celia Flor
 Councilor
 Bacolod City, Negros Occidental
 Tel no.: 034-4320406 / 034-4328140
 Mobile: 0920-9093856

Godofredo Reteracion
 City Planning and Development
 Coordinator
 Escalante City, Negros Occidental
 Tel no. 034-4540080
 Mobile: 0917-7157421
 E-mail: greteracion@yahoo.com

Negros Oriental

Vergie Linda M. Panabang
Medical Technologist II
Bindoy, Negros Oriental 6209
Mobile: 0917-3141953

Hon. Rosa Y. Paras
Municipal Mayor
Bindoy, Negros Oriental 6209
Mobile: 0917-3142210

Northern Samar

Lucita G. Alcera
Municipal Planning and Development Coordinator
Rosario, Northern Samar 6416
Mobile: 0917-3064338

Ignacio Bandal, Jr.
Municipal Mayor
Capul, Northern Samar

Elisa Castillo
Brgy. Chairman
Capul, Northern Samar

Lilibeth Chua
CBMS Focal Person
San Vicente, Northern Samar
Mobile: 0921-3637986

Nerissa Gadgad
Municipal Planning and Development Coordinator
Las Navas, Northern Samar

Cenon A. Legaspi
Municipal Planning and Development Coordinator
San Vicente, Northern Samar
Mobile: 0928-3325844

Madeleine M. Ong
Municipal Mayor
Laoang, Northern Samar

Edward Jonathan O. Potot
Project Evaluation Officer I
Provincial Planning and Development Office
Catarman, Northern Samar 6400
Tel no.: 055-5009157
Mobile: 0928-3026613
E-mail: bimboy80@yahoo.com

Oriental Mindoro

Lennie B. Alberto
Statistician I
Provincial Planning and Development Office
Calapan City, Oriental Mindoro 5200
Tel. no.: 288-1746

Mely M. Catapang
Project Development Officer IV
Provincial Planning and Development Office
Calapan City, Oriental Mindoro 5200
Tel. no.: 288-1746
Mobile: 0927-2429533

Palawan

Marsito Acoy
Municipal Mayor
Española, Palawan

Celsa Adier
Municipal Mayor
Aborlan, Palawan 5302
Mobile: 0918-3956638

Winston Adier
Municipal Planning and Development Coordinator
Aborlan, Palawan 5302
Mobile: 0917-5532951

David Aurello
Municipal Mayor
Dumaran, Palawan 5300
Edna E. Dabandan

Administrative Assistant I
Brooke's Point, Palawan
Mobile: 0928-3332731
E-mail:
mpdo_brookespoint@yahoo.com

Josephine C. Escaño
Project Evaluation Officer IV
Provincial Planning and Development Office
Puerto Princesa City, Palawan 5300
Tel no: 048-4345264
E-mail: jeepalawan@yahoo.com

Maria Teresa D. Fabellar
Project Evaluation Officer I
San Vicente, Palawan 5309
Mobile no.: 0920-6698896
E-mail: mates618@yahoo.com

Riza S. Flores
Admin Officer I
Provincial Planning and Development Office
Puerto Princesa City, Palawan 5300
Tel no.: 048-4345264
E-mail: ellamaan@yahoo.com.ph

Eva G. Llacuna
Budget Officer
Dumaran, Palawan 5300

Agnes G. Onda
Administrative Officer V
Brooke's Point, Palawan
E-mail:
mpdo_brookespoint@yahoo.com

Agnes Padul
Municipal Planning and Development Coordinator
Dumaran, Palawan 5300

Joie C. Paramide
Municipal Planning and Development Coordinator
Brooke's Point, Palawan

Mobile No.: 0926-3823064
E-mail:
mpdo_brookespoint@yahoo.com

Josephine C. Rabang
Project Evaluation Officer III
Provincial Planning and Development Office
Puerto Princesa City, Palawan 5300
Tel no: 048-4345264
E-mail: jo_ar2003@yahoo.com

Evelyn B. Sabay
Administrative Assistant V
Aborlan, Palawan 5302
Mobile: 0918-5682843

Sharlene D. Vilches
Planning Officer I
Provincial Planning and Development Office
Puerto Princesa City, Palawan 5300
Tel no.: 048-4345264
E-mail: sha_daquer@yahoo.com

Pangasinan

Alberto C. Marcos
Municipal Planning and Development Coordinator
San Quintin, Pangasinan, 2444
Tel no.: 075-5756085
Mobile: 0927-9524904
E-mail: alberto.marcos@yahoo.com

Romblon

Robert Fabella
Municipal Mayor
Calatrava, Romblon

Danilo F. Fabiala
Municipal Planning and Development Coordinator
Corcuera, Romblon

Leovigildo Ferranco
Municipal Planning and Development Coordinator
Banton, Romblon
Mobile: 0906-4249405 / 0915-7792873

Juliet Ngo-Fiel
Municipal Mayor
Looc, Romblon 5507
Mobile: 0918-9250903
E-mail: jnfiel@yahoo.com

Ramon Galicia
Municipal Mayor
Alcantara, Romblon

Solomon Gregorio
Municipal Planning and Development Coordinator
Looc, Romblon 5507
Mobile: 0906-2444476

Fred Hernandez
Municipal Mayor
Sta. Maria, Romblon

Evelyn M. Magayam
Provincial Planning and Development Office
Romblon, Romblon 550
Mobile: 0921-3286133
E-mail: billy_ppdo@yahoo.com

Ibarra R. Manzala
Municipal Mayor
Magdiwang, Romblon 5511
Mobile: 0920-4064749 / 0917-3287904

Eddie F. Mazo
Municipal Mayor
Corcuera, Romblon

Mary Claire B. Mortel
Municipal Planning and Development Coordinator

San Andres, Romblon 5504
Mobile: 0920-8423357

Darryl V. Perez
Statistician - OIC MPDC
San Fernando, Romblon 5513
Mobile: 0918-2028084
E-mail: seikolo@yahoo.com

Sheila Sofia P. Rance
Municipal Planning and Development Coordinator
Magdiwang, Romblon 5511
Mobile: 0920-8643673 / 0927-4951675
E-mail: anz_rance@yahoo.com

Theodore M. Rojas
Municipal Planning and Development Coordinator
Romblon, Romblon 5500
Mobile: 0919-4553608
E-mail: rojas/heoclore@yahoo.com

Fernald G. Rovillos
Municipal Mayor
San Andres, Romblon 5504
Mobile: 0916-5538541

Oscar Vicente L. Ylagan, Jr.
Provincial Planning and Development Coordinator
Romblon, Romblon
Mobile: 0919-4005035
E-mail: jylagan_ppdo@yahoo.com

Samar

Ireneo T. Abejo
Municipal Planning and Development Coordinator
Paranas, Samar 6709

Arnold Aroza
City Planning and Development Coordinator
Catbalogan City, Samar

Nicasio U. Bermejo
Municipal Planning and Development Coordinator
Motiong, Samar 6709

Danilo A. Cabrigas
Municipal Planning and Development Coordinator
San Joso de Buan, Samar 6709

Geronima B. Casino
OIC MPDC
Jiabong, Samar 6709

Filemon G. Cobilla
Municipal Planning and Development Coordinator
Matuguinao, Samar 6709

Ruel Duallo
Municipal Planning and Development Coordinator
Sta. Rita, Samar 6709

Nancy B. Grey
Municipal Mayor
San Jorge, Samar

Sol Ilagan
MSWDO
Sta. Rita, Samar 6709

Lesarbo I. Mengote
Municipal Planning and Development Coordinator
Hinabangan, Samar 6709

Arcadio C. Olaje
Municipal Planning and Development Coordinator
Tarangnan, Samar 6709

Manuel C. Orejola
Municipal Planning and Development Coordinator
Basey, Samar
Mobile: 0920-2796651

Terencio Silagan, Jr.
Municipal Planning and Development Coordinator
Sto. Niño, Samar 6709

Garry Diego C. Teatro
Municipal Planning and Development Coordinator
Sta. Margarita, Samar 6709
Tel no. (055) 209-8317
E-mail: selinapabilari@yahoo.com

Sarangani

Rene S. Paraba
Assistant Provincial Planning and Development Coordinator
Provincial Government of Sarangani
Tel no.: 083-5082179
E-mail: repars@yahoo.com

Siquijor

Gilbert J. Briones
Municipal Planning and Development Coordinator
Siquijor, Siquijor 6225

Sorsogon

Sally A. Lee
Provincial Governor
Sorsogon City, Sorsogon 4700
Tel no.: 056-2112121
E-mail: gov.sorsogon@gmail.com

South Cotabato

Antonio Damandaman
Municipal Mayor
Sto. Niño, South Cotabato

Rene Formacion
Municipal Planning and Development Coordinator
Sto. Niño, South Cotabato

Southern Leyte**Emma T. Acasio**

STAT 1
City Planning and Development
Office
Maasin City, Southern Leyte, 6600
Tel No.: 053-5709745

Ranulfo Capilitan

Municipal Planning and Develop-
ment Coordinator
Malitbog, Southern Leyte

Roberto Loquinte

Municipal Mayor
Anahawan, Southern Leyte

Sultan Kudarat**Elpidio Alcaide**

MLGOO-DILG
Lebak, Sultan Kudarat 9807
Tel no.: 064-2053327

Rafael F. Flauta, Jr.

Municipal Mayor
Sen. Ninoy Aquino, Sultan Kudarat
Mobile: 0919-6240380 / 0927-
2066666

Solano G. Gani

Project Evaluation Officer IV /
CBMS Focal Person
Provincial Planning and Develop-
ment Office
Isulan, Sultan Kudarat 9805
Tel no.: 064-2013023
Fax no.: 064-2013024
Mobile: 0917-3565497
E-mail: datusol2000@yahoo.com

Armando B. Magaway

Municipal Planning and Develop-
ment Coordinator
Lebak, Sultan Kudarat 9807
Tel no.: 064-2053327

Jaime James M. Ramirez

Municipal Coop. Development
Specialist
Sen. Ninoy Aquino, Sultan Kudarat,
9811
Mobile: 0921-6363650

Freddie G. Tiosing

Acting MPDC
Isulan, Sultan Kudarat 9805

Ovette C. Viray

Admin Aide III
Isulan, Sultan Kudarat 9805
Mobile: 0928-5726831

Sulu**Brian Alawi**

OIC-Municipal Planning and
Development Coordinator
Jolo, Sulu 7400
E-mail: bg_alawi@yahoo.com
Mobile: 0927-3774204

Hussin U. Amin

Municipal Mayor
Jolo, Sulu 7400
Mobile: 0918-8882021

Bertrand Chio

Provincial Planning and Develop-
ment Coordinator
Sulu

Patta A. Jajie

Executive Secretary
Parang, Sulu
Mobile: 0926-3004559

Akmadnur Mukattil

Municipal Planning and Develop-
ment Coordinator
Parang, Sulu
Mobile: 0926-8850132

Ahmad R. Omar
Municipal Mayor
Luuk, Sulu

Henry A. Siraji
Municipal Planning and Development Coordinator
Luuk, Sulu

Abdulsakur Tan
Provincial Governor
Sulu

Rizal D. Tingkahon
Municipal Mayor
Parang, Sulu

Tarlac

Manuel T. Barit
Municipal Planning and Development Coordinator
San Miguel, Tarlac 2309
Tel no.: 045-6000212
Fax no.: 045-6000211

John Cabañero
Municipal Planning and Development Coordinator
Ramos, Tarlac

Roselia Gamboa
City Social Welfare & Development Officer
Tarlac City, Tarlac 2300
Tel no.: 045-9821655

Lorenzo D. Macaraeg
OIC-Provincial Administrator
Tarlac City, Tarlac 2300
Tel no.: 045-9821363 / 045-9822040

Roman L. Martinez III
Project Evaluation Officer III
Tarlac City, Tarlac 2300
Tel no.: 045-8000311
E-mail: manmartz2003@yahoo.com

Genaro Mendoza
City Mayor
Tarlac City, Tarlac 2300
Tel no.: 045-9825520

Amelia Pamintuan
PSWD Office
Tarlac City, Tarlac 2300
Mobile: 0916-3726680

Raul Regalado
Social Welfare Assistant
City Social Welfare & Development Office
Tarlac City, Tarlac 2300
Tel no.: 045-9821655
E-mail: rulzki@yahoo.com

Jimbo Y. Soriano
Social Welfare Assistant III
City Social Welfare & Development Office
Tarlac City, Tarlac 2300
Tel no.: 045-9821655

Edwina K. Tabamo
Provincial Agriculturist
Tarlac City, Tarlac 2300
Tel no.: 045-9821764
Fax no.: 045-8000455
Mobile: 0918-3602867 / 0916-8504416

Roberto P. Ventura
Provincial Planning and Development Coordinator
Tarlac City, Tarlac 2300
Tel no.: 045-9822374
Mobile: 0915-9810507
E-mail: butch_ventura@yahoo.com

Jojo Zapanta
IT Consultant (Office of the Governor)
Provincial Planning and Development Office
Tarlac City, Tarlac 2300

Tel no.: 045-9822374
Mobile: 0919-2801675
E-mail: JO2ZAPANTA@yahoo.com

Tawi-Tawi**Vicente Cabanes**

Municipal Planning and Development Coordinator
Panglima Sugala, Tawi-Tawi, 7501
Mobile: 0929-3802989

Nestor Delasas

Provincial Planning and Development Coordinator
Tawi-Tawi

Arthur Guerzon

Municipal Planning and Development Coordinator
Mapun, Tawi-Tawi

Manuel Pampona

Municipal Planning and Development Coordinator
Bongao, Tawi-Tawi

Albert Que

Municipal Mayor
Bongao, Tawi-Tawi

Nurbert M. Sahali

Municipal Mayor
Panglima Sugala, Tawi-Tawi, 7501
Mobile: 0917-7222150

Sadikul Sahali

Provincial Governor
Tawi-Tawi

Manuel Sampulna

Municipal Planning and Development Coordinator
Bongao, Tawi-Tawi

Nickerson Tan

Municipal Mayor

Mapun, Tawi-Tawi

Zamboanga del Norte**Ailen Cariaga**

Municipal Planning and Development Coordinator
Leon B. Postigo, Zamboanga del Norte

Maritess Doremom

Planning Staff
Leon B. Postigo, Zamboanga del Norte

Leticia E. Jagonia

Economist II
Provincial Planning and Development Office
Dipolog City, Zamboanga Del Norte
Tel no.: 065-2123625
E-mail: lejagonia@yahoo.com

Noel Pelotena

PCA / Municipal Nutrition Action Officer
Leon B. Postigo, Zamboanga del Norte
Tel no.: 065-3113007 (Mun. Information Officer)
Mobile: 0918-3388676 (Mun. Information Officer)

Rolando V. Tablezo

Municipal Mayor
Leon B. Postigo, Zamboanga del Norte
Mobile.: 0916-6743397
Tel no.: 065-3113007 (Mun. Information Officer)
Mobile: 0918-3388676 (Mun. Information Officer)

Idelle M. Winters

Municipal Planning and Development Coordinator
Jose Dalman, Zamboanga del Sur

Zamboanga del Sur**Edilberto S. Adlaon**

Municipal Mayor
 Vincenzo Sagun, Zamboanga del Sur
 E-mail: mayor_ed2004@yahoo.com
 Mobile: 0928-2821000

Juliet Agustin

Municipal Planning and Development Coordinator
 Dumingag, Zamboanga del Sur

Leonida A. Angcap

Municipal Mayor
 Midsalip, Zamboanga del Sur

Melecio Braza

Municipal Planning and Development Coordinator
 Sominot, Zamboanga del Sur

Allan P. Damas

Municipal Mayor
 Kumalarang, Zamboanga del Sur
 Mobile: 0917-3255557

Flavio Saniel, Jr.

Municipal Mayor
 Molave, Zamboanga del Sur

Alel E. Tabiado

Municipal Planning and Development Coordinator
 Kumalarang, Zamboanga del Sur

NONGOVERNMENT / PEOPLE'S ORGANIZATIONS**Institute for Democratic Participation in Governance (IDPG)****Oscar Francisco**

Managing Trustee
 Mobile: 0927-7601724

Peace and Equity Foundation**Veronica Villavicencio**

Executive Director
 #69 Esteban Abada Street
 Loyola Heights, Quezon City
 Tel no.: 426-8402
 Telefax Number: 426-8402 local
 102 or 426-9785 to 86

Allyn J. Lopez

Regional Manager, Luzon Regional Office
 69 Esteban Abada Street
 Loyola Heights, Quezon City
 Tel no.: 426-8402
 Telefax Number: 426-8402 local
 102 or 426-9785 to 86

Philippine Business for Social Progress (PBSP)**Gil Salazar**

Executive Director
 PSDC Building
 Magallanes cor. Real Streets
 1002 Intramuros, Manila
 P.O. Box 3839 Manila
 Tel no.: 527-7741 to 51
 Fax no.: 527-3743
 E-mail: pbsp@pbsp.org.ph

Philippine Rural Reconstruction Movement (PRRM)**Carla S. Santos**

Director
 PRRM Building , 56 Mother Ignacia Ave. cor. Dr. Dr. Lazcano St.
 Barangay Paligsahan
 Quezon City, 1103
 Tel no.: 371-2139 / 372-4995
 E-mail: kaisantos2004@yahoo.com

Rebecca S. Gaddi
 Project Coordinator, Packard Phase III
 (Good Governance for Population & Development)
 Tel no.: 4155422
 E-mail: bekwag@yahoo.co.uk

Naga, Rawis Villa Corro Mangrove Fisherfolks Association (NARAVIL MFA)

Joelous H. Gonjoran
 Chairman
 Sitio Rawis, Brgy. Looc
 Cabucgayan, Biliran

Social Watch Philippines (SWP)

Leonor Briones
 Lead Convenor
 3/F 40 Matulungin St.
 Central District
 Diliman, Quezon City
 Tel no.: 426-5626
 Fax no.: 426-5626
 E-mail: sowat@info.com.ph;
 brioneslm@yahoo.com

Rene Raya
 Co-Convenor
 3/F 40 Matulungin St.
 Central District
 Diliman, Quezon City
 Tel no.: 426-5626
 Fax no.: 426-5626

Dante Bismonte
 Board of Trustees of Philippine Rural for Reconstruction Movement (PRRM)
 Social Watch Philippines (SWP)-South Luzon Convenor
 Email: danbismonte@yahoo.com

Shubert Ciencia
 Area Manager for Nueva Ecija
 562 Maharlika Highway
 Magsaysay, Bayombong
 Nueva Vizcaya
Crispin Tria
 Bataan NGO-PO Network
 Mobile Number: 0920-601-6732
 Email:c_eboy@yahoo.com

ACADEMIC INSTITUTIONS

De La Salle University (DLSU)

Wyona C. Patalinghug
 Vice Chancellor for Research
 Taft Avenue, Manila
 Tel no.: 524-4611 loc. 401
 E-mail: patalinghugw@dlsu.edu.ph

Rachel Edita O. Roxas
 Associate Professor
 College of Computer Studies
 Gokongwei Bulding 2401 Taft Ave.
 Malate, Manila 1004
 Tel no.: 524-0402
 Fax no.: 536-0218
 Mobile: 0917-8305682
 E-mail: roxasar@dlsu.edu.ph

Ponciano S. Intal, Jr.
 Executive Director
 Angelo King Institute for Economic and Business Studies
 De La Salle University
 Taft Avenue, Manila
 Tel no.: 524-5333
 Fax no.: 524-5347
 E-mail: intalp@dls-csb.edu.ph

Marissa Garcia
 Deputy Director
 Angelo King Institute for Economic and Business Studies
 De La Salle University
 Taft Avenue, Manila

Tel no.: 524-5333
Fax no.: 524-5347

University of the Philippines

Victoria Bautista
Vice Chancellor
2/F National Computer Center
Diliman, Quezon City
Tel no: 426-1514
E-mail: bautista@yahoo.com

CONFERENCE SECRETARIAT

PEP-CBMS Network Coordinating Team
10th Flr. Angelo King International Center
Estrada St. cor. Arellano Avenue
Malate, Manila
Contact Nos.: 526-2067 / 5238888 loc.
274
Fax No.: 5262067
E-mail: mimap@dls-csb.edu.ph
Website: www.pep-net.org

Dr. Celia M. Reyes
PEP Co-Director and CBMS Netork Leader
E-mail: reyesc@dls-csb.edu.ph

Anne Bernadette E. Mandap
Research and Administrative Officer
E-mail: mandapa@dls-scb.edu.ph

Jasminda A. Quilitis
Senior Database Management Specialist
E-mail: asirotj@dls-csb.edu.ph

Joel E. Bancolita
Senior Database Management Specialist
E-mail: bancolitaj@dls-csb.edu.ph

Marsmath A. Baris, Jr.
Researcher
E-mail: barism@dls-csb.edu.ph

Juan Paulo M. Fajardo
Researcher
E-mail: fajardojp@dls-csb.edu.ph
Allelie Sobreñas
Research Associate
E-mail: sobrevinas@dls-csb.edu.ph

Marilyn Ritualo
Publications Consultant
E-mail: ritualom@dls-csb.edu.ph

Lei-Ann Genevieve D. Burgos
Project Administrative Associate
E-mail: delenal@dls-csb.edu.ph

Marvin John Inocencio
Assistant Programmer and Software Developer
E-mail: inocenciom@dls-csb.edu.ph

Cecilia Ozamiz
Project Administrative Associate for Finance

Lorenzo Demiao
Project Administrative Associate for Finance

Snapshots from the Conference







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