Introduction

The Community Based Monitoring System (CBMS) is one of the tools developed through the Micro Impacts of Macroeconomic Adjustment Policies (MIMAP) Research Program of IDRC to provide policymakers and program implementers with a good information base for tracking the impacts of macroeconomic reforms and various policy shocks. CBMS attempts to build and strengthen the capacity of planners and program implementers at the national and local levels for a more improved and transparent system of resource allocation and governance. A major objective of the CBMS is to assist poverty reduction. In so doing, corollary benefits are achieved such as building the capacities of local government units, increasing gender equity, and eliciting early warning signs of crises. Since the early 1990s, IDRC has supported the design and pilot-test of CBMS through MIMAP National Projects in Asia and Africa. From 2002 to 2012, further development and expansion of global CBMS research initiatives has been implemented and managed through the Poverty and Economic Policy (PEP) Network Program with continued support from the IDRC-Canada. Enhancements in the CBMS methodology and its applications have likewise been supported by the Canadian International and Development Agency (CIDA), the Australian Agency for International Development, and the UK Department for International Development (DFID). Since October 2012, the CBMS Research Program work has continued to expand under the Partnership for Economic Policy (PEP), supported by the IDRC and the UK-DFID through the Project, Policy Analysis on Growth and Employment.

With the growing number of countries that implement and intend to adopt the CBMS, the CBMS Network was formed under the PEP Program of IDRC in 2002 to facilitate

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1Updated and prepared by the Community-Based Monitoring System (CBMS) Network Coordinating Team of the CBMS Network Office based at DLSU-AKI Manila for the PEP-PAGE CBMS Research Program. This is an updated version of the manual developed in 2003 by the CBMS Network Coordinating Team as part of the Poverty and Economic Policy (PEP) Network Project.

2Earlier local poverty monitoring systems were developed and pilot tested under IDRC’s MIMAP National Programs in the Philippines, Nepal, Vietnam, Senegal, Burkina Faso, Sri Lanka and India. The one being promoted for replication here is the community-based monitoring system developed and pilot tested in the Philippines.
the development and utilization of CBMS for policymaking and governance in more countries. The CBMS Network is composed of researchers and analysts specializing in poverty measurement, development and implementation of local monitoring systems, and policy-impact analysis. The CBMS Network generally aims to provide the national and local governments with up to date information for policymaking and program implementation through the development and institutionalization of a CBMS. The CBMS International Network Coordinating Team is based at the Anglo King Institute for Economic and Business Studies of the De La Salle University-Manila in the Philippines.

**CBMS Norm**

CBMS is an organized system of data collection, processing, validation and use of local-level data as inputs for development planning, program implementation and impact monitoring. It was designed as a tool to improve transparency in local governance while empowering communities in the process of development. In particular, CBMS intends to fill information gaps to diagnose the extent of poverty at the local level, determine the causes of poverty, formulate policies and programs, identify eligible program beneficiaries, and assess the impact of policies and programs. It is intended to promote evidence-based decision-making.

The community-based monitoring system (CBMS) was designed in 1993 to provide policy makers with a regular source of information that can be used to track the micro impacts of macroeconomic shocks on the vulnerable groups in the society.

CBMS is local government unit (LGU)-based and promotes community participation. It taps existing LGU personnel and community volunteers as monitors, and has a core set of indicators.

CBMS work involves the design, pilot-test and implementation of a methodology for data collection using the CBMS Accelerated Poverty Profiling (APP)³ tools, data processing, validation and utilization of CBMS data for needs identification as well as for the design and monitoring of program interventions at all geopolitical levels. The CBMS research initiative of PEP complements global efforts to fight poverty by providing better statistics or benchmark information for evidence-based policymaking while empowering communities and development leaders, and promoting accountability for better management and greater transparency in allocation of resources.

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³ Developed by the CBMS Network Coordinating Team led by Dr. Celia Reyes. The CBMS APP is an organized, systematic and efficient process of use of latest information and communication technology tools e.g. tablets, and the standard CBMS instruments for data collection (CBMS SCAN), processing (CBMS STATSIN), poverty mapping and data management tools. Data is transmitted and managed and accessed through the CBMS Portal.
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1.0. Call for Project Proposals

Supported by the International Development Research Centre (IDRC) of Canada and the Department for International Development (DFID) of the United Kingdom, the Angelo King Institute for Economic and Business Studies of De La Salle University Manila, through the CBMS Network Office, provides research grants of up to US$ 50,000 to qualified institutions in developing countries to develop and pilot-test CBMS indicators, methodologies and instruments and conduct PAGE-research thematic study using CBMS data.

Aside from the financial support to conduct CBMS research, grantees are provided with opportunities to participate in CBMS and PEP training workshops, conferences, and organized study visits to CBMS sites. They are also given access to the PEP-CBMS database, as well as technical support from a pool of CBMS resource persons. Technical support is provided for advanced CBMS work relating to CBMS data analysis and applications (including multidimensional poverty analysis and monitoring development goals (e.g. SDGs)), and institutionalization of CBMS initiatives.

Research and academic institutions, as well as to other government and non-government organizations involved in policy research and related poverty monitoring and reduction initiatives are eligible and welcome to apply. The research team members should have university-level training in economics/policy analysis, statistics, or equivalent experience. The research team should be gender-mixed, with at least 50 percent of the members being female. PEP does not accept new proposals for the development of CBMS in the Philippines since it has been institutionalized and adopted by more than half of all local government units as a tool for various thematic concerns.

An open call for proposals is mainly done electronically through the CBMS and PEP web-site at www.pep-net.org. Proponents whose research proposals have passed the initial screening by the CBMS Network Coordinating Team of the CBMS Network Office based at DLSU-AKI are notified with comments for any necessary revisions or additional information to be incorporated in a revised proposal for submission. Shortlisted proposals are then provided to the CBMS Thematic Research Group for final review. Proponents with shortlisted proposals are invited to participate in the PEP Annual Meeting to present and discuss their proposal. During the Annual Meeting, potential grantees are able to learn from on-going CBMS initiatives, interact with the pool of CBMS resource persons, and obtain the necessary basic tools to develop a more detailed CBMS proposal.

Institutions that are interested in submitting a proposal may follow the guidelines and format in Annex A.
2.0 Review and Approval of Grant Applications

The review process of CBMS proposals usually takes 6 to 12 months before the formal approval of a Project. The duration of the review process depends on the quality of the initial proposals submitted and the capacity of the Proponent Institution to revise the original proposal based on the set of comments from the CBMS Thematic Research Group. The project will commence immediately once the revised proposal is approved by the PEP’s Executive Director upon recommendation by the CBMS Research Director.

The process of grant applications and review is as follows:

1. Proponents submit a research proposal to the CBMS Network Coordinating Team for initial screening.
2. If the proposal lacks some important basic elements based on the set criteria, the proposal is sent back to the proponents for revision.
3. Upon submission of revised proposal to the CBMS Network Coordinating Team, document is circulated to the members of the CBMS Thematic Research Group (TRG) for further review.
4. Comments from the members of the CBMS Thematic Research Group on the proposals are consolidated by the CBMS Network Coordinating Team and sent to the proponents for consideration in finalizing their proposal.
5. Upon receipt of the final proposal\(^4\), the CBMS Network Coordinating Team shares the document with the members of the CBMS Thematic Research Group for final recommendations for approval.
6. Once grant applications are approved by the Executive Director of PEP, proponents are notified and sent a draft grant contract for review.
7. An initial grant payment is released once the grant contract has been signed by all parties concerned.

2.1. Review and Coordinating Bodies

2.1. a. The CBMS Network Coordinating Team

The CBMS Network Coordinating Team\(^5\) is responsible for the following tasks in

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\(^4\) All PEP Proposals are subject to plagiarism analysis prior to approval. In cases of plagiarism, proponents are notified and given time to respond and address the issue through submission of a revised proposal, in accordance with PEP guidelines for proper referencing and citation of sources. After said notification, and if no significant improvement or action has been taken by the proponent, PEP reserves the right to reject the proposal.

\(^5\) Based at the CBMS Network Office of the DLSU-Angelo King Institute for Economic and Business Studies (AKI), Manila, Philippines
line with the management of the CBMS research grants:

(1) Preparation of requirements and guidelines for the call for proposals
(2) Dissemination of information to potential researchers about the grant and corresponding requirements for application
(3) Consolidation of all grant applications
(4) Initial screening of grant applications
(5) Technical review of proposals
(6) Circulation of proposals to the CBMS thematic research group for review
(7) Consolidation of comments and recommendations of CBMS thematic research group
(8) Technical support and mentoring to project teams in finalizing their proposals
(9) Notification of successful and unsuccessful applicants
(10) Technical Monitoring and review of Project outputs for approval of grant payments
(11) Technical/mentoring/capacity building support to project teams in the duration of the implementation of the project
(12) Policy outreach support to project teams for developing and implementing strategies for institutionalization
(13) Management and monitoring of the CBMS database and portal
(14) Establishment and monitoring of protocols/guidelines for access and use of CBMS database
(15) Review and approval of required outputs for participation of project teams in PEP meetings, workshops and study visits
(16) Organization and conduct of dissemination activities to facilitate presentation of Project findings and recommendations to target groups
(17) Archiving of records

2.1. b. The CBMS Thematic Research Group (TRG)\textsuperscript{6}

This is a recommendatory body comprised of technical experts who provide general oversight in the research and advocacy work of the CBMS network. The CBMS TRG is responsible for the detailed review and approval of the proposal based on the given set of criteria.

\textsuperscript{6} Formerly known as the CBMS Program Committee
2.2. Basis for Evaluation

2.2. a. Pre-screening of Proposal

Proposals from all applicants are initially screened by the CBMS Network Coordinating Team. Complete proposals are then circulated electronically to the CBMS TRG for evaluation of technical content, feasibility and cost effectiveness.

The proposal should include details on the following:

1. Background/relevance of CBMS to the country. In this section, the proponent should be able to discuss the following:

   ➢ Rationale for CBMS with respect to local context i.e. poverty reduction initiatives/issues within the country where the Project will be implemented.
   ➢ Background of the existing monitoring systems, the decentralization policies, governance and local administration structures of the country.
   ➢ The information gaps that the Project intends to fill.
   ➢ The research questions that the project seeks to answer.
     - The research questions should fall under the research themes identified in the Call for Proposals. Moreover, the project should be using mainly, but not necessarily solely, data that have been collected from the implementation of the CBMS Accelerated Poverty Profiling (APP) tools.

2. Proposed CBMS design and methodology

   ➢ List of core indicators to be monitored
   ➢ Rationale of choice and brief profile of the pilot area
   ➢ Advocacy and work plan
     - Data Collection
     - Data Processing
     - Data Validation
     - Database building and management
     - Flow of Information
Local capacity building and resource mobilization

3. Research proposal on thematic issue
   - Rationale and objectives for the Study
   - Research Questions
   - Research Methodology

4. Dissemination strategy and intended use of CBMS findings
   - Target users of research results
   - Uses of CBMS data
     - Local level planning and budgeting
     - Resource allocation
     - Targeting
     - Impact monitoring
   - Modes and frequency of dissemination of research results
     - Database
     - Publication
     - Web-site
     - Workshops/Conferences

5. Institutional Arrangements
   - Background information on administering institution
   - Composition of the Project Team
     - Project Leader
     - Project Team Members/Researchers
     - Consultants
   - Research and Policy Advisory Council

6. Work Plan and Timetable of Activities

7. Budget
2.2. b. Criteria for Approval

The research proposals to be reviewed by the CBMS Thematic Research Group are evaluated based on the following criteria:

2.2.b.1 CBMS Design

(a) Relevance of the System

The proposed CBMS should be regarded as complementary to the national poverty monitoring system in the country. The proposal must be able to provide relevant details on the significance of the development of the system in the context of local and national development processes in the proponent’s country.

Relevant development processes to CBMS initiatives may include decentralization, governance, poverty alleviation, program design, budgeting, targeting and impact monitoring, community empowerment among others. In line with this, the proposal should at least contain information that would sufficiently address the following concerns:

1. Why is there a need for the development of such a system in the country?
2. What is the basis for the development of the system? Is the system being developed due to local demand (as may be required by the decentralization process) or as a complementary tool to existing national program initiatives i.e. poverty reduction?
3. What are the specific gaps in particular areas of the development process that the proposed system is trying to address?
4. How will the proposed system close the gaps identified? What are the specific steps that will be implemented to address these gaps and concerns?
5. What distinguishes the proposed system from existing monitoring systems in the country and other related international development initiatives?
6. What is the institutional framework in the country where the proposed CBMS will operate? What is the potential in terms of institutionalizing the proposed system in the country where the
(b) Technical Feasibility

Technical feasibility of the system is assessed based on the following:

➢ **Indicators**

One main aspect of the CBMS that makes it effective in poverty measurement is that it provides multidimensional information down to the community and household level.

For the proposed CBMS, the system should be able to generate a core set of indicators that captures the different dimensions of poverty. In addition, the system should be flexible enough to be able to generate additional sets of information that are primarily relevant to the other development concerns of the communities, and whenever possible, provide the information requirements of the different sectors at each geopolitical level in that country. The indicators can also be based on national and international poverty initiatives like the Poverty Reduction Strategies Papers (PRSPs), Minimum Basic Needs (MBN) approach and the Sustainable Development Goals (SDGs).

The core set of indicators should be:

- Poverty-related and comparable to national and international norms;
- Country, local and community-relevant, and designed to monitor welfare conditions at each level; and
- Simple, measurable, feasible, and easy to collect and process given existing institutional conditions, structures and capacities in the communities where the system will be implemented.

➢ **Data Collection, Processing and Data Validation**

The design of the methodology for data collection, processing and data validation should consider the technical capabilities of key players in the eventual institutionalization of
the system. It is important to bear in mind that the system to be developed will not only be for use by the researchers but will eventually be transferred to focal persons in various geopolitical units in the country. In addition, the methodology to be adopted should be able to build on the strengths of existing systems in the locality and likewise, address whatever weaknesses the said systems may have had.

In this regard, the proposal should at least be able to provide the following details:

1. How will data be collected? What are the instruments that will be used to collect the information? How frequent will the information be collected?
2. Who will collect the information? Who are the key players at each geopolitical level?
3. How will the data be processed? Who will process the information?
4. Who are the key players at each geopolitical level?
5. How will the data be validated? Who will validate the data?
6. Who will update the database after the validation?

➢ Flow of Information

The proposal must contain relevant details on the dissemination strategy of the proposed system. A clear linkage between national and local government and non-government agencies/units involved in implementing and sustaining the proposed system must be established.

In this regard, the proposal should provide the following details:

1. Who will be the repository of the processed information?
2. How will the process data be disseminated?
3. Who will have access to the processed information?
4. How will the processed information be used?
(c) Work Plan

This component of the CBMS project involves the design and pilot-test of the proposed CBMS methodology and instruments in the context of the country project site, implementation of local capacity building on the implementation of CBMS for possible replication and institutionalization of the system in the country, and the use of CBMS data for poverty profiling/analysis and examination of a PEP-research thematic issue under the current call for proposal.

The pilot test of the CBMS methodology is to examine the feasibility of the proposed CBMS design in the local setting. The activity would test the core poverty indicator system, data collection instruments, data processing techniques, data validation and analysis. The pilot test would also assess the capacity of local partners at the village/local level in the implementation of the CBMS.

The pilot test is ideal to test the usefulness to the local government of the resulting CBMS. This exercise demonstrates how the data can be useful to local governments and also assesses the capacity of the local government in the implementation of the CBMS.

(d) Cost of the System

This takes into account the resource requirements for the implementation of the proposed CBMS. Resource requirements include human, financial and physical resources as well as time needed for the proposed system. Direct costs of the project should at least cover requirements for the design and pilot test of the CBMS methodology and instruments, data collection, processing and analysis, local capacity building on use of CBMS, preparation of research papers, and dissemination of findings to target groups and key stakeholders.

2.2.b.2 Thematic Research Study

The proposed thematic research study is evaluated in terms of details provided in line with its objectives and relevance, the specific research questions to be addressed in line with relevant policy issue/PAGE theme chosen, the use of CBMS and other relevant data for the conduct of the thematic study, and the appropriateness and feasibility of the research methodology that is being proposed to be undertaken during the project period.

2.2.b.3 Project Team and Institution

The project is also evaluated based on the capacity (relevant skills and
experience) of the members of the project team and of the proponent institution to carry out the required activities and produce the expected deliverables of the project.

3.0. Notification of Status of Proposals

The proponents are notified of the status of their proposals via e-mail. A sample of this notification is shown in Annex B.

4.0. Expected Project Outputs

The CBMS projects funded by PEP are expected to produce the following outputs:

(1) Research Papers

The CBMS project outputs include 3 research papers: (1) final design of CBMS methodology and instruments in the local context based on the results of the pilot-test; (2) a poverty/SDG profile of the pilot sites using the CBMS core indicators generated from the CBMS census; and (3) on the conduct of the PEP-PAGE research theme study using CBMS and other related data.

(2) Database with complete documentation

(3) Policy Brief

5.0. Monitoring of Project Outputs

The CBMS Network Coordinating Team uses the following mechanisms to facilitate monitoring of research outputs of the Projects:

5.1. Project Status Reports

Recipients of CBMS grants are required to submit a quarterly project status (technical) report containing the narrative details of the accomplishments of the project implemented vis-à-vis the planned activities and expected milestones specified in the approved proposal and in the grant contract agreement with the Recipient Institution. The project status (technical) report should be accompanied by the required research outputs e.g. data collection instruments, research papers, and database for the project reporting period. A report on the consultation and dissemination activities conducted during the project period with details on program, attendees and highlights of discussions and outcomes is also required. A final project status (technical) report must be submitted
together with all final versions of research outputs for review and approval prior to the release of the final grant payment.

Under the current PAGE-CBMS Program, all grant recipients are required to submit this *project status report (Technical Report)* by completing the **online project technical report section** that will be made available in the project’s intranet profile at the PEP website. Expected project deliverables are based on the agreed schedule indicated in the grant contract. All grant payments are subject to completion and approval of expected project outputs and milestones.

### 5.2. Interim Meetings and Technical Workshops

Grant recipients are also invited to participate and present project outputs during interim meetings and technical workshops organized by the CBMS Network Coordinating Team.

### 5.3. Field Visits to Project Site

As per agreement in the grant contract letter, the Recipient shall allow any representative of the CBMS Network Coordinating Team to visit the Project site at any time during the project period.

### 5.4. Completion of PEP Online Monitoring and Evaluation Form

All grant recipients are also required to complete and update the PEP online Technical Report form.

### 6.0. Dissemination and Advocacy

At the onset of a project, grant recipients are encouraged to include a dissemination strategy/plan that would facilitate the eventual institutionalization of the CBMS to be developed. The dissemination and advocacy activities will be jointly undertaken both by the recipient and the grantee. Research outputs of all CBMS grant recipients of PEP are disseminated by PEP and the CBMS Network Office through the CBMS network’s quarterly newsletter and other related publication, Facebook page, PEP website, newsletter and PEP-organized meetings and conferences.
7.0. Closing of Grants and Archiving of Records

7.1. Closing of Grants

The process of closing grants shall be as follows:

7.1. a. The recipient shall submit a final project status and financial report on the Project, together with the final versions of all related research outputs as per the grant contract schedule of expected deliverables, for review and approval by the CBMS Network Coordinating Team;

7.1. b. Once the submitted, reports and research outputs are approved by the CBMS Network Coordinating Team, the CBMS Research Director will make a recommendation to the Executive Director of PEP for the final tranche of the grant (if necessary) together with a notification of the closing of grant to be released to the Recipient. If there is no need to release a final payment, only a letter indicating the closing of grant is sent to the Recipient.

7.2. Archiving of Records

All hard and soft copies of project reports shall be kept on file by the CBMS Network Coordinating Team for a period of six (6) years. As per agreement in the grant contract letter, the Recipient is also required to keep copies of corresponding Project reports for the same duration.
ANNEX A
Community Based Monitoring System (CBMS)

Project Proposal Format

Title of the Project
Duration of the Project Phase (month/day/year-month/day/year)

I. Project Overview
   1. Title of the Project
   2. Project Proponent
      a. Name of Institution
      b. Name of Head of Institution
      c. Mailing Address
      d. Telephone and Fax Numbers
      e. E-mail Address
      f. Website
      g. Brief Profile of the Proponent Institution
         (A brochure on the Institution with details of its primary mandate
         and ongoing research initiatives can be appended to the
         proposal)
   3. Abstract of the Proposed Project

II. Project Administrative Information
   1. Project Leader/Director
   2. Position in the Institution
   3. Mailing Address
   4. E-mail
   5. Telephone
   6. Facsimile
III. Background

This section should include (as a minimum) information on the following:

1. Rationale of the Project with respect to local context. i.e. ongoing poverty reduction initiatives/issues within the country where the Project will be implemented
2. A description of existing, related monitoring systems, decentralization policies and administration structures at the local levels
3. A discussion of the value added of this research and the knowledge gaps that the project intends to fill in

IV. Objectives

The objective(s) should be doable and relevant to current initiatives of the country in terms of poverty monitoring and alleviation. The proposal should identify the research questions it seeks to answer. The research questions should fall under any of the five (5) priority research themes listed in the Call for Proposals.

The project should have at least two major objectives: (i) to develop and implement a community-based monitoring system (CBMS) to monitor the different dimensions of poverty; and (ii) to examine a research question(s) falling under any of the five (5) priority themes for PAGE II.

The design of a pretested CBMS will be documented in Research Paper 1. The poverty profile of the communities where CBMS will be implemented will be documented in the second research paper. Research Paper 3 will answer the research question(s) for the selected priority theme.

V. Research and Mobilization Activities

Given the dual objectives of the project, there will be two parallel research activities: (i) design and implementation of CBMS; and (ii) research on the selected priority theme.

1. On the design and implementation of CBMS

While the basic features of the monitoring system will be based on the CBMS developed by the CBMS Network Office, it is expected that the
design will be modified to take into account the specificities of the country. Poverty indicators should be customized to reflect the dimensions of poverty that are relevant to the country. The tablet-based data-capture system developed by the PEP-CBMS Program Coordinating Team\(^7\) will be adopted. The institutions and personnel to be involved will need to take into account existing governance structures and capacities.

This section should include details on the methodology and instruments to be used for the monitoring system:

a. Indicators
   i. What are the sets of information to be collected?
   ii. What is the rationale for choosing the indicators?

b. Coverage
   i. Where will the data collection be conducted?
   ii. What is the rationale for choosing the project site?
   iii. What is the coverage in terms of population and number of households?

c. Data Collection
   i. Who will collect the data?
   ii. How will the field operation be conducted?

d. Data Processing
   i. How will the data be processed?
   ii. Who will process the data?

e. Data Validation
   i. How will the Team ensure the quality of the data?
   ii. Who will validate the data?

f. Database Management
   i. Who will maintain the database?
   ii. Who will be responsible for updating the database?
   iii. Who will have access to the database?

g. Data Analysis
   i. How will the data be analyzed and used?

2. On the priority research theme

\(^7\) of the CBMS Network Office, DLSU-AKI, Manila
This section should focus on how the research question will be addressed. Details on the methodology to be used and the corresponding data requirements should be discussed here.

a. Methodology
   i. What methods will be used to answer the specific research question(s)?
   ii. Cite studies that have used these methodologies.

b. Data requirements
   i. Since the CBMS is designed primarily as a regular poverty monitoring system, it is not expected that the core CBMS questionnaire will have all the items of information necessary for the methods being proposed. Identify items of information that need to be collected in a rider questionnaire. This rider questionnaire will be administered together with the core CBMS questionnaire.
   ii. Who should be the respondent for this rider questionnaire?

VI. Consultation and Dissemination Strategy

This section should present the strategy for linking research to policy. Key stakeholders are expected to be consulted during the course of the project. Project findings are expected to be disseminated during national and/or local workshops to be conducted within the project period. In this section, proponents should provide details on the following:

1. Nature and scope of dissemination activities to be conducted
2. Target audience/agencies/organizations to participate in each activity

VII. Expected Outcomes

This section should contain how the monitoring system to be developed will facilitate evidence-based decision making among national and local policymakers, communities and other stakeholders and their expected outcomes on the welfare of the various stakeholders.
VIII. Institutions and Personnel

This section should include an institutional background of the recipient institution. Likewise, include a description of the specific role of the recipient institution and its concerned departments and designated research team in the administration and implementation of the Project. The research team should be gender mixed and comprised of at least 50% women. Curriculum vitae and project tasks of the research team leader and all members must be submitted. We also require a copy of the certificate of registration of the Recipient Institution issued by the government of the country in which the project will be implemented.

If the Recipient Institution intends to collaborate with other institutions (i.e. national or local government units, research partners, and other development partners or donor agencies aside from the PEP Network) in the duration of the Project, details should also be included herein.

IX. Work Plan and Timetable of Activities

This section should present the timetable of activities. The project, including the dissemination activities, should be completed within 24 months.

CBMS Project: Timetable of Activities (sample)

<table>
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<tr>
<th>Activities</th>
<th>Months</th>
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<tr>
<td>I. Development of a CBMS</td>
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<td>a. Review of Existing Monitoring Systems</td>
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<td>b. Design of the Proposed System</td>
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<td>c. Presentation of Draft Design</td>
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<td>d. Report Writing</td>
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<td>II. Implementation of the System</td>
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<td>a. Development of data collection and processing tools</td>
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<td>b. Networking with key persons in pilot site/s</td>
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<td>c. Conduct training of local enumerators and data processors</td>
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<td>d. Conduct data collection</td>
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<td>e. Consolidation and processing of data</td>
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<td>f. Analysis and validation of survey results</td>
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<td>g. Assessment and refinement of the CBMS design</td>
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<td>h. Report writing of poverty profile</td>
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<tr>
<td>i. Dissemination of poverty profile and final CBMS design</td>
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<td>e. Consultation Meetings/Dissemination of Results</td>
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### II. Conduct Research on the priority theme

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<th>Activities</th>
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<td>c. Preparation of draft report</td>
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<td>f. Preparation of policy brief</td>
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X. Budget

The budget should not exceed the core CBMS research grant of US$50,000.

The CBMS core research grant of **US$ 50,000** covers the design of CBMS (in the local context) and data collection instruments (questionnaires and manuals), local capacity building, primary data collection, data processing and analysis, preparation of three (3) research papers and one (1) policy brief, and national/local dissemination.

The budget should reflect the estimated cost of activities according to the proposed work plan. The budget per item should also be in the local currency (with the equivalent amount in US dollars). The indirect costs (management fee, predicted currency fluctuation and communication) budget should not exceed more than 13% of the total budget.
Community-Based Monitoring System (CBMS) Network Project

**Budget**

**Project Title:**

**Items**

1.0 Personnel

1.1 Professional Fees/Salaries

Project Team Leader _____ x ____ man-months

Project Team Members _____ x ____ man-months

2.0 Research Expenses

2.1 Pretest of Survey Instruments

This item includes costs to conduct a pretest of survey instruments. It includes researchers' expenses

E.g. board and lodging, fieldwork materials/supplies, and transportation costs.

2.2 Data collection

This item includes costs of local capacity building (training of local enumerators), field data collection, including payments to enumerators and purchase of tablets.

2.3 Research Supplies/Software

This item includes costs of consumable goods (paper, computer ink, pens, etc.), reference materials and software needed to conduct the research.
3.0 Consultation and Dissemination

3.1 Workshop 1: Presentation of CBMS Design

3.2 Workshop 2: Presentation of Results of Poverty Profile and Thematic Research Results - National workshop

3.3 Workshop 3: Presentation of Results of Poverty Profile and Thematic Research Results - Local workshop

4.0 Indirect Costs (maximum of 13% of sum of items 1.0-3.0)

4.1 Management Fee
This item includes the project contribution to office accommodation, rent, utility charges, accounting/auditing, legal, and management fees.

4.2 Other Support Services
This item covers costs for communications i.e. telex, internet, courier, and postage expenses, and general office/administrative photocopying fees.
ANNEX B

Notification Letter 1

REJECTION

<Date>

Name of Head of Proponent Institution
Name of Institution

Dear <(Title) Name of Project Leader>,

Thank you for submitting the proposal entitled <“Title of Project”> under the PEP-CBMS Research Grant Program. We regret that while we received numerous worthwhile proposals from many well-intentioned and committed institutions, we can only support only a few. The CBMS Research Grant Program selects projects through a rigorous evaluation process whereby project proposals are selected by our CBMS Thematic Research Group (TRG). Unfortunately, after careful consideration and deliberation of the CBMS TRG, your proposal was not approved for funding.

We sincerely appreciate your interest in the PEP CBMS Research Grant Program.

Sincerely yours,

Dr. Celia M. Reyes
PEP-CBMS Research Director
Notification Letter 2

PROPOSAL APPROVAL

<Date>

Name of Project Leader
Designation
Institution
Address

Dear <(Title) Name of Project Leader>,

Thank you for submitting your revised proposal last <Month/day, 201X> on <“Title of Project”>. We are pleased to inform you that your proposal is approved for PEP funding. However, we still would like you to address some of the comments in the attached matrix.

Please submit your revised final proposal at the PEP Intranet together with your responses on the comment matrix not later than <Month Day, 201X>. This version will be used in the contract that will be sent to you.

Sincerely yours,

Dr. Celia M. Reyes
PEP-CBMS Research Director