

PLAN-BUDGET LINK

Enhancing Local Planning-Budgeting Link Through Social Accountability

A Workshop Documentation Report

Project



Service Delivery Assessment, Phase 2
Plan-Budget Link Project
GTZ-Decentralization Program

April 14-16, 2009
Sabin Resort Hotel
Ormoc City



Pacifico Ortiz Hall
Er. Arrupe Road
Social Development Complex
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WORKSHOP ON ENHANCING LOCAL PLANNING- BUDGETING LINK THROUGH SOCIAL ACCOUNTABILITY

A Workshop Documentation Report

Service Delivery Assessment (SDA), Phase 2
Plan-Budget Link (PBL) Project
GTZ-Decentralization Program (DP)

THE FOLLOWING IS a Workshop Documentation Report on the **Workshop on Enhancing Local Planning-Budgeting Link through Social Accountability** held at the Sabin Resort Hotel, Ormoc City on 14-16 April 2009. The Report documents the content and processes, the major issues discussed, and the outputs of the Workshop.

The Workshop was the third of a series in the **PBL Project: SDA, Phase 2** of the GTZ-DP. The project was anchored on the guidelines developed in pursuant to the Joint Memorandum Circular No. 1(JMC-1), series of 2007 on the *Harmonization of Local Planning, Investment Programming, Revenue Administration, Budgeting and Expenditure Management*. The Ateneo School of Government (ASoG) was contracted by GTZ-Decentralization Program (GTZ-DP) to design and implement the Project in the pilot Municipality of Barugo, Province of Leyte.

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WORKSHOP OVERVIEW

THE “WORKSHOP on Enhancing Local Planning-Budgeting Link through Social Accountability” was aimed at impressing upon the participants the value of social accountability (SAc) in enhancing the link of local planning and budgeting processes towards improved development and governance outcomes.

The activity was the third of the series of workshops of the PBL Project of the GTZ-DP. The project is anchored on the guidelines developed in pursuant to the JMC- 1 on the Harmonization of Local Planning, Investment Programming, Revenue Administration, Budgeting and Expenditure Management. PBL in general intends to pilot-test the implementation of JMC guidelines in a selected municipality in Leyte Province, namely, Barugo. The Ateneo School of Government (ASoG) was contracted by GTZ-DP to design and implement the Project.

Participants in the workshop were the LGU staff and personnel of the Municipality of Barugo, Leyte headed by Mayor Alden Avestruz, all of whom belonged to the Technical Working Group (TWG) that was set up by virtue of an Executive Order specifically for the Project. The ASoG resource persons/facilitators – Mr. Rande Cabaces and Mr. Dondon Parafina – were supplemented by resource persons from the regional offices of Department of the Interior and Local Government (DILG), National Economic Development Authority (NEDA), Housing and Land Use Regulatory Board (HLURB), and Department of Finance (DOF). Practitioner-consultants, a former city mayor (Atty. Franklin Quijano of Iligan City) and a former city administrator (Mr. Jimmy Yaokasin, Jr., concurrently Chairman of the Board of Trustees, Development Academy of the Philippines), also took part in the workshop as part of the project design. Mr. Adelfo V. Briones of ASoG served as the overall workshop facilitator.

The approach to the Workshop (and the succeeding workshops) hinged on the phrase “development of a replicable methodology”, understood as a methodology that is not only facilitative to learning but can also be easily applied to and replicated in other social service areas. The main features of the methodology included the selection of a completed

social service project as a case study; the use of experience-based, inductive/adult learning approach; and the utilization of the “experience-experts/prescriptions-strategy-sustainability” approach.

The topics in the Workshop included the following:

- Review of pilot project on harmonization of local planning and budgeting;
- Reflection and sharing on the value of SAc
- Inputs on SAc from the perspective of National Government Agencies’ (NGAs) prescriptions and guidelines
- SAc concepts, principals and pillars
- The G-Watch and Citizens’ Action Experience
- Elements of a tool for SAc
- Designing and implementing the LGU’s SAc strategy

The major results of the activities and series of workshops show an increased interest among the participants to fill the gaps and address issues pertaining to the PBL process as a requirement in good governance and social accountability. This is shown in the individual reflection outputs, group outputs (e.g. reflections on existing LGU practices, specifically on budgeting, expenditure management, planning, and performance management; and identifying areas for change in each), and the action planning activity. The review of a live case, that is, the Water System Project that was designed and implemented in Barugo, impressed on the participants the need to find indigenous ways of practicing social accountability in the actual planning and implementation of a service delivery project. In general, the workshop activities provided the participants with broad strokes on how social accountability can be exercised and applied in their local context, with the view that this will enhance governance outcomes.

The facilitating factors were identified as: (a) high participant interest; (b) presence of the LGU leadership; (c) introduction of new concepts, methodologies, and tools; and (d) experience and expertise of the facilitators and resource persons.

The constraints, on the other hand, are the following: (a) low participation from civil society organizations (CSOs)/non-government organizations (NGOs)/people’s organizations (POs); (b) SAc workshop design too conceptual, (c) NGA presentations not focused on SAc; (d) inadequate leveling off among the resource persons on concepts and definitions of terms, (e) duplication of some activities from previous workshops; (f) time management; and (g) lack of practical, actionable outputs.

The following recommendations are put forward to reinforce the facilitating factors: (a) retain and enhance the experiential learning approach by focusing on local case studies; (b) highlight the modeling aspect of the LGU leadership in terms of active participation in the learning activities; (c) situating fresh concepts in real-world context extracted from the experience and expertise of resource persons.

To mitigate the constraints, the following are recommended: (a) formulate an action plan aimed at encouraging and providing an enabling environment for non-active citizen organizations to be accredited to the MDC; (b) strengthen the overall project design as well as the individual workshop designs by providing enough leeway to provide feedback and revisions. If revisions are done during the actual run of the workshops, the decision to do so should still be within the ambit of the learning objectives; (c) keep the perspective (and operationally manage it as well) that seemingly diverse professional opinions are indicative of a healthy attitude towards issue analysis; (d) balance between what is contingent to the goals and objectives of the activities, and the need to efficiently manage the time allotted for each learning block; and (e) encourage the participants to push for “do-able” but more strategic action plans to institutionalize SAc in the municipality.

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ABBREVIATIONS & ACRONYMS

AIP	Annual Investment Plan
ANSA-EAP	Affiliated Network for Social Accountability-East Asia Pacific
APP	Annual Procurement Plan
ASoG	Ateneo School of Government
BAC	Bids and Awards Committee
BDP	Barangay Development Plan
CDP	Comprehensive Development Plan
CLUP	Comprehensive Land Use Plan
CSO	civil society organization
DCF	Data Capture Forms
DBM	Department of Budget and Management
DILG	Department of Interior and Local Government
DOF	Department of Finance
DP	Decentralization Program
ELA	Executive-Legislative Agenda
G-Watch	Government Watch
GTZ	German Technical Cooperation
HLURB	Housing and Land Use Regulatory Board
JMC	Joint Memorandum Circular
LCE	Local Chief Executive
LDC	Local Development Council
LGC	Local Government Code
LGPMS	Local Government Performance Management System
LGU	Local Government Unit
MBO	Municipal Budget Officer
MDC	Municipal Development Council
MLGOO	Municipal Local Government Operations Officer
NEDA	National Economic Development Agency
NGA	National Government Agency
NGO	non-government organization
PBL	Plan-Budget Link



PO	people's organization
PPA	Program, project, activity
RDC	Regional Development Council
RDP	Regional Development Plan
RPS	Rationalized Local Planning System
SAC	Social accountability
SB	Sangguniang Bayan
SDA	Service Delivery Assessment
SGD	Small group discussion
SLGR	State of the Local Government Report
SP	Sangguniang Panlalawigan
TWG	Technical Working Group

PROJECT CONTEXT

THE AIM OF the Workshop on Enhancing Planning-Budgeting Link through Social Accountability was to impress upon the participants the value of SAC in enhancing the link of local planning and budgeting processes towards improved development and governance outcomes.

The workshop participants were led by the TWG contingent from the Municipality of Barugo, Province of Leyte, headed by Mayor Alden Avestruz. Other participants/resource persons included the representatives of the regional offices of the national government agencies (NGAs), such as the Department of Budget (DBM), Department of Finance (DOF), National Economic Development Agency (NEDA), Department of Interior and Local Government (DILG), and the Housing and Land Use Regulatory Board (HLURB).

The Plan-Budget Link Project was conceived as Phase 2 of the Service Delivery Assessment (SDA) of the German Technical Cooperation-Decentralization Program (GTZ-DP). The aim of the project is to develop an experience-based replicable methodology in a pilot municipality in Leyte Province that will aid in harmonizing planning, programming, budgeting, monitoring and evaluation activities, particularly vertically and horizontally linking development plans to programs and budgets. The thematic focus is on a specific service delivery function selected by the pilot local government unit (LGU). The project is essentially an experiment at optimizing existing initiatives at the local and central government levels at rationalizing planning-budgeting linkages.

The project is anchored on the guidelines developed in pursuant to the Joint Memorandum Circular (JMC) No. 1, series of 2007 on the *Harmonization of Local Planning, Investment Programming, Revenue Administration, Budgeting and Expenditure Management*.

GTZ-DP contracted the services of the Ateneo School of Government (ASoG) to implement the Plan-Budget Link Project. ASoG was tasked to contribute to the capacity development agenda for service delivery reforms by undertaking (a) the technical analysis of content and process issues related to planning-budgeting linkages, and (b) the design and implementation of onsite project activities. ASoG, for its part, highlighted the inclusion of

SAC themes promoted by the Affiliated Network for Social Accountability-East Asia Pacific (ANSA-EAP).¹

After a series of pre-selection and screening field research activities conducted between October 2008 and January 2009, GTZ-DP and ASoG selected the Municipality of Barugo as the pilot municipality for the project.

OBJECTIVES

The objectives of the Workshop on Enhancing Planning-Budgeting Link through Social Accountability include the following:

- Situate the SAC framework in the Barugo LGU's development and project contexts;
- Deepen appreciation of how SAC can help the Barugo LGU address such contexts more effectively;
- Share existing good practices in mainstreaming SAC in LGU planning, budgeting and project implementation processes; and
- Facilitate a planning process to identify specific needs and actions toward mainstreaming SAC.

METHODOLOGY

THE ACTIVITIES were designed to maximize full participation among the participants. The approach was a combination of inductive-deductive learning methodology. The inductive approach was highlighted by grounding the learning on the experiences and expertise of the participants, while the deductive approach used concepts and principles as guidelines for practical application in real-life situations.

Three basic methodologies were applied in the workshop: small group activities/discussions, plenary sessions, and inputs by resource persons.

SMALL GROUP DISCUSSIONS

The small group discussion (SGD) was used mainly to maximize participation. Considering that the group was heterogeneous, i.e. varying levels of rank and position within the same LGU organization, it was important to capture the opinions, impressions,

¹ ANSA-EAP is a regional network established in 2008 to help cultivate the East Asia-Pacific way of doing social accountability by upholding the region's culture and norms. ANSA-EAP reaches out to various groups: citizen groups, nongovernment organizations, civic associations, the business sector, and government institutions. It harnesses and enhances the region's knowledge, expertise, and experience. Through ANSA-EAP, homegrown efforts can make people realize the direction and value of their participation in governance, further enriching the existing community of learning and practice. ANSA-EAP is based in the Ateneo School of Government. (For additional information about ANSA-EAP, please refer to www.ansa-eap.net)

and comments of each one. Usually the SGD would start with a set of questions to be reflected on and answered individually, after which each member would share his/her opinion, comment, or answer with the other members. The self-facilitating nature of the SGD would then bring out the collective answer of the group through consensus. The collective answer would be reported to the big group.

PLENARY SESSIONS

The plenary sessions served as the venue where the reports of the SGDs were presented by group reporters. After each group presentation, comments, clarification questions, and the like would be asked by the facilitator and the participants. Sometimes critiquing of SGD outputs was allowed, depending on the objectives of a particular session.

A summary and a synthesis usually followed after the group presentations. The synthesis provided the participants with an anchor on the major insights and learning of that particular session, as well as the link to the next learning session. The synthesis was presented as a sub-frame of the general workshop framework.

INPUTS BY RESOURCE PERSONS

The inputs were usually in the form of powerpoint presentations. The main resource persons for this workshop were Mr. Rande Cabaces, capacity building specialist, and Mr. Dondon Parafina, network specialist, both of ANSA-EAP. Representatives of the NGAs provided inputs on mechanisms of accountability as prescribed by the manuals and guidelines. The GTZ practitioner-consultants, Atty. Quijano and Mr. Yaokasin, provided practical views from the LGU perspective.

(See Annex A: Program of Activities)

ACTIVITIES

The Workshop had ten (10) major activities, here presented in sequence:²

- Review of pilot project on harmonization of local planning and budgeting;
- Reflection and sharing on the value of SAc
- Harmonization of local planning and budgeting towards improving local governance
- Reflecting on existing LGU practices and identifying areas for change
- Presentation of SAc concept and pillars

² It may be noted that the flow of activities as presented on the first day differs from what is presented here. The reason is that changes were done during the actual run of the workshop in response to the learning needs of the participants.

- Film showing of the Naga City experience
- Review-presentation of the Barugo Water System Project
- Presentation of the G-Watch and Citizens' Action Experience
- Presentation of the elements of a tool for SAc
- Action planning: Designing and implementing the LGU's SAc strategy

The following is a documentation of the content, process, and major results of the Workshop.

MAJOR RESULTS

REVIEW OF PILOT PROJECT ON HARMONIZATION OF LOCAL PLANNING AND BUDGETING

The first session aimed to create a common understanding among the participants, the resource persons, and the facilitators on what it means to be part of the PBL Project, including its implications. Thus, the first session had the following learning objectives:

- To create a shared understanding of the rationale and objectives of the pilot project on harmonization among the participants;
- To establish shared appreciation of critical events in the design and implementation of the pilot harmonization project; and
- To draw out lessons and insights on the links between harmonization, SAc, and good governance.

In the course of the workshop, the participants were expected to come up with three (3) outputs:

- Participants' views on the harmonization process and pilot project initiative;
- Participants' views on harmonization and role of SAc; and
- Identified next steps for the pilot project.

First through individual reflection, then through small group activity and discussions, the participants were asked to reconstruct the harmonization project timeline and identify insights on how harmonization links with SAc and the LGU vision. They were also asked to identify possible next steps for the pilot project.

The individual reflection came up with insights on how project outcomes could improve local governance, in general, and service delivery, in particular. In summary, the individual insights included the following:

- Effective planning-budgeting link in the LGU
- Efficient public expenditure management
- Fast-tracking development and economic growth
- Equitable public service delivery
- Better quality of life
- Catalyst of change if [learning] is adhered to

The report on the project timeline enumerated the events and activities leading to the present workshop, starting with the pre-selection stage.

With SAC principles and mechanisms embedded in the PBL Project, the participants expected the following outcomes in their LGU:

- Behavioral changes among LGU officials and personnel, especially if the approach used is the “team approach”
- Active participation of CSOs, with CSOs [becoming] more aware of their involvement in LGU plan-budget processes
- Improved service delivery
- Sustainability of LGU projects
- The participants saw the need to take up the following as part of the “urgent next steps”:
- Full implementation of the learning gained in the PBL project
- Identify, agree on, and submit a project proposal [to a funding agency] that will pilot test project learning
- Identify areas [in the LGU organization] that need improvement

(See *Annex B: Workshop Outputs on Review of Pilot Project on Harmonization of Local Planning and Budgeting*)

In reaction to the group reports, Ms. Fillone, the GTZ-DP Adviser, expressed her appreciation in behalf of GTZ-DP because it appeared that everyone was clear about the objectives of the project and how one activity was linked with each other. However, she also pointed out the need to sustain and replicate the outputs of the project, more reflection on the operational areas where SAC comes into the plan-budget link process, and how practical is SAC when applied to the daily operations of the LGU.

SHARING ON THE VALUE OF SOCIAL ACCOUNTABILITY

The group sharing on the value of SAC was aimed to share a common understanding on the value of SAC and how it would interface with the PBL Project. Specifically, the objectives of the sharing were:

- To promote practical appreciation of key lessons and insights from the sessions on the role of SAC vis-à-vis harmonization and good governance goals;
- To facilitate internalization of the value of SAC by grounding it on the individual and organizational contexts of the participants; and
- To improve local knowledge in integrating SAC into current good governance efforts of the Barugo LGU by identifying possible SAC mechanisms, objectives, intended outcomes, roles for stakeholders.

The group reports focused on the outcomes if SAC were to become an integral part of governance in the context of the “harmonization” project. The reports presented the requirements as well. A summary of the report outputs are presented in Table 1:

Table 1. Summary of group outputs on the value of Sac, and the requirements.

Value of Sac vis-à-vis harmonization and good governance goals	Requirements for SAc to be integrated in local governance in Barugo
<ul style="list-style-type: none"> • Effective leadership and transparency • Effective time management in the performance of duties • Cooperation between and among various LGU officials and personnel • Attitudinal change towards delivery of services, resulting in quality of goods and services delivered • Use of measurable indicators that will meet the expectations of the constituents • Bottom-up approach in the planning-budgeting process • Active participation of CSOs/NGOs in both quantity and quality • Access to information by constituents for check and balance 	<ul style="list-style-type: none"> • Transparency in governance for the constituents to know what the LGU is doing. This will also provide check and balance and impress on the constituents a “sense of ownership” • Responsiveness, i.e. LGU to address needs of constituents so that services delivered are appropriate to their latter’s needs. To do this, LGU should set up feedback mechanisms to know the sentiments and needs of constituents. LGU should also use measurable performance indicators • Bottom-up process, i.e. LGU should set up mechanisms in the planning-budgeting processes so that concerned staff and personnel as well as CSOs and community members are able to participate • Attitudinal change towards delivery of services is necessary, not only focused on improvements in systems and mechanisms • Budgets should be “put” in the right allocation • LGU should set up mechanisms for more CSO participation in governance processes, especially in local planning and budgeting processes

HARMONIZATION OF LOCAL PLANNING AND BUDGETING TOWARDS IMPROVING LOCAL GOVERNANCE

This session, which was a series of inputs by the NGA representatives, aimed to (a) establish a shared appreciation of NGAs’ views and roles vis-à-vis the rationale, objectives, and salient provisions of the JMC-1 on harmonization of local planning and budgeting; (b) create awareness of NGAs’ views on how SAc initiatives can contribute to harmonization and good governance efforts; and create shared understanding of the rationale, objectives, and design of the pilot project being implemented in Barugo.

To help the participants situate the LGU in the context of the role of the NGAs, specifically from the perspective of SAc, the NGA representatives presented their insights, including their respective departments’ prescriptions, on how (a) harmonization can contribute to improving governance in the LGU; (b) how harmonization will impact on local planning, budgeting, expenditure management, and performance management; (c) their role in the harmonization program, including specific ways for their departments to help improve local governance practices; and (d) how harmonization can be enhanced with SAc.



DILG Presentation

Ms. Estela Creer, the Municipal Local Governance Officer (MLGOO) of Barugo, outlined and summarized the Rationalized Local Planning System (RPS) prescribed by the DILG for local development planning of LGUs.

The topics discussed by Ms. Creer's presentation were the following:

Current state of local planning in the Philippines

Salient points were:

- inactive Local Development Councils (LDCs);
- indifferent or unsupportive Sanggunian; lack or total absence of vertical linkages (i.e. disconnect of the local plans from provincial, regional, and national plans);
- lack or total absence of horizontal linkages among sectoral concerns (i.e. disconnect of local plans from community or sectoral needs);
- weak plan-to-budget link;
- multiplicity of plans at the municipal level (around 30 separate plans, e.g. Local Poverty Reduction Action Plan, Integrated Area Community Peace & Order & Public Safety Plan, Gender & Development Plan, Disaster Management Plan, etc.)

Rationalizing local planning

Two reasons were presented why it is important to “rationalize” local planning. First is a need to implement the full implications of the Local Government Code (LGC) of 1991 pertaining to planning. Second, LGUs should understand that planning is an integral part of governance. Rationalizing local planning will enhance the LGU's capability in the performance of its dual functions, namely (a) as a political subdivision of the national government charged with the management of its entire geographical territory, and (b) as a corporate entity.

Issues addressed in performing planning functions

These issues are raised in the following questions: (a) Who should be involved in planning? (b) Why should LGUs plan? (c) How are plans prepared? and (d) What are the tools for plan implementation?

Features in local planning

Selected features include the following: (a) faithful compliance with the Local Government Code's (LGC) provisions, (b) limiting LGU plans to the Comprehensive Development Plan (CDP) and the Comprehensive Land Use Plan (CLUP), (c) NGAs to dovetail their requirements with the local planning system, and (d) less technocratic, more participatory and consultative.

Focusing on the feature “less technocratic, more participatory and consultative”, Ms. Creer emphasized that the RPS, in its section on the formulation of the CDP, provides for opportunities for **multi-stakeholder participation** in every step of the comprehensive development planning process through (a) mobilization of the LDC and its sectoral and functional committees, (b) interface between NGAs, and (c) complementation between and among the Province and its component cities and municipalities.

(See Annex C: Powerpoint Presentation – *The Rationalized Local Planning System*)³

HLURB Presentation

Ms. Zenaida Estur’s presentation was entitled “A Guide to CLUP Preparation”. Salient points in her presentation included the following, among others:

- Definition of terms (e.g. Land Use Planning, Comprehensive Land Use Plan)
- Rationale, Principles, Objectives and Approaches in the formulation of the CLUP
- Legal mandates and policies supporting land use planning
- The structure of the CLUP document

Ms. Estur also elaborated on the principles and roles of citizen participation in the CLUP formulation, some of which include:

- Public-private sector partnership by encouraging shared responsibility between the government and the private sector in the development and management of the country’s physical resources
- People empowerment by establishing pragmatic appropriate flexible and dynamic structures or mechanisms that involve the participation of key stakeholders
- Recognition of the rights of indigenous people by ensuring the indigenous peoples’ right to develop, control, and use lands within their ancestral domains
- Adoption of the “bottom-up” approach in the formulation of the CLUP, such as the integration of Barangay Development Plans (BDPs) in the municipality’s plans. The integration aims to harmonize development goals and objectives of all barangays in cities or municipalities. It also identifies and reconciles inconsistencies and incompatibilities in land use proposals among adjacent barangays.

According to Ms. Estur, citizen participation mechanisms are embedded in the process of CLUP preparation. For instance, the LDC is mentioned as a key stakeholder and participant in the CLUP formulation. She also presented a guide in conducting consultations in the preparation of the CLUP, where community members are supposed to (a) participate in the identification of issues and ideas through broad-based discussions such as workshops, focus groups, surveys, meetings with existing groups, and interviews; (b) help the planning team explore the pros and cons of various options through participatory design workshops,

³ Annexes in MSPowerpoint presentations are included in this documentation as softcopy files.

evaluative workshops, and interactive displays/exhibits; and (c) provide feedback to fine-tune the draft through presentations/displays, public hearings, workshops and submission of written comments.

(See Annex D: Powerpoint Presentation – A Guide to CLUP Preparation)

NEDA Presentation

Ms. Marivic Cuayzon presented the NEDA perspective with the title “Mechanisms for Engaging Stakeholders in Regional Planning”.⁴ Salient points in her presentation included the following:

- Participation of representatives of accredited private sector and NGOs based in the region (who should comprise one-fourth of the fully constituted council) are members of the regional planning team
- Participation of accredited private sector and NGOs (through sectoral committees) in the preparation of the plan: visioning, formulation of development goals, objectives, targets, strategies and PPAs – through small groups and/or technical working group meetings and sectoral meetings, then consultation with key stakeholders for validation
- In the monitoring and evaluation of the implementation of the regional development plan, part of the process is the consultation with key stakeholders (fisherfolk, farmers, businessmen, academe, LGUs, etc.) through interviews and conduct of local development forums
- Presentation of the reports to the RDC for comments and/or reactions

Specifically, Ms. Cuayzon pointed out the role of citizens and citizen groups in the formulation of the regional development plan:

- The RDP is linked with LGU plans through the representation of the LGUs in the RDC and constant coordination with the provinces and cities to ensure consistency in vision, goals and objectives, strategic thrusts and to the extent possible, complementarity of PPAs
- With the private sector through participation of NGOs/CSOs in the RDC and through the conduct of stakeholders consultations
- Multi-stakeholders consultation takes place throughout the planning process. It takes place as often as necessary, whether formally or informally

(See Annex E: Powerpoint Presentation – Mechanisms for Engaging Stakeholders in Regional Planning)

⁴ NEDA is the agency officially mandated to provide assistance in the preparation of the regional and provincial development plans, while DILG is mandated to assist at the municipality level. This is the reason why Ms. Cuayzon’s presentation is on the regional-level planning.

REFLECTING ON EXISTING LGU PRACTICES AND IDENTIFYING AREAS FOR CHANGE

This session was aimed at identifying the gaps between existing LGU practices and systems, on the one hand, and the JMC-1 prescribed systems and processes, on the other hand. The process of identifying the gaps was assumed to lead to a clearer role or contribution of SAC actions and initiatives in the harmonization process.

Specifically, the workshop's objectives included were:

- To facilitate internalization of the lessons and insights from the previous sessions by analyzing gaps between the requirements of the harmonization process and the existing practices of the LGU;
- To produce an initial operational knowledge of local harmonization which includes identified areas for LGU reform that comprehensively address local needs;
- To establish deeper appreciation of the links between the JMC, the pilot project on harmonization, good governance, and Barugo's development goals; and
- To create shared appreciation of the role of SAC initiatives in the local harmonization process and Barugo's reform agenda.

Four (4) areas were covered by the small group discussions, the outputs of which were reported during the plenary presentation on the second day. The areas were planning (i.e. preparation of the Annual Investment Program, or AIP); budgeting (i.e. preparation of the budget); expenditure (i.e. procurement process); and performance monitoring (i.e. implementation of the Local Government Performance Management System or LGPMS).

Harmonization Requirements in Local Planning

The small group output is summarized in Table 2.

Table 2. Summary of group outputs on the harmonization requirements in local development planning

Existing systems/practices	Areas for change/Improvement
Review/assess existing plans (i.e. CLUP, CDP, LDIP, ELA, AIP)	Increase the frequency of review/assessment from once a year to twice a year, or as the need arises
Consultations with the department heads and the barangay captains	Include CSOs/NGOs/POs in the consultation Enclose the details of the agenda in the notice (or invitation) for consultation Provide financial support for participants (for traveling expenses and for honorarium)
Consolidation of prioritized programs, projects, and activities	Include the barangays for social accountability (e.g., direct project implementation)
Allocation of funds	
Presentation of AIP to MDC for approval	
Presentation of the AIP to the Sangguniang Bayan (SB) for adoption	SB member in the MDC to sponsor the resolution for adoption

From the above matrix, it can be concluded that one area that needs more attention is the inclusion of community and sectoral representatives in the local planning process, in addition to providing them support for their participation.

Harmonization Requirements in Budgeting

The small group output on the requirements in budgeting is summarized in Table 3.

Table 3. Summary of group outputs on the harmonization requirement in budgeting.

Existing systems/practices	Areas for change/improvement
BUDGET PREPARATION	
<ul style="list-style-type: none"> • Budget Call – Municipal Budget Officer (MBO) issues communication re budget call • Budget Hearing - Presentation of budget, negotiation, prioritization of PPA s • Budget Consolidation - Finalization of budget proposal • Submission to SB for approval 	Limited resources – intensification of tax collections. Delayed submission of budget proposal – encourage department heads to submit their proposed budget early
BUDGET AUTHORIZATION	
<ul style="list-style-type: none"> • Calendar for deliberation • Presentation of budget • Referral to the Committee chair on appropriation • SB deliberates the budget • Budget Approval 	No quorum – request the SB members to attend during the budget deliberation. Delayed approval of SB due to proposed adjustments – proposed adjustments of the SB should be done by the appropriations committee and the SB presiding officer during the budget hearing, since these officials were present
BUDGET REVIEW	
<ul style="list-style-type: none"> • Endorsement to Provincial Budget Officer⁵ • Submission to SP • SP deliberates the Annual Budget and approval 	None – it’s not our concern

⁵ It may be noted that in the Workshop on Budgeting, Expenditure Management, Investment Programming, and Revenue Administration, one of the practices corrected by the resource persons was the practice of the Barugo Municipal Budget Officer “handcarrying” the copy of the Annual Budget to the



While this part is a review of one of the major activities in the Workshop on Budgeting, Expenditure Management, Investment Programming, and Revenue Administration, the activity helped the participants to clarify areas for change and improvement. Most items in the column “Areas for Change/Improvement” were already identified in the previous workshop.

Sangguniang Panlalawigan for the Budget Review. The prescription says that the transmittal for of the Annual Budget to the SP is the task of the SB secretary.

Harmonization Requirements in Expenditure Management

The small group output on the requirements in expenditure management is summarized in Table 4.

Table 4. Summary of group outputs on the harmonization requirements in expenditure management.

Existing system practices	Areas for change/improvement
Preparation of the Annual Procurement Program (APP)	Late or non-submission of APP by the department heads
Consolidation of APP	
Request from end user	
Bids and Awards Committee (BAC) convened and decide the mode of Procurement	Regular convening of BAC
Preparation of BAC resolution	Trained BAC secretariat to prepare documents
Preparation of quotation of prices	Each requesting department should prepare the canvass
Opening of canvass	
Preparation of Abstract of Canvass	
Preparation of all necessary documents such as vouchers, Obligation Request, P.O. Inspections and Acceptance Report, etc.	Requesting department should prepare and follow up all necessary documents
Issuance of cheques	
Payment of goods	
Issuance of receipts from the contractor	
Delivery and acceptance of goods	Supply officer must be vigilant on the quantity and quality of goods being delivered

The step-by-step identification of the expenditure management procedure helped the participants to become familiar with the procurement process of the LGU. The identification of the areas for change and improvement also brought home the point the need for transparency and accountability in the entire process.

Harmonization Requirements in Performance Management

The small group output on the requirements in performance management is summarized in Table 5.

Table 5. Summary table of group outputs on the harmonization requirements in performance management.

Existing system practices	Areas for Change/Improvement
Re-activation of LGPMS Team	More active involvement of the team members in the preparation
Filling up of Data Capture Forms (DCF) by the departments/offices	Accurate and complete accomplishment of Data Capture Forms by offices/personnel
Consolidation/encoding of Data Capture Forms (DCF) into the LGPMS	Sustain the web-based LGPMS program
Generation of LGPMS data	(a) Conduct of consultative conference (exit conference) before drafting the final State of the Local Government Report (SLGR), and (b) revalidation of

Existing system practices	Areas for Change/Improvement
	LGPMS-generated data
Preparation and formulation of the SLGR	SLGR drafting and finalization must be participatory
Presentation of SLGR to local officials and department heads	Include presentation to MDC, LGU personnel. Circulate SLGR through an LGU newsletter and updated LGU website
Submission of SLGR as the LGU Annual Report to the DILG Provincial Office	Submit SLGR to the SB and the Sangguniang Panlalawigan (SP) as prescribed by the LGC. Copy furnish the DILG Provincial Office

The report on performance management shows serious areas for change and improvements, specifically on prescribed systems and procedures. Identification of the need to install and be more innovative in the use of information technology was also an area that the participants felt should be given attention.

PRESENTATION OF SOCIAL ACCOUNTABILITY CONCEPTS AND PILLARS

This presentation was a review of the topic presented by Mr. Cabaces during the Project Design Workshop held in Ormoc City on March 5, 2009. The same topic was nevertheless presented here because a number of participants were not present during the Project Design Workshop. A review of the same topic was also deemed important as it would help the participants familiarize themselves with the conceptual handles and key principles from a SAc initiative or experience, thus enabling them to appreciate the importance of SAc in the current project on harmonization and the role of sustained citizen engagement within the public financial management process.

(For a summary of the presentation, see *Annex F: Powerpoint Presentation – SAc Concepts and Pillars*)

Film Showing: The Naga City Experience

To promote individual and LGU buy-in of the concepts and principles of SAc (as presented and discussed in the previous topic), it was important that the participants see how these concepts and principles are applied on the ground. To help the participants understand SAc better, a four-series video clip was shown to the participants. The videos contained actual cases of SAc practices and interviews with Mayor Jesse Robredo of Naga City⁶ as well as key constituents.

- Participation in Budget
- Transparency and Right to Know
- Value of Information

⁶ Mayor Jesse Robredo is a multi-awarded local chief executive whose initiatives and innovations in local governance have been recognized internationally.



- SA to address People's Needs

The videos highlighted key processes, results, and insights from good practices in SAc. At the same time, the videos showed how the SAc framework and key concepts can work on the ground – good governance principles (transparency, accountability, participation), key players and roles, the four (4) SAc pillars, and the SAc “building blocks” (i.e. rights to voice, association, and negotiation). Finally, the videos showed SAc in practice: how SAc has helped improve local development, governance, and project outcomes.

REVIEW-PRESENTATION OF THE WATER SYSTEM PROJECT

This presentation was a review of the selected social service delivery project that was used as a case study or “learning specimen” in the PBL series of workshops. This was previously presented during the Workshop on Budgeting, Expenditure Management, Investment Programming, and Revenue Administration conducted on March 17-20, 2009 at the Ormoc Villa Hotel.

(See *Annex G: Water System Project Profile*)

Mr. Jimjim Yaokasin, former administrator of Tacloban City and GTZ consultant, facilitated the discussion and analysis of the Water System Project Profile. Mr. Yaokasin's experience and expertise on local government administration helped the participants in sorting out the gaps and issues based on their actual experience and in line with “harmonization” as well as SAc good practices (as shown in the video clips).

After the presentation, and prior to the discussion and analysis, Mr. Yaokasin stressed that there are “varying motives, participation, and transparency being exercised at different levels of governance”. He cited as an example the regional development councils (RDCs) which requires only sectoral-related groups to participate – since the RDC is a higher-level structure, the motives, nature of participation, and the exercise of transparency are very different when compared with that of an LGU's, where stakes are higher and more focused on personalities. This is the reason why public service (in the context of an LGU) is a “vocation” and it has the power to change the direction of the LGU. He emphasized that a public servant in a municipality should be able to meet the needs of the constituents immediately, effectively, and in a cost-efficient manner.

During the discussion and analysis that followed, a number of facts emerged. The following is a summary of the discussion that followed.

- The need for water facilities in the barangays is found in the CLUP. It is also mentioned in the Executive-Legislative Agenda (ELA) (which underwent consultations with the barangay captains during the ELA preparation). It is an item in the AIP of 2006.
- The MDC came up with the number of water pumps for the barangays – 37 units, one for each barangay. Extra units were purchased because a number of barangays requested for additional pumps.

- The approach to project implementation was supposed to be “*pintakasi*” or “*bayanihan*”, in which the barangays are expected to provide counterpart to the project in the form of labor. Estimated cost of labor per barangay was Php3,000-5,000, but this was not part of the annual budget of the barangays then.⁷ There appeared to be two limitations: first, their small annual budget (average per barangay: Php300,000); and second, the project came about in the last quarter of 2008, so the barangays would have to postpone the inclusion of the counterpart to the 2009 budget.
- There seems to be a change of attitude of the barangay leaders towards the acquisition of the jetmatic pumps. Three factors appeared to contribute to this perception: (a) the lag in time from planning to implementation; (b) lack of initiative of the barangays to look for funds to cover the labor counterpart; and (c) not following the MDC agreement (i.e. in the MDC meeting, the barangays agreed to provide counterpart; but during implementation, they allegedly wanted the entire package sans the cost of labor counterpart).

It thus appears that there was a huge gap in terms of SAc – from planning up to implementation. While the barangay captains were consulted and agreed to provide counterparts, the barangay constituents were not part of the consultation process. The other was that the project was overtaken by the changing attitudes of people over time (*ningas cogan*).

Some tips include the following:

- LGU officials should go to the barangays to find out and discuss the constituents’ needs
- Provide the barangays with clear implementation guidelines
- Seek a venue where the constituents are present when the project is given. In the same way, when the project is implemented or inaugurated, go to the barangay (and make sure that the project is functioning well, or at the very least, functional)
- Ensure that items like jetmatic pumps have warranties (at least six months) as prescribed by the New Government Procurement System
- Announce the projects by posting notices on billboards and bulletin boards (located in strategic places); the announcements should have enough details to inform people
- Make use of the SLGR as a venue to show transparency in governance
- Document projects, focusing on lessons learned

Ms. Pauline Nayra, executive director of the Runggiyan Social Development Foundation and a participant, stressed the gravity of people’s consultations in local governance processes. She shared that the essence of SAc should be to provide a venue for the people’s voice to be heard in an organized manner, thus encouraging basic sectors to participate in planning and budgeting.

⁷ It also appears that the LCE “forgot” to check whether the barangays should include their counterpart in the budget.

As a final note to the discussion, Ms. Fillone congratulated the participants for being frank and honest about the project, in spite of putting themselves on the spot and showing their vulnerability to criticisms. The point of the whole exercise, she stressed, was not about the LGU's weaknesses, but as a stepping-stone for learning and improvement.

PRESENTATION OF THE G-WATCH AND CITIZENS' ACTION EXPERIENCE

In order to give the participants an idea of what it takes – and how it can be done – to advocate for and actually implement a social accountability project, Mr. Dondon Parafina, ANSA-EAP Networking Specialist, presented the G-Watch (Government Watch) and Citizen's Action experience.

The presentation highlighted the following points:

- A situationer providing examples of how governments and institutions, including that of the Philippines, lose huge amounts of resources due to corruption and leakage. For example, G-Watch research has determined that over the last 20 years, the Philippine government estimated it has lost \$48 billion to corruption, which amount could have covered the country's \$40.6 billion external debt incurred in the same period.
- G-Watch, which is part of ASoG, advances a preventive approach to curb corruption. It takes prevention in the context of simple but well-planned participatory systems monitoring and reform. The simplicity of monitoring system is premised on an ordinary citizen's concern: Is the government able to deliver what it promised to deliver?
- G-Watch, as a research and monitoring program, envisions competent and credible government institutions and meaningful civil society participation in governance. Its fundamental mission is to provide a venue where both the government and the civil society can be engaged in the formulation of systems and procedures to improve governance.

Some accomplishments of G-Watch:

- Developed and tested monitoring tools in various programs, such as textbook delivery, school building construction projects, public works, disaster relief distribution, and Customs' seized goods
- Convinced the Department of Public Work and Highways to open itself to civil society and community involvement in the implementation of its school building projects through the *Bayanihang Eskwela*
- In the Department of Health, the G-Watch report has prompted the review of drug procurement in both the regional and hospital offices, which led to the issuance of a memorandum aimed at improving the agency's drug procurement procedures
- In partnership with the Department of Education, G-Watch formed a consortium of CSOs to help in the monitoring and inspection of textbooks to be delivered to high schools and districts nationwide. The program resulted in cheaper prices of textbooks, faster procurement process and lower delivery errors
- The G-Watch advocacy is sustained through various seminars and briefing-orientations for civil society and community groups. G-Watch projects and initiatives include the Textbook Count, Textbook Walk, Bayanihang Eskwela.

- G-Watch has been recognized locally and internationally for its achievements.

In response to the comments and questions raised in the open forum that followed the presentation, Mr. Parafina emphasized that part of the solution to the problem of corruption is admitting that it exists and is indeed prevalent. While there are loopholes in the efforts to curb corruption (as pointed out, for example, by Atty. Quijano, that corruption begins at the pre-bidding and bidding process, which is prior to actual implementation), G-Watch continues to look for solutions such as establishing partnerships with similar-intentioned institutions. In fact, G-Watch has inspired other similar initiatives in monitoring: Bantay-Lansangan, Bantay-Canvass, and Pork Barrel Watch, to mention a few. In the G-Watch experience, there are always volunteers, most of whom are the actual beneficiaries of the projects. In most cases, the focus of such monitoring watchdogs is in government expenditure because the outcomes are readily seen by the people.

(See Annex H: Government Watch Project Profile)

PRESENTATION OF THE ELEMENTS OF A TOOL FOR SOCIAL ACCOUNTABILITY

The presentation was conducted by Mr. Adelfo Briones who is the main facilitator of the ASoG training team for this workshop. The presentation focused on the basic elements of a tool for SAc, whether the tool is for performance monitoring, motivating citizens and citizen groups to engage local governments, or helping local governments to understand and appreciate the merits of SAc.

Mr. Briones started the presentation with a clarification of terms and concepts: the subtle distinction between “accountability” and “social accountability”. “Accountability” is the obligation of power-holders (government officials, private corporations, international financial institutions, CSOs) to account for or take responsibility for their actions. “Social accountability”, on the other hand, is an approach towards building accountability that relies on civic engagement – ordinary citizens and/or CSOs who participate directly or indirectly in exacting accountability. Thus, the first definition is directed towards constituents, while the second definition is a two-way direction, with citizens and citizens groups actively engaging institutions to account for their actions.

Based on the latter definition, there are four requirements, or “pillars”, for SAc to be realized. The four pillars are: (a) an enabling environment, (b) an organized citizenry, (c) access to information, and (d) consideration of the cultural context.

An Enabling Environment

For it to exist and function, SAc needs an enabling environment. For example, the freedom of citizens to associate should be upheld by the government, including legislation of policies and laws that uphold the right of citizens to participate in governance processes, and providing for mechanisms for dialogue and engagement between citizens groups and government. In the same manner, the political context and structures should allow for

agreement on criteria and mechanisms for citizens groups accreditation (e.g. MDC). Two other factors that could also bring about an enabling environment are (a) the influence of politicians, local or national, in the selection and approval of citizens groups; and (b) perception of the public and of LGU officials on citizens groups articulating views, asserting rights, engaging government.

An Organized Citizenry

The capacity of civil society actors is another key factor of successful social accountability. The level of organization of CSOs, the breadth of their membership, their technical and advocacy skills, their capacity to mobilize and effectively use media, their legitimacy and representativity and their level of responsiveness and accountability to their own members are all central to the success of SAc activities. In many contexts, efforts to promote an enabling environment for civil society and to build the capacity (both organizational and technical) of CSOs are required.

It is thus important to take stock of all accredited citizens groups in the locality (i.e. accredited with the MDC) and determine under which sector they are identified. An analysis should likewise be done to know the extent to which they engage the local government.

An inventory of non-accredited citizens groups should likewise be done, the sectors under which they are identified, and the reasons for their non-participation/non-accreditation. These non-accredited organizations may be granted the status of observers in MDC meetings.

In general, the nature and extent of influence on LGU decisions should be determined. This will help establish whether these organizations need assistance in building their capability to engage local governments in a rational and systematic manner.

Access to Information

The availability and reliability of public documents and data is essential to building SAc. Such information is the basis for SAc activities, and thus its quality and accessibility is a key determinant of the success of SAc mechanisms. In many cases, initial SAc efforts may need to focus on securing freedom of information legislation, addressing a lack of political will to disclose or strengthen the technical capacity of public institutions to record, manage and make available relevant data.

Accessibility here has two connotations, physical access to documents, and their availability in a format that is understandable to inquirers. Because not all information is in documents, access also means to people (officials) and places.

Citizens and citizens groups have the right to access information in local planning, revenue generation, investment programming, budgeting, and in the prioritizing of PPAs as well as their implementation. An important area is for citizens and the LGU to level off on

the performance standards against which local government officials and offices are measured, i.e. the use of the LGPMS as a performance management tool.

Consideration of the Cultural Context

The parameters for SAc are largely determined by the existing political context and culture. For example, the feasibility and likelihood of success of SAc initiatives are highly dependent upon whether the political regime is democratic, a multi-party system is in place, basic political and civil rights are guaranteed (including access to information and freedoms of expression, association and assembly) and whether there is a culture of political transparency and probity. The existence of these underlying factors, and the potential risks that their absence may pose, must be taken into account when planning SAc initiatives. Legal, institutional and socio-cultural factors will also have an important influence on the success of SAc activities. An unfavorable context does not mean that SAc activities should not be pursued. In such circumstances, however, an analysis of the key factors influencing the environment for SAc (and the risks they entail) must be undertaken and appropriate strategies for addressing potential barriers developed.

(See Annex I: Powerpoint Presentation – Elements of a Tool Based on the Four Pillars)

ACTION PLANNING: DESIGNING AND IMPLEMENTING THE LGU'S SAc STRATEGY

The final workshop aimed to put together the outputs, learning, and insights into an action plan for the participants to follow up on. Specifically, this workshop aimed to (a) create basic competence in building and customizing an SAc strategy by clarifying key steps and processes, (b) build knowledge in attaining better fit between the SAc action and the local context by outlining key parameters and guidelines, and (c) establish understanding on designing an SAc program or integrating SAc practices or systems in existing programs.

The Action Plan Matrix guided the participants to (a) select options in mainstreaming SAc based on the given SAc environment in their LGU, (b) identify key steps in carrying out a SAc initiative, (c) propose guidelines and pointers for planning a SAc intervention, and (d) propose guidelines for developing and adapting SAc tools.

As in the previous exercise, the participants were grouped under the areas of planning, expenditure management, budgeting, and performance management.

(See Annex J: Matrices for Designing and Implementing the LGU's SAc Strategy)

After the group presentations, comments and feedback were solicited. Below is a summary of the salient points during the open forum that followed:

Performance management

One of the major problems, it seemed to the participants, is the “lack of mature perception”, explained as “not knowing yet [the full extent] of their [i.e. both public officials

and citizens] role in local governance”. One participant commented that “attitude is a basic factor”, especially the attitude of “*ningas cogon*”, that results in “difficulty in completing project”.

It is important to establish mechanisms in order to address and/or determine citizens’ feedback on government performance. One way is to get systematic feedback from the members of the MDC. Another is to publish a newsletter that will include contact information (e.g. email address, landline/mobile phone numbers). Still another is to activate the LGU website and design it to be interactive, using the Local Government Performance Management System (LGPMS) as guide. However, the constraint is the intermittent internet connection in the area.

There’s a need to build and develop the capacity of local CSOs, as has been pointed out again and again. CSOs can be the vehicles to organize grassroots communities as well as the channel through which feedback is routed. CSOs can use the LGPMS as their guide in getting feedback from the communities. On the other hand, the LGU should also develop its skills in identifying and determining the needs of its constituents. In both cases, the LGU and CSOs will need to enhance their capacity to network and partner with other entities that can provide assistance in these matters. (An example was to tap the editorial staff of the Philippine Daily Inquirer, many of whom are Baragueños, to help the LGU and CSOs in their proposed newsletter publication, or to provide training to the LGU staff.)

Planning

One way of motivating citizens to participate in local planning is to make prescribed mechanisms work, such as the MDC.

A critical assumption is that people will participate in local governance processes if they believe such participation will address their basic needs. For example, members who attend MDC meetings, especially those who live in far-flung barangays and who have inadequate resources for transportation and food, will need support from the LGU in terms of transportation, at the very least. If support is non-existent – at least during the early stage of development – people would not be able to sustain their participation.

In the same manner, the *ningas cogon* attitude of many barangay people should also be addressed. To do this, the LGU should implement only those projects that address the basic needs of the people.

Atty. Quijano stressed that the principle of inclusion is crucial at the level of the LGUs. He noted that, ideally, consensus must be built deliberately at the local level and to provide space to all persuasions.

Ms. Cuayzon of NEDA-8 shared her observation that politics often affect RDC operations. At this level, she said, screening of CSO/NGO representation becomes politically expedient.

Budgeting

The LGU has a plan to issue an ordinance on people's participation in the budgeting process.

Expenditure management

Current policy has limitations. With or without the participation of CSOs, the bidding process continues. Should the official presence of CSOs be required during the bidding process, i.e. if CSOs are not present, should the bidding be stopped? For instance, Mr. Yaokasin observed that the participation of CSOs/NGOs in the bidding process is laudable, but participation should be complemented by technical competence.

Additional inputs

The MLGOO, together with the MPDC, has come up with an inventory of all CSOs/NGOs/POs in Barugo. Most of these organizations, however, are non-functional at present. There are no point-persons in these organizations who could take charge of their accreditation in the SB. The suggestion was for the SB, which is mandated to conduct accreditation, to go to the POs and validate the data.

Some POs died a natural death for lack of support. To revitalize those that still exist, the LGU should invite them as observers in the MDC. Include support (financial or material) in the invitation package. But inform them also of the requirements.

Summary of reports

The following is a summary of the reports and discussions:

- Information needs: Determine what type of information and how useful, then make sure that information is evidence-based.
- Communication strategies: Need for strategic thinking when communicating with constituents – think of the audience, the message, and the media to relay the message. Frame the message according to the needs of different groups.
- Capacity development: Enhance and increase the knowledge and skills of both LGU and CSOs. Look for alternative capacity development approaches in terms of delivery, like coaching and mentoring (instead of just the formal mass training). Link with other institutions that can provide such services.
- Feedback mechanism: Determine and develop ways to get feedback from citizens and citizen groups.

SYNTHESIS, NEXT STEPS, AND FEEDBACK FROM PARTICIPANTS

Synthesis

Mr. Cabaces presented a synthesis of the workshop by going over the sequence of topics and highlighting the major points in each.

Next Steps

Mr. Briones went over the project timeline and outlined the requirements for the coming Workshop on Local Development Planning. He also reminded the participants about the project proposal as one of the outputs of the PBL Project – the need to start thinking about which service delivery project would be most feasible given the situation in Barugo.

Feedback from participants

As part of the end-of-workshop evaluation process, the participants were asked their feedback and comments on the current workshop and on the project as a whole.

In general, the body expressed gratitude for the opportunity to participate in the series of PBL training workshops. They said that the training workshops have enhanced their knowledge and enabled them to acquire new learning and insights into the local government processes, especially in the complicated matter of the plan-budget link. Most of them also thanked the proponents and organizers of the workshops for choosing Barugo as the partner in this project.

- The representatives from the LGU of Albueria (c/o Mr. Cubi) likewise expressed gratitude for being invited to the series of training workshops. Mr. Cubi commented that he had attended similar trainings in the past, but the current training has a “radical approach” because of the process (“from experiential to analytical”).
- Each one should be given a chance to be the group presenter during plenary presentations.
- Interested in doing the project proposal.
- The representatives of the POs said this is the first time they have attended this kind of workshop. A highlight was that they now realize the importance and value of the need to enhance the working relationship/partnership between the CSOs and the LGU.
- Several participants expressed hope that the learning and insights from the workshops would be applied in their LGU.
- The MLGOO commented that this is the first time she has attended a training workshop with this kind of design (experiential-analytical) and finds it very “workable” in terms of lessons learned. She also praised the participants for their “humility” to discuss their gaps and weaknesses, their openness and willingness to learn.
- The training workshops, according to some, encourage them to think more analytically, boosts their professionalism to a higher level, help them to improve their performance.
- The series of training workshops was a good venue for “bonding” and strengthening the personal and working relationships of the participants. This kind of “integrated relationship” is needed to make the planning and budgeting processes more cohesive.

Closing messages

After the feedback from the participants, the facilitators and resource persons were given time for their closing messages. Below is a summary of their messages:

Mr. Jimjim Yaokasin

From his experience as city administrator of Tacloban, Mr. Yaokasin stressed that SAc strategies actually made it easier for the city administration to implement programs and projects by engaging the citizenry, especially the marginalized. Examples he cited were the relocation of the Muslim community, market improvement, and the conduct of fiestas. All these were done using a process of consultation with those affected by the programs and projects. He noted that there should be transparency in the planning and implementation of projects – everything should be “aboveboard”.

He also provided tips on how to increase revenues, such as engaging business individuals and groups to pay their taxes diligently. Barangay consultations should also be done well (structured, systematic, but personal approach) because these are the venues by which the tension between the LGU and the barangays is eased. Start the participation of the people during the planning process.

To the barangays, CSOs and POs: Always make an attempt to be informed about the actions and processes of the LGU.

Atty. Franklin Quijano

Atty. Quijano admitted that he also learned much from the participants. The PBL Project, if sustained to its logical course, would “define the new beginnings of a new Barugo”. However, there is a need now to “temper the anxiety” arising from expectations. So the question is “How will the LGU temper these expectations?”

There is also a need to define the needs of the people and to capture these in terms of the PBL. Hence it’s very important to define “participatory development planning”. For instance, everybody should be clear about the “bottom-up approach” in planning.

Ms. Olive Fillone

Ms. Fillone commented that she is humbled by the appreciation and gratitude of the participants. She admitted about her many learning from the way the series of training workshops was implemented. She thinks everybody is making progress in terms of raised awareness on governance processes, however small. The efforts have been worth it.

Mayor Alden Avestruz

There’s a need for attitudinal change for everyone in the LGU. Such change should be facts- and evidence-based. This will help Barugo “repair” itself. Examples cited are being lax while in the office, or not knowing what tasks to perform. He likewise admitted that, as a politician, he must consider political realities (such as appointments being based on “political realities”).

ANALYSIS OF THE RESULTS

THE ANALYSIS OF the results, covering the facilitating factors and constraints, includes (a) the general observations and assessment by the ASoG team, and (b) the results of the End-of-Workshop Evaluation accomplished by the participants.

FACILITATING FACTORS

ASoG Observations and Assessment

High participant interest

While the participants found the workshop topics on SAc quite novel in the sense that they were treading on unfamiliar and untested ground, they exhibited a high interest in the subject matter. Most, if not all, of them participated in the discussions. A number of them would go out during small group discussions, but their small talk revolved around the topics being discussed. Most of their questions and comments were insightful, probing into the LGU context and asking how SAc can be applied in their workplaces.

Presence of the LGU leadership

The presence of the mayor, several SB members, and key department heads was evidence not only of interest among the LGU leadership in the PBL Project but also of their felt need to enhance their capacity in running the local government. Their presence also served as an example to the other participants. The consistent involvement of the mayor, for example, during the small group discussions and exercises motivated the participants to do well during these activities.

Introduction of new concepts, methodologies, and tools

For many of the participants, the topic on SAc was something new. Steeped in the traditional way of exercising leadership and politics, the participants found the SAc themes as something of a novelty. In addition, the practical ways by which SAc can be applied in their LGU helped them to question and probe their context and their own way of doing things. It was also obvious that many of them had to grapple with the concepts, but their efforts at understanding SAc showed the need to change their paradigm in a situation where political culture and tradition held sway.

Experience and expertise of facilitators and resource persons

The experience and expertise of the facilitators and the resource persons also facilitated the work of the participants in understanding SAc. For instance, Mr. Parafina, who has been with the G-Watch since its inception more than a decade ago, helped the participants to visualize how SAc can be applied in their situation through the many examples he presented. Mr. Yaokasin's experience as city administrator of Tacloban City

brought home the point that SAc is something that should be practical given the political and social contingencies in a given situation. Atty. Quijano’s experience as former mayor of Iligan City showed the practical and political perspective of SAc as an ideal to be pursued.

Facilitating Factors Based on the Participants’ End-of-Workshop Evaluation

In addition to the qualitative comments of the participants, the End-of-Workshop Evaluation looked at two dimensions of the activity: (a) to what extent did the workshop accomplish its objectives, and (b) how effective were the sessions.

The mean score of each dimension was used as the cut off to distinguish between the facilitating factors and the constraints: those items with a score above the mean are considered facilitating, while those below the average are considered as constraints, to some extent.

The following are the facilitating factors based on the End-of-Workshop Evaluation by the participants.

Accomplishment of objectives

Figure 1 shows the results of the participants’ evaluation in terms of objective attainment:

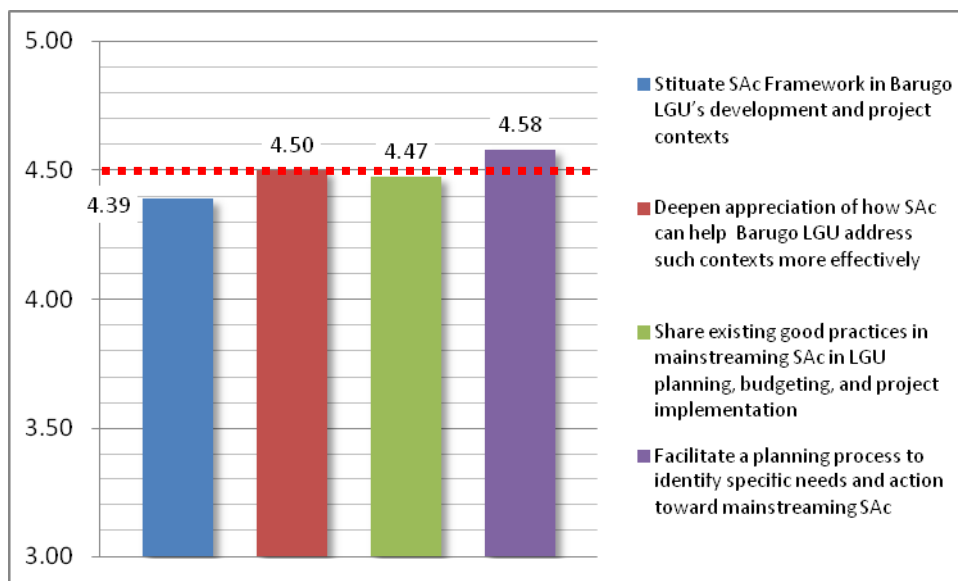


Figure 1. Results of the End-of-Workshop Evaluation in terms of “Accomplishment of Objectives”.

Of the four (4) workshop objectives under the category “Accomplishment of Objectives”, two are considered as facilitating. These are:

- Deepen appreciation of how SAc can help Barugo LGU address development and project contexts more effectively (with an average score of 4.50); and
- Facilitate a planning process to identify specific needs and action toward mainstreaming SAc (with an average score of 4.58).

As it currently stands, social accountability is not consciously used as a frame of reference, much less appreciated as a tool for good governance. Thus, the two objectives seem to resonate with the needs of the participants in terms of citizen participation and engagement with the local government as established in the Rapid Needs Assessment conducted prior to PBL Project implementation. This need was further heightened with the inputs and activities of the workshop that focused on citizen participation and engagement. From a human resource development standpoint, it is now important to fill in the “skills” gap so that the competency requirements for social accountability will be, in a way, become more complete.

Effectiveness of the workshops sessions

Figure 2 shows the results of the participants’ evaluation in terms of the effectiveness of the workshop sessions:

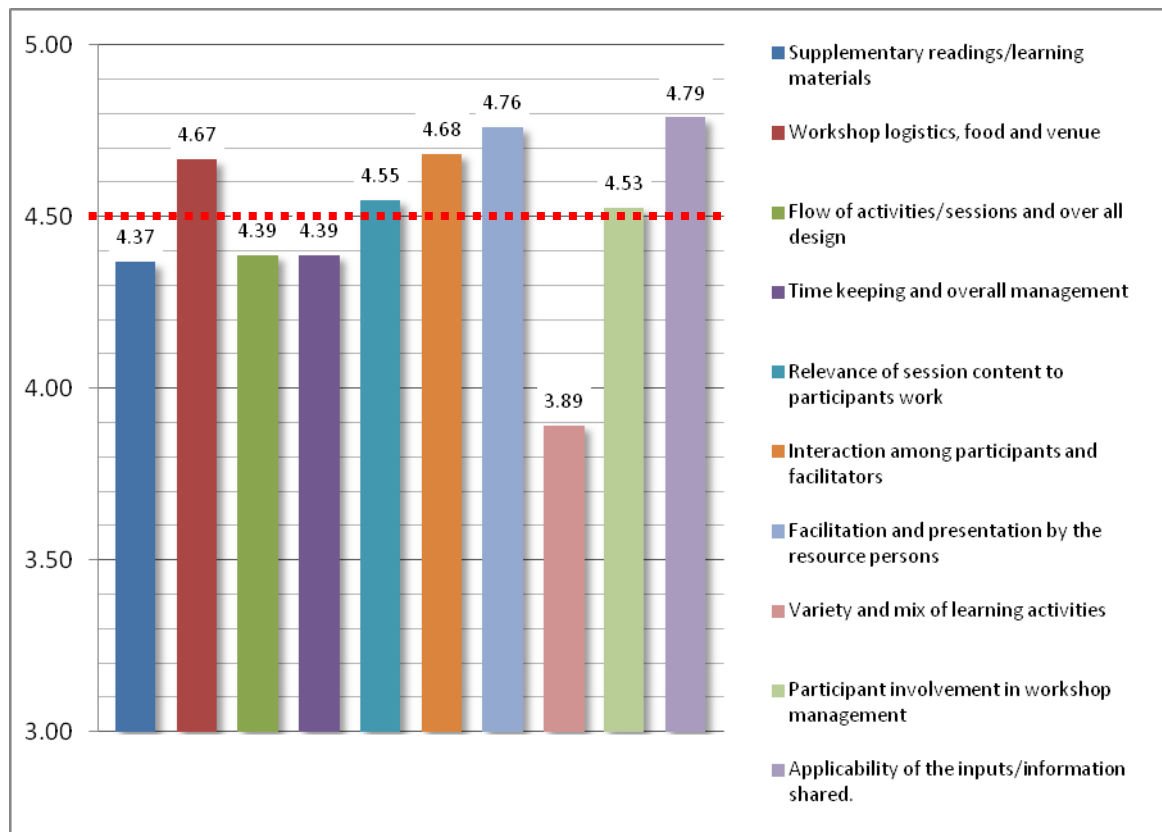


Figure 2. Results of the End-of-Workshop Evaluation in terms of “Effectiveness of the Workshop Sessions”.

Of the ten (10) items that were evaluated in terms of effectiveness of the workshop sessions, six (6) are considered as facilitating. These are:

- (a) Workshop logistics, food and venue (average score: 4.67)
- (b) Relevance of session contents to participants’ work (average score: 4.55)

- (c) Interaction among participants and facilitators (average score: 4.68)
- (d) Facilitation and presentation by the resource persons (average score: 4.76)
- (e) Participant involvement in workshop management (average score: 4.53)
- (f) Applicability of the inputs/information shared (average score: 4.79)

This analysis would like to highlight two (4) items as facilitating factors. The items on “relevance of session contents to participants’ work” (item b) and “applicability of the inputs/information shared” (item f) appear to indicate the participants’ heightened awareness of – if not openness to – the interface between local governance and participation/engagement by organized citizens’ groups. While there is a need for validation, it would seem that the participants are now more cognitively and attitudinally prepared to facilitate social accountability as a mechanism for more responsive governance.

CONSTRAINTS

ASoG Observations and Assessment

Low participation of CSOs/NGOs/POs

The lack of representation among CSOs/NGOs/POs in the series of PBL workshops brought home the point of the need to encourage and motivate citizens and citizen groups in Barugo to be more actively engaged in the affairs of local governance. While there are accredited groups in the MDC, nearly all are inactive, as acknowledged by local public officials. This lack of presence and participation is clearly manifested in the series of PBL workshops and activities.

SAC workshop design too conceptual

In hindsight, it can be said that a weakness of the workshop design was its being too conceptual in approach. This was perhaps the reason why changes in the sequence of activities had to be done during the actual run of the workshop. It was likewise obvious that the facilitators and the resource persons had difficulty in trying to get a handle of the workshop flow, adjusting the process to fit into the so-called “psychological and logical flow”. This was the first time this kind of workshop was being conducted at the LGU level, hence the reason for the difficulty.

NGA presentations not focused on SAC

Prior to the workshop, the NGA representatives were requested to identify prescribed mechanisms for citizen participation based on their manuals and guidelines. The purpose was to prepare them for a presentation of these mechanisms during the workshop. However, their presentations, in general, only skimmed through the topic on citizen participation mechanisms (except NEDA’s, which, understandably, focused on citizen participation mechanisms at the regional level). The inadequate explanation appeared to leave the participants hanging on the actual role of higher level government agencies in promoting citizen participation at the LGU level.

Inadequate leveling off among the resource persons on concepts and definition of terms

While this problem was not explicitly acknowledged, one issue that kept cropping up during the entire workshop was the lack of leveling off among the resource persons on the meaning and implication of some key terms related to the topic. For instance, there appeared to be a divergence of opinions on the meaning of “accountability” and “social accountability”, with one being interchanged with the other. There were also instances when the resource persons from ASoG/ANSA-EAP and the GTZ *appeared* to be contradicting each other, with the former advocating for SAc (as defined by them) and the latter questioning the practicality of some of SAc’s aspects in the real world of local governance. (A caveat to this statement, however, is that the GTZ resource persons generally accept and practice SAc in governance. Their questions were directed at stimulating the participants to be critical of the concepts and ideas being presented).

Duplication of some activities from previous workshops

A number of activities were a review of the previous workshop on budgeting, expenditure management, etc. (e.g. identifying the gaps and issues in the plan-budget process). While a repetition of these exercises emphasized to the participants to be more cognizant of the need to address such issues and gaps, such duplication might lead to reaction formation (e.g. doing the opposite of what is prescribed). While none of the participants were heard to complain about the duplication, some resource persons pointed this out to the facilitators.

Time management

Managing the flow of activities according to the presented timetable posed a challenge to the facilitators. For one, the initial activity of the first day was delayed due to the late arrival of most participants, thus pushing the other activities forward. Another factor was the change in the sequencing of activities at mid-training caused by the contingency of responding to the learning needs of the participants as perceived by the facilitators and the resource persons. A third factor was that some resource persons went overtime in giving their inputs. The workshop, however, ended on time as designed.

Lack of practical, actionable outputs

While “action plans” were formulated at the end of the workshop in the areas of budgeting, expenditure management, planning, and performance management, the plans lacked the rigor needed for them to be implemented in a practical way. The plans were broad strokes of what could be done in the various areas of public finance management without going into the details of strategizing. The question, of course, is how these plans will be put into action, given the limitations of time and resources in the LGU of Barugo.

Constraints Based on the Participants' End-of-Workshop Evaluation

The following are considered as constraints based on the End-of-Workshop Evaluation by the participants.

Accomplishment of objectives

Of the four items on this dimension, two are considered as constraints:

- (a) Situate SAc Framework in Barugo LGU's development and project contexts (average score: 4.39)
- (b) Share existing good practices in mainstreaming SAc in LGU planning, budgeting, and project implementation (average score: 4.47)

While considered "high" in the scale, the average evaluation scores given by the participants to these two objectives fell short of the 4.5 mean. For the first objective, the main constraint was that the inputs and process were highly conceptual (as mentioned elsewhere in this report). This was also true for the second objective which, while presenting "good practices in mainstreaming SAc" in the LGU plan-budget process, was a bit removed from the actual experience of the participants. While the inputs and presentations were appreciated, the participants, it can be assumed, were still struggling with how to fit the new learning given their unique socio-cultural and political contexts.

Effectiveness of the workshop sessions

Four (4) of the ten evaluation items in this dimension likewise fell short of the mean score of 4.50. These are the items on:

- (a) Supplementary readings/learning materials (average score: 4.37)
- (b) Flow of activities/sessions and overall design (average score: 4.39)
- (c) Timekeeping and overall management (average score: 4.39)
- (d) Variety and mix of learning activities (3.89)

It may be noted that these four items reveal fundamental weaknesses in the workshop process and flow as perceived by the participants. For instance, item (d) shows that the participants, as adult learners, need the appropriate learning activities that reflect their personal and professional experiences, including expectations. The resource persons and facilitators seem to have fallen short of this standard. This validates ASoG's observation that the overall workshop design was "too conceptual", thus resulting in a "lack of "practical, actionable outputs".

Based on the analysis of the facilitating factors and the constraints, this report puts forward the following recommendations.

RECOMMENDATIONS

THE FOLLOWING are the recommendations to enhance the facilitating factors and mitigate the constraints.

REINFORCING THE FACILITATING FACTORS

It is important to retain and enhance the experience-based/inductive/adult learning approach to the workshop as this is a major facilitating factor. In the subsequent workshops (as well as in efforts to replicate the project in other localities), the approach should focus on local case studies and familiar experiences of the participants that could serve as anchors for deeper learning. Such an approach would also boost participant interest in the topics.

The presence and active participation of the LGU leadership in the workshops should be encouraged. Further, the modeling aspect should also be pointed out to the participants for all to become appreciative of how exemplars can help move the organization forward in achieving its goal.

If the topic on SAC was novel to the participants, the lesson learned here is the importance of situating such fresh concepts in their real-world context. There may be value in purely ideological discussions, but giving new ideas a practical slant would certainly help the participants become more efficient and effective in their respective areas of influence. Working in a LGU is not just discussing new ideas, it is about practical excellence in looking after the welfare of the people. In this connection, it must be emphasized that there is value in bringing to the workshops the political and practical perspective of the GTZ resource persons. Their inputs and insights, often extracted from their experience and expertise in working with (and in) LGUs, are often eye-openers to most of the participants.

MITIGATING THE CONSTRAINTS

The need for more participation and active engagement of CSOs/NGOs/POs in Barugo has been over-emphasized, it seems, since the start of the PBL project series of workshops. The more practical thing to do is for the LGU of Barugo – in partnership with the few active local citizens groups (e.g. Runggiyan) – to formulate an action plan aimed at encouraging and motivating non-active citizen organizations in the municipality to be accredited as MDC members. This includes following up on the inventory of all CSOs/NGOs/POs in Barugo, assessing their capacities, providing them capacity development assistance (including resources), and accrediting them to the MDC if qualified. In any case, the goal is for the LGU of Barugo to provide an “enabling environment” where citizens groups can be fostered and developed.

On the matter of workshop design, it is important to always consider two things. First is the practical ways by which the workshop activities can be implemented. This means

relating the learning contents to the real-time experiences of the participants so that learning outcomes are always in context. Second is the consideration of the “psychological and logical flow” of the workshop activities so that participants do not end up confused. Responding to participants’ learning needs during the actual run of the workshop is the mark of a good trainer; however, such contingencies should have been anticipated during the workshop design stage. This also goes for the duplication of workshop activities.

This flaw can be attributed to ASoG’s delayed submission of the workshop design to GTZ-DP and its practitioner-consultants for feedback and leveling off. In this particular case, the draft workshop design was submitted a week prior to the workshop dates, thus limiting a more substantive exchange between ASoG and GTZ-DP on how it could be revised and improved. In this regard, the recommendation is for the consultant (e.g. ASoG) to prepare and submit the workshop design in advance, say, one month prior to the workshop conduct to give time for the principal to provide feedback and recommendations.

From the perspective of the project implementer (i.e. ASoG), another matter that should be considered is for the resource persons to work as one cohesive team. Specifically, they should level off on the workshop framework, definition of terms, approaches in the implementation, and anything else related to the workshop. Contrasting views expressed during the workshop might only result in confusing the participants. The goal of the resource persons, therefore, is to speak with “one voice” and to deliver “one message”.

On the other hand, the project design purposely brought in practitioner-consultants to provide real-world scenarios from their direct experience in local governance. To a certain extent, bringing in experts from involved government agencies likewise provided the project with the perspective of the implementing agents. In any case, there was and is no intent to limit anybody’s professional opinion. In this case, when the practitioner-consultants raised the issue of social accountability’s practical application and value, it had the benefit of presenting the participants the full spectrum of the concept’s applicability – from ideal (based on principles) to operational (based on economic and political realities). While there may have been confusion and unanswered questions, these are the consequences of a healthy discussion leading to a desire for deeper analysis of the issues involved. But then again, issues such as “lack of leveling off among resource persons” during the actual workshop could have been mitigated had the project implementer submitted the workshop design on time for feedback and revisions, as mentioned above.

Mitigating the problem of time management during the actual run of any workshop is often a problem among facilitators. Being strict in implementing the designed time blocks is often easier said (or designed) than done. Sometimes there are activities and messages that have to be allotted more time than was designed, as happened in this workshop. Perhaps the key here is to balance between what is contingent to the goals and objectives of the workshop, on the one hand, and the need to manage the time for each activity, on the other hand.

The lack of “actionable” plans in terms of workshop outputs can be mitigated by following up the participants to review the objectives, strategies, and activities so that issues and gaps in the areas of budgeting, expenditure management, etc. can be addressed in practical ways. A more detailed operational plan (timelines, resources needed, responsible persons/groups, risk management, etc.) will also help in pushing for a more “do-able” plan. However, the key here is to be selective of activities that are more strategic, i.e. activities that actually address several issues and gaps at once.

IN GENERAL, it can be said that while the workshop on social accountability had its weakness and limitations, it was able to deliver the message of the need for more citizen participation and engagement in local governance processes. What is more important at this stage in the PBL Project in Barugo is the realization that LGU officials need to provide an “enabling environment” for citizens and citizens groups’ involvement in the serious business of governance. The openness of LGU officials to the demands of SAC – whether potential or active – is the best indicator that the workshop was able to achieve its goals and objectives.

ANNEXES

- A Program of Activities
- B Workshop Outputs on Review of Pilot Project on Harmonization of Local Planning and Budgeting
- C Powerpoint Presentation – The Rationalized Local Planning System
- D Powerpoint Presentation – A Guide to CLUP Preparation
- E Powerpoint Presentation – Mechanisms for Engaging Stakeholders in Regional Planning
- F Powerpoint Presentation – SAc Concepts and Pillars
- G Water System Project Profile
- H Government Watch Project Profile
- I Powerpoint Presentation – Elements of a Tool Based on the Four Pillars
- J Matrices for Designing and Implementing the LGU’s SAc Strategy
- K Integrated Workshop Evaluation

Attachment A PROGRAM OF ACTIVITIES

Time	DAY 1 – 14 April, Tue	DAY 2 – 15 April, Wed	DAY 3 – 16 April, Thu
08:00 – 08:30 AM	PRELIMINARIES: <ul style="list-style-type: none"> • Invocation • Philippine National Anthem • Introduction of Pax and Resource Persons • Expectations Setting • Workshop Overview 	Recapitulation	Recapitulation
08:30 – 10:00 AM	WORKSHOP 1: <ul style="list-style-type: none"> • Review of pilot project on harmonization of local planning and budgeting 	WORKSHOP 3: Reflecting on SA’s value and identifying spheres or areas for SAC action	Continuation of Workshop 4: Designing and implementing an LGU’s SAC strategy
10:00 – 10:15 AM	BREAK		
10:15 – 12:00 NN	INPUT 1: Harmonization of Local Planning and Budgeting Towards Improving Local Governance	INPUT 3: Scanning the LGU’s social accountability environment based on the four pillars	SYNTHESIS: Sustaining SAC commitments for harmonized LGU planning and budgeting processes, and improved local development and governance outcomes LEARNING MANAGEMENT CLOSING
12:00 – 01:00 PM	LUNCH		
01:00 – 02:30 PM	WORKSHOP 2: Reflecting on existing LGU practices and identifying areas for change	INPUT 4: Adapting and implementing social accountability tools and approaches in local water service provision	
02:30 – 03:00 PM	SYNTHESIS: Framework for situating SAC in the harmonization process		
03:00 – 03:15 PM	BREAK		
03:15 – 04:45 PM	INPUT 2: Social accountability concepts and pillars	WORKSHOP 4: Designing and implementing an LGU’s SAC strategy	
04:45 – 05:00 PM	Management of Learning	Management of Learning	

WORKSHOP OUTPUTS ON REVIEW OF PILOT PROJECT ON HARMONIZATION OF LOCAL PLANNING AND BUDGETING

Group No.	Individual Reflection	Steps/Events	Project Impact	Urgent Next Steps
1	<ul style="list-style-type: none"> To have effective plan & budget link at the LGU To enable efficient public expenditure & management Fast track development & economic growth Equitable public service delivery 	<ul style="list-style-type: none"> LGU org assessment Survey on 4 areas of org competency: <ul style="list-style-type: none"> Mgt systems Org culture & values Knowledge & skills Physical systems – database to support local planning MOA signing, project background, goals & framework Proj approach strategies / activities outputs Identification of service delivery area for revisiting of past experiences Orientation on element of good governance & social accountability Project design & schedule of PB link workshops Revenue administration, budget & expenditure mgt, investment programming, JMC-1 	<ul style="list-style-type: none"> Behavioral changes among LGU officials , personnel, 4 functionaries especially using team building approach Active participation of CSOs / improved knowledge on Plan & Budget processes To improve public service delivery thru implementing PB link 	<ul style="list-style-type: none"> To fully implement the learning we got from the PB link project Prepare of project proposal & come up with a project that will be pilot tested whereby our learning from this PB link project will be applied
2	<ul style="list-style-type: none"> Interviews with key personnel Authority from SB to enter into MOA MOA signing Scheduling series of workshops Identification of participants 	<ul style="list-style-type: none"> LCE Meeting conducted LCE / participants Creation of Prepare TO and IOT Attended series of workshop Meeting to accomplished assignments 	<ul style="list-style-type: none"> Sustainability of project in the LGU 	<ul style="list-style-type: none"> Implement/adopt learning
3	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> Selection of beneficiary LGU 	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> Emphasize on best

Workshop on Enhancing Local Planning-Budgeting Link through Social Accountability

Plan-Budget Link Project, SDA Phase 2

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		<ul style="list-style-type: none"> • MOA Signing • Interview of key personnel 		<p>practices of the LGU</p> <ul style="list-style-type: none"> • Identification of areas that need improvements
4	<ul style="list-style-type: none"> • Capacity building • To enable efficient public expenditure & mgt • Better quality of life • This will catalyze change if adhered to 	<ul style="list-style-type: none"> • MOA Signing • Interview of key personnel • Overview of PB link 	<ul style="list-style-type: none"> • Enhanced PPB • Efficient & effective local governance 	<ul style="list-style-type: none"> • Focus on areas which need improvement • Implement the action points indentified



**POWERPOINT PRESENTATION : THE RATIONALIZED LOCAL PLANNING
SYSTEM**

(Please open MS Powerpoint file: *Annex C_ Rationalized Local Planning System*)



POWERPOINT PRESENTATION : A GUIDE TO CLUP PREPARATION

(Please open MS Powerpoint file: *Annex D_ A Guide to CLUP Preparation*)



Annex E

**POWERPOINT PRESENTATION : MECHANISMS FOR ENGAGING
STAKEHOLDERS IN REGIONAL PLANNING**

(Please open MS Powerpoint file: *Annex E_ Mechanisms for Engaging Stakeholders in Regional Planning*)

POWERPOINT PRESENTATION : SAc CONCEPT AND PILLARS

(Please open MS Powerpoint file: *Annex F_ SAc Concepts and Pillars*)



MATRIX FOR BUDGETING AND EXPENDITURE MANAGEMENT

Budget Phase	Description of the Process	Duration		People Involved & Their Role(s)	Policies Adopted	Output	Unintended Consequences (if any)	Gaps & Issues Identified/Encountered
		Start	End					
Budget Preparation	LCE – MPDO discussed the budget and presented the same to the MDC for approval	June 2007		LCE -approval & proposal MPDO -prepare AIP MBO- appropriate funding MDC-approval	LGC ELA CLUP Budget Prep, Manual	Approved AIP 2008	Less participation of CSo's & Po's in planning and budgeting	Does not meet the required no. of CSOs, POs and Coops
Budget Authorization	Present to the SB for adoption			LCE MPDC MPDO-presents the AIP SB - adoption	LGC	Appropriation Ordinance	Delayed adoption of AIP	Approval takes time
Budget Review	AIP submitted to the SP thru the PBO			PBO -review & endorse thru SP MBO -submit Local Finance Province – Review SP -approval	LGC DBM Circular	SP Resolution	None	None
Budget Execution	POW prepared Procurement			MPDO-prepared POW	R.A. 9184	Purchase 57 units jetmatic	-Barangay captain changed jetmatic pump	Jetmatic pumps do not fit the needs by

Workshop on Enhancing Local Planning-Budgeting Link through Social Accountability

Plan-Budget Link Project, SDA Phase 2

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Budget Phase	Description of the Process	Duration		People Involved & Their Role(s)	Policies Adopted	Output	Unintended Consequences (if any)	Gaps & Issues Identified/Encountered
		Start	End					
	process Release & Actual Disbursement			BAC-bidding process LCE-Payment & approval MEO-signed POW	NGA's	pump w/ accessories	project -no brgy. Counterpart (labor)	some brgys.
Budget Accountability	Distribution of Jetmatic pump			Supply Officer Brgy. Chairman	MRG	57 units received by barangays 3 units jetmatic pump installed		No labor cost for installation



Ateneo School of Government Government Watch

PROJECT PROFILE

1. Situation Analysis

CORRUPTION IN THE GOVERNMENT remains to be the leading cause of economic retardation and the most dangerous threat to democratic institutions in Third World countries, such as the Philippines. The World Bank (1997) defines it as “abuse of public power for private gain” while social scientist Robert Klitgaard (1988) equates it to monopoly plus discretion less accountability ($C=M+D-A$). In both definitions, corruption ensues from the vulnerability and weakness of bureaucratic systems and structures.

However one defines it, the society’s poor sector always suffers most heavily from the harmful effects of corruption. Because of corruption, the poor citizens become victims rather than beneficiaries of government’s policies and programs.

Several studies and surveys, whether local or foreign, have repeatedly attested to the extent of corruption in the Philippines. Over the last 20 years, the Philippine government estimated that it has lost \$48 billion to corruption. This amount could have covered the country’s \$40.6 billion external debt incurred in the same period.

In the Transparency International’s surveys, the Philippines consistently ranked below the borderline mark of 5.0. This indicates high incidence of corruption as perceived by business company executives, academics, and risk analysts.

A local survey of the Philippine Social Weather Station in 2001 also named corruption as one of the most common causes of the Filipino public’s dissatisfaction over the last 15 years. In the same survey, 50% of Filipinos believed there is massive corruption in the government, 90% could refer to a corrupt agency outright, and 78% could name a government agency that became more corrupt today than a few years ago.

The EDSA Revolutions in 1986 and 2001, where the people protested against government abuses and ineptitude, have proven the Filipinos’ intolerance of corruption. Such revolutionary actions, however, did not suffice to eradicate corrupt practices in the government. Each administration had its own share of large-scale anomalies. Until today, government transactions, whether procurement, licensing or tax collection, are still characterized by inefficient service, low quality of work, bribery, fraud, collusion and mismanaged resources that lead to the continued erosion of public trust of government and to greater poverty.

The project advances a preventive approach to curb corruption. *It takes prevention in the context of simple but well-planned participatory systems monitoring and reform.* The simplicity of monitoring

system is premised on an ordinary people's concern: Is the government able to deliver what it promised to deliver? This system, therefore, basically revolves around the comparison of inputs and outputs; plan and execution; expectation and actual results. Taking off from such simplicity, the system needs to be rationalized and strengthened so that they can guide and constrain the administrators to appropriate actions and decisions. It likewise allows for greater access and participation by responsible citizens. The citizens' participation in the running of the institutions is useful in making the implementation of rules and procedures transparent. When things are transparent, it is easier to see who is accountable and it is easier to identify corrective measures.

Constant systems monitoring, moreover, sustains the institutions. Effective systems for monitoring and managing performance will significantly discourage graft, corruption and inefficiency in government. Objective performance assessments available to the public will also contribute to the transformation of Philippine politics and governance--from one heavily influenced by popularity, emotions, partisanship and patronage, to one based on performance, rationality, transparency and professionalism.

2. Proponent

The Ateneo School of Government (ASG) Implements the Government Watch (G-Watch) Project

ASG IS A PROFESSIONAL school for public service based in the Ateneo de Manila University, a premiere private educational institution in the Philippines. ASG was established in 1996 to serve as an institutional vehicle for the development of public servants and to provide a forum for dialogue and partnership among government, private sector, non-government sector and people's organizations.

The ASG also has research, training and advocacy programs that produce case studies of best practices in the area of governance and public management. It convenes seminars, fora, and other venues for dialogue and consensus building to bridge the gap between the world of theories and the world of policy decision and action.

ASG, in partnership with the Ateneo Center for Social Policy and Public Affairs (ACSPPA) conceived of the G-Watch project in 2000 to promote good and effective governance. This effort was in reaction to the plethora of reports on government corruption and incompetence, particularly in the Estrada administration. It is conceived along the principle of *prevention* of the occurrence of corruption and inefficiency through the reform of systems and the institutionalization and strengthening of these reforms.

G-Watch has received funding support from the United Nations Development Programme, The World Bank, Partnership for Transparency Fund, ROLE- USAID, and The Asia Foundation.

3. Vision, Mission, Objectives and Methodology

G-Watch, as a research and monitoring program, envisions competent and credible government institutions and meaningful civil society participation in governance

Thus, the fundamental mission of G-Watch is to provide a venue where both the government and the civil society can be engaged in the formulation of systems and procedures to improve governance.

Such mission is detailed in the following objectives:

- To develop expenditure tracking tool, wherein there is a system of ensuring appropriate and rational spending of resources.
- To complement internal agency monitoring to facilitate development of a performance-based monitoring system in government.
- To develop problem identification tool that will assist government to improve its performance.
- To serve as a credible “performance signpost” to both the government and the public.
- To promote citizens’ participation in governance.
- To attain these objectives, G-Watch employs the following methodology:
- It enters into a Memorandum of Agreement (MOA) to ensure agency cooperation.
- It uses simple tools to monitor the performance of key projects implemented by selected government agencies.
- It accesses and uses actual government documents as reference of monitoring data to be processed and analyzed.
- It communicates the findings to the concerned government agencies and important stakeholders for critique and validation.
- It uses findings to facilitate problem-solving sessions among agencies and stakeholders concerned to improve project performance.
- It transfers its tools and techniques to local citizens groups through seminars, training-workshops and manuals.

4. Accomplishments

G-Watch has specialized in expenditure tracking and in the monitoring of government agencies’ program implementation. It has developed and tested monitoring tools in various programs, such as textbook delivery, school building construction projects, public works, disaster relief distribution, and Customs’ seized goods.

Notably, G-Watch was able to have positive influences on agency policies and programs through its monitoring initiatives. For instance, it has alarmed DPWH of specific project implementation delays and costs increases incurred in road and bridge projects. It likewise convinced the agency to open itself to civil society and community involvement in the implementation of its school building projects through the *Bayanihang Eskwela*.

In the DOH, the G-Watch report has prompted the review of drug procurement in both the regional and hospital offices, which led to the issuance of a memorandum aimed at improving the agency’s drug procurement procedures.

Finally, DepED responded encouragingly to the G-Watch monitoring of textbooks delivery by launching the *Textbook Count*. For this program, G-Watch formed a consortium of CSOs to help in the monitoring and inspection of textbooks to be delivered to high schools and districts nationwide. The program resulted in cheaper prices of textbooks, faster procurement process and lower delivery errors.

5. Recognitions

The G-Watch monitoring initiatives had been presented to various forums and conferences, both local and abroad. These include:

- ADB/OECD Regional Meeting on Good Practices on Corruption Prevention Practices, Macau, 24-25 March 2009.
- Pan-African Stakeholders Conference on Social Accountability. Addis Ababa, Ethiopia. 19-20 May 2008.
- Publishing for Impact Forum, Washington DC, USA, 4-6 June 2007.
- 7th Civicus World Assembly, Glasgow, Scotland, 23-27 May 2007.
- 12th International Anti-Corruption Conference, Guatemala City, Guatemala, 15-18 November 2006.
- National Anti-Corruption Conference. Sponsored by the UNDP. Shangrila Hotel, Makati. 26 October 2004
- Association of Schools of Public Administration of the Philippines (ASPAP) National Conference. NCPAG Auditorium, University of the Philippines - Diliman, Quezon City. 18-19 September 2004.
- Coalition Against Corruption Conference. Shangrila Hotel, Makati. 21 September 2004.
- Various seminars and briefing-orientations for civil society and community groups had also been conducted for G-Watch projects and initiatives, namely Textbook Count, Textbook Walk, Bayanihang Eskwela.
- G-Watch has received commendations from the Department of Education and Ombudsman Simeon V. Marcelo. It was in the Top 10 of the Changemakers' international competition for civil society innovations in governance.

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**POWERPOINT PRESENTATION : ELEMENTS OF A TOOL BASED ON THE
FOUR PILLAR**

(Please open MS Powerpoint file: *Annex I_ Elements of a Tool Based on the 4 Pillars*)



MATRICES FOR DESIGNING AND IMPLEMENTING THE LGU'S SAC STRATEGY

Areas for social accountability	Objectives of proposed SAC action/mechanism	Space for engagement	Information needs of citizen groups	Possible partners (sector, CSOs, private groups)	Cultural or local factors that facilitate or hinder	Possible benefits from the proposed action	Possible risks from the proposed action	LGU actors, and their key roles	Time frame for implementing the proposed action
BUDGETING									
More number of attendance of CSOs, POs, NGOs during Budget hearing	To be able to invite more CSOs, Pos, NGO in order to have a transparent budget hearing	Executive Order (proposed) MOA (Proposed) MDC	Orientation of CSOs, Pos, NGOs their role in budgeting	BFCC ASCMC Margina-lized sectors	Reluctance of CSOs, POs and NGOs to participate	Inclusion of the Programs of CSOs, POs and NGOs in budgeting	Delayed submission of budget.	Mayor – Issues Executive Order to all CSOs, POs and NGOs SB – pass authority to enter into agreement BO –facilitate the activities	May – Issuance of EO, Consultations/ Orientation with CSOs, POs and NGOs June – Signing of MOA July – August – Budgeting Process
EXPENDITURE MANAGEMENT									

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Participation of PO's, CSO's and private groups or NGO's during the opening of bids	To be transparent during the opening of bids	RA 9184 JMC No. 1 series of 2007	Presentation on the rationale of citizens engagement in the bidding process	Member of PICE Private sector PICPA PO's * less no. of accredited PO's and CSO's	Lack of interest due to their own personal schedule No personal being derived Notion that their is already a predetermined winner in the bid * the law itself does not impose the strict attendance/participation	Enhanced transparency	Citizen involvement may be superficial	BAC validates/examines technical and financial document of bidders Read the bid	July 2009
PLANNING									
Inputs form BDC's during LIGA meeting Inputs from PO's,	Data gathered from the CBMS Needs-based data as output from fo-	Functional MDC Periodic	Resolution from the LIGA with the list of prioritize PPAs of various ba-	Farmers Fisherfolks	Ningas-cogon attitude Full participation if their	Semblance of ownership to proposed activity/plan	Self serving interests (political ambition, political	DILG assists in making BDP MPDO – lead implementing	January to June - draft guidelines, rules; pass



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					the respective sector -organize ad hoc committee for recognition, merit and award system wherein such group are represented				
PERFORMANCE MANAGEMENT									
Conduct annual participatory assessment for each of the five (5) Performance Areas in the LGPMS.	To generate citizens feedback on the performance of the LGU.	MDC	Orientation LGPMS and SLGR. Simplified rather than technocratic data analysis (waray-waray translation of data).	MDC members	Facilitating – Cooperative Hindering- Lack of mature perceptions of CSOs role on good governance and SAC.	Enhanced interactions between LGU and citizens.	Not Substantive participation of the citizens group. Unfamiliarity about the LGPMS/SLGR	LCE – Issue communication to conduct Annual Participatory Assessment of LGPMS/SLGR. LGPMS TEAM Present the LGPMS/SLGR to the MDC.	January – February - Gather and consolidate data for feeding up into the LGPMS from the data capture forms. 1 st to 2 nd week of March –

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								MDC- Facilitate the Participatory Assessment.	Validation of Data. 3 rd week – submission of SLGR to SB, SP and copy furnish DILG.
Publication of LGPMS/SLGR results into the LGU Newsletter and LGU Website.	To generate citizens feedback on the performance of the LGU especially for the constituents and citizens group outside the locality.	Local Circulation/ Bulletin Boards/ Subscriptions/ LGU Website.	LGU Newsletter in English and Waray-Waray versions. Graphical and Visual presentation of LGPMS results in the LGU website with interactive features that will generate feedback through email and on-	Community Center CORE Group. CSOs/POs/NGOs/Coops	Facilitating – Cooperative Hindering- “Ningas Cogon” attitude of LGU technical personnel.	Enhanced interactions between LGU and citizens.	Editorial staff not trained for newsletter packaging and content preparations Irregular updating of LGPMS website contents	LCE – Issue EO for the creation of LGU Editorial staff and LGU Website Team developer and content management. LGU Editorial Staff– Prepare newsletter contents. CSOs- Give	January – February - Gather and consolidate data for feeding up into the LGU Newsletter/ Website. 1 st to 2 nd week of March – Validation of Data. 3 rd week March–



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			line forum.					feedback, suggestions about the contents of the LGU Newsletter and website.	Preparation and printing of LGU Newsletter. Uploading of data into the LGU Website



INTEGRATED WORKSHOP EVALUATION⁸

How well did we accomplish the workshop objectives?					
1 as poor; 5 as very well					
Criteria	1	2	3	4	5
Stituate SAc Framework in Barugo LGU's development and project contexts			2	7	9
Deepen appreciation of how social accountability can help the Barugo LGU address such contexts more effectively			1	7	10
Share existing good practices in mainstreaming social accountability in LGU planning, budgeting, and project implementation			1	8	10
Facilitate a planning process to identify specific needs and action toward mainstreaming social accountability				8	11
Comments:					
1. very good inputs given by the resource speakers and guests					
2. very much challenging because it's more of workshops					
3. we are able to integrate SAc aspects in the different plan budget link project process					
4. should be implemented again as possible					
5. apply what we learned for our LGU; adhere to best practices like the GWatch					

How Effective were the day's sessions?					
1 as very poor; 5 as very well					
Criteria	1	2	3	4	5
Supplementary readings/learning materials			2	8	9
Workshop logistics, food and venue			1	5	15
Flow of activities/sessions and overall design				11	7
Time keeping and overall management			2	9	8
Relevance of session content to participants work			1	7	12
Interaction among participants and facilitators				5	13
Facilitation and presentation by the resource persons				5	16
Variety and mix of learning activities		1	11	6	10

⁸ The Integrated Workshop Evaluation was conducted by the team from ANSA-EAP.

How Effective were the day's sessions?					
Participant involvement in workshop management				9	10
Applicability of the inputs/information shared.				4	15
Comments <ul style="list-style-type: none"> ▪ Thank you very much ▪ other participants cannot participate well in the workshops because they have no knowledge on the process and some technologies were new to them ▪ good food, excellent venue ▪ very accommodating staff and consultants ▪ work on variety of food served, esp. breakfast 					

What were your most significant lessons/insights for the day?

- My social accountability to clients is very crucial part of a public servant
- I learned more about good governance ; harmonization in LGU
- The workshops are very difficult
- SOAR
- Four pillars of social accountability

What plans in the workshop are you most interested to take forward?

- Applying the knowledge imparted by the resource persons in this workshop
- The integration of CSO and PO in every step of the plan-budget link process
- Empowerment of CSOs and POs
- The local planning strategies
- Project proposal making workshops
-

Overall assessment of the day's session:

	1	2	3	4	5
	0	0	0	6	13

Comments:

- Very inspiring workshop
- Topics discussed will impact the LGU
- Very well planned and implemented workshops

Further suggestions:

- More active participation of participants during workshops
- Change of venue, outside Region 8
- Learnings need to be shared
- Make the workshops simpler; simplify methods
- Varied mix of learning activities please

Looking back, Moving Forward: Impressions on the Workshop

- Rigid training, even snack we are still training. It's my first time to have experience a workshop, thank you.
- Sana lahat ng mga tao magpepresent din, hindi lang iilang tao.
- This is what I wanted to know for my people.
- Enhanced my knowledge, I got many insights. We are thankful that our LGU was chosen
- Albuerra: it's very interesting, we had similar trainings, but the approach here is very radical and analytical. This can be applied in our respected areas. The approach is really remarkable.
- It is also my first. It's is a refresher for me. As a CSO rep, I was got many input in engagement with government
- I have attended more than 50 trainings having long been in government. I learned that another way of training people is getting the experience of the people, workshop first before lecture.
- I learned a lot.
- Aside from our work in my office, there are things that I need to learn outside from my job. Now I'm more aware of what's happening in our LGU
- I actually volunteered because of the units for masteral. Many good things have been said already, I just hope that we can apply it in our locality.
- Actual practitioners are present. I was able to study in ateneo where units are very expensive. I also got international exposure from GTZ. We are challenge to deliver.
- Humility of people to discuss their rights and wrongs. Openness and willingness to learn. There are things that were discussed that I as DILG have been advocating, citizen's charter, performance billboard
- I'm thankful to GTZ, Ateneo for the learnings they imparted. We hope we can get diploma from ateneo. Mabibiyak yung ulo ko sa kaiisip sa mga workshops, it developed my thinking a lot. We are thankful for the rare opportunity and for the good accommodation. To my co-participants, let's be more active in giving inputs in the workshops.
- I learned more insight as a public servant from the four pillars of social accountability
- From public health, this training is really new to me. I learned new terminologies in purchase requests. What happens in the LGU is clearer to me. I'm looking forward to participate in more workshops, especially in Cebu. Thank you for being generous.
- Let's make sure that we can apply what we learn in Barugo.
- I thank Ateneo, it was like I studied masteral, I got headaches. The speakers are well versed. The trainings are very difficult, but are very helpful to our work in the LGU
- This is the best accomplishment that I have, having met Ateneans. It was my dream to study in Ateneo. We are not so reliant with the mayor, we can pilot also pilot the ship.
- I've been to many training, but this is really different.
- Albuerra: we are thankful for having been invited. The approach is effective as been mentioned many times. We hope to apply the same approach in our regular local workshops.
- I learned a lot because it's my first workshop that I'm really "pukaw na pukaw" because I have to be always ready in case that I will be called to present.
- I have served five mayors in my town. I'm the senior most. I hope that my town will make some progress, at least in my life time. I'm thankful to the germans. This is really something aside from my 40 years in public service. Thank you for giving my town opportunity for progress.
- Many pilot projects are pouring in Barugo and we hope that we deserve them. My knowledge has really been enhanced; my learnings from other workshops have really been sharpened. Social accountability is a unique learning I got from these workshops. The methodology helped us internalize our learnings because it is based on our experiences. The resource persons are eloquent. The whole training is really superb!
- I'm learning. I always look forward to the workshops because I get to work with the very enthusiastic people from Barugo. It is in Barugo that I realize that the soil is very fertile; we get all the technical support.



-
- Jimjim: I'm not playing the devil's advocate anymore. SA is really a must, in relocating an entire muslim community, we engaged them about 18 times. We did the same in engaging the market vendors when we had to renovate the market. In our fiestas, we also tap the CSOs to organize the month long fiesta. Getting the citizen groups involve is really a must. We come up with a big bulletin board of our accomplishment. We were able to pass tax increase 5 months prior to elections because we consulted the Chambers, the market vendors. We were able to enhance revenues with their own suggestions. We were able to increase our revenue from 80 to 240 M in 3 years by engaging more people.
 - Iligan Mayor: I'm disturbed because I'm to sit through to the end. We are actually defining of a new Barugo. I see anxiety and joy. We are raising so much expectation because of this project. How do we temper the expectations. We need to know the need of the people but it should not end there. It's bland. We need salt. But how do we capture the aspiration of the people? Governance is not only the function of the Mayor and the SB. The people need to own the process of governance.
 - Olive: ACHtung: I'm convinced that the money of the german tax payers are really not going to waste. We see that it is making difference here. It's a milestone because now something new is really being appreciated. We are happy that even in one municipality we are making a progress. There are moments like this that I have to think where my work is going to, what for, now I can say that it is really something worthwhile.