

PLAN-BUDGET LINK Project

TERMINAL REPORT

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

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THE FOLLOWING is a **Terminal Report** for the **Plan-Budget Link Project: Service Delivery Assessment, Phase 2** of the GTZ-Decentralization Program. It covers activities conducted within the project period, January – May 2009.

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*.

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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ABBREVIATIONS & ACRONYMS

ABC	Association of Barangay Captains
AIP	Annual Investment Program
ANSA-EAP	Affiliated Network for Social Accountability-East Asia Pacific
APP	Annual Procurement Plan
ASoG	Ateneo School of Government
BAC	Bids and Awards Committee
BLGF	Bureau of Local Government Finance
BPLS	Business Permit Licensing System
CBMS	Community -Based Monitoring System
CDP	Comprehensive Development Plan
CLUP	Comprehensive Land Use Plan
CSO	Civil society organization
DBM	Department of Budget and Management
DILG	Department of the Interior and Local Government
DOF	Department of Finance
DP	Decentralization Program
ELA	Executive-Legislative Agenda
GAM	Goal Achievement Matrix
GTZ	German Technical Cooperation
HLURB	Housing and Land Use Regulatory Board
JMC	Joint Memorandum Circular
LDIP	Local Development Investment Plan/Program
LFC	Local Finance Committee
LGC	Local Government Code
LGPMS	Local Government Performance Management System
LGU	Local Government Unit
M&E	Monitoring and Evaluation
MBO	Municipal Budget Office
MDC	Municipal Development Council
MOA	Memorandum of Agreement
MPDC	Municipal Planning and Development Coordinator
MPDO	Municipal Planning and Development Office
MTO	Municipal Treasurer's Office
NEDA	National Economic Development Agency
NGA	National government agency



NGO	Non-government organization
PBL	Plan-Budget Link
PDPFP	Provincial Development and Physical Framework Plan
PEEDC	People's Economic and Enterprise Development Center
PO	People's organization
PPA	Program, project, activity
PPDO	Provincial Planning and Development Office
ReLI	Revisit, Learn, Improve
RNA	Rapid Needs Appraisal
RPS	Rationalized Planning System
SAc	Social Accountability
SB	Sangguniang Bayan
SDA	Service Delivery Assessment
SGD	Small group discussion
SP	Sangguniang Panlalawigan
TWG	Technical Working Group



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I. INTRODUCTION

1.1. Project Background

The Plan-Budget Link (PBL) Project was conceived as Phase 2 of Service Delivery Assessment (SDA) of the German Technical Cooperation-Decentralization Program (GTZ-DP). It was developed to address serious gaps in service delivery collaboration among government offices at the local and regional levels, as identified in Phase 1 of the SDA.¹Said gaps ranged from functional assignment to performance assessment, and spanned the entire breadth of the planning cycle.

GTZ-DP contracted the Ateneo School of Government (ASoG) to implement the PBL 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 in the contract the inclusion of social accountability themes promoted by the Affiliated Network for Social Accountability-East Asia Pacific (ANSA-EAP).²

A. Project Objectives and Thematic Coverage

The project aims 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.

Specifically, the project aims to achieve the following objectives:

1. Pilot-test the Joint Memorandum Circular (JMC) No. 1, Series of 2007 *Guidelines on the Harmonization of Local Planning, Investment Programming, Revenue Administration, Budgeting and Expenditure Management*;

¹ Phase 1 of the SDA was implemented in 2007 covering two LGUs in Southern Leyte.

² 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)



2. Facilitate collaborative processes in planning, programming and budgeting;
3. Tap existing development planning mechanisms and structures enshrined in the Local Government Code (LGC) in facilitating vertical plan linkage between the municipal and provincial plans;
4. Mobilize multi-stakeholders in government and non-government institutions as integral partners in the design and implementation of project interventions;
5. Develop LGC-mandated planning instruments that effectively link plans, programs and budgets in the delivery of an LGU-selected social service; and
6. Optimize the use of self-assessment tools.

B. Pilot Area and Timeframe

The project was carried out over a period of five months, from January to May 2009. However, prior to this, a series of pre-selection and screening field research activities were undertaken between October 2008 and February 2009 by GTZ-DP and ASoG to select the pilot municipality for the project.

Six municipalities in the Province of Leyte were shortlisted by GTZ-DP as potential pilot areas, namely, Albuera, Barugo, Carigara, Hilongos, Isabel, and Palo. The Municipality of Barugo was eventually selected upon assessment of its Municipal Development Council (MDC), Municipal Planning and Development Office (MPDO), and local planning and budgeting practices. This was determined through an initial Rapid Needs Appraisal (RNA) conducted on 25-28 November 2008, which consisted of key informant interviews, focus group discussion and review of secondary data. As final criteria for selection, ASOG and GTZ-DP considered Barugo's willingness to participate in the project, as well as its political will to implement reforms in the context of the PBL.

Box 1. PROFILE OF THE PILOT AREA

Municipality of Barugo, Province of Leyte

Mayor: Atty. *Alden Avestruz*
 Vice-Mayor: *Juliana Villasin*
 Political Environment: *Traditional, headed by a first-termer mayor who enjoys the majority support of the Sangguniang Bayan (SB) members and LGU staff.*

Land Area: *89.52 sq. kms.*
 No. of Barangays: *37*
 Population: *26,919**
 No. of Households: *5,108**

Income Class: *4th Class (as of 2007)*
 Main Economic Activities: *Agriculture (rice, corn, copra), small-scale fishing and aquaculture, cottage industry (tuba, roscas)*

**Based on 2000 Census*

Source:

http://en.wikipedia.org/wiki/Barugo_Leyte

Based on the second round of RNA conducted on 16-17 February 2009, the Municipality of Barugo appeared to be primed for the project.³ It was confirmed to have the basic organizational competencies and practices, not to mention challenges, to

³ The RNA focused on Barugo's organizational competencies, social accountability practices, and state of citizen participation in local governance processes. For detailed results of the activity, refer to *Barugo Rapid Needs Appraisal*, March 2009, unpublished activity documentation report submitted to GTZ-DP for the Plan-Budget Link Project (Service Delivery Assessment, Phase 2), Quezon City: Ateneo School of Government.

meaningfully take part in the project. Table 1 shows the specific strengths and weaknesses of the local government in relation to the planning-budget process.

Table 1. Strengths and Weaknesses of the Municipal Government of Barugo

Strengths (+)	Weaknesses (-)
<ul style="list-style-type: none"> • With functional MDC • Presence of an NGO advocating for MDC participation and LGU capacity development (Runggiyan Social Development Foundation) • LGU plans to conduct advocacy activities for civic participation in MDC • Expressed openness for coaching and to be the project pilot • Used to counterparting; qualified for World Bank pilot project on road development • Mayor close to Provincial Governor • Mayor 1st term 	<ul style="list-style-type: none"> • Weak participation of CSOs in MDC • MDC processes not clear • MPDO is overloaded, multi-tasking • Non-functional Monitoring and Evaluation (M&E) team

C. Methodological Framework

The project design 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 approach uses the “inductive approach to learning” (also known as the “andragogical approach”). In this approach, learning is, to a large extent, based on and culled from the experience of the participants, which is then supplemented with theoretical and practical inputs from resource persons and references. The rationale for this specific approach is anchored on the principle that adults learn best because they are able to “own the process”, thus facilitating a more sustainable application to real life situations. The resource persons are mainly facilitators of learning.

The ReLI Framework

To facilitate this process, two basic methodologies guided the design of the learning activities and workshops, namely, the ReLI Framework and the “E-E-S-S” Way. “ReLI” stands for “**R**evisit the process”, “**L**earn from the process”, and “**I**mprove on the process (e.g. in other service delivery areas)”. This framework allows the participants to reflect on their plan-budget experience specific to the selected project, highlight what they learned from that experience, and then apply those learning to other service delivery areas. Figure 1 illustrates the ReLI framework.

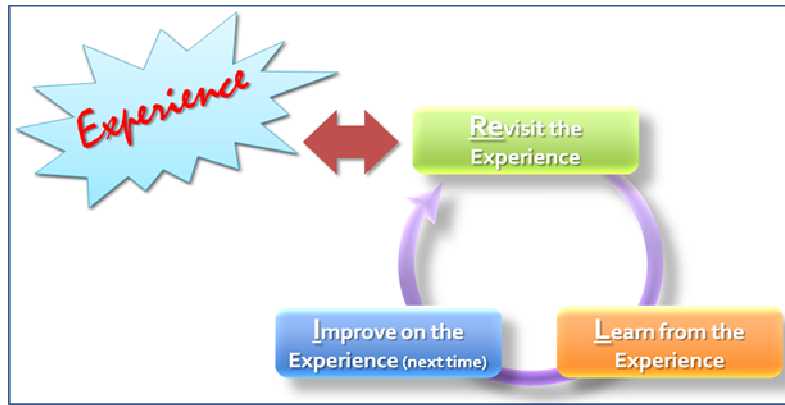


Figure 1. The ReLI Framework

The E-E-S-S Way

On the other hand, “E-E-S-S” stands for “experience-experts/resource persons/prescriptions-strategy-sustainability”. “Experience” allow the participants to communicate the manner by which they conducted and implemented the plan-budget processes of the selected project. “Experts/Resource Persons/Prescriptions” brings in the “right way” of conducting and implementing the project. By comparing “experience” with “experts/prescriptions”, gaps and issues are determined and highlighted.⁴ “Strategy” allows all – participants and experts alike – to look for solutions, and to share and focus on the best ways of addressing the gaps and issues that arise from the previous two exercises. Finally, “sustainability” allows all to think on how to apply, institutionalize and sustain the strategies. Figure 2 below illustrates this approach.

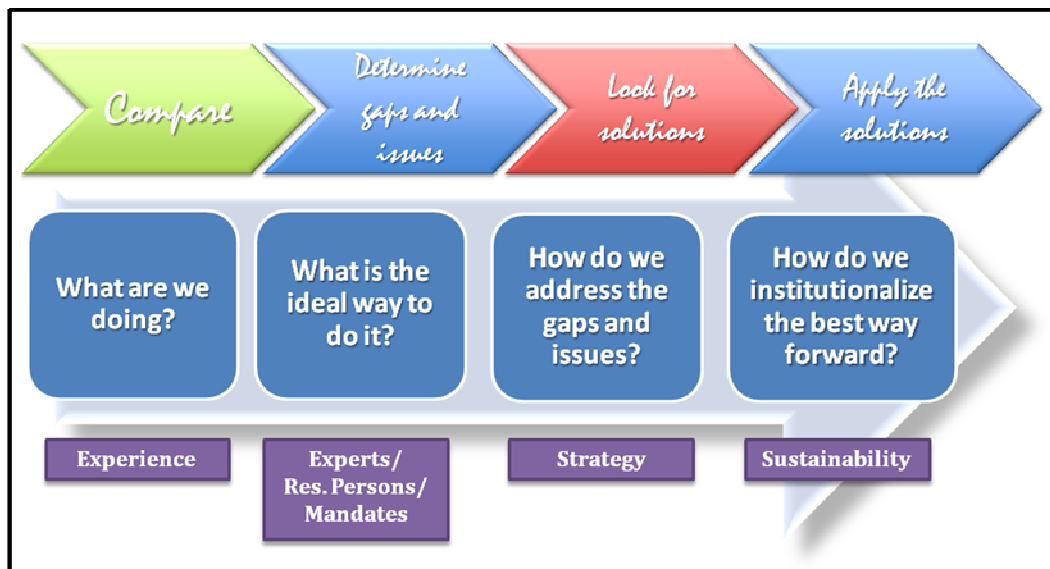


Figure 2. The "E-E-S-S" Way

⁴ In addition to gaps and issues, salient features may also arise from the comparison, such as culturally sensitive practices or indigenous approaches that may be more efficient and effective compared to government prescriptions.

In view of the foregoing, three basic methodologies were applied in the workshop: small group activities and 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, 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 for the presentation of SGD outputs to all participants. After each group presentation, the facilitators and participants would be given the chance to pose comments, clarification or questions. 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 resource persons and facilitators of the workshop were from the regional line agencies whose inputs focused on the prescribed mandates from manuals and guidelines of their respective departments. On the other hand, ASOG and GTZ-DP consultants provided the LGU practitioner perspective.

(Refer to *Annex A: List of PBL Project Resource Persons.*)

1.2. Organization of the Terminal Report

This Terminal Report is divided into five major parts. Part I provides a general background of the project, its objectives, scope, pilot site and timeline, and methodological framework. Part II highlights major project results summarizing workshops conducted, coverage, outputs, use of outputs, and outcomes. Part III discusses the analysis of both facilitating factors and constraints that affected the project's design and content. Parts IV and V present the project Conclusions and Recommendations, respectively.

II. MAJOR PROJECT RESULTS

2.1. Activities Conducted

A number of inter-related learning activities and workshops were successively carried out from January to July 2009. The project kicked off with a preparatory Operations Planning Workshop on 29 January 2009 to coincide with the formal signing of a Memorandum of Agreement (MOA) between the Municipality of Barugo and GTZ. This was followed by a series of workshops covering the different phases of the planning-budget process, which culminated with a Workshop on Project Proposal Making on 27-29 May 2009.

Aside from these workshops, a rapid needs appraisal of Barugo’s existing organizational competencies and social accountability practices was also undertaken as a requirement for the rollout and implementation of the project. Finally, a Project Assessment Activity was conducted on 20-22 July 2009 to signal the closure of the project.

Table 2 provides a timeline of the activities undertaken in relation to the PBL project.

Table 2. Project Activities Conducted, January-July 2009

Duration	Title of Activity	Venue
29 January 2009	MOA Signing and Operations Planning Workshop	Tacloban City
16-17 February 2009	Rapid Needs Appraisal of Barugo’s Organizational Competencies and Social Accountability Practices	Barugo, Leyte
05-06 March 2009	Project Design Workshop	Ormoc City
17-20 March 2009	Workshop on Budgeting, Expenditure Management, Investment Programming, and Revenue Generation	Ormoc City
14-16 April 2009	Workshop on Enhancing Local Planning-Budgeting Link through Social Accountability	Ormoc City
28-30 April 2009	Workshop on Local Development Planning	Cebu City
04-06 May 2009	Plan-Budget Link Integration Workshop	Ormoc City
27-29 May 2009	Workshop on Project Proposal Making	Tacloban City
20-22 July 2009	Project Assessment Activity	Barugo, Leyte

2.2. Stakeholder Participation

From the onset, the project has heavily involved the LGU staff and personnel of the Municipality of Barugo. A total of 31 local stakeholders took part in the project, headed by Mayor Alden Avestruz and Vice-Mayor Juliana Villasin. As per design, majority of the participants were from the Executive branch of the LGU. Most of them

were members of the Municipal Development Council (MDC) and/or the Local Finance Committee (LFC).

Representatives of the community (i.e. barangay), private sector and NGO were also invited to participate in the workshops. The participants included three (3) barangay captains – one of whom is the president of the Association of Barangay Captains (ABC) – and three representatives from citizen’s organizations.

(Refer to *Annex B: List of PBL Project Participants.*)

In addition to the local stakeholders from Barugo, relevant oversight agencies in Region 8 (Eastern Visayas) were tapped to represent the national government and serve as resource persons in the different workshops. These include 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 Provincial Planning and Development Office (PPDO) represented the Province of Leyte in the project.

(Refer to *Annex C: List of Representatives of Region 8 Oversight Agencies and the Province of Leyte.*)

Three personnel from the neighboring Municipality of Albuera, which was shortlisted in the pilot area selection process, were also invited as observers in a number of workshops.

Other participants/resource persons were two GTZ-DP resource persons, Atty. Franklin Quijano, former mayor of Iligan City, and Mr. Jimjim Yaokasin, former administrator of Tacloban City and concurrent Chairman of the Board of the Development Academy of the Philippines. They complemented the pool of experts from ASOG.

In the post-project assessment conducted by ASOG, the participants rated their quality of participation to be very high. To some extent, they attributed this to the workshop approach and structure, which challenged them to provide inputs especially in the small group discussions. The presence of the mayor, vice-mayor, and SB members in all the workshops also appeared to have motivated the participants to attend in nearly all activities.

2.3. Content Coverage

The series of workshops and learning activities conducted throughout the project period can be classified into three main categories. Fig. 3 shows the categorization of the activities according to their thematic coverage.

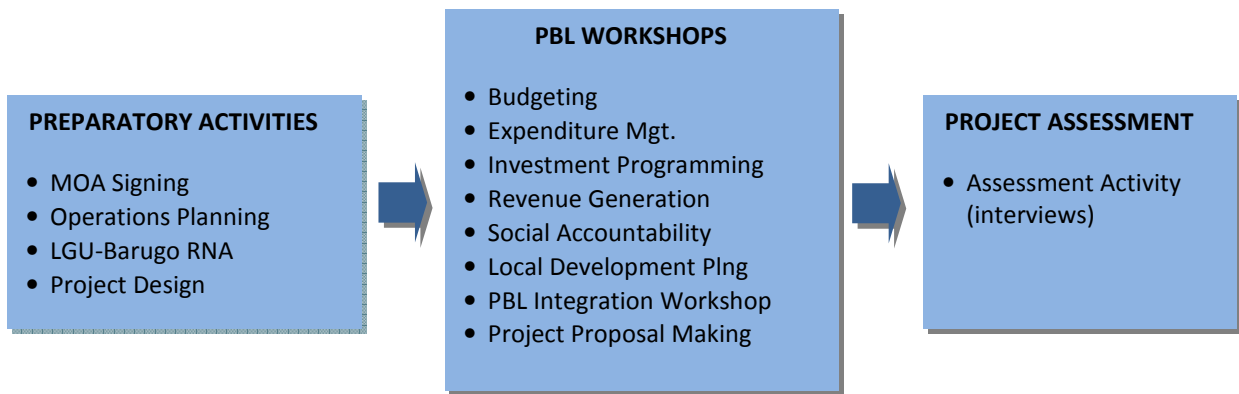


Figure 3. Project Activities, By Thematic Coverage

The Preparatory Activities conducted within the first three months of the project were meant to orient the participants on the context of the project and to explain its underpinning elements, frameworks, principles and approaches. They were also designed to engage the participants in a participatory process to level off expectations, understand current conditions, promote local ownership, and lock in commitment to the project.

The succeeding PBL workshops held from March to May 2009 were based on the planning-budget cycle, but starting from the “end” of the process to facilitate inductive, experience-based learning. As such, the workshops were designed to start with expenditure management, followed by budgeting, investment programming, revenue administration, and finally planning.

For these workshops, the participants were asked to select a specific social service project as their “specimen” and “anchor for learning”. Through small group discussions, followed by a plenary presentation and discussion, the participants agreed to use the Water System Project that the LGU implemented and completed in 2008.

The workshops on local development planning and on enhancing the planning-budget link through social accountability were conducted separately in April.

Among the major topics tackled in this series of activities were:

1. The Municipality of Barugo’s Water System Project as a case study;
2. The local budgeting process;
3. Expenditure management, investment programming, and revenue generation and administration;
4. Social Accountability (SAc) concepts, principles, pillars, and sample applications;
5. Designing and implementing a local SAc strategy;
6. Baseline information on the Municipality of Barugo’s local plans and investment programs, namely, the Comprehensive Land Use Development Plan (CLUP), Comprehensive Development Plan (CDP), Executive-Legislative Agenda (ELA),

Local Development Investment Program (LDIP), and Annual Investment Program (AIP);

7. The spatial-sectoral link between the CLUP and the CDP using the RPS and the JMC-1 as the mandated guide;
8. The vertical link between and among barangay and municipality, municipality and province, and province and region;
9. The horizontal link between and among local planning and development, investment programming, and budgeting as a contiguous process; and
10. Barugo’s vision, goals, and prioritized programs, projects and activities (PPAs).

A PBL integration workshop was conducted on 4-6 May 2009 to bring together into one coherent process the various components that would facilitate the harmonization of plans, programs, budgets, and monitoring and evaluation activities, particularly linking development plans to programs and budgets both vertically and horizontally as prescribed in JMC-1 and other government guidelines. This particular workshop involved the following activities:

1. Review of vision-reality gaps;
2. Review of validated sectoral goals versus PPAs;
3. Review of existing Local Development Investment Program (LDIP) and Executive-Legislative Agenda (ELA) with the validated PPAs;
4. Aligning the Annual Budget with the validated AIP; and
5. Selection of a Social Service Project for Project Proposal Making

Figure 4 illustrates the roadmap of the PBL Integration Workshop.

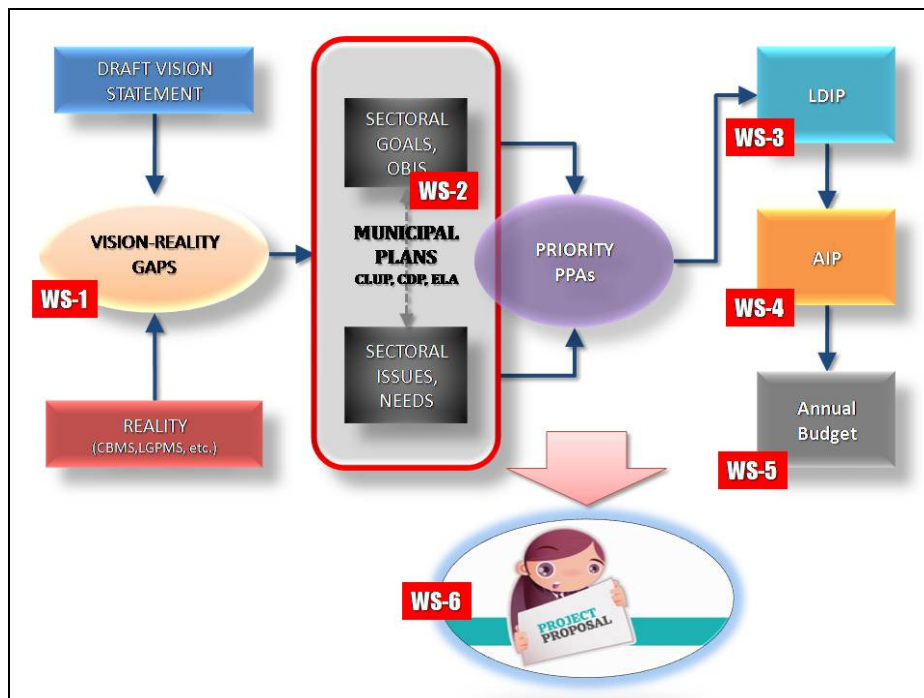


Figure 4. Overview of the PBL Integration Process

Finally, a workshop on project proposal making was held on 27-29 May 2009 to familiarize the participants with the basic concepts, processes, and requirements of project development and management for the purpose of preparing a proposal on a social service project, which is a major output of the PBL Project. This was to orient the LGU staff on one of the municipality's options for revenue generation.

This last workshop covered the following topics:

1. Foundations in project development;
2. Project concept review;
3. Market feasibility overview;
4. Technical feasibility overview;
5. Financial feasibility overview; and
6. Social impact of projects.

An Assessment Activity was conducted on July 20-22, 2009 to assess the attainment of project objectives vis-à-vis the learning gained by the participants through the learning activities as designed. The M&E activity also looked into the quality of participation in the project, the initial steps taken by the LGU as a result of project learning, strategies to sustain the gains, the facilitating factors and the constraints, and the recommendations to sustain the PBL initiatives.

2.4. Project Outputs

The series of workshops and learning activities allowed the participants to re-visit, understand and review their practices, systems and processes in relation to the planning-budget cycle. Through a combination of inductive and deductive learning approaches, this resulted in the validation of plans, investment programs and annual budget according to the goals, objectives and vision of the LGU.

The LGU's Vision Statement itself, as indicated in the draft CDP, was re-visited and subsequently reformulated to follow the RPS prescription of using "descriptors" or adjectives that articulate the LGU's most desired end-state encompassing five sectors, namely, social, economic, environment, land use and infrastructure support, and local governance.⁵ The revised draft Vision

Box 2. BARUGO'S REVISED DRAFT VISION STATEMENT

Barugo is a reliable producer and competitive exporter of excellent agricultural products, driven by God loving, socially responsible and empowered citizenry, living in an ecologically-balanced environment, steered by highly competent and accountable leaders advocating participatory governance.

⁵ Barugo's draft Vision Statement was lifted from its draft CDP which was prepared as part of the DILG-8 piloting roll-out of the CDP preparation. It must be noted, however, that the RPS is explicit in prescribing that there should only be one Vision Statement for the LGU. Accordingly, "the proper occasion for drafting one is in connection with the CLUP preparation. The CDP and other short-term plans must not have another vision statement but will simply adopt the vision in the CLUP and must contribute towards its eventual realization. The goals in

Statement provided the basic framework for validating the municipality's sectoral goals, identifying the priority Programs, Projects and Activities (PPAs), and reflecting the same in the Local Development Investment Program (LDIP), Annual Investment Plan (AIP), and annual budget.

As another major output of the PBL Project was the identification of a particular social service project to be submitted to a funding facility. The Technical Working Group, which was tasked to do a Goals-Achievement Matrix (GAM) of the five proposals from the participants, selected the establishment of a People's Economic Enterprise Development Center (PEEDC) as the most viable project option.

Box 3. BARUGO'S PROPOSED SOCIAL SERVICE PROJECT: ESTABLISHMENT OF A PEEDC

The PEEDC is envisioned by the participants "to address poverty and accelerate economic development in Barugo by promoting entrepreneurial and employment opportunities through mobilization of local resources, adoption of appropriate technology, proactive provision of business development services, encouragement of private-public partnership and people's participation." It is expected to increase family income, employment and local revenues, promote healthier and active citizens, encourage citizen's participation, decrease incidence of poverty, and ultimately improve LGU capacity for local economic development.

The proposed project comprises the following:

1. Institution Building/PO Organizing and Strengthening
2. Local Resource Mobilization
3. Enterprise Development Advice
4. Product Development, Designing, Technology Dissemination and Capacity Building
5. Provision of Common Service Facilities
6. Marketing Assistance
7. Environmental Management
8. Project Management, Monitoring & Evaluation

In sum, the project produced the following major outputs for the LGU:

1. Revised draft Vision Statement;
2. Validated sectoral goals and objectives as reflected in the CLUP, CDP and ELA;
3. Prioritized PPAs;
4. A validated LDIP;
5. A validated AIP that incorporates the budgetary requirements of the proposed PEEDC;
6. A validated annual budget aligned with the AIP; and

the CDP therefore shall consist of sectoral objectives and targets because the time and resource constraints are considered." RPS, p. 88.

7. A proposed social service project (i.e. PEEDC) that is linked to the annual budget, to the investment programs, to the goals and objectives, and finally, to the LGU vision.

2.5. Use of Outputs by Stakeholders

The validated plans and investment programs of the Municipality of Barugo served as useful working documents for the MDC and Local Finance Committee in prioritizing PPAs and in reviewing the municipality's LDIP, AIP, ELA and Annual Budget for the remainder of the fiscal year (July-December 2009). The outputs were also expected to guide the Legislative, MTO, and Assessor in the finalization, approval and implementation of the Revenue Code, BPLS and RFPS.

Moreover, the project outputs provided the foundation for facilitating a consultative and participatory PPB. These were particularly useful to the MDC, Local Finance Committee, and Department Heads who are involved in the accreditation of CSOs, cooperatives and NGOs, and in the deliberation of budget proposals.

In the Assessment Activity conducted on 20-22 July 2009, local stakeholders reported having used the project outputs as reference materials in undertaking the following LGU activities:

1. Updating the draft CDP
2. Drafting the Local Revenue Code and other local codes
3. Publishing the contents of the current AIP with the corresponding budget
4. Shortening the BPLS process
5. Implementing the BAC guidelines for emergency procurement,
6. Implementing a public consultation process to identify and determine community needs and issues through the *Serbisyo ha Barangay*
7. Negotiating an agreement with the local GTZ office and the PPDO for technical assistance in the updating the LGU's CLUP, among others.

Lastly, the validated plans and investment programs of the Municipality of Barugo served as bases for taking forward the LGU's selected project proposal to establish a PEEDC, which is one of the major outputs of the PBL Project. As an offshoot of the Project Proposal Making Workshop in May, the LGU has decided to prepare and develop a full-blown proposal for the PEEDC by providing logistical support (e.g. venue for writing, writing materials, equipment such as laptops, refreshments); policy support (e.g. a memorandum that would allow the writers to work on their task during their regular working time); and data support (e.g. tasking of other participants to retrieve the required information for the write-up). It was also suggested that the members of the Sangguniang Bayan who participated in the PBL would monitor the activity.

Figure 5 shows the process of the draft preparation, review and presentation of the Barugo PEEDC Project Proposal, as a result of the project.

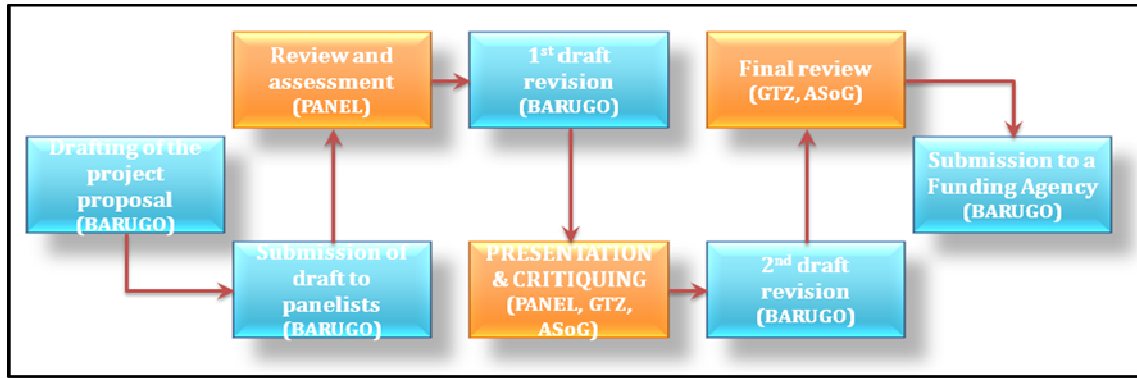


Figure 5. Process of the Drafting, Review and Presentation of the Barugo PEEDC Project Proposal

2.6. Project Outcomes

At the Project Design Workshop held in March 2009, the participants expressed their expected outcomes from the project. These were classified into four categories as shown in Figure 6.

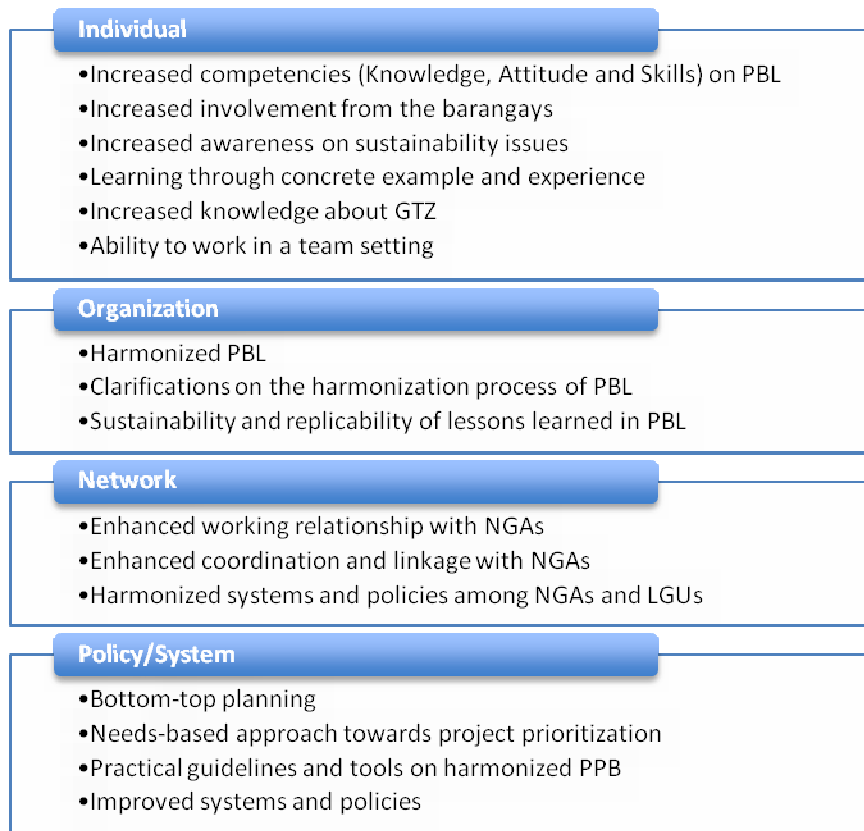


Figure 6. Expected Project Outcomes

In July 2009, an Assessment Activity was conducted to evaluate the overall project methodology and results from the perspective of the participants. In the said activity, the participants reported having taken specific actions to translate their

learning into actual practice and sustain the momentum and initiatives generated by the project. They also indicated their future plans at institutionalizing the PBL process in the long run, as prescribed in JMC-1. These are discussed in detail below.

A. Steps Taken by the LGU as a Result of the PBL Project

By and large, it was revealed that there have been no “major changes” yet at the LGU level as a result of the PBL Project. Nonetheless, the attitude of most staff and personnel was observed to be no longer “business as usual” as there now seems to be an awareness of the need to apply important lessons from the PBL initiative into actual practice, particularly in this year’s (2010) planning-budgeting cycle. The municipality’s openness to introduce and implement changes in its PBL practices was also noted.

While “impact” is not yet observable in terms of improved public service delivery and local business climate, participants reported having taken concrete steps toward this end. They cited the following activities as borne out of the process initiated in the PBL project:

Initial activities for the updating of the Comprehensive Land Use Plan. The LGU has already allocated around Php150,000 as start-up fund for CLUP updating preparation. The mayor has likewise formally requested GTZ office in Tacloban City to assist the LGU in the start-up preparations. The MPDO has also communicated with the PPDO for provision of technical support.

Drafting and finalization of the Comprehensive Development Plan. The CDP is currently being drafted and key LGU personnel have participated (and will continue to participate) ongoing capacity development activities to finalize the document. A major area where work is ongoing is the CDP section on Ecological Profiling; this is being worked out as an input to the CLUP preparation.

2010 Annual Investment Program Preparation. The LGU is currently working on identifying and prioritizing PPAs. The *Serbisyo ha Barangay* has become a venue to help community members identify PPAs that address community needs and concerns, in addition to being a service delivery program.

Local Development Investment Plan Preparation (LDIP). The LDIP preparation is being worked out as a component of the CDP.

Annual Budget Preparation. The MBO has already sent out a formal notice to all department heads in preparation for the budget hearing.

By office and department, most of the outcomes reported by the participants relate to policy and systems. For example, the Municipal Budget Office has already circulated a memorandum requesting the department heads to submit their

supplemental budget proposals in writing.⁶ This move was seen as one step towards ensuring participation in the budget process. The interviewed participants said they are “happy” with this turn of events because, prior to the PBL Project, the practice was for the MBO to determine unilaterally the budget of each department, and then inform the concerned department heads later. Many were frustrated with this practice, with some taking it personally.

Other examples of activities taken by the various offices include the orientation and updating of the LGU staff on the PBL Project, listing and profiling of CSOs/NGOs/POs, reconstitution of the MDC, consultations with oversight agencies, review of PPAs vis-a-vis usage of LGU funds, request for the submission of supplemental budgets by the MBO, and the ongoing review of the new Local Revenue Code, among others (Table 3).

Table 3. Specific Changes Taken by Various Offices and Departments of Barugo

Outcome	Details	Office / Dept.
Individual	Orientation and updating of all LGU staff especially non-participants on the PBL Project during a seminar in Tagaytay City on July 9-12, 2009. The mayor expressed his intention to carry on with the PBL reforms, but its implementation “should be done carefully” given the 2010 elections.	Office of the Mayor
Organization	Specific instructions to staff to review the projects, highlighting the time element on the usage of funds. Follow up of the financial assistance to the barangays as provided for in the ELA.	Office of the Mayor
	Consolidation of the inventory of CSOs/NGOs/POs in coordination with the MLGOO.	Municipal Planning and Development Office
Network	Informal consultation with DBM-Region 8 on the bidding and procurement process.	Municipal Accountant’s Office
	Informal consultation with the Bureau of Local Government Finance (BLGF) under DOF-Region 8 on the process of drafting and formulation of the Local Revenue Code.	Municipal Treasurer’s Office
Policy/Systems	Circulation of a memo requesting the department heads to submit their supplemental budget proposals in writing, which is seen as one step towards ensuring participation in the budget process.	Municipal Budget Office
	Communicating to the public the contents of the AIP’s	Municipal Planning and

⁶ However, during the Validation Workshop of the M&E Results held in Tacloban City on September 11, 2009, the participants commented that the issuance of a memo is still to be implemented by the MBO.

Outcome	Details	Office / Dept.
	PPAs and the corresponding budget by posting a “performance billboard” in front of the municipal hall.	Development Office
	Strict implementation of the guidelines on the quarterly allotment of funds for the departments’ budgets.	Municipal Budget Office
	Implementation of a shortened procedure for the Business Permit Licensing System (BPLS), reducing the number of required signatories from 12 to four.	Municipal Treasurer’s Office
	Inclusion of a Bids and Awards Committee resolution in cases of emergency procurement.	Municipal Accountant’s Office
	Ongoing review of the LGU’s Local Revenue Code and other codal instruments.	Sangguniang Bayan

B. Intended Steps to be Taken by the LGU

Majority of the respondents appeared to be convinced that if the PBL process is followed, it will have a major impact on development outcomes envisioned by the LGU. This was the context of the intended steps and changes that they enumerated, as seen in Table 4.

Table 4. Specific Changes Intended to be Taken by Various Offices and Department of Barugo

Outcome	Details	Office / Dept.
Individual	To be the lead office in implementing PBL reforms	Office of the Mayor
	As the MDC Secretariat, to lead in the reconstitution of the MDC and facilitate the latter’s orientation on its roles and functions, including roll-out of capacity development activities	Municipal Planning and Development Office
	To initiate and sustain the revision of the CLUP	
	To identify and motivate personnel who will serve as “lead persons” to plan, organize, and implement the PBL change process	Municipal Local Government Operations Officer
	To facilitate the process of consensus-building in identifying areas needing reforms, prioritizing activities, and laying out a course of action	
Organization	To meet regularly for coordination and monitoring purposes, as well as to resolve issues and problems that may arise from the PBL implementation activities	Local Finance Committee
	To use participatory approaches where these are required, specifically in local planning	Municipal Planning and Development

Outcome	Details	Office / Dept.
	To provide assistance to NGOs/POs in the accreditation process	Office
	To finalize the draft CDP	
	To regularly generate and update data (e.g. CBMS)	
	To exercise “transparency”, such as posting of a billboard announcing the LGU’s Annual Budget	Municipal Budget Office
	To be more “transparent” by posting the LGU’s monthly income and expenditures for public viewing;	Municipal Treasurer’s Office
	To lay out an action plan that is do-able given the LGU’s limited resources	Municipal Local Government Operations Officer
	To accredit qualified NGOs/POs in the MDC.	Sangguniang Bayan
	To “consult the MLGOO for instructions”	
Network	To issue direct order for department heads to interface and communicate with the NGAs for any PBL concern	Office of the Mayor
	To consult the PPDO and request for technical assistance in the preparation of the CLUP.	Municipal Planning and Development Office
Policy/Systems	To promote multi-stakeholder participation in the budget process, not only internally among concerned LGU staff and personnel but also with citizens groups	Municipal Budget Office
	To comply with the JMC-1 process of budget preparation, starting with next year’s budget cycle	
	To be “proactive by allotting more time in the field collecting taxes and fees” and do this with “ <i>kamay na bakal</i> ” (literally: with an iron hand) by closing business establishments that do not comply with the guidelines;	Municipal Treasurer’s Office
	To comply with and implement the provisions of the new Revenue Code when approved;	
	To implement the policy of “no disbursements” unless all the required documents are complete.	
	To monitor and evaluate the outputs, outcomes, and impacts especially in the area of improving service delivery, based on government-mandated guidelines.	Municipal Local Government Operations Officer



C. Challenges in Implementing the Intended Steps

While the above list is not exhaustive, it indicates the level of interest and commitment that the project has generated from the participants. However, the realization of these intended steps or changes faces certain challenges at both the individual and organizational levels. According to the participants, these include (a) resistance to change, (b) resources to move forward, (d) constituent needs versus political accommodation, and (d) understanding and practice of Social Accountability.

Resistance to change

A running apprehension among the respondents in particular and the participants in general was resistance to change – specifically personal and organizational change – in the course of implementation. While they collectively see the need for the plan-budget reforms to push through in their LGU, they also acknowledge the fact this will entail a new way of thinking and behaving. They also realize that changes in the individual person (e.g. each participant) should be supported by organizational changes (and vice-versa).

The first challenge would be at the individual and personal level. As many of the respondents recognized, this involves attitude and behavioral change – a change that is ideally anchored on the recognition and realization of their “public value” as public servants. This covers both elective and non-elective officials who are oath-bound to follow a code of conduct.

The other challenge, and no less weighty than the first one, would be at the organizational level. The challenge might be evaluated as “technical” as this would involve a change in structures, systems, and processes in the organization. Beyond the technical, however, is the challenge of transforming the organizational culture. Any change in this area therefore should deeply consider the norms, values, and orientation of the organization.

Resources to move forward

Barugo, as a 4th class municipality, is not replete with resources. Its annual budget of Php41 million – the bulk of which comes from the Internal Revenue Allotment of Php36 million - is barely enough for the minimum requirements of its operations and social services. Clearly, implementing the lessons learned from the PBL Project will require financial assistance – and considerable amounts will have to be sourced externally. The programs and projects, including the proposed “People’s Economic and Enterprise Development Center” (or PEEDC), which is a major output of the PBL Project, will require a huge amount of funds. Such also will be required to respond to the challenge of developing the capacity of LGU personnel, barangay officials, and non-LGU stakeholders.

The other challenge in the area of “resources” is the capacity of the LGU personnel and non-LGU stakeholders to sustain the momentum started by the PBL

Project. This refers to the time that would be actually allotted for the planning and implementation of the learning and lessons, given that, in the case of LGU personnel, a common complaint is the “lack of time” due to work overload brought about by constituent demands. A similar situation might also pose as a challenge to citizen groups, notwithstanding their interest in social accountability. Majority of the members of these organizations belong to the poorer sector, thus “taking their time away” from their livelihood pursuits in order to engage and/or work with government might be a real burden for them.

If leadership is considered as a resource, then this would likewise pose a challenge to the LGU. While the LGU provides the institutional leadership for the community, not all those in positions of authority are gifted with leadership skills. Also, while majority of the participants expect their elected officials (e.g. mayor, vice-mayor, SB members) to take the lead, the latter have limited terms of offices. Their being partisan might also be seen as an impediment to the effective implementation of such reforms.

Constituent needs versus political accommodation

Another challenge that confronts the implementation of the lessons gained from the PBL Project is the dilemma between being responsive to constituent needs and the contingency of political accommodation. On the one hand, being in public office means one is duty-bound to facilitate the effective and efficient delivery of services to address real community needs. On the other hand, patronage and political accommodation oftentimes result in skewed priorities detached from constituent needs.

This misalignment between community needs and political accommodation often finds its way into the plan-to-budget process, making irrelevant those guidelines and prescriptions that attempt to rationalize the process. Local development plans, investment plans, and budgets – however intelligently crafted they may be – become secondary since the bases for decision-making would shift from constituent demands to political contingencies. This constraint would be especially felt where patronage politics is the norm. The coming 2010 elections should be the perfect arena where these assumptions and apprehensions will be tested.

Understanding and practice of social accountability

Social accountability was one of the more interesting topics in the PBL Project because it provided the other half of the governance equation – that of responsible citizenship. But the topic also raised more questions than answers. How ready and capable are the citizens and citizens groups in Barugo to exercise social accountability? What are the forms of engagement and/or partnership with the LGU? What are the specific governance areas where citizens groups can contribute significantly in terms of participation in decision-making? What are the scope and limitations of such an engagement? In what ways can citizen participation facilitate the delivery of social services, especially to the marginalized sectors? How does one measure the impact that

social accountability is supposed to make on social service delivery and the standard of life of the Barugo citizen?

These and other questions will have to be addressed if citizen participation is to become relevant in the overall development of the municipality.

III. ANALYSIS OF RESULTS

3.1. Project Design

A. Facilitating Factors

The major facilitating factors that contributed to the effectiveness of the project design include the following: a) application of appropriate methodology, b) management of project expectations, c) participation in the PBL Project, and d) emphasis on outputs and outcomes.

Application of Appropriate Methodology

The first area that facilitated the implementation of the PBL Project was the application of an appropriate methodology, which is a combination of both inductive and deductive learning approaches.

“The lessons were built on top of what we already knew,” one respondent said when asked his impressions about the methodology. This statement summarized the capacity development approach of the PBL Project. The methodology was designed to augment the LGU’s sound practices and identify those that needed to be enhanced, corrected, or learned. Learning and lessons were drawn from the experiences of the participants through a dialogical and participatory approach, supplemented by concepts, principles, and orientations inputted by competent resource persons and facilitators with the help of consultant-practitioners and resource persons from regional oversight agencies.

Moreover, the exercises were designed to bring the participants as near to the actual experience as possible. While constrained because of time limitations and the simulation-like nature of the exercises, the participants were able to “learn by doing” some of the crucial steps in the harmonization process. For instance, the exercises in the Local Development Planning Workshop – the visioning, the goal formulation and prioritization using the Goal-Achievement Matrix (GAM), and other similar activities – helped the participants to be more familiar with and value the various planning tools and mechanisms prescribed in the Rationalizing the Local Planning System (RPS).

The way the learning activities were structured also increased the “bonding” among LGU participants, between LGU and non-LGU participants, and between LGU and the representatives of the oversight agencies. This factor is crucial in a cultural sense: the typical Filipino work environment is concerned not only with production and

outputs, but also, and sometimes even more importantly, with relationships. Thus, the connections established during the workshops have made it easier for LGU personnel to access the regional offices of the oversight agencies instead of setting up formal meetings that sometimes take a long time to schedule. Internally among the LGU participants, issues and concerns affecting the PBL process were discussed openly and solutions sought for.

Competence of Resource Persons and Facilitators

The participants benefited from a competent pool of resource persons and facilitators who were able to simplify basic concepts, principles, and practical applications of PBL. This proved to be very helpful considering that the topics were found to be difficult “to some extent” by the participants.

The facilitators were also able to handle the variety of opinions and different perspectives of the participants from regional oversight agencies, who are mandated to guide and support local government processes; from LGU practitioners, whose experience and expertise, as well as practical insights, would be invaluable to balance the technical demands; and from academe-based resource persons, whose praxis would help bridge the gap between theory and practical application. The effective harmonization of technical, development and political ideas was critical to ensure that all the inputs and information would not overwhelm the participants.

The NGA representation in the workshop was particularly useful. Their being in one venue in a learning setting such as the PBL Project was helpful because it helped the participants understand and coordinate with each other, specifically on the rationale and operational side of the various forms and memorandum circulars emanating from the NGAs. The actual, face-to-face discussions with the NGA representatives also facilitated the participants’ understanding of the processes, tools, and mechanisms in the implementation of the various guidelines related to the PBL. In general, the respondents said that the inputs of the NGA representatives were “very useful at the LGU level”.

In addition to the ASoG resource persons and facilitators’ being “very knowledgeable”, they were also “very approachable and accommodating”. In addition to “being very approachable”, the GTZ resource persons [Atty. Quijano, Mr. Yaokasin, and Ms. Fillone] provided “very useful and practical insights” based on actual experience. They also provided the participants with “new ideas and approaches on how to do things” as well as “practical tips”.

Management of Project Expectations

It also helped that, from the start of the Project, expectations were leveled off and managed. The steps towards the selection of Barugo as the pilot municipality; the preparatory discussions on what to expect from the Project; the participation of the LGU and non-LGU stakeholders as well as representatives from the oversight agencies in the

design, openness to amendments in the timeline – all these contributed to the facilitation of project implementation.

Expectations were managed throughout the length of the project by various means, requiring constant communication and feedback among project stakeholders. At the onset of each workshop, for example, the overall design and flow of the series of learning activities were presented to the participants, including a review and recapitulation of the previous workshop. At the close of each workshop, the participants would present a synthesis of their learning and insights, after which the facilitator would segue into where the current activity fits into the overall design and flow. This strategy helped in keeping all stakeholders informed about the overall thrust direction of the project.

In addition to managing workshop expectations, the project stakeholders also conducted informal, “back-door” communication and feedbacking with each other. For instance, the GTZ-DP field officer provided important information from the ground, feeding such information to the GTZ central office or to ASoG when appropriate. The field officer also served as the link between GTZ and ASoG offices in Manila, on the one hand, and the Barugo stakeholders, on the other hand. More importantly, the face-to-face meetings among the key stakeholders – the mayor of Barugo, GTZ-DP, and ASoG – provided a venue for the continuous leveling off among each other, thus deflecting contentious issues that may arise during project implementation.

Active Participation in the PBL Project

Another important area that facilitated the effectiveness of the project design was the active participation of the participants themselves. Without the participants’ interest and self-motivation to take part in the activities, it would have been difficult to achieve the various objectives of the workshops. This is especially so because the planning-budget cycle is a highly participatory process as prescribed in JMC-1.

The relationship between participation and methodology is actually two-way. Participants claimed that the quality of participation, which they self-rated to be “very high,” can also be attributed to the learning methodology and the way the learning activities were structured. For instance, they noted that the small group discussions and plenary presentations “forced” them to be actively involved in the activities.

The role modeling aspect of the LGU leadership was also a major factor that contributed to the quality of participation. With rare exceptions, the top guns of the LGU were present in all learning activities from start to finish. In addition, they were not “above” their subordinates when it came to the nitty-gritty – they participated in the small group discussions, allowing lower level staff to lead the groups, and enjoyed the icebreakers like the rest. The presence of the LGU leadership may have upped the “compliance factor” of the LGU staff to attend the workshops, but it was a valuable contribution to the overall quality of participation.

It helped, of course, that the venue and accommodations were first rate. While it was not expressly brought to the open, one clear major motivating factor for the good attendance and high quality of participation was the choice of venues.

Emphasis on Outputs and Outcomes

Using the GTZ-DP M&E Framework brought attention to the need for realistic, practical, and attainable outputs and outcomes. From the start, the Project was framed not only as a cognitive exercise (i.e. learning for learning's sake), but also as an output-oriented series of cohesive activities geared towards practical application in the LGU in order to achieve governance and development outcomes, specifically in the area of service delivery.

This emphasis was also enhanced by the use of the so-called "technology of participation." Specifically, the metacard technique helped the participants focus on outputs rather than on the activity itself.

Understandably, a large part of the outcomes is still in the cognitive domain – an increased awareness and understanding of the need to implement and put into practice the PBL Project lessons and learning at the individual, organizational, and institutional levels. While still to be verified in terms of specific indicators (not covered in this report), the examples on the outputs and usage of outputs should point to measurable outcomes, such as, for instance, shorter processing time for business license application (and therefore more satisfied clients and an increase in revenue), streamlined emergency procurement (and therefore a procurement system less prone to anomalies), PPAs that reflect actual community problems and issues (and therefore a more realistic and responsive AIP), a more active and involved MDC, and so on.

B. Constraints

The major constraints related to the design PBL Project were the following: a) need for more leveling off between project proponent and project implementer, b) workplace vacuum, c) lack of participation from CSOs/NGOs/POs, and d) "suffocating" timeline.

Need for More Leveling Off

While the overall approach and methodology were considered appropriate to the attainment of the PBL Project objectives, a number of constraints appeared to hamper the facilitation of activities.

The methodology of one workshop stood out in particular – the Workshop on Local Development Planning conducted on 28-30 April 2009 in Cebu City. While the overall design attempted to follow the agreed upon methodology of experience-based approach, the facilitators and resource persons encountered difficulties in managing specific activities and coming up with the expected outputs. The reasons, as cited in the

workshop documentation report on Local Development Planning, were mainly due to a flawed design. These included, among others, the following:

1. Underestimation of the time required to efficiently implement and manage the workshop activities, thus putting a constraint on the expected outputs;
2. The unexpected last-minute vacillation of the ASoG resource person to act as the principal resource person. It may be remembered that the resource person objected to the revisions proposed by GTZ-DP on his original workshop design, causing him to back out at the last minute but was prevailed upon to take on the task. This compounded the problem of insufficient time for leveling off between GTZ-DP and ASoG on a final workshop design.
3. Apropos to the above issue was the “insertion” of topics and activities that were not part of the workshop design, creating a nearly unwieldy situation on the sequencing of activities.

As pointed out in the documentation report for this particular workshop, a major factor that contributed to the constraints were the delayed submission of workshop designs to GTZ-DP for review, and the inability of the lead resource person to join pre-workshop meetings so that leveling off can be done ahead of time. This often resulted in on-site management challenges that affected the logical and psychological flow of the workshop process.

Vacuum in the Workplace

While everybody understood that the workshops would take place outside of Barugo in order to keep away from distractions and to maximize the learning activities, an undercurrent of apprehension was palpable among the respondents. Understandably, the reasons given were related to work outputs in the *municipio* and political projection.

First, the number of participants who took time off from their work to attend the workshops may actually have had an impact on the amount and quality of work accomplished in the *municipio*. The absence of these employees may have caused a negative impression among clients who expect their public servants to be always available and who might have difficulty understanding the importance of capacity development activities such as the PBL Project.

Second, and this was articulated by the mayor, there was apprehension that the LGU participants' protracted absence from the *municipio* may be used as political fodder by the local opposition.⁷ This apprehension was framed in the context of the runoff to the 2010 elections, when political personalities and parties were already perceived to be upping the ante against each other.

⁷ It should be noted, however, that the vice-mayor, acknowledged to be the leader of the local political opposition, was also present in nearly all workshops and was active in the workshop activities.

These limitations may have hampered the operations of the *municipio* to some extent. Based on the feedback of the respondents, however, such limitations are offset by the gains made by the LGU because of its participation in the project.

Lack of participation from CSOs/NGOs/POs

A major weakness of the PBL Project was the lack of participation from CSOs/NGOs/POs. The problem was not about non-receptivity of the LGU to provide an “enabling environment”, but a deficiency on the part of local citizens groups to actively engage the local government in governance processes. As cited in the pre-project “Barugo Rapid Needs Appraisal” documentation report, the “quality of participation of these groups [CSOs/NGOs/POs] is poor”.

Several factors appear to contribute to the non-participation (or lack of quality in terms of participation) of most of the NGOs/POs. First is the lack of appreciation and proper understanding of local developmental needs. Second, CSOs/NGOs/POs’ level of awareness of their functions and responsibilities in the MDC is quite low, except for a handful. Third, most of these organizations have insufficient resources to support internal needs, such as funding for transportation. Finally, there is the attitude of “quid pro quo”, i.e. attendance and participation in MDC meetings do not translate to immediate and concrete benefits for their respective organizations.⁸

Thus, the representation of the various local citizens groups in PBL Project learning activities left much to be desired. Out of 19 recognized organizations, only three (two POs, one NGO) were represented in the workshops: the Barugo Food Delicacies Producers Association, the San Miguel Barugo Tricycle Operators and Drivers Association, and the Runggiyan Social Development Foundation, Inc.

In addition, the quality of participation of the organizations’ representatives was not that high except for the representative of Runggiyan. Again, this was understandable given that this was the first time for the other two to join an intensive training workshop on a technical subject with local government officials. But it was to their credit that the representatives persisted in attending all workshops and showed a desire to join in the discussions.

“Suffocating” Timeline

“*Sobrang tight yung schedule, parang di na kami makahinga* [The schedule was so tight it was as if we were suffocating].” This observation captured the sentiments of the participants who thought the project timeline should have been more “forgiving”. However, it should be noted that the statement was said in a light-hearted way, indicating that, notwithstanding the tight schedule, the participants appreciated the entire process.

⁸ *Barugo Rapid Needs Appraisal*. (2009, March). Unpublished activity documentation report submitted to GTZ-DP for the Plan-Budget Link Project (Service Delivery Assessment, Phase 2), p. 23. Quezon City: Ateneo School of Government.



Indeed, if one looks at the project timeline – which spans a total of seven (7) months (excluding the time allocated for the pre-screening and screening of LGUs) – the activities were quite close to each other, with the result that the participants – including the project proponent and the implementer – had to work on a tight schedule to keep up with the requirements of each activity. The scheduling required good communication and coordination among the key stakeholders. The scheme could not have worked had it not been for the tight way GTZ-DP oversaw the project.

The project timeline is clearly stipulated in the MOA and was presented and explained during the MOA signing activity⁹ and the Project Design Workshop.¹⁰ The timeline was also reiterated and updated during the workshops. As a pilot project, it was designed in such a way to take advantage of the momentum generated by the series of learning activities.

Another aspect that might be considered a constraint from the perspective of the participants was the “timing” of the project vis-a-vis the LGU planning-budgeting cycle. It may be recalled that the project spanned between January and August 2009. If one looks at the JMC-1 guidelines, the major activities within this period include updating of the planning and budgeting database, plan review, updating/preparation and approval of the AIP, budget preparation (including the conduct of technical budget and hearings on budget proposals submitted by department heads).¹¹ Had the project been implemented earlier, they said, the learning and lessons gained from the project could have been applied in the plan-budget cycle of the current year, thus closing the gap between implementation and impact.

3.2. Project Contents

A. Facilitating Factors

The major factors that facilitated the participant’s appreciation of the Project’s contents were a) relevance of the topics and b) competence of resource persons and facilitators.

Relevance of the Topics

The participants who took part in the Activity Assessment were unanimous in saying that all the topics in the PBL Project were relevant and should be retained. The

⁹ *MOA Signing and Operations Planning Workshop*. (2009, January 29). Unpublished activity documentation report submitted to GTZ-DP for the Plan-Budget Link Project (Service Delivery Assessment, Phase 2). Quezon City: Ateneo School of Government.

¹⁰ *Project Design Workshop*. (2009, March). Unpublished workshop documentation report submitted to GTZ-DP for the Plan-Budget Link Project (Service Delivery Assessment, Phase 2). Quezon City: Ateneo School of Government.

¹¹ German Agency for Technical Cooperation (GTZ) – Decentralization Program. (2008). *Harmonization of Local Planning, Investment Programming, Revenue Administration, Budgeting and Expenditure Management: Joint Memorandum Circular (JMC No. 001, Series of 2007)*. Makati City: Author. Pp. 14-19.



topic on Budgeting was considered “most helpful”, followed by Local Planning, then by Investment Programming. The “least helpful” subjects were Expenditure Management and Project Proposal Making. On the average, however, all the topics were rated as “most helpful”.

The participants noted that the Project contents are the very tools that translate good governance – transparency, accountability, and participation – into effective and efficient social delivery outcomes. Special mention was the emphasis on the “bottom-up approach”, referring to the participatory process adopted by the learning activities. This strikes a familiar chord to majority of the participants – starting with the mayor and the SB members – who have expressed a need to improve and develop their leadership, managerial, and administrative competencies as a means of attaining development outcomes for their municipality.

Some of the specific competencies the participants were able to acquire from the project include: knowledge about the specific step-by-step procedure on the budget cycle, informed openness toward citizen participation in governance decision-making, technical knowledge about project proposal making and other procedures, a deeper understanding of the role of the socio-political context in local governance, appreciation of the role of the NGAs as oversight agencies, and so on. The project also helped uncover and clarify a number of latent issues that were “bothering” some of the employees, such as the “loose way” [the actual term used was “*bara-bara*”] by which the prescriptions were interpreted and implemented, or personal conflicts disguised as technical problems.

For the president of the Association of Barangay Captains (ABC), the PBL Project was relevant in the sense that the lessons learned could – and should – be an important component in building the capacity of barangays officials. As it stands now, there is a vacuum in the barangays in terms of appreciation and technical knowledge of the PBL process. If cascaded to the barangay level, the lessons from the PBL Project would provide the vertical link between barangay development plans and municipal development plans.

Competence of Resource Persons and Facilitators

As discussed earlier, the resource persons and facilitators of the learning activities took efforts to simplify and “laicize” the technical nature of the topics. This was another factor that facilitated the effectiveness of the Project contents. While admitting that the topics were difficult “to some extent”, the participants were able to grasp the basic PBL concepts, principles, and practical applications due to the efforts and skills of the resource persons. The ease with which the participants used technical terms in their ordinary conversations outside of the formal learning sessions proved how they were able to absorb the more challenging aspects of the topics.

B. Constraints

The constraints that affected the delivery of the Project contents were related to a) resource person issues, b) relative difficulty of topics, c) time allotment for topics, and d) timing of the PBL project.

Resource person issues

While the resource persons and facilitators were found to be competent overall, the participants also noted the difficulty of understanding a technical topic when the resource person has inadequate understanding of the PBL Project methodology. It should be pointed out, however, that there was only one case where this occurred – again, the Workshop on Local Development Planning. Inevitably, the problem was noticed by the participants who commented that the resource person in this particular workshop seemed not to fit into his expected role, not seemed to be prepared for his topics, and that he was “more of a facilitator than a resource person”.

Relative Difficulty of Topics

As already mentioned, the topics were perceived to be “difficult to some extent”. Overall, however, the topic on Project Proposal Making was considered the most difficult because of the following reasons: participants’ unfamiliarity with the subject (“very technical”), limited time for the learning sessions which covered pre-project feasibility studies, and unavailability of data specifically qualitative information.

But the level of difficulty did not distract the participants from appreciating the subject matter, seeing how the learning was an important piece in the overall framework of local development. A few even said that what they learned from the Project Proposal Making Workshop would be invaluable in pursuing their private enterprises such as when they retire from the service.

Time Allotment for Topics

The topics on Expenditure Management, Investment Programming, Revenue Generation, and Social Accountability were mentioned, but this was qualified to mean as “not exactly to be changed, but to allocate more time for [additional] discussions and clarifications”. The participants found the time allotted for these topics to be too short; they needed more extensive discussions on these topics.

Timing of the PBL Project

Another factor that somehow affected the appreciation of the contents was the “timing” of the project. According to the participants, the conduct of the PBL Project was quite off because “[the Project concluded at a time] when we are already about to start the planning-budgeting cycle for the current year”. The concern was that if they were to practice what they learned from the workshops, they would need more time for the lessons to sink in both at the individual participant level and at the organizational level.

Such a situation, however, only shows the urgency of the need to practice what they have learned, or else the acquired learning and skills would eventually be forgotten.

IV. CONCLUSIONS

BARUGO'S PBL Project experience was an attempt to bring together into one coherent process the various components that would facilitate the harmonization of plans, programs, budgets, and monitoring and evaluation activities, particularly vertically and horizontally linking development plans to programs and budgets according to the prescriptions of JMC-1 and other government guidelines.

In terms of project objectives, the participants believed that three (3) of the six (6) project objectives were attained "to a great extent". These objectives are:

1. Facilitate collaboration between and among national government agencies, LGU, and civil society organizations;
2. Use government-mandated planning instruments that link plans, programs and budgets, e.g. the three (3) major municipal plans (Comprehensive Land Use Plan [CLUP], Comprehensive Development Plan [CDP], and Executive-Legislative Agenda [ELA]) are linked with the Annual Investment Program (AIP) and Annual Budget; and
3. Make use of assessment tools to improve social service delivery in the municipality, e.g. Local Government Performance Management System (LGPMs).

On the other hand, the other three objectives that were attained only "to some extent" are:

1. Pilot-test existing guidelines on harmonization, e.g. interface between NGAs, LGUs, and CSOs;
2. Tap existing development planning mechanisms and structures enshrined in the Local Government Code to facilitate linkage bet. municipal & provincial plans, e.g., linking the LGU plans (CDP) with the Provincial Development and Physical Framework Plan (PDPFP); and
3. Mobilize stakeholders in government and non-government institutions as partners in local development projects, e.g. inclusion of CSOs/NGOs/POs in local planning processes.

While the above assessment gives an indication of success for the project, its real contribution lies in how much learning the participants – including the project proponent and the implementer – have gained from the capacity development activities. In this respect, the participants have repeatedly said that what they have learned from the project "more than justified" the LGU's counterpart to the project.

Indeed, through the project, relevant gaps and issues were identified and analyzed, strategic decision-points were put forward, and recommendations were

proposed. Moving forward means translating these lessons into actionable plans. Much will be required from the public servants of Barugo LGU and the constituents of the municipality to create an impact on public service delivery and local business climate.

The Ateneo School of Government believes that capacity development is a highly interactive process between the learner and his/her environment. It is as much a highly personal and individual endeavor as it is social and collaborative. The capacity development intervention must build on the learner's past and present experiences so that it achieves a lasting life-long effect. Finally, capacity development is only worthwhile if the changes in the individual competencies and overall capabilities of the individual learners lead to positive changes in the very structure, systems, actions and relations of the environment (organization, community or society) in which the learner is located.

If done well – and the biggest challenge is to do well – the harmonization of plans, programs, budgets, and monitoring and evaluation activities will show that good governance and ethical leadership can, and does work, in a LGU like Barugo.

V. RECOMMENDATIONS

Given the facilitating factors and the constraints above, the following are highlighted as recommendations:

5.1. Reinforcing the Facilitating Factors

The facilitating factors need to be enhanced if the aim is to replicate and upscale the project in other LGUs.

First, given that one of the project's main objectives is to develop the capacity of stakeholders in the plan-budget process, it is very important to find and apply the appropriate approach in project implementation. The experience-based learning approach is highly recommended because the participants are adult learners who bring with them a wealth of experience and expertise as public servants or as citizens who have a stake in local development. Learning and lessons should emanate from the experiences of the participants through a dialogical and participatory approach, supplemented by concepts, principles, and orientations inputted by competent resource persons and facilitators. The experience-based approach also affirms the participants' sound practices and allows them to discover where the gaps are and how to address these.

Second, the role of resource persons and facilitators is central to make the experience-based learning approach work. From the outset, the resource persons and facilitators' responsibility should be made clear – that they are facilitators of learning whose role is to help the participants mine their experiences and expertise, highlighting

those points that bring about attitude/behavior and organizational change. The resource persons and facilitators should likewise have the competence to translate technical language into one that is simple and easy to understand. Above all, the resource persons and facilitators should have a deep understanding of the dynamics and workings of local governments and their partners in development.

Third, expectations on project content, process, and deliverables should be well-managed from start to end. This means leveling off with all participants and stakeholders on a regular basis as the project is executed. Project milestones and indicators should be in place for everyone to appreciate. Any changes during the course of project implementation should be consensus-based. In addition, to help manage expectations as well as to facilitate project operations, it is crucial that information flow be clearly defined and communication/coordination issues be anticipated and resolved early on.

Fourth, project outputs and outcomes are certain to be attained if there is high interest and participation. This means the participants are motivated because of a clear personal, professional, and organizational need to address actual and perceived gaps in the plan-budget link process that, if left unattended, would have an adverse effect not only in terms of operations but also – and perhaps more importantly – in terms of impact on the ground. A key factor here is the quality of participation of the LGU leadership (specifically elective officials who are perceived to be the de facto LGU leaders). As shown in the Barugo experience, the consistent attendance and participation of the elective officials provided a role modeling function for the other participants.

Fifth, in addition to the process being anchored on the so-called experience-based learning approach, the project should have clear outputs and outcomes. The M&E (Result Chain) Framework used by GTZ-DP is one such tool that helps the participants to identify and refine their outputs and outcomes and even impact. In addition, there should be clear and measurable monitoring and end-of-project indicators at the personal/behavioral, organizational, and institutional levels to help the participants determine their progress vis-a-vis project objectives.

5.2. Mitigating the Constraints

A successful mitigation of constraints, in addition to enhancing the facilitating factors, will ensure the successful implementation of the project lessons in Barugo and its replication in other LGUs.

First, there is a need to establish procedures and protocols regarding coordination and communication among the project stakeholders. The aim is to mitigate the problem of insufficient leveling off and to manage expectations especially during the course of the project run when intervening factors have a tendency to modify previously set agreements, such as when a resource person backs out from his/her appointment at

the last minute for one reason or another. As the project implementer, ASoG had its share of challenges in this area, mitigated only because of the full and timely support of GTZ-DP. Equally important is the prompt and timely submission of workshop designs and workshop documentations. Delayed submissions and the inability of resource persons to join pre-workshop meetings so that leveling off can be done ahead of time will eventually pose on-site management challenges that would affect not only the operational side but also the logical and psychological flow of the learning process.

Second, “immersion” of the resource persons in all aspects of the project is crucial to give justice to the project’s goals and objectives. It is not enough for resource persons to provide what is minimally required, such as a training design, supplementary reading materials, PowerPoint presentations, and the like. These are the products of, and are conditioned by, a deep understanding of the participants’ dynamics and learning needs, as well as a good appreciation of the project’s goals, objectives, and approaches. This is the *raison d’être* for pre-workshop meetings and similar activities: to discuss and agree on certain minimum requirements that would enhance the learning experience of the participants.

Third, the level of difficulty maybe inherent in most of the topics due to their technical nature, but this is often contingent on the resource persons and facilitators’ management of the subject matter and their ability to translate the concepts and technicalese into the field of experience of the participants. Furthermore, a critical factor is the fit between the subject matter and its relevance to the participants – the more relevant, the better appreciated, and the more learning is facilitated. This is why the results and key findings of the pre-project needs appraisal are crucial in determining the shape of the project design.

Fourth, the issue regarding the absence of the participants from their LGU workplaces should be understood against the backdrop of whether or not to hold the workshop sessions in Barugo. Based upon the discussion among project stakeholders on the pros and cons of this issue, it was decided to hold the workshops outside of Barugo. A major consideration was the lack of workshop facilities in the municipality and the distraction caused by the proximity to their workplaces and domiciles. Another consideration was the need to maximize the resources provided by GTZ and ASoG to achieve a learning environment that is conducive, a requirement that Barugo cannot offer at the moment.

Fifth, the lack of participation of citizens groups in the project is a challenge that must be confronted head-on not only by the LGU but also by its development partners and concerned local citizens. The number of non-LGU representatives and their quality of participation in the project was an indication of the situation on the ground. The LGU faces a number of strategic challenges in this regard: creating an enabling environment in terms of policies and guidelines promoting citizen participation; activating, maximizing, and sustaining the special bodies and other participatory mechanisms mandated in the LGC (e.g. MDC); inspiring and encouraging ordinary citizens to become

partners of local development; and so on. Development partners, on the other hand, have a crucial role to play in the areas of organizing, awareness-raising, capacity development, and resource assistance. The latter is very important given that majority of existing local citizens organization have very limited resources.

Sixth, there is a need to achieve a good balance in terms of the “timing” of the project, starting with the project concept up to the final activity. The “timing” is often contingent on several factors, such as the perspectives of the various stakeholders (proponent, implementer, LGU-partner). For instance, the project proponent (GTZ-DP) operates from the perspective of availability of resources (which is often time-bound), while the project implementer (ASoG) conducts the activities from the viewpoint of management and including the availability of manpower (e.g. resource persons, facilitators). The LGU-partner, for its part, is often assumed to perceive the project from a cost-benefit or transactional perspective. The convergence of these various dynamic are factors that create the “timing” in terms of project implementation timeline. Ideally, the key to resolve the problem of a “suffocating” timeline is to give due consideration to the capacity and pace of the target participants to absorb the content and to deal with the process.

Finally, the constraints foreseen as the LGU moves forward to take advantage of the gains of the project should be dealt with in a transparent and accountable manner. How to manage the constraints is mainly the responsibility of the LGU leadership. This will be a challenge given that the LGU leadership has to deal with and manage three major ingredients in governance: developmental, political, and technical. Any LGU practitioner or politician knows how permeable their boundaries are when it comes to decision-making in governance. The PBL participants’ experience attests how the interaction of these factors during the discussions and decision-points often generated dilemmas. Such dilemmas will be amplified in the course of implementing the project gains.

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List of PBL Project Resource Persons

DR. RUFO MENDOZA

Workshop on Budgeting, Expenditure Management, Investment Programming, and Revenue Generation

Dr. Rufo Mendoza is a faculty member at the Ateneo School of Government's Master in Public Management and its Executive Education Program. He is also a member of organizations such as Association of Government Internal Auditors and Philippine Institute of Certified Public Accountants. Dr. Mendoza served as city accountant during the term of Mayor Vilma Santos in Lipa City, Batangas. He received the "Outstanding CPA in Professional Development" national award given by PICPA in 2008.

Dr. Mendoza received his PhD major in Community Development and minor in Agribusiness Management from the University of the Philippines-Los Baños. He also had his Masters of Management, major in Development Management in the same university. He is a certified public accountant.

RANDEE CABACES

Workshop on Enhancing Local Planning-Budgeting Link through Social Accountability

Mr. Randee Cabaces is the capacity-building specialist for the Affiliated Network for Social Accountability in East Asia and the Pacific (ANSA-EAP). He used to work as assistant program manager of the Executive Education Program under the Ateneo School of Government. Mr. Cabaces has had many training engagements in the areas of participatory monitoring and evaluation, learning and knowledge management, among others.

Mr. Cabaces finished his Masters in Environment and Natural Resource Management at the University of the Philippines-Open University. He received his Bachelor's degree in Community Development at University of the Philippines, Diliman.

REDEMPTO PARAFINA

Workshop on Enhancing Local Planning-Budgeting Link through Social Accountability

Mr. Redempto Parafina is currently the networking coordinator for the Affiliated Network for Social Accountability in East Asia and the Pacific (ANSA-EAP). He became director of the Government Watch Project under the Ateneo School of Government. He also served as executive assistant in Partnership for Transparency Fund. Mr. Parafina specializes

in the areas of social accountability, procurement management and research project development and management.

Mr. Parafina completed his Master of Arts in Philosophy at the University of the Philippines. He received his Bachelor's degree in Philosophy from the same university.

GILBERT LOZADA

Workshop on Local Development Planning

Mr. Gilbert Lozada is an institutional and transportation planner at the Public Governance and Development Initiatives. He lectures on local planning and public management at the Ateneo School of Government and the Graduate School of Management, Pamantasan ng Lungsod ng Maynila. Gilbert had taught public administration and political science subjects at the University of the Philippines-Colleges of Public Administration and Arts and Sciences. He had worked as Director IV at the Department of Interior and Local Government and Estate Manager at the National Housing Authority.

Mr. Lozada graduated with Master of Public Administration, Bachelor of Arts in Political Science and Diploma in Transportation Planning in the University of the Philippines. He is working on a masteral program in Environment and Natural Resources Management, also in the same university.

JOHN MANZANAS

Workshop on Project Proposal Making

Mr. John Manzanias is a lecturer at the Ateneo School of Government where he teaches subjects such as Local Economic Development Planning, Local Competitive Advantage, Local Value Chain Analysis, SMEs and Public Policy, among others. He is also a freelance consultant with engagements in International Labor Organization, Department of Trade and Industry, Agriteam Canada and other institutions.

Mr. Manzanias finished his Master in Business Administration at the University of the Philippines. He received his Bachelor's degree in Economics from San Sebastian College.

ADELFO BRIONES

Project Manager, Overall Facilitator

Mr. Adelfo Briones sits as the director of the Center Community Services under the Ateneo School of Government. He works as a research specialist for the Affiliated Network for Social Accountability in East Asia and the Pacific (ANSA-EAP). He is also a faculty member of ASoG's Masters in Public Management, teaching Leadership in Public Service. Mr. Briones has a broad experience in the facilitation of capacity development programs, strategic

planning, project development and management and other technical activities. He also has solid background in participatory social research using qualitative approaches.

Mr. Briones is finishing his Doctorate in Social and Community Psychology at the Ateneo de Manila University. He completed his Masters in Social and Community Psychology from the same university. He has two Bachelor degrees: Sacred Theology (cum laude, from the Central Seminary of the University of Sto. Tomas), and Philosophy and English Literature (magna cum laude, from San Carlos Seminary College, Cebu City).

ATTY. FRANKLIN QUIJANO

GTZ-DP Resource Person

Atty. Franklin Quijano was mayor of Iligan City from 1998 to 2004. He presently chairs the GRP Peace Panel for RPMM as well as the Rebolusyonaryong Partido ng Manggagawa ng Pilipinas. He also serves as consultant to the National Electrification Administration and Synergeia.

Atty. Quijano completed his Bachelor of Laws at the University of San Carlos in Cebu City. He also has a Bachelor's degree in Economics from the same university. He passed both the Professional Career Service and Bar examinations.

JIMMY YAOKASIN

GTZ-DP Resource Person

Jimmy T. Yaokasin was the City Administrator of Tacloban from 2003-2008 during the time of former Mayor Alfredo Romualdez, Sr. He is currently the Chairman of the Development Academy of the Philippines. He started Star Oil, Inc., an independent fuel distribution company which now has 16 company and dealer-owned stations in Eastern Visayas and parts of Mindanao. Mr. Yaokasin is an active member of civic and community organizations – a Paul Harris Fellow of Rotary International, Zone Leader of Gideons International, and the Jaycees (Junior Chamber International) where he was once the JCI Vice-President supervising Jaycee chapters in Malaysia, Thailand, Singapore, Indonesia and Nepal.

Mr. Yaokasin obtained his degree in Business Administration major in Accountancy (Magna cum Laude) from the University of the Philippines. He obtained his Masters in Business Administration degree under the Executive MBA program of the Kellogg School of Management, Northwestern University, Chicago and the Hongkong University of Science and Technology. Mr. Yaokasin is a Certified Public Accountant.

List of PBL Project Participants

<u>Name</u>	<u>Designation</u>
Atty. Alden M. Avestruz	Municipal Mayor
Juliana A. Villasin	Municipal Vice-Mayor
Jose Benusa	SB Member
Artemio Apostol	SB Member
Danilo Bugal	ABC President
Leonila Taghap	Brgy. Chairman
Silvestre Ponferrada	Brgy. Chairman
Estela Creer	MLGOO
Engr. Judith M. Borrel	Municipal Planning and Development Coordinator
Engr. Eliseo Penaranda	Assistant MPDC
Engr. Polcomar P. Canonce	Project Development Officer III
Michael Delima	Local Assessment Operations Officer III
Mario Alvarado	Draftsman II
Engr. Teofilo Glenn Avestruz	Municipal Engineer
Dr. Lourdes Calzita	Municipal Health Officer
Sonia Caneda	Nurse II
Dina DG. Avorque	Municipal Treasurer
Nancy Agosto	Administrative Assistant III
Teresita Badiable	Municipal Budget Officer
Richel Ellaso	Municipal Accountant
Oscalen Colasito	Local Assessment Operations Officer I
Reynaldo Bodo	Municipal Agriculture Officer
Engr. Ariel Gam	Agriculture Technician
Luz Raagas	Municipal Social Welfare and Development Officer I
Fe Reyes	Youth Development Officer III
Doroteo Astorga	Municipal Assessor
Chesterton Reyes	Administrative Assistant I
Jannah Dela Pena	Administrative Assistant II
Paulina Nayra	Runggiyan Social Development Foundation, Inc.
Laurentino Caneda	San Miguel Barugo Tricycle Operators and Drivers



	Association
Clotilde Astorga	Barugo Food Delicacies Producers Association
Mario Cubi	LGU-Albuera Municipal Planning and Development Officer
Alfonso Mayor	LGU-Albuera Municipal Budget Officer
Arlene Villar	LGU-Albuera Municipal Agricultural Officer



List of Representatives of Region 8 Oversight Agencies and
the Province of Leyte

<u>Name</u>	<u>Oversight Agency (Region 8)</u>
Blanca Cercado	Department of the Interior and Local Government
Edmund Talle	Department of Budget and Management
Teresita Atuel	Department of Finance
Lina Go	Department of Finance
Marivic Cuayzon	National Economic Development Authority
Zenaida Estur	Housing and Land Use Regulatory Board

<u>Name</u>	<u>Province of Leyte</u>
Evelia Martin	Provincial Planning and Development Office

