

# **Social Watch Philippines**





Social Watch Philippines  
Monitoring Report 2003

**T R A C K I N G  
P R O G R E S S**

**Accomplishments and Shortfalls  
in Local Social Development**

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Social Watch Philippines

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# INTRODUCTION

This report is part of the continuing initiative of Social Watch Philippines (SWP) to monitor the commitments made by the Philippine Government during world conferences and to measure actual progress towards the agreed goals and targets by highlighting the situation in selected local areas in the Philippines. Through this, SWP likewise intends to substantiate development trends in the country by presenting the progress and shortfalls in social development at local level. The presentations relied primarily on the monitoring activities undertaken by the Social Watch networks in designated pilot areas.

This report is divided into two parts. The first part is a presentation of a set of key indicators that highlight the trends and achievements made in each of the selected study areas. Case studies were done to provide deeper insights concerning specific local issues and concerns. Development plans were also reviewed to assess whether clear targets were set and appropriate strategies developed to ensure that the commitments made are translated into operational plans. Finally, local budgets were evaluated to analyze the investments made by local government towards reducing poverty and improving social development.

The second part contains the statistical annex which presents key social development indicators at the national, regional and provincial levels. Where available, figures have been broken down to show disparities in performance based on location, gender and income group. The annex also presents key indicators for countries in the Asian region to assess how the Philippines performed compared to its Asian neighbors.

By and large, progress in social development has been partial and largely uneven. Accomplishments in some areas have been minimal, while other areas experienced actual reversals. Moreover, inequalities persist and have actually increased over time.

Clearly, more efforts are needed to meet the basic targets. As time may be running short, advocacy must be heightened to prompt government to put up, scale up and speed up or be left out in the development march.



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# The Template and Modules

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SOCIAL WATCH MONITORING REPORT 2003

# The Social Watch Local Monitoring System

By Rene R. Raya

The Social Watch Monitoring System was developed by Social Watch Philippines (SWP) to keep track of progress in social development. It uses a template of indicators culled mostly from available administrative data and official surveys. The monitoring template is designed specifically for small area monitoring, particularly at the level of provinces and municipalities. The objective is to localize social watching and ensure that national development goals and strategies are translated into concrete programs and actions at the local level. Specifically, the monitoring system aims to:

- 1) establish benchmarks for tracking progress in key social development goals;
- 2) assess the operationalization of the country's international commitments at the local level; and
- 3) strengthen the advocacy for mainstreaming the Millennium Development Goals (MDG) to serve as a framework in local development planning and budgeting

The monitoring template took off from the commitments made by the Philippine government in various international conferences, particularly the World Summit on Social Development (WSSD) (Copenhagen, 1995) and the Millennium Summit (New York, 2000).

Since 1990, the United Nations sponsored a series of global conferences that resulted to a comprehensive development agenda. The 1995 WSSD adopted three core objectives: poverty alleviation, expansion of productive employment and social integration. These core objectives were substantiated by 11 major social concerns and 53 key indicators.

## Social Development 11 Major Social Concerns

1. Poverty Alleviation
2. Population
3. Health
4. Education
5. Employment
6. Shelter
7. Environment
8. Disaster
9. Crime
10. Social Protection
11. Family

In September 2000, the Millennium Summit adopted the Millennium Development Goals (MDG) which tried to capture all the salient points that were articulated in previous world conferences. The Summit identified eight goals and 14 key targets to be achieved by the year 2015.

## Millennium Development Goals and Targets

### Goal 1: Eradicate extreme poverty and hunger

- Halve the proportion of people living in extreme poverty between 1990-2015
- Halve the proportion of population below minimum level of dietary energy consumption & halve proportion of underweight children (under 5 yrs. old)

RENE R. RAYA is a member of the management collective of Action for Economic Reforms (AER) and co-convenor of Social Watch Philippines (SWP).

- Halve the proportion of people with no access to safe drinking water or those who cannot afford it by 2015

### **Goal 2: Achieve universal primary education**

- Achieve universal access to primary education by 2015

### **Goal 3: Promote gender equality and empower women**

- Eliminate gender disparity in primary & secondary education, preferably by 2005 & all levels of education not later than 2015

### **Goal 4: Reduce child mortality**

- Reduce children under-five mortality rate by two-thirds by 2015

### **Goal 5: Improve maternal health**

- Reduce maternal mortality rate by three-quarters by 2015
- Increase access to reproductive health services to 60 percent by 2005, 80 percent by 2010, and 100 percent by 2015

### **Goal 6: Combat HIV/AIDS, malaria and other diseases**

- Halt and reverse the spread of HIV/AIDS by 2015
- Halt by 2015 and begin to reverse the incidence of malaria and other major diseases

### **Goal 7: Ensure environmental sustainability**

- Implement national strategies for sustainable development by 2005, to reverse loss of environment resources by 2015
- By 2020, to have achieved a significant improvement in the lives of at least 100 million slum dwellers

### **Goal 8: Develop a Global Partnership for Development**

- Develop further an open; rule-based; predictable; non-discriminatory trading and financial system; include a commitment to good governance; development & poverty reduction – both nationally and internationally
- Deal comprehensively with the debt problems of developing countries through national and international measures in order to make debts sustainable in the long run

The Social Watch Monitoring System was finalized in a series of national and local workshops attended by SWP members and other civil society organizations active in various sectoral concerns. The design of the monitoring template considered the existing statistical system and the feasibility of generating the selected indicators on a sustained basis. The monitoring template includes input, performance and enabling indicators that are directly or indirectly linked to desired outcomes.

The Social Watch Monitoring System consists of five modules.

## **Module I – Monitoring Template of Key Social Indicators**

The template is a selection of indicators that monitor access to basic social services and progress in human development. The monitoring template covers the following: demographic information, employment statistics, health and education performance, infrastructure, shelter, personal security, women and children. Where available, time series starting 1990 (the reference year for the MDG) will be compiled for these indicators.

## **Module II – Assessment of Special Concerns**

Social Watch identified important social concerns that are not adequately covered by existing monitoring system. These include the following: social integration; gender equity; quality of employment; asset reform; security; disaster preparedness; environment and partnership. The case study approach is recommended to assess the status and developments related to these issues and concerns. Social Watch also identified a set of indicators that can help in keeping track of these social concerns.

## **Module III - Quality of Life Index**

The Quality of Life Index (QLI) is a pure capability-based measure that is similar to UNDP's Human Development Index (HDI). As developed by Action for Economic Reforms (AER), the indicator measures achievement in three dimensions of human capabilities: the capability to be well nourished; the capability for healthy and safe reproduction; and the capability to be educated and be knowledgeable. The in-

dex is computed by assigning equal weights to the corresponding component indicators: under-five nutrition, attended births and elementary cohort survival rate. The QLI is a cost-effective indicator that can be generated easily using available administrative data and applied at both national and local levels. The index serves as an effective advocacy tool to promote human development as a priority concern in local planning and resource allocation.

#### **Module IV - Review of Development Plan**

This module consists of a set of questions designed to appraise the local development plan in terms of its framework, scope, pro-poor bias and incorporation of the MDG and WSSD targets. The questions guide evaluators in identifying the strong points, the gaps, the weak areas and the recommendations to improve future planning.

#### **Module V - Analysis of the Local Budget**

This module is designed to assess the local budget, including the annual investment program, in terms of their responsiveness to poverty reduction and social development concerns. Social Watch supports the 20/20 Initiative which specifies that 20 per cent of the budget should go to priority human development concerns such as: primary health care; basic education; nutrition; family planning; maternal and child care and water. The module also evaluates the budget process in terms of transparency and public participation.

The monitoring system attempts to capture a complete cycle that starts with the monitoring of quantitative indicators. Generating and compiling key social indicators is not enough. It is important for social watchers to use these indicators in plotting trends and in analyzing the local situation. Local situationers are further substantiated through case studies to deepen analysis on some of the most critical issues and concerns. Social indicators, situational analysis and case studies provide important input in local development planning, resource mobilization and budgeting.

The Social Watch Monitoring System was piloted in the provinces of Nueva Ecija, Camarines Sur, Guimaras and North Cotabato and in the city of Dumaguete. A series of workshops were held to finalize the monitoring system, identify pilot areas and plan its implementation. Research teams were formed in the pilot areas to initiate data collection, processing and analysis. Key development issues were identified as topics for the case studies to highlight some of the special concerns.

### **Implementation Highlights**

While it took the research teams more time than originally planned, the monitoring system was successfully implemented in all pilot areas. However, the extent of implementation varied according to the availability and consistency of data and the relationship with local government units and with branch offices of national government agencies.

A startup information baseline containing key social indicators was established covering all the pilot areas. Demographic information, health statistics and education indicators are almost always available down to the level of municipalities and barangays. However, data on employment, infrastructure, shelter, security, women and children are available only at the provincial level. In most cases, data is available only for the most recent years.

The Quality of Life Index (QLI) was also generated for selected municipalities in four of the five pilot areas. However, the indices were generated only for a period of two to three years. The original plan was to generate a time series starting 1990 or 1995.

Five case studies were also completed which highlighted the following social concerns: quality of employment, reproductive health, health information system, peace initiatives and partnership between government and civil society groups.

Finally, provincial and municipal development plans, annual investment plans and local budgets were obtained and analyzed in all the five pilot areas. Social Watch also prepared a consolidated report on development planning and budgeting based on the analysis done by the local research teams.

The local teams encountered several problems in the course of data gathering.

1. Difficulty and delays in accessing data and documents from both local government units (LGU) and national agencies
2. Non-availability, inconsistency and significant gaps in the required data
3. Lost or destruction of data due to fire, flood and office transfer
4. Unconsolidated and unprocessed data
5. Lack of data desegregation (by gender and by municipalities)

6. Lack of planning and systematic approach to data collection, processing and consolidation

In all the pilot areas, local government units have very little knowledge about the Millennium Development Goals (MDGs) and other international commitments made by the Philippine government. The local monitoring teams also noted the weak linkage between social indicators and development planning and budgeting.

Based on this pilot initiative, Social Watch will continue to build on the monitoring system to improve its content and methodology. It will refine the monitoring template and instruments; identify new indicators and determine alternative data collection strategies. Alternative options will be evaluated according to its usefulness, feasibility and technical adequacy. Social Watch will pursue and expand its monitoring beyond the initial pilot areas and conduct further research to ensure impact of the monitoring system on policy and social development.

**[Attachment: the Monitoring Modules]**

# Module I - Monitoring Template of Key Social Indicators

Indicator	Information Sources / Notes
Demographics	NSO
Population by Sex /Growth Rate	
Percent Urban/Rural	
Age Dependency Ratio	
Ethno-cultural/linguistic (No. & Percent of Population)	
Employment	DOLE
Employment by Sector	
New Jobs Generated	
Unemployment Rate	
Overseas Employment	
Health	PHO/RHU
Infant Mortality Rate	
Under 5 Mortality	
Maternal Mortality Ratio	
Incidence of moderately/severely underweight	
Deliveries attended by Doctors, Nurses, Midwives & Hilots	
Access to water (Levels I to III)	
Access to sanitary facility	
TB, Malaria, HIV/AIDS Cases	
Doctor /Bed to population ratio	
Number of BHS/BHW (Barangay Health Staff/Health Worker) to population	
Education	Division Office (DepEd)
Elementary Participation rate	
High School Participation rate	

Indicator	Information Sources / Notes
Elementary/Secondary Cohort Survival Rate	
No. of Barangays w/o Complete Elementary School	
No. of Municipalities w/o Complete High School	
No. of Barangays w/o Day Care Center	
Infrastructure	PPDO
Road Density (km of road per square km)	
Per Cent of Barangays w/o Electricity	
Per Cent of House Holds w/o Electricity	
No of Phone Lines per 1000 Population	
Shelter	PPDO
Breakdown of Housing by Type (durability, amenities, security of tenure)	
Ratio of Households who are Informal Occupants (slum dwellers or residing in depressed communities)	
Personal Security	PPDO/Disaster CC/PNP
Crime Solution Efficiency Rate	
Number of Cases Files / Solved	
Number of Displaced Families	
No of Armed Conflict Incidents	
Vulnerability of Women/Children	PPDO
Incidence of domestic violence	
Incidence of Child Abuse	
Incidence of Rape	
Incidence of Trafficking in Women and Children	

\* All statistics with gender breakdown where applicable

# Module II – Assessment of Special Concerns

Social Integration	
<p>Identification of Vulnerable Groups</p> <ul style="list-style-type: none"> <li>• Ethnic minorities / Indigenous Peoples</li> <li>• The poor, landless, homeless, jobless</li> <li>• Persons with disabilities</li> <li>• Disaster victims</li> <li>• Internal refugees</li> <li>• Victims of Human Rights violations</li> <li>• Slum dwellers/illegal occupants</li> <li>• Domestic and Overseas Migrants</li> <li>• Senior citizens</li> <li>• Children</li> </ul>	
<ul style="list-style-type: none"> <li>• Disparity in income, education enrollment and survival, labor force participation, employment and crime rates</li> <li>• Differentiation in basic services available in IP communities health clinics, day care centers, schools, water, road, electricity, sanitary facilities, housing and roads</li> <li>• Presence or absence of specific ordinances, programs and projects catering for IPs (Indigenous People)</li> <li>• Disparity in incidences of crimes, civil disturbance, imprisonment and detention</li> <li>• Disparity in representation in government</li> </ul>	
Gender Equity	
<p>Gender Disparity Indicators</p> <ul style="list-style-type: none"> <li>• Disparity in income, education enrollment and survival, labor force participation and employment</li> <li>• Presence or absence of specific support programs for single parents, women household heads, victims of abuses and other women in especially difficult circumstances</li> <li>• Number of women in especially difficult circumstances given assistance</li> <li>• Representation in government</li> <li>• Participation in community affairs and local governance</li> </ul>	
Quality of Employment	
<ul style="list-style-type: none"> <li>• Extent of Contractualization</li> <li>• Incidence of Child Labor</li> <li>• Wage/Income Level</li> <li>• Number of Labor Cases Filed / Number Resolved</li> <li>• Security of Tenure</li> <li>• Social Security Coverage/Social Protection</li> <li>• Overseas Migration Statistics</li> </ul>	
Asset Reform	
<p>Extent of Land Distribution</p> <ul style="list-style-type: none"> <li>• No. of CLOAs (Certificate of Land Ownership and Acquisition) processed, awarded, cancelled</li> <li>• No. of EPs (Emancipation Patent) processed, awarded, cancelled</li> <li>• No. &amp; hectares of problematic land reform coverage</li> </ul>	

<ul style="list-style-type: none"> <li>• No. of pending cases filed/resolved</li> <li>• Legal and illegal land conversion (no. of cases and total area covered)</li> <li>• CADC (Certificate of Ancestral Domain Claim) processed, awarded, cancelled (No. &amp; Hectares.)</li> <li>• Farming households with access to formal and informal credit</li> <li>• Farms with available irrigation facilities</li> <li>• Proportion of active/successful cooperatives</li> </ul> <p>Include also indicators community-based forest management, sustainable agriculture and coastal resource management</p>	
<b>Peace and Security</b>	
<ul style="list-style-type: none"> <li>• Armed Conflict Incidents</li> <li>• Casualties among Civilians/Noncombatants</li> <li>• Human Rights Violation/Political Prisoners</li> <li>• Evacuation and Displacement Incidents</li> <li>• Internally Displaced Persons</li> <li>• Crime and Violent Incidents</li> <li>• Crime Resolution Rate</li> <li>• Peace Efforts and Programs</li> </ul>	
<b>Partnership with CSO / NGOs</b>	
<ul style="list-style-type: none"> <li>• Number of Accredited Active NGOs (Non-Government Organizations)</li> <li>• Number of Members in Local Development Councils</li> <li>• Sectors Represented in the Local Development Councils</li> <li>• Women Representation in Local Development Councils</li> <li>• IPs Representation in Local Development Councils</li> <li>• Representation of other Vulnerable Groups</li> <li>• Procedure for NGO accreditation</li> <li>• Frequency of meetings of the Local Development Councils</li> </ul> <p>Additional: NGO initiated venues for Government Organizations(GO)-NGO engagement (such as forums sponsored by NGO, Councils set up by NGO alliances, etc)</p>	
<b>Disaster Preparedness</b>	
<ul style="list-style-type: none"> <li>• No. of Disaster Events</li> <li>• No. of Affected Families</li> <li>• No. of Families Displaced</li> <li>• No. of Victims Assisted</li> <li>• Municipalities/Barangays w/ Disaster Committees</li> <li>• Municipalities/Barangays w/ Disaster Plans</li> <li>• Capacities/Vulnerabilities Analysis Completed</li> <li>• Drills Conducted</li> <li>• Disaster Mitigation and Response Programs Being Implemented</li> </ul>	
<b>Environmental Sustainability</b>	
<ul style="list-style-type: none"> <li>• Forest Cover</li> <li>• Percent of Forest Cover to Land Area</li> <li>• Corals in Excellent and Good Condition</li> <li>• Mangrove Forest Cover</li> <li>• Pollution Indicators</li> <li>• Adoption and Implementation of Local Policies on the Environment</li> <li>• Programs on Reforestation, Watershed Rehabilitation, Sustainable (?)</li> <li>• Agriculture, Solid Waste Management - Coverage and Successes</li> <li>• Partnership building among Local Government Units, NGOs and Private Sector</li> </ul>	

\* Period Coverage – 1990 as base year to most recent available data

# Module III - Quality of Life Index

## A. Guidelines for Survey Instrument

Three component indicators will be used to generate the Quality of Life Index or QLI:

- 1) Under-Five Nutrition
- 2) Attended Births
- 3) Elementary Cohort Survival Rate

A five to ten year time series of the index will be generated using 1990 as base year. This is to establish the benchmark for 1990 which has been agreed as the reference year for the Millennium Development Goals. At the level of the municipality, the health statistics are available usually with barangay breakdown. For education, the breakdown is not necessarily by barangay, but by school. In this case, we have to identify the barangays in which the schools are located. It is also unlikely that the data will go back to 1990. In this case, we gather whatever is available. To simplify the historical trending, QLI will be generated at five-year intervals and for the latest two years, thus — 1990, 1995, 2000 and 2001. Thus, it is not necessary to fill up the grid for all the years indicated. In many cases, the concerned agencies have already computed the required indicators. In such cases, we don't need to fill up the grid for raw data as long as the computational procedure is clear and consistent with our own computation.

## B. Data Source and Computational Procedure

### Under Five Nutrition

#### Source of Data:

Provincial Health Officer/Municipal Health Office of Rural Health Unit

#### Raw Data Format:

The data on Nutrition is based on weight for age standard for Filipino children. The system categorizes under-five children according to the following:

	Number	Per Cent of Total
Normal (NO)		
Mildly Malnourished (MI)		
Moderately Malnourished (MO)		
Severely Malnourished (SE)		
Overweight (OW)		

$$\text{Rate of Malnutrition} = \frac{\text{MO} + \text{SE}}{\text{Total Under-Five Children Weighed}}$$

$$\text{Nutrition Index} = 1 - \text{Rate of Malnutrition}$$

## Attended Births

### Source of Data:

Provincial Health Officer/Municipal Health Office of Rural Health Unit

### Raw Data Format:

The data on attended birth categorize deliveries by type of health personnel assisting, thus:

	Number	Per Cent of Total
Doctors		
Nurses		
Midwives		
Trained Hilot		
Untrained Hilot		
Not Specified		

Safe Reproduction Index =  $\frac{\text{No. of Deliveries Assisted by Doctors, Nurses \& Midwives}}{\text{Total Live Births - Not Specified}}$

## Elementary Cohort Survival Rate

### Source of Data:

Department of Education (DepEd) Division; At the municipal level, data is available either at the Office of the DepEd District Supervisor or the High School Principal.

### Raw Data Format:

Data on Cohort Survival is usually computed by the Division Office for the entire division and by municipalities. If this is not available, this can be generated using raw data on enrolment. For computation procedures, the assistance of the planning and statistics office of the Division can be requested. Cohort survival rate is based on the number of children who entered grade one and survived up to grade 6 after the prescribed number of years.

Cohort Survival Rate =  $\frac{\text{Number of Entrants in Grade 1 (Base Year)}}{\text{Number Surviving to Grade 6 (Base Year + 5)}}$

## C. Computing the Quality of Life Index (QLI)

The Quality of Life Index for a particular (what?) is obtained by taking the simple average of the three component indices: the Nutrition Index, the Safe Reproduction Index and the Elementary Cohort Survival Rate.

$$QLI = 1/3 (I_1 + I_2 + I_3)$$

Where,  $I_1$  = Nutrition Index

$I_2$  = Safe Reproduction Index

$I_3$  = Elementary Cohort Survival Rate

# Module IV - Review of Local Development Plan

## Guide Questions

Local Area:

Province    Municipality    Barangay

### Time Frame of Development Plan

- Annual
- Short Term (2 years)
- Medium Term (3-5 Years)
- Long Term (10-25 Years)

For What Period:

How regular is the formulation of the Development Plan?

Was there a previous Development Plan?    Yes    No

Does the Plan include a situationer?    Yes    No

Did the Plan include present status of sectoral situation?    Yes    No

What sectors were covered?

<hr/>	<hr/>

Did the situationer include historical trends?    Yes    No

Remarks about the Situationer:

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<hr/>
<hr/>

Is the framework clear?	<input type="checkbox"/> Yes	<input type="checkbox"/> Not so Clear	<input type="checkbox"/> No
Are the goals clearly defined?	<input type="checkbox"/> Yes	<input type="checkbox"/> Not so Clear	<input type="checkbox"/> No
Are the strategies clearly defined?	<input type="checkbox"/> Yes	<input type="checkbox"/> Not so Clear	<input type="checkbox"/> No
Are the Indicators well defined?	<input type="checkbox"/> Yes	<input type="checkbox"/> Can be Improved	<input type="checkbox"/> No
Are there annual targets to be met?	<input type="checkbox"/> Yes	<input type="checkbox"/> Can be Improved	<input type="checkbox"/> No
Are the Key Result Areas clear?	<input type="checkbox"/> Yes	<input type="checkbox"/> Not so Clear	<input type="checkbox"/> No
Is there a good mix of input and outcome indicators?	<input type="checkbox"/> Yes	<input type="checkbox"/> Not so Good	<input type="checkbox"/> No

Remarks about the framework and targets:

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Did the Plan clearly identify the vulnerable sectors?  Yes  Not so Clear  No

Did the Plan clearly identify the areas that must be given attention?  
 Yes  Not so Clear  No

Is there clear definition and targeting of the poor?  Yes  Not so Clear  No

Are there clear criteria for prioritizing?  Yes  Not so Clear  No

Remarks about targeting and pro-poor bias of the Development Plan:

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# Content and Coverage

Review the components of the Plan and indicate how strong it is in terms of the MDG and Social Development Concerns.

<b>Poverty reduction</b>	✓ Substantial	✓ Mentioned w/ targets	✓ Mentioned	✓ No Mention
<b>Food Security and hunger elimination</b>	✓ Substantial	✓ Mentioned w/ targets	✓ Mentioned	✓ No Mention
<b>Universal primary education</b>	✓ Substantial	✓ Mentioned w/ targets	✓ Mentioned	✓ No Mention
<b>Gender equality</b>	✓ Substantial	✓ Mentioned w/ targets	✓ Mentioned	✓ No Mention
<b>On Empowering women</b>	✓ Substantial	✓ Mentioned w/ targets	✓ Mentioned	✓ No Mention
<b>Reduce child mortality</b>	✓ Substantial	✓ Mentioned w/ targets	✓ Mentioned	✓ No Mention
<b>Maternal health</b>	✓ Substantial	✓ Mentioned w/ targets	✓ Mentioned	✓ No Mention
<b>Combat HIV/AIDS</b>	✓ Substantial	✓ Mentioned w/ targets	✓ Mentioned	✓ No Mention
<b>Infectious diseases</b>	✓ Substantial	✓ Mentioned w/ targets	✓ Mentioned	✓ No Mention
<b>Environmental sustainability</b>	✓ Substantial	✓ Mentioned w/ targets	✓ Mentioned	✓ No Mention
<b>Global Development Partnership</b>	✓ Substantial	✓ Mentioned w/ targets	✓ Mentioned	✓ No Mention
<b>Employment</b>	✓ Substantial	✓ Mentioned w/ targets	✓ Mentioned	✓ No Mention
<b>Shelter</b>	✓ Substantial	✓ Mentioned w/ targets	✓ Mentioned	✓ No Mention
<b>Disaster Mitigation</b>	✓ Substantial	✓ Mentioned w/ targets	✓ Mentioned	✓ No Mention
<b>Personal Security and Crime Prevention</b>	✓ Substantial	✓ Mentioned w/ targets	✓ Mentioned	✓ No Mention
<b>Social Protection</b>	✓ Substantial	✓ Mentioned w/ targets	✓ Mentioned	✓ No Mention
<b>Family Support System</b>	✓ Substantial	✓ Mentioned w/ targets	✓ Mentioned	✓ No Mention

Remarks about inclusion of MDG and WSSD Goals in the Plan:

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**Extent of operationalizing Minimum Basic Needs (MBN) in 5<sup>th</sup> and 6<sup>th</sup> class municipalities?**

- All 5<sup>th</sup>/6<sup>th</sup> Class
  Only 5<sup>th</sup>/6<sup>th</sup> Class
  None

**Extent of Implementation of the Department of Local Government Accessibility Index (as developed by the International Labor Organization)**

- Substantial
  Some Areas
  None

Is there an LGU-initiated poverty monitoring system and Local Poverty Alleviation Programs (LPAP)?

Yes  Uncertain  None

Is there any other poverty monitoring system being implemented in the area?

Yes  Uncertain  None

Is there a mechanism for Monitoring and Evaluation?

Yes  Not so Clear  None

Are the data/indicators desegregated by sex?

Yes  For Some  No

Are the data/indicators desegregated by poor and non-poor?

Yes  Some  No

Are the data/indicators desegregated by ethnicity?

Yes  Some  No

What agencies supported the Local Government Unit in formulating the Development Plan?

- Other government agencies
- Foreign consultants/donor agency
- Private consultant/s
- Academic institutions
- NGOs
- Individual Volunteers

Is there a costing of the Development Plan?

Yes  Not so Clear  None

Are the sources of funds clearly identified?

Yes  Not so Clear  None

Did the Plan indicate locally generated funds?

Yes  Not so Clear  None

What are the other salient features of the Development Plan?

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What are the gaps and weak spots of the Development Plan?

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Overall comments and evaluation of the Development Plan.

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# Module V - Analysis of the Local Budget

## Guide Questions

1. Present the summary of the budget and expenditure by sector, indicating clearly the allocation for basic social services.
2. Analyze the expenditure and annual investment plan in terms of allocating for basic services that is consistent with the 20/20 initiative:

Scope of Basic Social Services. The basic social services under the 20/20 Initiative shall be limited to the following services and programs:

- a. **Basic Education:** covers pre-school (early child development), elementary, secondary, basic adult literacy, non-formal education up to the age of 17;
- b. **Primary Health Care:** includes communicable and non-communicable disease control services, comprehensive maternal services and child public health care package (covering such areas as immunization, school health, sectors) and reproductive health services.
- c. **Food and Nutrition:** consists of food supplementation; micro-nutrients (such as iodized salt and Vitamin A supplementation); food fortification; nutrition education and counseling; and household food security;
- d. **Safe Water and Sanitation:** consist of low-cost Levels 1 and 2 water supply system, and environmental health services. Level 1 includes shallow wells, deep wells, spring systems while Level 2 covers communal faucets: barangay water supply system or poblacion water supply system.

3. Present and analyze sources of funding
  - a. Percent of Internal Revenue Allotment (IRA) to overall income
  - b. Percent of locally generated funds to total income
  - c. Are there foreign-assisted projects and how much is annual assistance?
  - d. Are there on-going development projects of national agencies?
4. What is the capability of the local unit to generate funds from local sources? Other potential sources for generating financial resources for development projects.
5. Present summary and analysis of allocation by object of expenditure – Personnel Services (PS), Maintenance and Other Operating Expenses (MOOE) and Capital Outlay (CO).
6. Present analysis of allocation by sector – social, economic, administrative, etc.

*Overall assessment of investment plan, budget and actual expenditure in terms of responsiveness to MDG and WSSD concerns.*