

GUIDELINES IN THE IMPLEMENTATION OF THE PROJECT: INSTITUTIONALIZATION OF THE SOCIAL WELFARE AND DEVELOPMENT INDICATOR SYSTEM (SWDIS) PHASE II (1994-1998)

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I.

Background and Rationale

In 1991, the Department jointly initiated a Social Welfare Indicator System (SWIS) Project with the National Statistical Coordination Board (NSCB). The NSCB provided initial funding and technical assistance to DSWD to develop the indicator system. This joint undertaking resulted into the creation of the SWIS Executive Committee (EXECOM) and the Technical Working Group (TWG), both headed by DSWD, as lead implementing agency. These groups were responsible in the drafting of the conceptual and statistical frameworks of the Project. The indicator system developed was focused on DSWD social welfare indicators only.

In 1992, the SWIS concept was further revised to accommodate changes and developments due to the implementation of the LGC of 1991, modifications resulting from two Medium-Term Philippine Development Plans (1987-1992 and 1993-1998), and the changing perspectives of the Project management. Later in 1992, the concept has evolved and the conceptual, statistical and operational frameworks were finalized. The Project is now known as the Social Welfare and Development Indicator System (SWDIS), incorporating the many substantial inputs from the NGOs, GOs, LGUs and the academe. It has expanded to respond to all other social welfare concerns of other agencies involved in the Social Welfare and Development sub-sector.

In 1993, the development of the SWDIS Operations Manual, institutionalization of the SWDIS in six (6) pilot regions and development of a Computer Based Data System (CBDS) and eventual installation of the same in these pilot regions, were planned. The Operations Manual has been completed. Six (6) pilot regions were identified, namely; I, IV, V, VIII, IX and XI. The CBDS was developed and completed, and representatives from the 6 pilot regions were oriented and trained on the same as scheduled.

The funds from NSCB has officially stopped in 1993 but follow-on activities towards the improvement and sustainability of the systems developed is still wanting, hence the need to sustain the efforts made through a follow-up project, this time with the Department taking the full responsibility, both financial and technical.

II.

Principles/Visions Guiding the Implementation of the SWDIS Project

A. DSWD VISION

The Department fully supports the vision of Philippines 2000. It has extensively embarked on new strategies to help government alleviate poverty. The SWDIS has been designed to respond to data needs in support to poverty alleviation.

B. DSWD POLICY THRUSTS AND DIRECTIONS

For 1994, the Department focuses its programs and services along poverty alleviation. The sustained development of databases for monitoring the changes in the status and condition of poor families over time is imperative.

III.

Project Description

The SWDIS Phase II Project is designed to institutionalize an integrated data system for monitoring the changes in the status and condition of the economically and socially disadvantaged families.

Specifically, the system intends to measure the changes in the following:

- a) status of well-being of the sector's beneficiaries;
- b) monitor the resources (manpower, funding and facilities) inputted into such services, and
- c) environmental factors.

Such changes affect the availability, accessibility and utilization of services on the poor population, now numbering 4.87 million families or 40.7 percent of the population.

The appropriate indicators have already been identified during the Phase I Project implementation. Monitoring of the same which is an objective in the 2nd Phase of the Project beginning in 1994, is through the preparation of Annual Situational Reports, institutionalization of the CBDS in the 6 identified Field Offices, and the actual pilot implementation of a poverty mapping methodology to gather family baseline data using the micro-indicators identified for such purpose.

The project will have two (2) expected outputs:

1. Support mechanism for keeping tab and evaluating achievements relative to the major goals of the Philippine Development Plan, namely: poverty alleviation; people empowerment; human resource development; international competitiveness and sustainable growth, through the preparation of Annual Situational Reports (First ASR to be prepared is for CY 1993); and
2. Updated data on the profile of target beneficiaries, specifically:
 - a) Masterlist of families,
 - b) Barangay Poverty Maps and quarterly monitoring reports using the DSWD-SWDIS FORM MONITORING THE MINIMUM BASIC NEEDS (MBN's) OF FILIPINO FAMILIES, developed and approved by the SWDIS TWG member-agencies last February, 1994 and consequently endorsed by DSWD Field Offices who will implement the Project.

The 1994 Work Program for project implementation is shown in Annex A[*].

IV.

Specific Guidelines

A. METHODOLOGY

A.1 1993 Annual Situational Report. This report shall be prepared in coordination with the SWDIS TWG member agencies, based on the specified format shown in Annex B. There will be 1 National Situationer to be prepared by PMS, and 14 Regional Situationer to be prepared by the 14 Field Offices.

The Project will involve the conduct of a simple family databased masterlist of poor families using the DSWD-SWDIS FORM Monitoring the MBN's of Filipino Families to gather the baseline information.

In the conduct of the family databased masterlisting, the following guidelines shall be followed:

- * Each Field Office shall identify only one (1) barangay, the most depressed by criteria/options set in Annex C[*].
- * A complete enumeration of all families in the barangay identified shall be conducted;
- * All processed families databases (masterlisting) shall be submitted to PMS in diskette form, using MICROSOFT-EXCEL for (Pilot FO staff already trained on this while for the pilot FO not yet trained on the use of MICROSOFT-EXCEL and the rest of the non-pilot regions, may use simple encoding using lotus/spreadsheet); and
- * A Barangay Family Database Needs Assessment Report (MBN) shall be prepared and submitted to PMS for consolidation.

B. INSTITUTIONAL ARRANGEMENT

The SWDIS Phase II Project shall be implemented in-house to maximize resources and develop the capability of Field Offices in conducting simple surveys. Implementation of the Project shall therefore be guided by the following:

AT THE NATIONAL LEVEL

B.1 The Planning and Monitoring Service (PMS) shall:

- Prepare all relevant Terms of References (TOR) for the specified activities, in consultation with the Field Offices;
- Develop the Family Data Base Survey Instrument specifically the DSWD-MBN Form;
- Ensure that funds are made available on time; and
- Monitor and evaluate the conduct of the masterlisting component of the Project.

AT THE REGIONAL LEVEL

1. The Field Offices (FOs) shall:

- Identify the most depressed barangay in the region, guided by the criteria/options for coverage;
- Prepare individual Field Office Work Programs for submission to PMS, using as basis Annex D[*];
- Identify staff who will be directly responsible in having the tasks done;
- Submit quarterly periodic report on the funds utilization and implemented activities;
- Process the masterlists and submit to PMS in diskette form;

- Coordinate the conduct of the initial survey using the MBN Form (3rd quarter); and
- Submit to PMS at least 2 quarterly reports on the Barangay MBN status (4th quarter)

The specific guidelines herein referred to, specifies the required outputs for the 1st year implementation of the Phase II Project. Succeeding guidelines shall be prepared to specifically identify activities for the whole duration of the Project.

D. RELEASE AND LIQUIDATION OF FUNDS

PMS shall make available 65,000.00 each to all Field Offices (FOs), for the conduct of a simple family database masterlist of poor families in only one identified most depressed barangay in the region.

Liquidation of funds received from PMS shall be done on a quarterly basis, through the regular accounting and auditing procedures.

E. TERMINAL REPORT PREPARATION

Each Field Office shall prepare a terminal report on the same using the prescribed format in Annex E.

The PMS shall also prepare an overall terminal report based on all the submitted Field Office terminal reports.

IV.

Implementation Period

This Department Order shall take effect immediately and shall be in force until its project completion in 1998.

Appropriate Terms of References (TORs) shall be prepared on an annual basis to identify specific processes and methodologies required until project completion.

For implementation.

Adopted: 20 April 1994

(SGD.) CORAZON ALMA G. DE LEON
Secretary

"ANNEX B"

Annual Situational Report CY _____

Title : Social Welfare Development Indicator System

I. Introduction:

This will give an overview of the area. Its particular characteristics such as location, size, economic activities, demographic features and etc. should be presented.

II. Situation of the Poor

This will contain the indicators presented in tables and figures per component. Justifications for any unusual figures should be included.

II.1 Component 1

II.2 Component 2

II.3 Component 3

II.4 Component 4

III. Analysis:

This will discuss the findings based on part II of the outline.

IV. Recommendation:

This will present recommendation/s arrived at as a result of the findings in part III.

"ANNEX E"

TERMINAL REPORT
(CY 1994 ACTIVITIES)

I. PROJECT TITLE

II. NAME AND ADDRESS

III. DURATION

IV. PROJECT DESCRIPTION

A. Thrust

B. Objectives

B.1 General

B.2 Specific

C. Expected Outputs

D. Methodology

V. ACCOMPLISHMENTS

VI. FINDINGS AND RECOMMENDATIONS

A. Salient Findings

B. Recommendations

VII. LESSONS FOR THE FUTURE

VIII. FINANCIAL REPORT (Attach relevant documents)

IX. TECHNICAL REPORT (Attach relevant documents)

X. PROJECT STAFF

[*] Not Included here.

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