

PROJECT I-PANTAWID

eFDS Training Manual

VOLUME VI

PROJECT MONITORING AND MANAGEMENT (eFDS Modules 12-14)



Concerned Citizens of Alaba
for Good Government, Inc.

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Guarding the Integrity of Conditional Cash Transfer Program (Project i-Pantawid)

eFDS Training Manual: Volume 6 PROJECT MONITORING AND MANAGEMENT (eFDS Modules 12-14)

Prepared by the Project i-Pantawid consortium led by the Citizens of Abra for Good Government, Inc. (CCAGG) in association with Responsible Citizens and Empowered Communities in Solidarity for Social Change (RECITE), Affiliated Network for Social Accountability for East Asia and the Pacific (ANSA-EAP), and the Partnership for Transparency Fund (PTF) under Grant No. TF015863 with the World Bank/Global Partnership for Social Accountability. The contents and opinions expressed herein are solely the responsibility of the consortium and do not necessarily reflect the views of the WB/GPSA.

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Acronyms and Abbreviations

ANSA-EAP	Affiliate Network for Social Accountability-East Asia and the Pacific
BB	Bulletin Board
BHS	Barangay Health Station
BL	Baseline
BM	Beneficiary Monitoring
Brgy	Barangay
CCAGG	Concerned Citizens of Abra for Good Government
CCT	Conditional Cash Transfer
CDD	Community Driven Development
CL	City Link (DSWD 4Ps staff based in city)
CSO	Civil Society Organization
DCF	Day Care Facility
DSWD	Department of Social Welfare and Development
ECCD	Early Childhood Care and Development
eFDS	Enhanced Family Development Session
FDS	Family Development Session
FM	Financial Management
Freq.	Frequency
FS	Financial Statement
GPSA	Global Partnership for Social Accountability
GHM	Grievance Handling Mechanism (used interchangeably with GRS)
GRS	Grievance Redress System
HH	Household
IBRD	International Bank for Reconstruction and Development (World Bank)
Info	Information
<i>i-Pantawid</i>	Guarding the Integrity of the Conditional Cash Transfer Program
IPM	Implementation Progress Monitoring
IRI	Intermediate Results Indicator
K&L	Knowledge and Learning
KPI	Key Performance Indicator (specified in project results framework)
LGU	Local Government Unit
M&E	Monitoring and Evaluation
ML	Municipal Link (DSWD 4Ps staff based in municipality)
MSWDO	Municipal Social Welfare Development Officer (LGU staff)
NHTS-PR	National Household Targeting System for Poverty Reduction
NLCGG	Northern Luzon Coalition for Good Governance
Pct	Percent
PDO	Project Development Objective
PL, PLs	Parent Leader, Parent Leaders
PIR	Performance Indicator Reference
PTF	Partnership for Transparency Fund
Q	Question
RECITE	Responsible Citizens and Empowered Communities in Solidarity for Social Change
RF	Results Framework
RHU	Rural Health Unit
SAc	Social Accountability
SSI	Selected Sub-Indicator
TPM	Third Party Monitoring
vs.	Versus
WB	World Bank
Yr	Year
4Ps	<i>Pantawid Pamilyang Pilipino Program</i>

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Project Management and Monitoring

Overview of this eFDS Training Manual

Purpose

This manual is intended to guide local implementing CSOs (LCSOs) on the i-Pantawid Project Model. With this manual, together with LCSO capacity building activities, LCSOs will be able to understand the i-Pantawid Project Model and conduct the enhanced Family Development Session (eFDS) for Parent Leaders, who will in turn cascade the eFDS topic to their beneficiary groups.

Overview of Training Manual

The eFDS Training Manual is composed of 6 volumes, divided as follows –

Volume	Content
1	eFDS Overview and Engaging and Enabling Parent Leaders (Foundation Session)
2	Ang Tulong ng Pantawid (eFDS 1)
3	Empowerment and Social Accountability (eFDS 2 – 4)
4	Social Contracting and Barangay Budgeting (eFDS 5 – 7)
5	Community Scorecard for Health and Education (eFDS 8 – 11)
6	Project Management and Monitoring (eFDS 12 – 14)

This Volume 6 covers Project Management and Monitoring modules.

Prior to implementing Volume 6, Volume 1 should be provided to all organizations and individuals intending to implement the i-Pantawid Model.

**Volume 6
Content**

The monthly half day PL training sessions for eFDS 12 to 14 are composed of a values formation and personal development session (labeled Tagapagpadaloy ng Pagbabago or TP) and an eFDS topic. Each TP and eFDS topic is detailed in the following sections of this manual.

Each TP and eFDS topic have accompanying Powerpoint slides that are designed to be printed on letter size paper and used as visual aids during the training. The slides are available in softcopy and the discussion guide may be found in the Notes Pages View of the slides. Printed copies of the Notes Pages View with the discussion guide and Powerpoint slides are part of this manual, inserted after the respective topics for easy reference.

The contents may be viewed as a basic training kit. The LCSO is free to enrich the discussion and augment the slides as they see fit, particularly in situating the discussion within the local context.

**Localized
Language or
Dialect**

The Powerpoint visual aids to be used for training are written in English and/or Filipino. The local implementing CSO may translate these into the local language or dialect, replacing the original text, as applicable.

Additionally, the discussion guide may be translated into the local language or dialect.

**How to print
the manual**

A printed manual may be produced for distribution from soft copy files. This manual may be printed back-to-back. The Powerpoint file may be printed in slide format on one side, and the Powerpoint file reprinted for the Notes Pages View at the back, so that while the facilitator is holding up the slide, the discussion guide is available at the back.

Letter size paper is used throughout. For back-to-back printing, use at least 80 gsm or substance 24 paper. A continuous ink printer would be most cost effective to produce colored training kits.

TP 12 – Ang Kaaya-ayang Pinuno

Objective

For the PL --

1. To review leadership styles and roles first shared in the Foundation Session
 2. To appreciate good leadership qualities and become better leaders
-

Materials needed

1. List of leader attributes, one copy per participant
 2. Answer sheet - *Ang Kaaya-ayang Pinuno*, one per group
 3. Meta cards (small) or Post-it notes
 4. Masking tape
-

Preparation

1. Request the Parent Leaders to share their experience with the previous eFDS cascade – how did it go, how did they feel, what helped, what hindered, etc. – process the experience
 2. Discuss what they recall from the previous session
-

Process 1 – Leadership styles and roles

1. Review leadership styles and roles
 2. Gather examples from participants when each leadership style is most useful to apply
-

Process 2 – Leadership qualities

1. Distribute list of leader qualities, one copy per participant, answer sheet and meta cards
 2. Form small groups of 4 or more, preferably grouping PLs from the same barangay together
 3. Each group to select a facilitator, a reporter and recorder among them
 4. Each group to determine the top 6 attributes of their ideal leader. Meta cards may be used to facilitate agreement. Qualities outside the list may be selected.
 5. Once there is agreement, to write these on the answer sheet, with the most important attribute in the center
 6. Each group to share their output and why they selected these attributes
 7. After all have shared, find the most common 6 attributes among all selected
 8. Process the outcome
-

Powerpoint slides and discussion guide for TP12 inserted here

eFDS 12 – Humakbang Paakyat

Objectives

1. Review of the community vision (from eFDS2)
 2. Review of ABC of citizen participation (from eFDS3)
 3. Review of *Plano ng Pamayanan* (from eFDS4)
 4. Review of Action Planning from Health and Education Interface Meetings (from eFDS8 and eFDS10)
 5. Introduction to Project Planning Mountain
 6. Selection and development of barangay project to be implemented by beneficiaries
-

Materials needed

1. Training kit - to be distributed after the introduction to the Project Planning Mountain
 2. Extra sheet of Project Planning Mountain and blank Action Planning Form to be given to each workshop group (one group per barangay)
 3. Manila paper
 4. Markers
 5. Small meta cards or post-it notes
-

Preparation

1. Gather the respective workshop output mentioned in the above objectives, from eFDS2, eFDS4, eFDS8 and eFDS10.
 2. Update the given Powerpoint slides with the gathered workshop output.
-

Process 1 – Review of prior workshop output

1. Review of the community vision (from eFDS2)
 2. Review of ABC of citizen participation (from eFDS3)
 3. Review of *Plano ng Pamayanan* (from eFDS4)
 4. Review of Action Planning from Health and Education Interface Meetings (from eFDS8 and eFDS10)
-

Process 2 – Project Planning Mountain

1. Introduce the participants to the Project Planning Mountain. Please see discussion guide on the Powerpoint slide under Notes Pages View.
 2. Practice filling up the Project Planning Mountain together with the example given in the Powerpoint file.
-

Process 3 – Barangay Project Plan

1. Introduce the participants to the Barangay Project Plan Form and discuss how it will be filled up, using the example Project Planning Mountain project.
-

**Process 4 –
Project
Selection**

1. Divide into smaller groups by barangay.
2. Distribute forms and training kit.
3. Each barangay to look through the previous output and select a project to work on over the next 2 months, defining the Project Planning Mountain and Action Plan (TPM 14) on Manila paper.
4. Guide the groups while working on the practicality of the project and the entries on the various project components.
5. Plenary sharing of selected projects by each barangay group. Discussion and suggestions for improvement from all participants.
6. Workshop output should be copied onto blank Project Planning Mountain forms and Action Plan forms for LCSO documentation and monitoring of projects. The PLs may take home the Manila Paper for sharing with their beneficiary groups.
7. For barangays with several PLs, the work defined in the Action Plan may be distributed among them. The PLs will seek assistance on the Action Plan items from their members during the cascade.
8. Inform the PLs that they will have to share an updated Project Planning Mountain and any progress on the Action Plan (TPM 14) at the next eFDS.

**Note for eFDS
cascade**

The PLs will cascade the same presentation and the devised Project Planning Mountain and Action Plan for their beneficiaries' eFDS. The plan may be improved during the cascade through a discussion with beneficiaries to be facilitated by PL. The work on the project should be distributed among the beneficiaries during the cascade. Any improvements and progress should be monitored by the PL and shared/submitted at the next eFDS training session for PLs, one combined presentation per barangay.

**Post workshop
report
processing**

1. Prepare a letter for the Mayor, Vice-mayor, ABC President, City/Municipal Social Welfare Officer and City/Municipal Link(s), informing them of the Pantawid members' projects and soliciting their support in general. Attach all Barangay Project Plans.
 2. Prepare a letter for each Punong Barangay, informing them of the Pantawid members' project for their barangay and soliciting their support in general. Attach the respective Barangay Project Plan.
 3. Email a copy of the letter to the mayor and attached Barangay Project Plans to the i-Pantawid Project Management Office.
-

Powerpoint slides and discussion guide for eFDS12 inserted here

TP 13 – Ang Nakakatulong na Puna

Objective

For the PL --

1. To understand the nature of feedback
 2. To develop skills on giving feedback that are well received
-

Preparation

1. Request the Parent Leaders to share their experience with the past eFDS cascade – how did it go, how did they feel, what helped, what hindered, etc. – process the experience
 2. Discuss what they recall from the previous session
-

Process 1 – What is feedback?

1. Define feedback
 2. Discuss the difference of positive vs. negative feedback
 3. Develop the concept of the usefulness of feedback and how we respond or react to feedback
-

Process 2 – The Sandwich Method

1. Discuss the sandwich method (see discussion guide on the slides)
 2. Instruct the PLs to pair up, preferably with PLs from the same barangay, and to practice giving feedback using the sandwich method. Switch pairs 2 – 3 times.
 3. Process the experience
 4. Discuss when and how the sandwich method can be used when speaking with spouse, children, barangay officials
-

Powerpoint slides and discussion guide for TP13 inserted here

eFDS 13 – Aming Huwarang Gawain

Objective

For the PL --

1. To share and refine their planned project with the group
 2. To learn more coaching, giving feedback and presentation skills
-

Materials needed

1. Manila paper and colored markers for group work – 4 – 5 sets
 2. Presentation Skills Scorecard – 30 copies
 3. Copies of the Barangay Project Plan prepared at the previous eFDS, for reference of the facilitator during the discussion of updated Barangay Project Plans
 4. Copies of slides 8 – 10, one set per barangay, to be used during the workshop
-

Process 1 – Review of eFDS12

1. Review the process undertaken during eFDS12 in the selection of a barangay project
 2. Review the Project Planning Mountain and Barangay Project Plan Form that was completed last month and shared with their beneficiary groups for comments and suggestions for improvement
 3. Process the response of the beneficiaries to the suggested project. Were there any suggestions for improvement or changes made in the project during the eFDS cascade?
-

Process 2 – Preparation for eFDS13

1. Discuss the preparation to be made before attending this eFDS.
 2. Were the preparations done? Was there any progress on the task assignments? Process the responses.
-

Process 3 – Presentation skills

1. Share and discuss slides on presentation skills and visual aids, provide examples
 2. Describe the presentation outline or content of the presentations to be made
 3. Discuss the Presentation Skills Scorecard content and how to score
-

**Process 4 –
Workshop**

1. Group the PLs by barangay
 2. PLs to discuss their group presentation on their project – who will present, what to present following the presentation outline
 3. All barangay groups to present their chosen project
 4. During each presentation, 4 or 5 PLs from other barangays will fill up a Presentation Skills Scorecard
 5. After each presentation, the participants will give feedback and/or suggestions for improvement of the project, at least 3 comments from the audience per barangay project.
 6. Facilitate the feedback session. The filled up scorecard will be given to the PL presenter.
-

**Note for eFDS
cascade**

1. For the PL cascade of eFDS13, the PLs will share the same presentation made with their members, task assignments will be reviewed and any progress noted, the PLs and their members will agree on next steps among themselves and prepare an updated Barangay Project Plan.
 2. PLs will track the project throughout the month and will report on progress at the next PL training.
-

**Post workshop
report
processing**

1. Gather copies of each barangay's Project Plan, to be used as a reference at the next eFDS.
-

Powerpoint slides and discussion guide for eFDS13 inserted here

TP 14 – Leadership Compass

Objective	For the PL to -- <ol style="list-style-type: none">1. Appreciate different work styles2. Reflect on our own work style and identify areas for growth3. Understand the positive and negative impact of each style taken to excess4. Learn the qualities we can develop to become better leaders
Materials needed	<ol style="list-style-type: none">1. Manila paper2. Colored markers3. Masking tape4. Print the Leadership Compass Self Assessment slides 4 - 5, one copy per PL
Preparation	<ol style="list-style-type: none">1. Before starting, set up the training room so that each corner represents a cardinal point (i.e., North, South, East, West)
Process 1 – Different work styles	<ol style="list-style-type: none">1. Distribute copies of the different work styles – North, South, East, West – to all participants2. Each will put a checkmark on the descriptions that fit their style. After marking, ask the participants to count how many marks they checked per style. The style with the most marks is their dominant style or direction.3. After participants have decided where they best fit, instruct them to go to their respective corner – North, South, East or West4. Introduce each group – North, South, East or West – using the attributes in the Leadership Compass Self Assessment
Process 2 – Workshop	<ol style="list-style-type: none">1. Distribute manila paper and markers, one set per cardinal point2. Share and discuss the guide questions each group will answer –<ol style="list-style-type: none">a. What is really great about being your direction?b. What is really hard about being your direction?c. What is the best way to work with us?d. What animal best represents your direction?e. What is your group theme song?3. Each group will share their responses to the questions in plenary4. Facilitator to summarize/highlight differences between the groups at the end of the sharing session

Powerpoint slides and discussion guide for TP14 inserted here

eFDS 14 – Ulirang Mamamayan, Ulirang Barangay

Objective

1. Practice project monitoring and reporting
 2. Discuss actions that will be done by the PLs after this last PL training module
-

Materials needed

1. Manila paper and colored markers for group work – 4 – 5 sets
 2. Presentation Skills Scorecard – 30 copies
 3. Copies of the Barangay Project Plan prepared at the previous eFDS, for reference of the facilitator during the discussion of updated Barangay Project Plans
 4. Meta cards
-

Preparation

Discuss the Parent Leaders' experience facilitating the previous eFDS.

Process 1 – Review of Project Reporting and Monitoring

1. Review the contents of a project report presentation
 2. Review the Barangay Project Plan Form, introduce a new column for the status update (see slide)
-

Process 2 – Project Updates

1. Group the PLs by barangay
 2. PLs to discuss their group presentation on their project – who will present, what to present following the presentation outline
 3. All barangay groups to present updates to their chosen project
 4. During each presentation, 4 or 5 PLs from other barangays will fill up a Presentation Skills Scorecard
 5. After each presentation, the participants will give feedback and/or suggestions for improvement of the project, at least 3 comments from the audience per barangay project.
 6. Facilitate the feedback session. The filled up scorecards will be given to the PL presenter.
-

Process 3 – eFDS cascade

1. For the PL cascade of eFDS14, the PLs will share the same presentation made with their members, task assignments will be reviewed and any progress noted, the PLs and their members will agree on next steps among themselves.
 2. PLs to share and discuss possible next steps with their members
-

**Process 4 –
Workshop on
Next steps**

1. Distribute meta cards and markers
 2. Request participants to group by barangay and write down what they think they can do as part of their active citizenship from now on, one idea per card, max. 10 words per card, big letters, indicate barangay
 3. Post the meta cards on the wall
 4. Group common ideas, summarize for the group
 5. Affirm expressions of confidence, process concerns
 6. LCSOs may offer to mentor the PLs as they pursue their projects towards completion
-

**Awarding of
Certificates**

1. Assemble awarding team at the front with certificates
 2. Read out certificate content
 3. Call PLs by name to receive their certificate
 4. Singing of “Pananagutan”
-

**Note for eFDS
cascade**

1. For the PL cascade of eFDS14, the PLs will share the same presentation made with their members, task assignments will be reviewed and any progress noted, the PLs and their members will agree on next steps among themselves and prepare an updated Barangay Project Plan.
 2. PLs in each barangay will work together to track the project throughout the succeeding months and will report on progress with their members at the next PL training.
-

**Post workshop
report
processing**

1. Gather the submitted meta cards with next steps, summarize by barangay
 2. Collect copies of the Barangay Project Plan with updates
 3. Prepare a Parent Leaders’ Sustainability Plan using the 2 items above as attachments, describing what the Parent Leaders plan to do going forward and submit this plan to the City/Municipal Link and the project management office.
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Powerpoint slides and discussion guide for eFDS14 inserted here