

I. Project Title: Developing and Enhancing Further the CBMS Methodologies and Applications to Adequately Respond to Emerging Challenges in Policymaking and Program Formulation at the Global and Country Levels

II. Project Proponent: CBMS Network Coordinating Team

III. Project Summary:

The Project generally aims to further develop the CBMS methodology, instruments and its applications, and strengthen advocacy towards the use of CBMS at the international level through the Network's continued technical collaboration with its stakeholders in the Philippines. At present, the scaling up of the adoption and application of CBMS in various development processes, i.e. local planning, budgeting and resource allocation and Millennium Development Goals (MDGs) monitoring, by various local government units with support from concerned national government agencies, non-government organizations and civil society groups, and the donor community draws valuable lessons that will be deemed valuable for CBMS Network researchers at the international level who are still in their initial or mid-level stage of CBMS work.

Specifically, the proposed project is expected to facilitate the technical documentation and dissemination of the best practices, lessons learned and strategies in the development, use and institutionalization of CBMS based on the CBMS-Philippines experience for the past decade. In addition, it aims to publish training modules on the development, implementation and institutionalization of CBMS for reference of CBMS researchers and data users, stakeholders and other interest groups for future CBMS-related work. At the end of the Project, said research outputs aim to contribute towards further building the CBMS knowledge base, and in promoting CBMS as a vital and cost-effective development tool for evidence-based policymaking and poverty reduction.

The technical and scientific service requirements of the Project shall be rendered and undertaken by the CBMS Network Coordinating Team of the Angelo King Institute for Economic and Business Studies of De La Salle University-Manila at no additional cost.

IV. Source of Funds: Research Grants under CBMS Phase 2

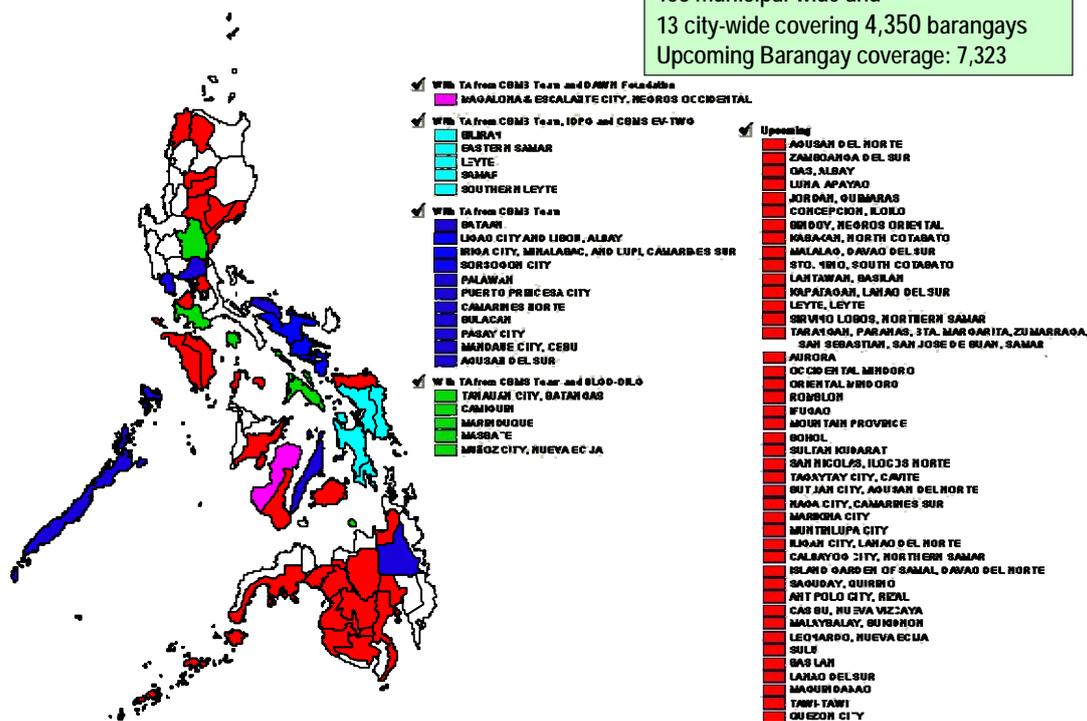
Developing and Enhancing Further the CBMS Methodologies and Applications to Adequately Respond to Emerging Challenges in Policymaking and Program Formulation at the Global and Country Levels

Introduction

More than ten years after it was first pilot-tested in the Municipality of Pandi in the Province of Bulacan, the Community-Based Monitoring System (CBMS) has now been integrated as part of the development planning and monitoring processes of a continuously growing list of local government units. At present, CBMS is being implemented in 15 provinces covering 158 municipalities, 13 cities and 4,350 barangays which represent at least 10 percent coverage of the country's total number of geo-political subdivisions.

Coverage of CBMS Implementation in the Philippines as of June 14, 2006

CBMS is currently being implemented in 15 provinces, 10 of which is province-wide 158 municipal-wide and 13 city-wide covering 4,350 barangays Upcoming Barangay coverage: 7,323



As shown in the table below, these LGUs have invested a significant amount of their resources in the CBMS indicating that they have seen firsthand the usefulness of the system in their development planning as well as in the targeting of program beneficiaries. The growing awareness on CBMS of local and international donor agencies has likewise resulted in the realignment of some of these organizations' funds to CBMS-based poverty interventions. One example of this is the CBMS Development Grant Program which provides funding to LGUs to help them implement poverty reduction

projects which were identified using data gathered through the CBMS. This grant program was made possible with the seed fund provided by UNDP Philippines and the Peace and Equity Foundation.

Note:

1. Parallel funds are earmarked for the CBMS Development Grant Program in the Philippines which provides financial support to local government units, non-government organizations, people's organizations, cooperatives and faith-based groups in implementing programs and interventions that will address specific development needs identified through CBMS.
2. Local contributions are earmarked for direct cost of implementation, Institutionalization of CBMS in respective communities that have adopted CBMS in their localities. Direct cost of implementation includes cost of training workshops (i.e., reproduction of training materials and meals for participants), reproduction of data collection instruments, and honorarium for local survey enumerators and data processors. These funds are approved by local development councils as part of their development budget, and are directly managed by the respective local government units.
3. Funds for CBMS Study Visits/Workshops are directly managed by fund sources. This fund covers cost of logistical and training requirements of the activity i.e., reproduction of briefing/training materials, cost of workshop meals and venue, land/air transportation cost, and honorarium for resource persons.

Several initiatives have likewise been jumpstarted to replicate and expand CBMS work in other areas of the country using a two-pronged approach. While an advocacy campaign has been consistently and steadfastly pursued by CBMS-partners at the local front, a parallel effort was also launched at the national level which led to the issuance of a number of memoranda and resolutions from key national government agencies relating to the scaling up of CBMS in the country. A case in point is the resolution issued by the National Statistical Coordination Board (NSCB) recognizing and enjoining support to the community-based monitoring system as a tool to strengthen the statistical system at the local level. Just recently, it also issued a clearance for the adoption of the CBMS in conjunction with its Statistical Survey Review and Clearance System (SSRCS). Meanwhile, the Department of Interior and Local Government (DILG) is now in the process of scaling up the establishment of CBMS as the instrument to generate the Core Local Poverty Indicators (CLPIs) for poverty diagnosis and planning and for tracking progress in meeting the Millennium Development Goals (MDGs) at the local level.

In a related development, the Working Group on MDGs and Social Progress of the Philippines Development Forum (PDF) has recently called for an acceleration in the target and pace of institutionalizing the CBMS. Chaired by the Philippine Government and the World Bank, the PDF is the primary mechanism of the government for facilitating substantive dialogue among stakeholders on the country's development agenda. The PDF's target is 100% LGU coverage of CBMS by 2010.

At the global front, the CBMS has been successfully transplanted in several countries in Asia and Africa. While CBMS researchers in these countries are encouraged to develop their own methodologies and data processing systems, most of them nevertheless look at the Philippine experience for lessons and methodologies that can be implemented in their country-specific contexts.

Rationale and Objectives

This ground swelling of interest and support for CBMS, both at the domestic and international fronts, brought forth a far greater challenge for the CBMS Network Coordinating Team as it tries to cope up with an ever increasing amount of requests for technical assistance concerning the implementation of the said system. The general objective of this project is therefore to capacitate further the CBMS Network Coordinating Team to meet the demands of its growing clientele. Specifically, the project hopes to do the following:

- Document lessons learned from the CBMS experience in the Philippines;
- Share strategies for institutionalization;
- Prepare, translate and publish its training modules in the following languages: English, Spanish and French; and
- Pursue an active advocacy at the global and country levels.

Project Activities

To meet these objectives, challenges should be addressed on the following fronts:

I. Research

1. Enhancing the CBMS Computerized Data Processing System

Further refinements in the CBMS Computerized Data Processing System is currently being pursued by the Team to make it user-friendly and so that it will be able to adequately respond to recent developments and needs in policymaking and program impact monitoring.

a. CBMS Data Encoding System

From using a computerized tally sheet in Microsoft Excel format, the CBMS Data Encoding System has evolved over time. At present, the CBMS encoding system is powered by the Census and Survey Processing (CS-PRO), a public domain software package for entry, editing, cross-tabulation, etc. developed by the US Census Bureau. The Team is currently implementing some enhancements to the system in order to make it user-friendly and at the same time to be able to address the limitations of the current version.

b. Enhancing STATSIM

The CBMS Team is currently working on fine-tuning the CBMS Statistical Simulator such that it will be able to offer more sophisticated statistical routines in the future. In particular, the focus of the team's work on the STATSIM is on how it can be able to simulate statistical computations made by more advanced and commercially available softwares such as SAS, Stata and SPSS. This would address the limitations of the previous version where only a limited dataset can be processed. The Team provides this software to its partner LGUs for free.

c. CBMS-NRDB

The Natural Resource Database software is a very critical component of the CBMS. The CBMS Team has used this freeware for CBMS-based poverty

mapping and for storing and displaying household- and individual-level information. CBMS-NRDB now refers to these particular uses of NRDB by the CBMS practitioners. The CBMS Team is closely coordinating with its developer, Mr. Richard Alexander, in further enhancing the program by adding more functions and software features and making it more user-friendly.

2. CBMS-Based Village-Level Planning and Budgeting

Moreover, the Team is working on improving its CBMS-based Village Planning Module in order to further promote evidence-based planning and budgeting as well as to strengthen the local government units' capacity to translate information to local development plans. The Team is collaborating with the Bureau of Local Government and Development (BLGD) of the Department of Interior and Local Government (DILG) toward this end.

3. Analysis of CBMS Data

The CBMS Network Coordinating Team has in its possession, a large amount of datasets which were submitted by its partner LGUs, some of which have implemented CBMS thrice already. This veritable treasure trove of data can be used for further data-mining or analysis. In the past, the Team had produced a paper on the welfare status of indigenous peoples (IPs) using CBMS data from Palawan. At present, the Team plans to generate time-series data and monitor movements in and out of poverty. Other possible studies could focus on the more vulnerable sectors such as women and children, senior citizens, etc.

4. Alternative Ways of Identifying the Poor Using CBMS Data

At present, the technical assistance provided by the CBMS Team to its partner LGUs in identifying the poor and eligible beneficiaries of government program is limited to income ranking method and composite index. Taking into account the capacities of its LGU partners, the CBMS Team is currently exploring other methods such as vulnerability indices, model-based composite indices, etc.

5. Building the National Repository of CBMS Data

The national repository of CBMS data is envisioned to help facilitate data sharing across government departments, private sector, civil society, donor agencies and other relevant stakeholders. Specifically, it is expected to facilitate the access and use of the integrated CBMS database by national entities in their advocacy work with key decision-makers and to effectively support government and non-government funding sources in strengthening evidence-based planning and monitoring as well as the alignment of their interventions to national priorities.

Aside from conducting consultations over arrangements on the selection of an agency that will house and maintain the national repository, the CBMS Network Coordinating Team shall also take the lead in the following activities related to this project: collection of CBMS data from the local government units; construction of the national repository; writing the manuals: user manual, procedure manual and technical documentation; training to partner national government agencies that will house the repository; and provision of ongoing support.

II. CBMS Study Visits of Network Members and Other Interest Groups

The success enjoyed by the CBMS in the Philippines and other countries in Asia and Africa offers excellent lessons and opportunities for possible replication in other countries. This early, CBMS Teams in various countries have already expressed their interest to know more about each others data processing systems and poverty mapping methodologies. To facilitate sharing of instruments, methodologies, research findings and recent developments across country teams, the CBMS Network Coordinating Team shall organize study visits of network members and other interest groups.

III. Dissemination and Advocacy

The Team aims to expand and pursue an even more aggressive dissemination and advocacy campaign which started in 2004, targeted at all development stakeholders, not only at the domestic but at the international level as well, about the outputs of the project activities mentioned above. This will be done primarily through the following:

- Annual CBMS Network Conference
- Publication of CBMS Training Modules
- Printing of newsletters and conference proceedings
- Publication and printing of the updated CBMS Network Brochure and other related publicity/advocacy materials

IV. Scaling up of CBMS

All the materials developed by the Team will be shared to all relevant stakeholders through the various mechanisms and strategies mentioned above. At the domestic level, this will be done primarily through Training of Trainors which ultimately will leave the capacity-building for local government units to the Department of Interior and Local Government (DILG) and National Anti-Poverty Commission (NAPC). In the long run, this will enable the Team to devote more time to the research activities enumerated above. In the near term however, the CBMS Network Coordinating Team will still provide technical assistance to these national government agencies and LGUs in customizing the CBMS survey instruments and data processing systems.

Project Period

The Team will carry out the above additional activities from July 2006-August 2007.

Proposed Budget

The project has a total budget of US\$103,519.34 and will be carried out by the CBMS Network Coordinating Team at no extra cost to the project.

	ITEMS	BUDGET	
		Peso	US\$
1.0	Field Work: Technical Collaboration with CBMS Local Partners		
	8 LGUs x P70,000	560,000.00	10,465.33

2.0	Dissemination		
2.1	CBMS Network Conference		
	3 conferences x P730,000 (3 day conference @150 pax)	2,190,000.00	40,926.93
2.2	Publication of CBMS Training Modules		
	Translation to English/French	173,500.00	3,242.38
	Translation to English/Spanish	173,500.00	3,242.38
	Editing/Lay-Out	116,592.00	2,178.88
	Printing		
	English Modules (500 copies)	116,592.00	2,178.88
	French Modules (100 copies)	23,318.00	435.77
	Spanish Modules (100 copies)	23,318.00	435.77
2.3	Newsletters and Conference Proceedings		
	Printing		
	CBMS National Conference Proceedings (3 issues @300 copies each)	270,000.00	5,045.79
	CBMS Network Newsletter (P50000 x 5 issues)	250,000.00	4,672.02
	Cover Design: Conference Proceedings (P 2500 x 3 issues)	7,500.00	140.16
	Editing/Lay-Out		
	CBMS National Conference Proceedings (P 250/page x 500 pages x 3 issues)	375,000.00	7,008.04
	CBMS Network Newsletter (P60000 x 5 issues)	30,000.00	560.64
2.4	Publication/Printing of the Updated CBMS Network Brochure and Other Related-Publicity/Advocacy Materials	100,000.00	1,868.81
3.0	CBMS Study Visits of Network Members and Other Interest Groups	150,000.00	2,803.21
4.0	Capacity Building/Training to CBMS Local Partners on the Use of Improved CBMS Instruments & Modules		
	(travel and accommodations of trainors)	1,000,000.00	18,688.10
	Total (Peso)	5,559,320.00	103,893.10

Exchange Rate Assumption (Source: Bloomberg.com/currency calculator):1 US\$ =P 53.51