



**MEMORANDUM CIRCULAR ON THE ESTABLISHMENT OF THE MONITORING AND EVALUATION SYSTEM FOR MEMORANDUM CIRCULAR NO. 2015-056 "GUIDELINES FOR THE IMPLEMENTATION OF THE DILG MICRO-MEDIUM-RISE BUILDING (MMRB) PROJECTS BY THE LGUs"**

Reference Number: 2016-147  
Date: October 21, 2016

Rev. No. 00

**1. Background:**

Pursuant to the Local Government Code of 1991 and the Urban Development and Housing Act of 1992, local governments shall implement local housing programs to provide for the housing needs of its homeless and underprivileged constituents through their own coffers and/or by leveraging their resources with other actors and stakeholders.

However, given the complexity of the housing problem and the enormity of shelter project costs, many LGUs express their lack of sufficient resources to implement socialized housing programs in order to adequately address the issue of homelessness among its constituents.

Recognizing this appeal, the Department of the Interior and Local Government (DILG) apportioned an amount under its Php 50 Billion Alternative Housing Program and People's Plan (AHPPP) Fund to provide financial assistance to willing and committed LGUs in order to accelerate the implementation of its socialized housing projects provided that these are prepared through the People's Planning Process.

Thus, through the DILG-OSEC Special Provision Nos. 10633 (2014) and 10651 (2015) otherwise known as the General Appropriations Acts for Fiscal Years 2014 and 2015, Php 1.4 Billion was allocated to assist in saving "at risk" people from foreseeable danger, improve flood prevention, and reduce economic loss for the broader community. The implementation and utilization of the fund, referred to as the People's Plan Fund (PPF) is provided for in the DILG Memorandum Circular No. 2015- 056 "Guidelines for the implementation of DILG Micro-Medium-Rise-Building (MMRB) Projects by LGUs".

To date, the PPF, more commonly known as the Local Government Unit Financial Assistance (LGU FA) already downloaded Php 700 Million for 9 projects in 7 LGUs within the National Capital Region (NCR) and Region III, in the fiscal years 2014 and 2015. Specifically, the following projects:

LGU	NAME OF PEOPLE'S PLAN	NATURE OF THE PROJECT	TYPE OF PROJECT	NO. OF ISF PROGRAM PARTNERS
Manila	Kabalikat Baseco	In City	MMRB	225
Quezon City	Alyansa ng Mamamayan ng Novaliches (ALMANOVA)	In City	MMRB	550
Quezon City	Apolonio Samson	On Site	MMRB	765



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Date: October 21, 2016

Rev. No. 00

Pasay	Pasay Grant Neighborhood Association	In City	MMRB	200
Parañaque	Bagong Parañaque Homes II	In City	MMRB	200
Las Piñas	Renaissance Village HOA	In City	MMRB	212
Muntinlupa	Harmony Ville Neighborhood Association	In City	MMRB	200
San Juan, Manila	San Juan Ville Homeowners Association	In City	MMRB	158
Pandi, Bulacan	Pinagsamang Mamamayan Maralita sa Tabing Ilog Assoc. Corp (PMMMTIAC)	Off site	MMRB with Livelihood Center	45
<b>TOTAL</b>				<b>2,555</b>

**2. Purpose**

The purpose of this policy is to provide guidelines on the monitoring and evaluation of the implementation of MC 2015-056. The Monitoring and Evaluation (M&E) of the People's Plan Fund (PPF) also aims to generate data essential in improving the government resettlement program policy and implementation.

2.1 The following are the specific objectives:

- 2.1.1 Strengthen transparency and accountability of the government to stakeholders [i.e. people's organizations (POs), Civil Society Organizations (CSOs), LGUs, National Government Agencies (NGAs)] under the P50 Billion Fund;
- 2.1.2 Provide systematic gathering of information necessary for analysing the progress, identification of the gaps and determining strategies for a more efficient implementation of the projects; and
- 2.1.3 Assess the impact of the PPF to the LGUs and ISF program partners.

2.2 The areas for monitoring shall include:

- 2.2.1. validation and issuance of certificate of eligibility to ISFs;
- 2.2.2. compliance to documentary requirements prior to the download of funds to the respective LGU;
- 2.2.3. documentation and evaluation of the progress of physical construction; and



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Reference Number: 2016-147

Date: October 21, 2016

Rev. No. 00

- 2.2.4. financial utilization based on the submitted Physical and Financial Plan;
- 2.2.5. provision of the Interim Shelter Fund to qualified ISFs living on top or within the 3 meter legal easement;
- 2.2.6. compliance of agencies/LGUs/ Non-Government Organizations (NGOs) /POs/Homeowners Associations (HOAs) to their responsibilities in the project; and
- 2.2.7. quality of services rendered by service providers and received by the program partners

### **3. Legal Compliance**

In conformity with MC No. 2015- 056, the Department, through the Informal Settler Families- Project Management Office (ISF-PMO) and in partnership with the DILG Regional Offices, shall be responsible for the monitoring and evaluation (M&E) of the implementation of the People's Plan Fund.

Article IV, Section A and B of the Memorandum Circular No. 2015-056 provides for the following responsibilities in the implementation of the program:

#### **3.1. The DILG shall:**

- 3.1.1. Conduct pre-qualification assessment based on the qualifications stipulated under the MC 2015-056. Consequently, the DILG ISF-PMO shall:
  - a) conduct validation of the prospective program partners; and
  - b) collect and monitor the participating LGU's compliance to the documentary requirements prior to downloading of funds to the Regional Office.
- 3.1.2. Facilitate regular consultative meetings, in close coordination with the Regional Office, with the participating LGU, PO/HOA, and CSO to assist them in complying with the requirements.
- 3.1.3. Release the approved amount of financial assistance to the LGU subject to the submission of the People's Plan and the listing and details of projects indicating among others the location of the site and names of respective beneficiaries approved by the DILG to the Department of Budget and Management (DBM).
- 3.1.4. Provide for or facilitate consultative meetings and technical assistance to LGUs and/or proponent POs/HOAs, whenever practicable, to ensure completion and sustainability of the shelter project.
- 3.1.5. Further in Article X of the MC 2015-056, the DILG shall perform, in relation to monitoring and evaluation, the following specific functions:



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Date: October 21, 2016

Rev. No. 00

- a) Conduct periodic monitoring of MMRB construction and basic facilities based on Physical and Financial Plan and work schedule; and
- b) Help conduct regular spot checks. Beneficiaries will be randomly selected to be interviewed and evaluated to assess:
  - i. Quality of services received by the household;
  - ii. Compliance of agencies/LGUs/NGOs with responsibilities; and
  - iii. Compliance of beneficiaries with conditionalities.
- c) Conduct periodic evaluation of program performance relative to achievement of targets and implementation progress based on the physical and financial plan.
- d) Conduct impact evaluation at the end of program period.

3.1.6. Monitor compliance to the creation of the LGU's Local Project Management Team (LPMT) through the Local Housing Board (LHB).

3.1.7. Submit quarterly reports indicating, among others, the breakdown of disbursements for the aforesaid programs to the DBM, House Committee on Appropriations, Senate Committee on Finance, and the Senate Committee on Housing.

3.2. The LGU shall:

3.2.1. Provide the DILG with a copy of the Physical and Financial Plan and other supporting documents seven (7) working days after the bidding process.

3.2.2. Submit the following set of documents to the DILG ISF PMO through the Regional Office:

3.2.2.1. Monthly monitoring report

3.2.2.2. Spot check and verification visit reports

3.2.2.3. Periodic evaluation report

3.1.2.4. Monthly or quarterly financial management reports

3.1.2.5. Documentation of grievance cases and how these are resolved

3.1.2.6. Impact evaluation report

#### **4. Scope**

The Project Monitoring and Evaluation (M&E) will cover the Micro-Medium Rise Building projects implemented by LGUs through the People's Plan Fund (PPF), by virtue of DILG



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Reference Number: 2016-147

Date: October 21, 2016

Rev. No. 00

MC 2015-56, for the informal settler families residing in danger zones within Metro Manila.

**5. Definition of Terms**

For purposes of this policy, the following definitions apply, unless otherwise stated:

<b>Assessment</b>	the process of gathering of information, analysing it, then making judgement on the basis of the information.
<b>Certificate of Eligibility</b>	a certification issued by the DILG ISF-PMO to beneficiaries found to be residing within the danger areas of the National Capital Region (NCR) as a result of "house-to-house" validation.
<b>Community Transformability Score Card (CTSC)</b>	is an impact evaluation tool that measures the individual, family, and community's transformation covering six (6) community transformability dimensions of a resettlement project, namely: 1) Shelter and Living Space, 2) Mobility and Access, 3) Economic/Livelihood Opportunities, 4) Social Matrix and Safety Nets, 5) Community Governance, and 6) Local Systems Integration.
<b>Department of the Interior and Local Government Informal Settler Families Project Management Office (DILG ISF-PMO)</b>	is the office within the Department that oversees all activities relative to the implementation of the AHPPP Fund and ensures the active participation of all agencies concerned.
<b>Department of the Interior and Local Government Regional Office (DILG RO)</b>	refers to the DILG regional offices in the National Capital Region (NCR) and Region III.
<b>Evaluation</b>	means the systematic and objective assessment of an on-going or completed project, program or policy, its design, implementation and results with the aim of determining the relevance and fulfilment of objectives, development efficiency, effectiveness, impact and sustainability.



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Rev. No. 00

<b>Impact</b>	refers to the positive and negative, primary and secondary long-term effects produced by a development intervention, directly or indirectly, intended or unintended.
<b>Impact Evaluation</b>	is the process of assessing the impact of a program in an intervention area.
<b>Indicator</b>	means a quantitative or qualitative factor or variable that provides a simple and reliable means to measure achievement, to reflect changes connected to an intervention, or to help assess the performance of a development actor.
<b>Interim Shelter Fund</b>	refers to the Php 18,000 dislocation assistance provided to qualified ISFs who voluntarily move out and dismantle their structure on-top of and along the three (3)-meter legal easement of waterways .  Voluntarily move out shall mean the ISF voluntarily availed of and transferred to their chosen permanent relocation site either in-city or off-city socialized housing projects of the government.
<b>Informal Settler Families (ISF) Program Partners</b>	refers to families living in housing units/dwellings located along waterways and other danger areas within the NCR which are determined and endorsed by the DILG ISF-PMO as qualified beneficiaries/recipients of the program.
<b>Local Project Management Team (LPMT)</b>	is the direct implementer of the people's plan project composed of POs, CSOs, NGAs, concerned LGUs, and other stakeholders created specifically for each project and community through the passage of a local ordinance by the city or municipal council.
<b>Micro-Medium-Rise-Building (MMRB)</b>	is a multi-family, mixed-residential, and/or commercial building of 1-5 storeys and houses families with independent means of access and each unit having its own living, dining, cooking, toilet, laundry, and sleeping areas, as may be preferred by the beneficiaries, subject to the limitations of the land.



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Reference Number: 2016-147

Date: October 21, 2016

Rev. No. 00

<b>Monitoring</b>	is the regular collection and analysis of information to assist timely decision-making, ensure accountability and provide the basis for evaluation and learning. It is a continuing function that uses methodological collection of data to provide the management and the main stakeholders of an on-going project or program with early indications of progress and achievement of objectives.
<b>Monitoring and Evaluation (M&amp;E)</b>	is the combination of monitoring and evaluation which together provide the knowledge required for effective project management, and reporting and accountability of responsibilities.
<b>People's Plans</b>	are community housing and shelter development plans formed by People's Organizations through a process of consultation with and endorsement by the beneficiaries. This is a process by which planning for minimum standards and requirements for housing and site development, determination of financing schemes, procurement process, livelihood identification and planning, and preventive action plan or policing of their own ranks to avoid returning to previous settlement, emanate from and decided solely by the Community Association, with only the facilitation of discussions and technical assistance provided by concerned NGAs and/or NGOs at each level.
<b>People's Plan Fund (PPF)</b>	is the amount transferred to the LGUs for the implementation of people's plans, towards the construction of Micro-Medium-Rise-Buildings (MMRBs) for informal settler families residing in danger areas within the National Capital Region.
<b>Validation</b>	refers to the process by which a claimant is determined to be a current or former resident of the identified waterways and other danger areas within the National Capital Region. Provided that, validation activities shall include, but not limited to, site visits, ocular inspections, and interviews.



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Rev. No. 00

## **6. Monitoring and Evaluation System**

The monitoring of the projects under the PPF will be a joint undertaking of the DILG ISF-PMO, the Regional Offices and the assigned C/MLGOOs at the field level, and the LGUs through the Local Project Management Team (LPMT).

The DILG ISF-PMO shall prepare the M&E tools and provide copies thereof to the DILG Regional Offices as well as the LGUs thru the latter's respective LPMTs/CSOs/POs concerned. The key activities and indicators, however, will be finalized based on the submitted work and financial plan, and people's plan design by the proponent LGU given the peculiarities in each project.

Any assessment/evaluation by any external institution such as other NGAs, NGOs or private sector will be done in coordination with the DILG, and the result of which shall be subject to the validation of the latter.

6.1. The M&E will cover three phases, namely: 1) pre-implementation phase, 2) actual implementation phase, and 3) post-implementation phase.

6.1.1. Pre-Implementation Phase: This phase is further divided into two sub-phases, namely:

6.1.1.1. Pre-qualification:

- a) The DILG ISF PMO shall prepare a monthly status report on the validation of ISFs. The status report shall be submitted every last Thursdays of the month.
- b) The DILG ISF-PMO shall submit monthly reports on the status of the issuance of the Certificates of Eligibility to applicant ISF program partners.
- c) The DILG ISF-PMO shall monitor and submit monthly reports on the compliance of the LGUs to the documentary requirements prior to downloading of funds to the Regional Office.
- d) The DILG ISF-PMO shall consolidate the reports submitted to them and subsequently prepare the monthly accomplishment reports.





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Reference Number: 2016-147

Date: October 21, 2016

Rev. No. 00

- 6.1.1.1. Prior to download from Regional Office to the LGU:
- a) The Regional Office through its C/MLGOO ISF Focal Person, shall prepare monthly reports on the compliance of the participating LGU relative to the documentary requirements, as stipulated in DILG MC 2015-056, using the prescribed tools hereto attached. The monthly report will be submitted to the Regional Office for consolidation of its ISF Focal person.
  - b) The Regional Office shall submit the monthly consolidated report to DILG ISF-PMO every last week of the month.
  - c) The DILG ISF-PMO, shall consolidate all reports relative the projects under the PPF. It shall prepare and submit consolidated monthly and quarterly reports every 2<sup>nd</sup> week of the succeeding month of the reporting period to the Undersecretary assigned to handle the ISF concerns.

**6.1.2. Implementation Phase:**

- 6.1.2.1. The LGU through its LPMT shall prepare the monthly status report and submit the same to the DILG Regional Office every 3<sup>rd</sup> week of each month. The report shall be signed by the authorized representative of the LPMT and/or Local Chief Executive (LCE).
- 6.1.2.2. The Regional Office shall validate the report through site inspections. It shall also prepare a consolidated monthly status report, based on the prescribed forms, through their respective ISF Focal Person and signed by the Regional Director.
- 6.1.2.3. The accomplished form shall be submitted by the DILG Regional Office to DILG ISF- PMO every last week of the month.
- 6.1.2.4. Periodic site visits shall be jointly conducted by the DILG ISF-PMO and Regional Office to verify the monitoring reports submitted.
- 6.1.2.5. The DILG ISF-PMO shall review and prepare the monthly consolidated reports and the quarterly accomplishment reports every 2<sup>nd</sup> week of the succeeding month of the reporting period, and submit the same to the SILG, DBM, House Committee on Appropriations, Senate Committee on Finance and Senate Committee on Housing.



Republic of the Philippines

DEPARTMENT OF THE INTERIOR AND LOCAL GOVERNMENT

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Reference Number: 2016-147

Date: October 21, 2016

Rev. No. 00

**6.1.3. Post-Implementation Phase:**

- 6.1.3.1. The DILG Regional Office shall submit reports on the provision of the Interim Shelter Fund to program partners who are residing within the three (3) - meter legal easement.
- 6.1.3.2. The DILG ISF-PMO, in partnership with the Regional Office, shall conduct an impact evaluation six (6) months after the target families have transferred to their new settlements. The Community Transformability Score Card (CTSC) of the Universities and Research Councils Network on Innovation for Inclusive Development in Southeast Asia (UNIID-SEA) shall be used for impact evaluation. The CTSC includes the following dimensions:
  - a) Shelter and living space
  - b) Mobility and access
  - c) Economic/livelihood opportunities
  - d) Social matrix and safety nets
  - e) Community governance
  - f) Local systems integration
- 6.1.3.3. Spot checks, interviews, and Focus Group Discussions (FGDs) with the relocated families shall be facilitated to evaluate the project impact.
- 6.1.3.4. The result of the impact evaluation shall be submitted to the POs/CSOs, LGUs, DILG Undersecretary assigned to handle ISF concerns, SILG, DBM, House of Representatives and Senate towards the improvement of program policies and implementation.

**6.2 Monitoring and Evaluation Tools**

**6.2.1. Pre-implementation Phase**

**6.2.1.1. Form 1: Monitoring Tool on LGU Compliance of Documentary Requirements**

Form 1 should be filled out by the DILG Regional Office. The form outlines the documentary requirements to be submitted by the people's organization and partner LGU based on Articles III and IV of the DILG MC 2015-056. It shall provide



Republic of the Philippines

DEPARTMENT OF THE INTERIOR AND LOCAL GOVERNMENT

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Reference Number: 2016-147

Date: October 21, 2016

Rev. No. 00

a quick analysis of the status of compliance of the LGUs to the documentary requirements. It is a simple assessment tool which shall assess the LGUs readiness to proceed with the MOA signing and downloading of the PPF.

*6.2.1.2. Form 2: Validation Tool*

Form 2 should be filled out by the DILG ISF-PMO. The tool will generate the necessary basic information of the applicant/beneficiary and other household members such as name, age, gender, civil status, address, occupation, and monthly income. Other vital information such as control and tag number, Pantawid ID, tenurial status, as well as the place of origin (i.e. waterway and other danger zone), type of project and project proponent (if applicable), and housing option will also be captured by the tool.

**6.2.2. Implementation Phase**

*6.2.2.1. Form 3: Monthly Monitoring Tool on MMRB/Livelihood Center Construction and Fund Utilization*

Form 3 should be filled out by the LPMT in close coordination with the City/Municipal Engineering Office. The tool indicates the status of the construction of the MMRB project and fund utilization based on the final Physical and Financial Plans submitted by the proponent LGU.

*6.2.2.2. Form 4: Monthly Progress Report on PPF*

Form 5 is a summary monthly report on the implementation of the People's Plan Fund (PPF). The form is to be filled out by DILG Regional Office based on the submitted Forms 3 and 4 of the partner LGU and the Regional Office' site inspection. The tool includes status report on the (a) profile of the LGU PPF; (b) Status of Construction; (c) Fund Utilization; (d) Summary of Agreements of the LHB/and or LPMT; (e) Documented grievances; (f) other concerns that the Regional Office feels the need to report; and lastly, (g) Photo documentation.

For purposes of documentation and verification, the Regional Office may attach supporting documents such as Forms 3 and 8, minutes of LPMT and/or LHB meetings and other related documents.



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**MEMORANDUM CIRCULAR ON THE ESTABLISHMENT OF THE MONITORING AND EVALUATION SYSTEM FOR MEMORANDUM CIRCULAR NO. 2015-056 "GUIDELINES FOR THE IMPLEMENTATION OF THE DILG MICRO-MEDIUM-RISE BUILDING (MMRB) PROJECTS BY THE LGUs"**

Reference Number: 2016-147

Date: October 21, 2016

Rev. No. 00

**6.2.3. Post-Implementation Phase**

**6.2.3.1. Form 5: Project Summary Monitoring Tool for People's Plan Fund (LGU Financial Assistance)**

Form 5 contains the summary of information regarding the PPF implementation. The tool, which shall be utilized by the DILG ISF-PMO, documents the transfer of fund from the DBM down to the participating LGU. It also captures the profile of each project, specifically the following details: (a) LGU partner, (b) HOA partner, (c) place of origin, (d) project site, (e) nature of project, (f) land area, (g) number of ISF project partners, and (h) breakdown of project cost. Furthermore, it also includes information on the housing construction, particularly the 1) type of housing, 2) target number of units, and 3) actual accomplishment.

The form shall be accomplished by the DILG ISF-PMO.

**6.2.3.2. Form 6: Summary Status Report on Construction**

Form 6 is a consolidation of all submitted Monthly Monitoring Tool for Construction (Form 3) for the entirety of the project implementation phase. It shall be accomplished by the DILG ISF-PMO in preparation of the Project Summary Report at the end of the project. The accomplished form shall provide a simple presentation of the monthly accomplishment rate as far as construction is concerned.

**6.2.3.3. Form 7: Summary Status Report on Fund Utilization**

Form 7 is a consolidation of all submitted Monthly Monitoring Tool for Fund Utilization (Form 4) for the entirety of the project implementation phase. It shall be accomplished by the DILG ISF-PMO in preparation of the Project Summary Report at the end of the project. The accomplished form will provide a simple presentation of the monthly fund utilization rate throughout the project implementation.

**6.2.3.4. Form 8: Assessment Tool for the Provision of Basic Services and Utilities**

Form 8 should be filled out by the LPMT. This form shall be filled out upon the constitution of the LPMT and regularly updated and submitted to the DILG Regional Office and DILG ISF PMO.

The tool aims to document and assess the availability and accessibility of basic services and facilities in various thematic areas such as (a) Health, (b) Education, (c) Livelihood, (d) Transportation, (e) Electricity, (f) Water, (g) Solid Waste



Republic of the Philippines

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**MEMORANDUM CIRCULAR ON THE ESTABLISHMENT OF THE MONITORING AND EVALUATION SYSTEM FOR MEMORANDUM CIRCULAR NO. 2015-056 "GUIDELINES FOR THE IMPLEMENTATION OF THE DILG MICRO-MEDIUM-RISE BUILDING (MMRB) PROJECTS BY THE LGUs"**

Reference Number: 2016-147

Date: October 21, 2016

Rev. No. 00

Management, (h) DRRM, (i) Transportation, (j) Peace and Order, etc., among program partners.

**6.2.3.5. Form 9: Community Transformability Score Card (CTSC)**

Form 9 aims to determine the success of a resettlement project. The program partners and an external facilitator shall provide a rating/score for each of the six (6) community transformability dimensions of the resettlement project, namely: 1) Shelter and Living Space, 2) Mobility and Access, 3) Economic/Livelihood Opportunities, 4) Social Matrix and Safety Nets, 5) Community Governance, and 6) Local Systems Integration. The tool will be administered twice - prior and post-relocation. The analysis of the results shall provide a comparison between the ISFs' previous and new settlements. Furthermore, the tool will assess the impact of the resettlement project to the program partners.

Other impact evaluation tools may also be used. The impact evaluation design and its administration shall be agreed upon by all the parties concerned.

**7. Penal Provision**

Under Section XIII of the DILG MC 2015-056, the DILG is authorized to execute sanctions such as:

7.1. Terminate, cancel, or suspend the implementation of the project in the following instances:

7.1.1. LGU's non-compliance to project processes, standards and requirements;

7.1.2. Corruption and fraudulent practices;

7.1.3. When situations/circumstances would make it improbable for the project to continue to be carried out;

7.1.4. Upon request of the LGU, in case the project is partially or fully cancelled due to the fault of the LGU or its agent, the LGU shall be obliged to return the unexpended balance of the released portion of the funds or the pertinent portion related to the cancelled component of the project.

7.2. Suspend, withhold the release of the funds if any of the following occurs:

7.2.1. The DILG, during the conduct of M&E activities determines that the LGU or the agent of the LGU is performing unsatisfactorily in the implementation and execution of the project(s) or in the event that substantial slippage in implementation is incurred;



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DEPARTMENT OF THE INTERIOR AND LOCAL GOVERNMENT

DILG-NAPOLCOM Center, EDSA corner Quezon Avenue, West Triangle, Quezon City

<http://www.dilg.gov.ph>

**MEMORANDUM CIRCULAR ON THE ESTABLISHMENT OF THE MONITORING AND EVALUATION SYSTEM FOR MEMORANDUM CIRCULAR NO. 2015-056 "GUIDELINES FOR THE IMPLEMENTATION OF THE DILG MICRO-MEDIUM-RISE BUILDING (MMRB) PROJECTS BY THE LGUs"**

Reference Number: 2016-147

Date: October 21, 2016

Rev. No. 00

7.2.2. Extraordinary conditions such as force majeure, fortuitous events and the like which shall make it necessary to suspend the implementation of the project(s);

7.2.3. The LGU will be given a period of one month to resolve the issue, improve performance or remedy the situation. However, termination will be resorted only, if the LGU, having been duly notified, does not make any effort to institute measures that will address issues at hand.

7.3. File the appropriate civil, criminal and/or administrative case against the concerned local public official/s for acts of omissions in relation to the performance of its duties under MC 2015-056.

**8. Annexes**

**Annex 1:** Monitoring Tool on LGU Compliance of Documentary Requirements

**Annex 2:** Validation Tool

**Annex 3:** Monthly Monitoring Tool on MMRB/Livelihood Center Construction and Fund Utilization

**Annex 4:** Monthly Progress Report

**Annex 5:** Project Summary Monitoring Tool for People's Plan Fund (LGU Financial Assistance)

**Annex 6:** Summary Status Report on Construction

**Annex 7:** Summary Status Report on Fund Utilization

**Annex 8:** Assessment Tool on the Provision of Basic Services and Utilities

**Annex 9:** Community Transformability Score Card (CTSC)

**9. Effectivity**

This Memorandum Circular shall take effect on the \_\_\_\_\_ of August 2016, unless otherwise provided herein, following its publication in the DILG website.

**10. Approving Authority**

ISMAEL D. SUENO] \_\_\_\_\_ October, 2016]

Secretary of the Interior and Local Government



DILG-03EC 01012016-3325



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**11. Feedback**

Inquiries concerning this document should be directed/addressed to the DILG Informal Settler Families - Project Management Office (ISF PMO) through Marilyn B. Estrellado or Lea Sumalde through 925-0367 or email address, [dilgisfhousing@gmail.com](mailto:dilgisfhousing@gmail.com) for appropriate action.

**Form 1: Monitoring Tool on LGU Compliance of Documentary Requirements**

This form is the monitoring tool which shall assess the LGU's readiness to proceed with the MOA signing and downloading of the PPF. Form 1 shall be filled up by the ISF Focal person of the DILG Regional Office. This form will be submitted to DILG ISF PMO every last week of the month.

**Instructions in filling-out the form:**

1. Indicate the name of the LGU.
2. Month and year covered by the status report.
3. The first row of Form 1 is the title of the form.
4. The second row, columns two (2) to (3) indicates the type of document on file whether it is original, certified true copy or photo copy.
5. The first (1<sup>st</sup>) column outlines all the documents to be submitted by the partner LGU which are divided into three categories namely, prior to MOA signing, prior to download to LGU, and after download to LGU.
6. Each category is further divided into three sub-categories relative to the source of the documentary requirements: (1) from the people's organization; (2) from the LGU; and; (3) from the NGAs.
7. Explanation or clarifications on the status of the document can be included in the 'Remarks Column' at the far right of the form.
8. In filling out the form, check the corresponding box whether the document is on file and the classification of the document.

Name of Partner LGU: \_\_\_\_\_

As of: \_\_\_\_\_

PEOPLE'S PLAN FUND- Monitoring Tool on the Compliance to Documentary Requirements						
DOCUMENT (1)	On File (2)	Classification (3)			Remarks (4)	
		Original	Certified True Copy	Photocopy		
<b>PRIOR TO MOA SIGNING</b>						
from the People's Organization/Home Owner's Association (PO/HOA)						
1	Cover Letter (Signifying Intent to Participate)					
2	Proof of Registration					
3	Organizational Structure					
4	PO/HOA Resolution					
5	People's Plan					
6	List of Prospective Beneficiaries					
from the National Government Agencies (NGAs)						
7	NAPC Endorsement of the People's Plan					



8	PCUP Endorsement of the People's Plan					
from the Local Government Unit (LGU)						
9	Resolution Authorizing the Mayor to Sign the MOA					
10	Vicinity Map					
11	Transfer Certificate of Title (TCT)					
12	Tax Declaration					
13	(where applicable)					
	Intent to Sell/ Intent to Buy/ Signed MOA with Landowner; or					
	Deed of Donation; or					
	Usufruct Agreement; or					
	Other similar instruments					
14	Architectural Plan					
15	Cost Estimate					
<b>PRIOR TO DOWNLOAD TO LGU</b>						
from the People's Organization/Home Owner's Association (PO/HOA)						
16	Masterlist of Validated Beneficiaries (DILG-certified)					
from the Local Government Unit (LGU)						
17	Signed DILG-LGU MOA					
18	Inter-LGU MOA (if applicable)					
19	Localized IRR					
20	Physical and Financial Plan					
21	Utilization Plan Proposal					
22	Environmental Compliance Certificate (if applicable)					
23	LHB Ordinance					
24	LPMT Ordinance					
25	Resettlement and Relocation Action Plan (RRAP)					
26	LHB Resolution approving RRAP					
27	Local Shelter Plan					
from the National Government Agencies (NGAs)						
28	DPWH Certification					
<b>AFTER DOWNLOAD TO LGU</b>						
29	LGU-issued Receipt					

Prepared by: \_\_\_\_\_

Attested by: \_\_\_\_\_

## VALIDATION FORM

Control Number:		Census Tag No:		Date of Validation:		Remarks:		
Name of Interviewee:	Surname	First Name	Middle Name	Relationship to HH:		Age:	Sex:	
Name of Household Head (HH):	Surname	First Name	Middle Name	Marital Status:		Age:	Sex:	
Occupation:		Monthly Income:		Pantawid ID:		Tenurial Status:	<input type="radio"/> Owner <input type="radio"/> Renter <input type="radio"/> Sharer	
Name of Spouse:	Surname	First Name	Middle Name	Occupation:		Monthly Income:	Age:	
Address:	Lot and Block Number	Street	Subdivision	Barangay	City			
Type of danger area:	<input type="radio"/> Waterway: _____		<input type="radio"/> Others: _____		If Waterway:	<input type="radio"/> On top of the water	<input type="radio"/> Within 3m	<input type="radio"/> Beyond 3m
Project Proponent:	Type of Project			Housing Option:				
<input type="radio"/> DPWH				<input type="radio"/> NHA	<input type="radio"/> In-city	<input type="radio"/> Off-city _____		
<input type="radio"/> MMDA				<input type="radio"/> LGU-Initiated	Housing Program: _____			
<input type="radio"/> PRRC				<input type="radio"/> People's Plan	PO: _____	Partner: _____		
<input type="radio"/> Others _____				<input type="radio"/> People's Plan Fund	PO: _____	Partner: _____		
<input type="radio"/> None				<input type="radio"/> Others	Specify: _____			
Authorized Representative:	Surname	First Name	Middle Name	Relationship to HH:		Age:		

**NOTES:**

1. Only the household head may designate an authorized representative who in his/her absence, may submit documents, answer surveys/interviews and receive the financial assistance on his/her behalf.
2. The authorized representative can be any of the following: a) spouse; b) parent; and c) child of legal age.
3. The validator shall ensure at all times the confidentiality of any personal information that comes to his/her knowledge and possession, pursuant to Republic Act No. 10173 (Data Privacy Act of 2012).

Household Members: (Dependents residing with the household head)					
Name	Age	Sex	Relationship to HH	Grade Level	Special Needs

**Comments:**

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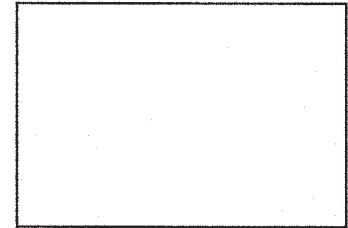
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**Signature over Printed Name of Interviewee**

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**Signature over Printed Name of Validator**



**Form 3: Monthly Monitoring Tool on MMRB/Livelihood Center Construction and Fund Utilization**

This tool will be filled up by the LPMT in close coordination with the City/Municipal Engineering Office and Budget Office. The tool indicates the status of the MMRB construction and fund utilization based on the final Physical and Financial Plans. The LPMT shall submit this form to the DILG Regional Office every 3<sup>rd</sup> week of the month.

**Instructions in filling-out the form:**

1. Column 1: The major activities during the construction as identified in the work and financial plan. This will vary from each LGU as they have different designs.
2. Column 2: Duration of accomplishment of each major activity in terms of the projected number of days to accomplish the activity. This can be derived from the submitted physical plan.
3. Column 3: Percentage of weight of each activity from the over-all projected activities to complete the project. This can also be culled out from the submitted physical plan.
4. Column 4 and 5: Quantitative or qualitative factor(s) or variable(s) that provide(s) a simple and reliable means to measure achievement and/or assess performance relative to project construction and fund utilization based from the work and financial plan. This should be agreed upon by the LPMT and DILG for purposes of clarity on measures of performance.
5. Column 6 and 7: Indicate the monthly physical and financial targets for the specific month/period.
6. Column 8-9: Actual accomplishment as of the monitoring period, based on the stated targets in column (6-7).
7. Column 10-11: For column 10, divide the accomplishment on Column 8 to Column 4 for the physical targets, then multiply by 100%. For column 11, divide the accomplishment on Column 9 to Column 5 for the financial targets, then multiply by 100%. This will provide a clear status on the percentage of performance of the project based from the over-all targets.
8. Columns 12 and 13: If ever there had been changes from the accomplishment of the targets for the month, these columns provide an explanation on the reasons for such changes. This will aid the monitoring teams/ focal persons to have an in depth analysis of the factors contributing to or hindering performance. Most importantly, these columns will be the bases for recommending possible interventions to overcome such hindering factors along the line of implementation.



Door and Windows	17	3.2										
Tile Works	25	6.2										
Painting Works	19	6.2										
Total	180 CD	100%										

\*Sample major activities





Door and Windows	17	3.2										
Tile Works	25	6.2										
Painting Works	19	6.2										
Total	180 CD	100%										

\*Sample major activities

#### Form 4: Monthly Progress Report

This tool will be filled up by the DILG Regional Office through its ISF Focal Person. The data that shall be included in the report shall be based from the monthly submitted report of the LMPT (Form 3). The tool indicates the status of the project implementation on the given period. The DILG Regional Office shall submit the herein form every last week of the month to the DILG ISF PMO.

Instructions in filling-out the form:

#### For Section I. Profile of the PPF Project

- Row 1: Indicate the name of the project
- Column (2): This means the location or project site
- Column (3): Total land area in terms of square meters devoted to the project
- Column (4): The type of project can be (1) in-city, (2) near-city, or off-site (3)
- Column (5): Indicate the amount of the LGU counterpart for the project such as cost of land, site development and other costs that will be shouldered by the LGU
- Column (6): Amount of the approved People's Plan Fund that will be or has been downloaded by DILG to the recipient LGU
- Column (7): Total project cost is the sum of the LGU counterpart and DILG approved PPF
- Column (8): Indicate the number of housing units to be constructed based from the design of the People's Plan submitted by the LGU
- Column (9): Indicate the number of families who will benefit from the project
- Column (10): State the place of origin of the target families who will be benefiting from the project
- Column (11): Indicate the target number of families within the 3 meter legal easement who will be provided with the P18,000 Interim Shelter Fund
- Column (12): Indicate the target number of families within the 3 meter legal easement already provided with the P18,000 Interim Shelter Fund

For Section II : Cull-out from Form 3 the following the data:

- Column (1) : Refer to Column 1 of Form 3
- Column (2) : Refer to Column 6 of Form 3
- Column (3): Refer to Column 8 of Form 3
- Column (4) : Refer to Column 10 of Form 3
- Columns (5-6) : Refer to Columns 12 and 13 of Form 3

At the blank provided below the table, explain in brief narrative the interpretation of the data contained in the table.

For Section III : Cull-out from Form 3 the following the data:

- Column (1) : Refer to Column 5 of Form 3
- Column (2) : Refer to Column 7 of Form 3
- Column (3): Refer to Column 9 of Form 3
- Column (4) : Refer to Column 11 of Form 3



**II. Status of Construction**

Major Activities (1)	Targets for the Month (2)	Accomplishment		Variance	
		Accomplishment (3)	Percentage of Accomplishment (4)	Variance (5)	Reasons for Variance (6)

Please insert on the blanks provided below a brief narrative on the data stated above:

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**III. Status of Fund Utilization**

Total Project Cost (1)	Projected Fund Utilization for the Period (2)	Accomplishment		Variance	
		Actual Amount Disbursed (3)	Percentage of Utilization (4)	Variance (5)	Reasons for Variance (6)

Please insert on the blanks provided below a brief narrative on the data stated above:

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**IV. Local Project Management Team/ Local Housing Board Updates**

Please indicate the summary of agreements during the monthly LPMT and/or Local Housing Board Meeting

Agenda/Topic /Issue (1)	Agreements (2)	Status of Agreements (3)


V. Grievance

Documented Grievance (1)	Action Taken (2)	Remarks (3)

VI. Others (If any)

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VII. Attachments:

Please provide the following documents if applicable:

1. Photo documentation of the project
2. Official Receipts/ Checks Issued
3. Monthly LGU Report
4. Copy of Minutes of the LPMT/LHB Meeting and Attendance Sheet
5. Summary Reports ( For DILG ISF PMO)

Prepared by: \_\_\_\_\_

Attested by: \_\_\_\_\_

## ANNEX 5

Form 5: Project Summary Monitoring Tool for People's Plan Fund (LGU Financial Assistance)

FISCAL YEAR	PPF BUDGET		PARTNER LGU									
	TOTAL AMOUNT RELEASED BY DBM	SARO NO./ Date	Local Government Unit	HOA Partner	Place of Origin of Beneficiaries	Project Site	Nature of Project	Land Area (in sq.m.)	Number of Families	PROJECT COST		
										DILG PPF Support	LGU Counterpart	Total Project Cost
2014	350,000,000		Pandi, Bulacan	Pinagsamang Mamamayan Maralita sa Taging Ilog Asso., Corp.	Barangay Tatalon, Quezon City	Barangay Mapulang Lupa, Pandi, Bulacan	Off-site	2,951 sq.m.	45	30,000,000		30,000,000
			City of Manila	Kabalikat sa Kaunlaran sa Baseco, Inc.	Baseco		In-City		225	36,000,000		36,000,000
			Quezon City	Alyansa ng Maralita ng Novaliches (ALMANOVA)		Barangay Sauyo, Quezon City	In-City	15,781	550	94,000,000		94,000,000
			Quezon City	Kaingin Bukid Barangay Apolonio Samson		Kaingin Bukid, District IV, Quezon City	In-City	28,000	765	100,000,000		100,000,000
			Las Pinas City	Renaissance Village HOA		Korva St., Barangay Elias Aldana, Las Pinas City	In-City	21,966	212	90,000,000		90,000,000
2015	350,000,000		City of Pasay	Pasay Grant Neighborhood Association		Int. Pinagbarlian St., Barangay 156, Pasay City	In-City	3,202	200	90,000,000		90,000,000
			Muntinlupa City	Harmony Ville Neighborhood Association			In-City		200	80,000,000		80,000,000
			San Juan City	San Juan Ville Homeowners Association	Barangay Salapan, San Juan City	F. Manalo, Barangay Batis, San Juan City	In-City	1,809	158	90,000,000		90,000,000
			Paranaque City	Bagong Paranaque Homes II			In-City	17,174	200	90,000,000		90,000,000
Grand Total	700,000,000							90,883	2,555			0

DILG CENTRAL TO REGIONAL OFFICE					REGIONAL OFFICE TO LGU					FUND UTILIZATION		
Amount Released to RO	Sub-Allotment No.	Date Released	Date Received	OR Receipt No.	Amount Released	Sub-Allotment No.	Date Released	Date Received	Receipt No.	Amount Utilized	Balance	Means of Verification
30,000,000	1607	01/05/2016			30,000,000			12/29/2015	No. 4739349			
36,000,000	731	07/16/2015			36,000,000							
94,000,000	1626	01/12/2016										
100,000,000												
90,000,000	1605	12/30/2015										
90,000,000												
80,000,000												
90,000,000	384	03/29/2016										
90,000,000	384	03/29/2016										
700,000,000					66,000,000							

The above form will be used by the DILG ISF PMO in tracking the downloading and disbursement of funds from the DILG Central Office to the LGU partners. This form shall be updated every 1<sup>st</sup> and 2<sup>nd</sup> week of the succeeding month of the reporting period of the DILG Regional Office.

Prepared by : \_\_\_\_\_

Attested by : \_\_\_\_\_

## Form 6: Summary Status Report on Construction

This form shall be filled out by the DILG ISF PMO to track monthly accomplishment of the project implementation. The rate of monthly accomplishment will be based from Column 4 of Section 2 of Form 3. This form shall be updated every 1<sup>st</sup> and 2<sup>nd</sup> week of the succeeding month of the reporting period of the DILG Regional Office and LPMT.

LGU: \_\_\_\_\_

Name of PPF Project: \_\_\_\_\_

ACTIVITIES	Duration	% W.T.	Rate of Accomplishment						Total Percentage of Accomplishment	
			Month 1	Month 2	Month 3	Month 3	Month 4	Month 5		Month 6
Site Development	33	6.3								
Rebar Works	64	11.5								
Form Works and scaffoldings	15	5.1								
Concrete Works	40	10								
Masonry Works	47	14.6								
Structural Steel Works	41	22.9								
Roofing Works	28	6.3								
Carpentry/Ceiling Works	4	0.6								
Sanitary/Plumbing Works	19	3.1								
Electrical Works	18	4								
Door and Windows	17	3.2								
Tile Works	25	6.2								
Painting Works	19	6.2								
<b>Total</b>	180 CD	100%								

\*Sample major activities

Prepared by: \_\_\_\_\_

Attested by: \_\_\_\_\_



Form 7: Summary Status Report on Fund Utilization

This shall be filled out by the DILG ISF PMO to track monthly accomplishment of the project implementation. The rate of monthly accomplishment will be based from Column 4 of Section 3 of Form 3. This form shall be updated every 1<sup>st</sup> and 2<sup>nd</sup> week of the succeeding month of the reporting period of the DILG Regional Office and LPMT.

LGU: \_\_\_\_\_

Name of PPF Project: \_\_\_\_\_

Activity	Budget Allocation	Actual Expenditure						Total Amount	Balance	Total Percentage of Accomplishment
		Month 1	Month 2	Month 3	Month 3	Month 4	Month 5			
Site Development										
Rebar Works										
Form Works and scaffoldings										
Concrete Works										
Masonry Works										
Structural Steel Works										
Roofing Works										
Carpentry/Ceiling Works										
Sanitary/Plumbing Works										
Electrical Works										
Door and Windows										
Tile Works										
Painting Works										
<b>Total</b>										

\*Sample major activities

Prepared by: \_\_\_\_\_

Attested by: \_\_\_\_\_

## ANNEX 8

### Form 8: Assessment Tool on the Provision of Basic Services and Utilities

This form will be filled up by the LPMT. The form is a simple assessment on the availability and accessibility of the basic services and utilities essential to adequate resettlement as outlined in Column 1. Column 2 shall indicate the standards in each facility as agreed upon by the TWG on Housing Concerns. In column 3, write in brief the actual status of the facility/utility. In column 4, indicate the distance of such facilities and services from the relocation site. Other comments, information, observations and assessment of the actual status of the basic services vis-à-vis standards can be included in Column 5. This form shall be filled up upon the constitution of the LPMT and regularly updated.

Services Needed by the Community (1)	Existing Facilities and Services		Distance from the PPF Project (4)	Remarks (5)
	Standards (2)	Actual Status Based from Standards (3)		
<b>Shelter and Living Space</b>				
Shelter/Unit	BP 220 standards			
Solid Waste Management	RA 9903; 1 MRF; Dump truck; Equipment			
Liquid Waste Management	Sewerage and septic tanks/treatment facility			
Power	ERC Policy: Direct individual metered connection			
Water	Direct individual metered connection (Level 3)			
<b>Mobility and Access</b>				
Transportation	Jeepney or Tricycle/Pedicab terminals			
Communications	Internet/Communication facilities			
<b>Livelihood and Economic Opportunities</b>				
Livelihood Productivity Center (NHA Standards)	3M: 1,500 families above 6M: 3,000 families above			
Market/Talipapa (NHA Standards)	1.5 M: 1,500 families above 3M: 3,000 families above			
Other Livelihood and Employment Opportunities				
<b>Social Network and Safety Nets</b>				
Education	Kindergarten (ratio):			

(DepEd Standards)	<ul style="list-style-type: none"> <li>• 1 Teacher: 30 Pupils</li> <li>• Double shift</li> </ul>			
	Grades 1-2: <ul style="list-style-type: none"> <li>• 1 Teacher: 40 Pupils</li> <li>• Double Shift</li> <li>• E-classroom package</li> <li>• Science and math Kits</li> </ul>			
	Grade 4-6: <ul style="list-style-type: none"> <li>• 1 Teacher: 45 Pupils</li> <li>• Single Shift</li> <li>• E-classroom package</li> <li>• Science and Math Kits</li> </ul>			
	Senior High School: Grade 11-12: <ul style="list-style-type: none"> <li>• 1.5 Teacher: 40 Pupils</li> <li>• Single Shift</li> <li>• E-classroom package</li> <li>• Science and Math Kits</li> </ul>			
Health (DOH Standards)	<ul style="list-style-type: none"> <li>• 1 Midwife: 1,000 Population</li> </ul>			
	<ul style="list-style-type: none"> <li>• 1 BHW: 20 HH</li> </ul>			
	<ul style="list-style-type: none"> <li>• 1 BHS (43 sq.m.): 5,000 Pop</li> </ul>			
	<ul style="list-style-type: none"> <li>• Equipment and Medicines</li> </ul>			
Food Security	<ul style="list-style-type: none"> <li>• Rolling Stores</li> <li>• Bigasang Bayan</li> </ul>			
Peace and Order	<ul style="list-style-type: none"> <li>• 1 PNP: 500-1,000 Pop with basic equipment</li> </ul>			
	<ul style="list-style-type: none"> <li>• Patrol vehicles</li> </ul>			
	<ul style="list-style-type: none"> <li>• 1 Station: 20 Personnel or 1 COMPAC (barangay)</li> </ul>			
	<ul style="list-style-type: none"> <li>• 20 Tanods: 1 Barangay</li> </ul>			
	<ul style="list-style-type: none"> <li>• Lupon Tagapamayapa</li> </ul>			
	<ul style="list-style-type: none"> <li>• Street Lights</li> </ul>			
DRRM	<ul style="list-style-type: none"> <li>• RA 10121</li> </ul>			
	<ul style="list-style-type: none"> <li>• Evacuation Center</li> </ul>			

Fire Protection	<ul style="list-style-type: none"> <li>• 1 FF: 2,000 Pop</li> </ul>			
	<ul style="list-style-type: none"> <li>• Firetrucks</li> </ul>			
Multi-Purpose Hall; Recreational and Cultural Activities	<ul style="list-style-type: none"> <li>• 1 Multi-purpose Hall</li> </ul>			
	<ul style="list-style-type: none"> <li>• Community Chapel/Mortuary</li> </ul>			
<b>Community Governance</b>				
Organized HOA	<ul style="list-style-type: none"> <li>• HLURB/SEC/DOLE Registered and/or LGU-accredited HOA/Sectoral Organization</li> </ul>			
Socio-Economic Profile	<ul style="list-style-type: none"> <li>• Inventory of Skills and other demographic data of relocated families</li> </ul>			
Local Project Management Team	<ul style="list-style-type: none"> <li>• DILG/MC 056-2015: Defined membership with regular monthly meetings</li> </ul>			
Capacity Building Activities	<ul style="list-style-type: none"> <li>• Estate Management Training Leadership Training</li> <li>• Leadership Trainings etc.</li> </ul>			
Grievance Redress Mechanism				
<b>Local System Integration</b>				
L/BDCs and other Special bodies	Representation of relocatees to Special Bodies at the barangay and city level; LIAC representation			
Relocation and Resettlement Action Plan (RRAP)	Integration of People's Plan in the RRAP			
Local Shelter Plan	Integration of RRAP in the LSP			
Constituency	Registration of barangay inhabitants			



Prepared by: \_\_\_\_\_

Attested by: \_\_\_\_\_