



The CEDO Handbook

Bangsamoro Development Authority

Program for Local Economic Development through Enlightened
Governance and Grassroots Empowerment (PLEDGE)

This Handbook is based on the PLEDGE Operations Manual, which was developed through Participatory Action Research (PAR) wherein the Community Enterprise and Development Officers (CEDOs) were active participants. Presented in tabular form, the content of the Handbook is synchronized with the stages and steps in field project planning, implementation, monitoring and internal evaluation as followed during the PAR process.

CEDOs should be skilled in community organizing and mobilization. Hence, included in this Handbook are pointers that s/he learned during the capacity building workshops:

GUIDE IN ENTERING A COMMUNITY

The following is a general guide for CEDOs in community planning, before they engage in the actual PLEDGE planning process:

1. Master the contents of the PLEDGE operations manual, particularly the concept, goals and objectives, implementing tools, guidelines, and the methodology.
2. Study the target community from a distance - Before a CEDO visits the target community, s/he should first search for information and know the background of the place and its people. Review documents from government agencies or NGOs which provide basic data on the socio-economic profile of the community.

The main objective of the secondary data gathering and assessment is to enhance the CEDO's environmental scan of the proposed project site. The CEDO must focus on the objective of PLEDGE, which is to assist the target groups in identifying viable enterprise project ideas.

The most important sources of information are the local stakeholders such as the following:

- Leaders of women, youth, still productive senior citizens, former combatants, and persons with disabilities
 - Village leaders or government agents
 - Local shop owners, businessmen or entrepreneurs
 - Non-Government Organizations (NGOs)
 - Community-based Organizations (CBOs)
 - Political leaders, school officials, religious groups, civic organizations
 - Government agencies and programs covering the area
3. Make an effort to link with other groups or service providers that are already working in the community - A strategic approach calls for partnerships and alliances. The best partners in the community are the existing service providers (government or private), if available. In most cases, it is also advantageous to link the community project with current or proposed government development programs or policies.
 4. Plan and schedule a definite day for entry - The first day in the community is very crucial. It can either motivate or disappoint a facilitator. Select and schedule a day when most of the stakeholders are available.
 5. Once inside the community, locate the key stakeholders previously identified - It is a "must" to talk to them first and to give them the importance that they deserve. These people carry much influence

in the community. Their opinions and pronouncements could make or unmake a planned community project. Therefore, it is best to befriend them. It is also necessary to study their group affiliations or personal interests. This information could be the starting point of inter-personal connections.

6. Make individual and informal consultations - It is always advantageous to do person-to-person informal talks with key stakeholders. This approach provides tremendous motivation and generates needed support for any community project. Furthermore, a person-to-person informal discussion could unravel important information which could guide the CEDO in interacting with target groups in subsequent meetings. To get quality results, these consultations should take into account the stakeholder's individual expertise and roles in the community.
7. Avoid "induced" or forced participation from the people - "Participatory" is the most important element in the community planning process. It means INFORMED, ENLIGHTENED, and ACTIVE involvement of the community in all stages of the project from planning to implementation and follow-up. The target groups have to "own" the project. In generating participation, it is better to consider "readiness and natural initiatives". "Sell" ideas, do not force them. The initial person-to-person informal talks with stakeholders could help CEDO appraise the level of interest or readiness to accept external assistance and to actively participate in the discussion of their community-based enterprise project.
8. Identify a local coordinating unit, or designate a local contact person - Chances are there are already existing formal and informal structures or organizations that are in charge of certain local concerns or activities in the community. The facilitator should learn what/who these are from his/her initial study and informal talks. If these people are already in place, it is advisable to consult them on the possibility of becoming contact persons for the project. However, if this is not possible, it is necessary to identify a local leader who will act as a focal person to help coordinate subsequent activities after the first visit of the CEDO.
9. Master brainstorming techniques - Even with the use of structured guide and forms, community meetings are hard to conduct especially if the topics are about projects that will impact the lives of the people. The most important part is how to generate good ideas and effective discussions so that decisions are done in consensus and from enlightened information sharing. This goal can be achieved if the CEDO is skilled in brainstorming techniques and in the use of the PLEDGE's community enterprise planning tools.
10. Always summarize the results and agreements of community meetings - The PLEDGE planning process has complete tools for brainstorming, enterprise ideas validation and prioritization, and summarization. Participants of a community meeting will always appreciate it if, at the end of the discussions, the CEDO will summarize the results and explain how these results will be utilized in the process of coming up with an approved training proposal.

STEPS IN THE PLEDGE METHODOLOGY

NO.	ACTIVITIES	EXPECTED OUTPUT	TOOLS/GUIDELINES	TIMEFRAME
A - Planning Stage				
These activities are the sole responsibilities of the CEDO. The BDA-CMO Staff provides the support and authority.				
1	Selected Municipal LGU and local partners orientation ¹	Municipal planning officers know about PLEDGE, MTT mobilized	PLEDGE Brochure and other briefing materials on BDA	
2	Barangay-wide orientation	Barangay officials understand and support PLEDGE	-do-	
3	Community enterprise project planning	Project ideas prioritized, decided upon	PLEDGE How to Conduct Community-based Enterprise Planning	
4	<i>Randomization by WB-IE</i>	<i>4 project ideas approved by WB-IE</i>	<i>Selection criteria by the WB-IE</i>	
5	Project designing, Proposal preparation	Project Proposals discussed, finalized and submitted	PLEDGE Project Proposal Templates	
6	Registration of partner People's Organization	PO takers of approved project ideas registered	Requirements/Template of registering agency	
7	Assessment of Project Proposal by MTT and BDA	Project proposals assessed by MTT and RMO	PLEDGE How to Assess of Project Proposals template	
8	Processing and approval of Project Proposal by BDA	Project proposals evaluated, approved by BDA	-do- plus BDA internal policies	
9	Preparation of Service Contract with the PO	Service Contracts prepare, signed by BDA	PLEDGE Service Contract templates	
10	<i>Release of 1st tranche (start of 5-month training intervention)</i>	<i>1st tranche of fund assistance released</i>	<i>PLEDGE Request for Fund Release template with supporting documents</i>	

¹ The selection and social preparation of target sites is the responsibility of the BDA-CMO staff.

NO.	ACTIVITIES	EXPECTED OUTPUT	TOOLS/GUIDELINES	TIMEFRAME
<p>B - Implementation, Monitoring and Internal Evaluation Stage</p> <p>These activities are the responsibilities of the partner POs, as enumerated in their service contract.</p> <p>However, they are under the supervision of the CEDO who provides coaching and follow-up assistance.</p>				
1	Values Transformation Training	Values transformation training conducted	BDA training materials on Values Transformation	
2	Training Induction Program (TIP), discussion of the terms of the Service Contract	PO members understand, accept their responsibilities	PLEDGE Project Proposal and Service Contract Templates	
3	Designation/certification of training/enterprise venue. Selection of the Trainees	Venue for training or the enterprise project identified, approved	PLEDGE Certificate of Inspection of Training/ Enterprise Venue Template	
4	<i>Submission/processing and release of request for the 1st Tranche of contract price</i>	<i>Request submitted, assessed and fund assistance released</i>	<i>PLEDGE Request for fund release template with supporting documents</i>	
5	Appointment of Skills Trainer by the PO	Training institution and/ or trainer appointed	PLEDGE Letter of Appointment of Trainer from the PO Template	
6	Preparation of Skills Training Syllabus or operation/training manual/ materials	Trainer prepares training syllabus, materials, manual for the products/service	PLEDGE Training Design Template in the Project Proposal	
7	Purchase of training tools, supplies and materials in the project proposal	Approved list of tools, equipment, non-perishable supplies purchased	PLEDGE Canvassing Template in the Project Proposal	
8	Delivery of training tools, supplies and materials, preparation of training venue	Tools, equipment and supplies delivered to training/ enterprise venue	Sales invoice and delivery receipts from suppliers	
9	Inspection, inventory of procured tools, equipment, supplies by BDA-RMO	Purchased tools, equipment, supplies inspected by CEDO	PLEDGE Certificate of Inspection of procured tools, equipment, and materials	
10	<i>Liquidation of 1st tranche, processing and release of 2nd tranche of contract price</i>	<i>Liquidation and request for fund release form submitted by PO</i>	<i>Request for fund release template with supporting documents</i>	

NO.	ACTIVITIES	EXPECTED OUTPUT	TOOLS/GUIDELINES	TIMEFRAME
11	Skills Training delivery on products or services identified and approved in the project proposal	Skills training conducted on site, or in relevant training venue	Skills training syllabus/outline from the project proposal or training manuals and materials by the Trainer	
12	Training on marketing, distribution, financial management, records keeping	Enterprise development training component conducted	PLEDGE TEP training materials for production, merchandizing and service enterprise, marketing, simple bookkeeping	
13	Training on environmental risks, grievance mechanism, gender and social issues	Training on the subjects conducted by BDA, ILO or other service providers	BDA, WB, ILO Training materials and other service providers	
14	Organizing PO-Enterprise relationships, organizing supply chain, linking with government agencies, markets, technologies, etc.	Organizational and business relationships and policies between PO and their enterprise projects agreed	PLEDGE Training materials on supply chain management	
15	Submission of training activity reports	All training related reports prepared, submitted to CMO for review	PLEDGE Training applications, enrollment report, graduation report, end of training report templates	
16	TEP evaluation	Evaluation of the 5-month TEP program conducted, follow-up issues identified	PLEDGE How to Conduct TEP Evaluation Tool	
17	Graduation and turnover of tools and equipment	Training program and turnover of tools and equipment conducted	PLEDGE Training Certificates, Certificate of Turn-over of tools and equipment templates	

NO.	ACTIVITIES	EXPECTED OUTPUT	TOOLS/GUIDELINES	TIMEFRAME
18	<i>Release of last tranche of the Service Contract</i>	<i>3rd and last tranche of fund assistance submitted and released</i>	<i>PLEDGE Request for Fund Release Template with supporting documents</i>	
19	Submission of SDI Report (this is a monthly requirement for MIS)	Monthly SDI reports submitted until end of each enterprise project	PLEDGE Summary Data Information Monitor Template	
20	Tracer Study – conducted at least 5 months after graduation of beneficiaries from the TEP	Tracer conducted, data analyzed, narrative report prepared individually and collectively	PLEDGE How to Conduct Tracer Study of Beneficiaries template	

The activities enumerated in this Handbook are expected to be completed ideally within 9-10 months: 4-5 months for the planning stage and 4-5 months for the implementation stage, representing one project cycle. The CEDO's job performance is assessed, evaluated and measured based on the effective and efficient implementation of the steps in this Handbook.

CEDO PERFORMANCE RATING INSTRUMENT

This performance rating will be conducted at the end of the project cycle in every site, which is after the end of the 5-month TEP training period. The CEDO's performance will be assessed, evaluated and measured at three levels of activities: compliance in applying the steps of the methodology, innovativeness in project planning and implementation strategies, and success of

the enterprise project within the 5-month training and transition period.

The purpose of the performance rating is to help the CEDOs improve their skills and knowledge, provide further assistance in building their capacities, and determine possible performance incentives.

The ratings will be based on actual sources of data and information:

1. Monthly monitoring reports required by CMO
2. Summary Data Information (SDI) monthly report
3. TEP Evaluation (at least one week before end of TEP training)
4. Personal interview with the CEDO, POs, and other stakeholders

ASSESSMENT TABLE

(1 is the lowest, 10 is the highest)

NO.	PERFORMANCE CRITERIA	RATING SCORE (PLEASE CHECK)									
		1	2	3	4	5	6	7	8	9	10
1	How dutiful the CEDO was in applying the PLEDGE tools										
2	How the CEDO worked within the timeframe allotted										
3	How much is the observable acceptance by beneficiaries										
4	How far the CEDO introduced changes, innovations										
5	Was the CEDO able to submit reports correctly?										
6	Was the CEDO able to submit reports on time?										
7	How many partners were generated (check number)										
8	How independent in facilitating project activities										
9	How s/he has shared the PLEDGE concept with others										
10	Overall success of the TEP implementation										
	Summary										
	Final Rating (Average)										

Raters:

_____ ; _____ ; _____

Date of Performance Evaluation: _____