

# GOOD PRACTICE DOCUMENTATION

DSWD FIELD OFFICE VIII



## “Seeing and Embracing Pantawid through UMET”

A Good Practice Documentation of the Pantawid  
Pamilyang Pilipino Program Field Office VIII

### BACKGROUND:

In today’s digital age, data access and management is more vital than ever before. These data creates a foundation of any business or government institution to make evidenced-based decisions towards the achievement of goals. To ensure that employees have the right data for decision-making, companies, institutions, agencies, and other organizations must ensure that the data management solutions that are available within the organization improves visibility, reliability, and security.

With 282, 289 active beneficiaries in Region VIII, the Pantawid Pamilyang Pilipino Program have a great demand for data management. This practice of collecting, organizing, and storing data plays an important role in the Program’s environment, making essential functions easier and less time consuming.

The Pantawid Program has various components that are being affected/impacted by the data management system. These components include:

1. Family Development Session (FDS) component that collects data on the profiles of parent leaders, monitoring of FDS and youth development sessions, backyard gardening and FDS application, and profiles of parent groups.
2. Institutional Partnership and Development for National Government Agencies and Local Government Unit (IPD-NGA/LGU) that collects data on the supply side gaps, engagement with the local government units and national government agencies, and monitoring of the functionality of the municipal action teams. This component also captures and monitors the status of the ESGPPA graduates and

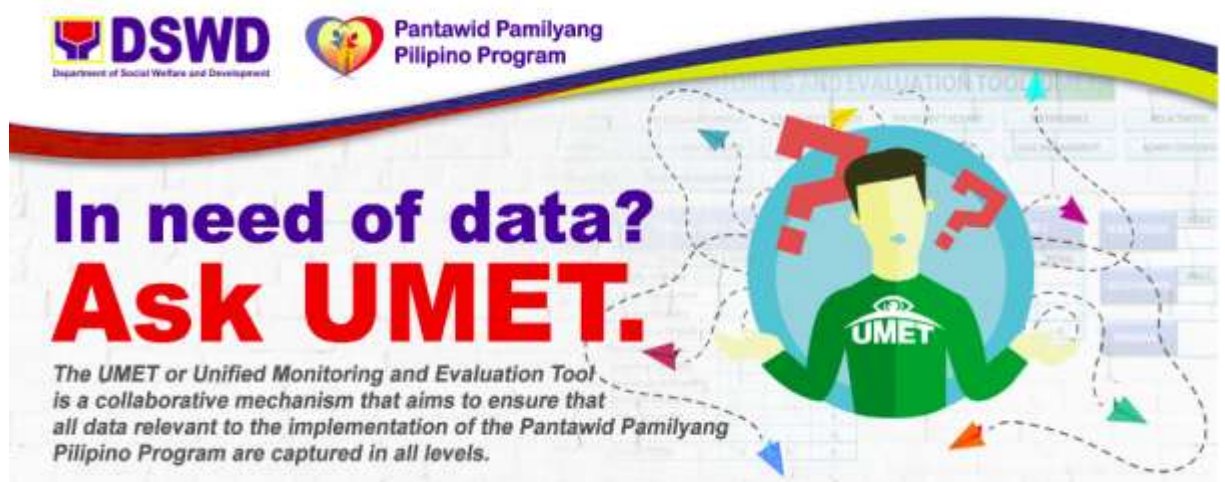
high school graduates that contributes to the overall well-being of the household beneficiaries.

3. Case Management component that collects data on the monthly case management activities for their target households, interventions and strategies.
4. Planning, Monitoring, and Evaluation Division (PMED) that analyses, processes, and banks all data gathered on a monthly basis with respect to the monthly targets.
5. Civil Society Organizations (CSO) component that collects data about the engagement activities of the program with all partner CSOs.
6. Administrative Support component that monitors the internal staff's issues and concerns that needed further intervention from the Regional Program Management Office (RPMO) and/or National Program Management Office (NPMO)

With effective data management, all of these components of the Pantawid Pamilya will be able to carefully implement its directives, plans, and strategies towards uplifting the lives of the beneficiaries it serves.

The presence of the Pantawid Pamilya Information System (PPIS) proves to be a significant part of the program's overall data management. However, the absence of unified monitoring tool creates a gap in the effective implementation of the program. Over the years, the Program's need for data has evolved from simple data gathering to analysis and from simple data presentation to data banking for future reference. It is in this premise that the UMET or the Unified Monitoring and Evaluation Tool were created to address this gap in data management.

What is UMET?



**DSWD**  
Department of Social Welfare and Development

**Pantawid Pamilyang Pilipino Program**

**In need of data?  
Ask UMET.**

*The UMET or Unified Monitoring and Evaluation Tool is a collaborative mechanism that aims to ensure that all data relevant to the implementation of the Pantawid Pamilyang Pilipino Program are captured in all levels.*

The UMET or **Unified Monitoring, and Evaluation Tool** are a collaborative mechanism that aims to ensure that all data relevant to the implementation of the Pantawid Pamilyang Pilipino Program are captured in all levels.

Its official logo is symbolized by **“the eye”** and **“the embrace”** tells what the UMET desires to accomplish.



The “Eye” intensifies the saying that seeing is believing. In the course of the program implementation, believing requires sets of evidence. UMET helps the program implementers in seeing all components from a wider perspective and allows deeper collaboration, analysis and insights. As a tool, it helps monitor and evaluates relevant data that are necessary for evidence-based decisions and directives. Ultimately, it serves as an eye-opener in recognizing challenges and developing strategies for the good of all.



The “Embrace” on the other hand, symbolizes UMET as it intensifies and institutionalizes the data banking processes of the technical staff thereby embracing a culture of efficient and effective data collection. To embrace monitoring and evaluation is to better understand and visualize the impact of these data closely. This tool encourages active engagement and collaboration of all units within the program and will help ensure the achievement of strategic goals.

Further, this initiative has been conceptualized and implemented to address the following issues relative to the collection of the relevant data not found in the Pantawid Pamilya Information System or PPIS:

- ✓ No consistent data collection
- ✓ Overloading of data request from the Field Staff whenever data is needed by Regional Program Management Office (RPMO) and/or National Program Management Office (NPMO)
- ✓ Too many technical staff requesting data from the Field Staff
- ✓ No data banking of relevant data
- ✓ Regular work plan of the Field Staff is affected whenever data not found in the PPIS is being requested
- ✓ Case Management activities of the case workers are hampered as more time is given to report making

Since its inception in 2017, the UMET has evolved from Version 1 to Version 12 to cater to the additional updates on the reportorial templates cascaded from NPMO down to the RPMO level and other indicators directed by the management to be collected from Pantawid. So far, POOs have been able to generate Knowledge Products in the form of Quarterly, Semestral and Annual Narrative Reports using data collected from UMET and those that stem from the Pantawid Pamilyang Pilipino Program.



**PRE-IMPLEMENTATION:**

Last 2017, the Monitoring and Evaluation Officers conducted series of meetings to discuss on the number of reports and the kind of data collected from the Field Staff and how frequent these data are being asked. Different reportorial templates were gathered from the

different program component Focals like that from the FDS, IPD, MCCT and those with other required reportorial templates.

**Pre-Implementation Phase**

- February 2018**  
Presentation of UMET in the PIR or Progam Implementation Review Delegation of tasks within the C/MAT
- July 2017 - December 2017:** Identification of reports and kinds of data to be collected from the ground. Creation of UMET Versions 0-9.

The collected reportorial templates were incorporated in the UMET. Upon completion, the tool was subjected to critiquing from among the Monitoring and Evaluation Officers then to the RPMO Technical Team.

The finished product was then presented in the Program Implementation Review for CY 2017 held last February 1 to 4, 2018 which was attended by selected City/Municipal Links, Social Welfare Assistant and Municipal Roving Bookkeepers and all staff of the Provincial Operation Offices and Regional Program Management Office for further comments and then agreement setting in its soft launching and use.



After the official presentation of the UMET in February 2018, the UMET was pilot implemented to all areas with the following process:

The Municipal Operation Office shall fill out the UMET on a monthly basis with activities and data that have happened or available within the month only.

The delegation of data entry was divided as follows:

1. C/MLs or Municipal Links shall fill-out the work sheets of the HP (Household profile), IP (Indigenous People), PL (Parent Leader), FDS (Family Development Session), YDS (Youth Development Session), TS (Testimonials), CSO (Civil Society Organization), Case Management and FDS Application.
2. SWAs or Social Welfare Assistants shall fill-out the work sheets of the IPD (Institutional Partnership Development) Activities, Supply Side Gaps, IPD-LGU Engagements, ESGP-PA, HS (High School) Graduate Status & SLP (Sustainable Livelihood Program) Intervention.


The Final Monthly Report shall be reviewed and polished (if necessary) by the Team Leader designated and is replaced every quarter. The Monthly UMET report shall be submitted to the M&E Officers of each POO on or before the deadline with or without the data of the delinquent ML.

M&E Officers then shall share the submitted UMET to the SWO IIIs as data consolidation shall be done by the following:

- a. PMEO to consolidate the HP (Household profile, Testimonials, ESGP-PA, HS (High School) Graduate Status, Admin Concerns and SLP (Sustainable Livelihood Program) Intervention worksheets.
- b. SWO IIIs to consolidate the IP (Indigenous People), PL (Parent Leader), FDS (Family Development Session), YDS (Youth Development Session), IPD (Institutional Partnership Development) Activities, Supply Side Gaps, CSO Activities, IPD-LGU, Case Management, FDS Application worksheets.

After consolidation, the Provincial Link shall review and polish (if necessary) the final POO monthly report and to submit it to the RPMO thru the RMEO. The deadline of the UMET monthly report is every 15th day of the following month. The content of the Quarterly, Semestral and Annual provincial reports shall be the consolidated analysis of the data from the UMET.

## IMPLEMENTATION:



**Full Implementation Phase**

**September 2019**  
Version 11, Enhancement of the FDS and Indigenous People Tab

**April 2019:** Presentation of UMET to NPMO-PMED

**January 2019**  
Creation of the First Annual Accomplishment Report using UMET Data

**August 2018:** Full swing utilization of UMET

The UMET had a series of redoing from the time it piloted in 2018. That is why by 2019, the UMET was already in its version 10 as it became fully implemented and was regularly submitted every month.

A narrative provincial report was already started to be consistently submitted using the data from the UMET which now form part of the provincial Knowledge Management (KM) products.

## Mechanisms for Sustainability

To sustain the utilization of the monitoring tool, the RPMO established the following mechanisms:

1. The 4Ps Division Chief issued a memorandum to all program staff to regularly comply with the submission of UMET on a monthly basis. An established deadline was also set to ensure consistency in the submission.
2. A User-guide/manual was also issued to the staff that will serve as a reference on how to fill out the monitoring tool.
3. The submission of UMET was included in the Individual Performance Contract (IPC) of all the Municipal Links, Social Welfare Assistants, Municipal Roving Bookkeepers, Social Welfare Officers, and Provincial Links. This forms part of their Key Results Areas (KRA) that will be evaluated on a Semestral basis.
4. Coordination with the Regional Information and Technology Unit on the possible creation of an online version of UMET.
5. Provision of the uniform reporting template for the creation of the narrative reports and analysis all the data derived from the UMET.
6. Regular provision of technical assistance to the field staff. The feed backing mechanisms on the quality of the reports submitted was facilitated through e-mails, calls, sms, FB Messenger, staff meetings.
7. Issuance of memorandum for non-compliant staff.

## RESULTS/IMPACT:

As an emphasis, UMET collects only statistical data. It does not contain any pertinent information of any specific Pantawid households such as names, birthday, addresses and the likes. It only captures the actual count and current statistical status of the specific data sections in the UMET as a reportorial tool.

The main tangible result of the data collection through UMET is having an evidence-based statistics which will aid in the planning and benchmarking of certain programs and activities relevant not just to Pantawid but to other sections of DSWD and other partner stakeholders as well compared to the previous activity on doing estimates for targeting.

With the full implementation on the use of the UMET, the challenges on data collection and data banking were addressed.

This was manifested by the following:

1. Regular gathering and timely submission of monthly reports from the municipal and provincial operations office. Six provinces (100%) regularly submits the consolidated monitoring tool based on agree timelines.
2. C/MLs are no longer heavily burdened on the data they need to provide whenever specific program-related data such as on the statuses of the case management efforts. Urgent need for data can be generated and reported without disturbing the regular activities of the Field Staff. The RPMO just need to refer to the submitted reports of the POOs for the needed data.
3. The Provincial Operations Offices (POOs) have been able to regularly share to their respective Legislators and other partner stakeholders their locally produced Knowledge Management products in the form of narrative reports derived from the processed data of UMET. These reports serve as evidences of the program activities and accomplishments within the province.

This M&E initiative is a good practice because it has intensified the culture of the regular data collection and ownership among program components. It has addressed the identified gaps and the flagging of the glaring areas in the implementation have become more evidence-based. The program component focal which serve as the end-users of the collected data have a tangible reference that serve as their basis for the provision of technical assistance to the field staff. As a result, the data analysis of the assigned program component has been strengthened and has become more purposive.

In essence, it has strengthened the data collection of the following other relative indicators in the program implementation:

- ✓ Count of Pantawid Senior Citizens
- ✓ Count of Pantawid Solo Parents
- ✓ Count of Pantawid Household Engagements
- ✓ Count of Pregnant Pantawid female member of the family roster
- ✓ Count of PWDs among Pantawid households



- ✓ Beneficiaries Positive Testimonial Statements using the GAD Indicators
- ✓ Whereabouts of the Pantawid High School Graduates
- ✓ Whereabouts of the Pantawid ESGP-PA Graduates
- ✓ Status of Case Management Efforts
- ✓ Accounting of Pantawid Households that received Livelihood Interventions
- ✓ Membership/Affiliation to Local Organizations of the Pantawid Parent Groups
- ✓ Admin Concerns of the C/MOOs
- ✓ Reportorial Templates from MCCT-IP
- ✓ Reportorial Templates from FDS
- ✓ Reportorial Templates from IPD-NGA, IPD-LGU and IPD-CSO

**IMPLICATIONS FOR REPLICATION:**

As the Pantawid Pamilya is now institutionalized, the case management plays a very vital role in ensuring that Pantawid beneficiaries will move from one level to a higher level of well-being, to self-sufficiency in fact, before the termination of the seven-year program duration.

The UMET has inspired the creation of another tool that helps in the effective monitoring of case management strategies. This tool is the UCMD of the Unified Case Management Database which is being utilized by the Social Welfare Officers (SWO-III's).

The development of the Unified Case Management Database resulted to the creation UMET Version 13 of which FDS, YDS and Case Management sheets in UMET were transferred to it. This is to bring focus to the responsibility on the data collection from the grounds of which the Unified Case Management Tool will be then the sole task for completion of the City/Municipal Links while UMET indicators shall be the shared responsibility of the Social Welfare Assistant and the Municipal Roving Bookkeeper.

The UMET was also shared to Region 4A and other RMEOs or Regional Monitoring and Evaluation Officers for possible study and duplication in their respective regions. Since these regions are under the same 4Ps program that processes the same sets of data, the same monitoring tool can be replicated provided that they do not have other existing monitoring tool that works for them and their needs in their respective regions. Apart from the physical equipment such as computers and internet, the support of their respective program managers would also be instrumental in the replication of this initiative.

## **LESSONS LEARNED:**

### **UMET as an online system**

The UMET can be better enhanced if this will be made into an online system. This will shorten the time needed to send these reports since the monitoring and evaluation can see the data being placed into the online system real time. This can be done in coordination with the Information and Technology (IT) personnel. However, as per initial consultation with the IT team, it is possible but may take a long period of time. Developing an online system requires programming skills, something that not all IT personnel are equipped with, and will require the office to outsource programming services from third party suppliers. It will be costly and funds are definitely needed.

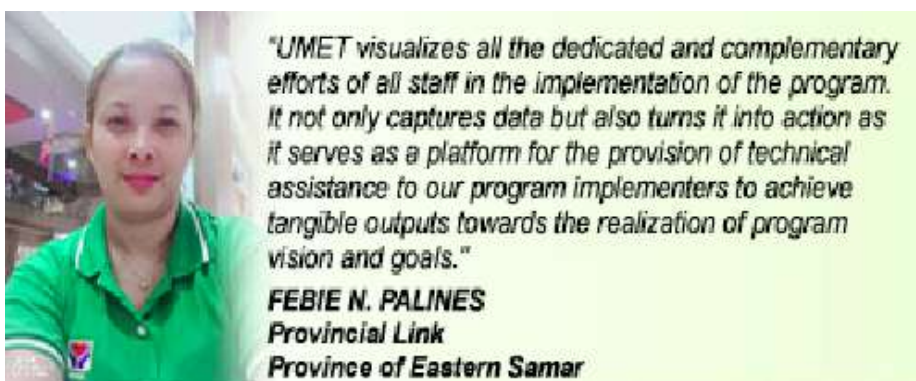
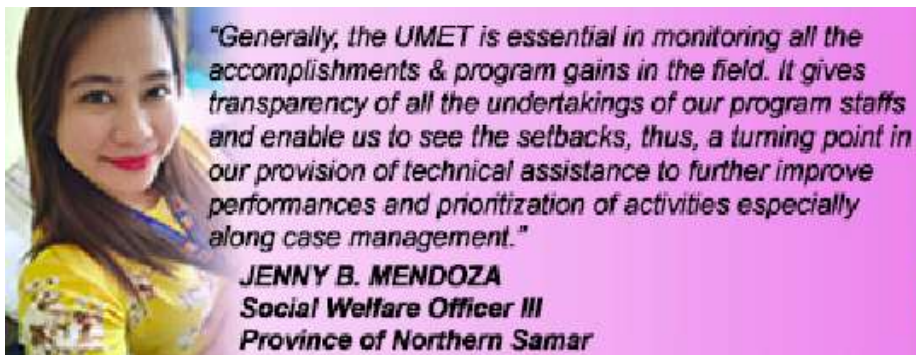
### **UMET must be flexible**

The UMET is not absolute in its form as it is flexible to accommodate the new sets of new reportorial directives from NPMO as long as it is not yet available in the tool. It can be updated continuously as the other program component receives new reportorial templates from the NPMO. However, the POOs and the C/MOOs have already expressed their gratitude for this initiative in unifying the needed reports.

### **Compliance is not the sole responsibility of the Municipal Link**

The UMET ensures that data collection and reporting are not the sole responsibility of the City/Municipal Link alone but a shared responsibility among the staff of the City/Municipal Operations Office. During the implementation phase, there were instances of incomplete submission because the assigned municipal staff

The tool also made it easier for the end-user to supply needed information as required/requested by the National Program Management Office, partner national agencies, and civil society organizations. As UMET evolved from 2017 up to the present date, it has generated positive responses from the end-users.



### **Awards and Recognitions Received**

The UMET won as 3rd Placer in the 2019 M&E Initiatives Award for the Unified Monitoring & Evaluation Tool (UMET) last September 13, 2019 during the NPMO Search for the Most Promising M&E initiative. The UMET was the only regional entry that topped the first three winners in the competition.

Last January 2021, the UMET was also recognized as the Best Knowledge Management Initiative during the Regional PRAISE AWARDS. ###

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