21 July 2023

DIVISION MEMORANDUM
DM No. 524 , s. 2023

ADOPTION OF THE POLICY AND IMPLEMENTING GUIDELINES OF DEPED QUEZON FOR THE IMPLEMENTATION OF PROGRAMS, ACTIVITIES AND PROJECTS (PAPs) PER BASIC EDUCATION MONITORING AND EVALUATION FRAMEWORK (BMEF)

To: Assistant Schools Division Superintendents
Division Chiefs
Section/Unit Heads
Public Schools District Supervisors
Elementary and Secondary School Heads
All Others Concerned

1. In support to the call of the Department of Education (DepEd) to quality and accessible education, the policy framework on **Basic Education Monitoring and Evaluation Framework (BEMEF)** was developed and implemented through DepEd Order (DO) No. 029, s. 2022, to track and measure the achievement of the **2030 Basic Education Development Plan (BEDP)** per DO 024, s. 2022.

2. The BMEF is also linked to the planning and budget strategy of the Department to explicitly identify and articulate the indicators and targets, for measuring performance in the development of plans and policies of all DepEd operating units at all governance levels. It further aims to complement the planning and budget strategy by setting up the framework for agency-wide monitoring and evaluation (M&E).

3. DepEd Quezon is one with DepEd's quality thrust, especially in improving access to education and the delivery of quality teaching in the unique school settings of the province, through the effective and efficient implementation of different programs, activities and projects (PAPs). It is evident in the visionary leadership of the Top Management embodied in the mantra **"Serbisyong Tapat at Sapat"**, a new-fangled strategy which skewers the objectives of the Department's **MATATAG**

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Agenda, as well as the BEDP pillars and enabling mechanisms, into the Division's *"KALILAYAN Project"*.

4. To attain the objectives of the *"KALILAYAN Project"*, this Office, through the School Governance and Operations Division - School Management Monitoring and Evaluation (SGOD-SMME), directs the adoption of the policy and implementing guidelines of DepEd Quezon for the implementation of PAPs per DO 29, s. 2022.

5. Aligned with the quality thrust of the Division, this Memorandum is issued to guide all operating units, schools, community learning centers, and offices in the strict implementation, monitoring and evaluation, and reporting of PAPs in the approved annual implementation plan (AIP), and work and financial plan (WFP).

6. The **Program Management Information System (PMIS)**, a web-based information system designed to improve DepEd's progress monitoring of the status of program and project implementation, shall be strictly implemented per DO 011, s. 2021 or the Guidelines on the Operationalization of the Program Management Information System. It shall be used for planning and budgeting, results monitoring and evaluation, and for policy decisions.

7. Likewise, the **Program Implementation Review (PIR)** shall be established as the reporting platform of DepEd operating units at all governance levels. It shall be conducted on a quarterly basis to report the accomplishments of outputs in terms of efficiency, and corresponding utilization of the budget.

8. In operationalizing the conduct of M&E, all schools and operating units are required to develop **M&E Plans** for their respective education plans, programs, and policies. These M&E Plans which encompass the four M&E core processes (i.e. establishment of purpose and scope; data collection and management; data analysis; and information dissemination, reporting and dissemination) should be reviewed regularly during the PIR, together with the **Program Implementation Monitoring Tool (PIM)** per operating unit.

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9. The Division, through the Division Planning Team, the Planning and Research (PAR), and the SMME, shall conduct orientations and trainings to update program implementers on strategies and developments in basic education M&E. They shall lead the conduct of M&E towards the attainment of goals and quarterly targets in the **Division Education Development Plan (DEDP)**. The M&E findings and feedback shall serve as input for the continuous improvement of PAPs implementation.

10. In view of the foregoing, the effectivity and adoption of this policy and implementing guidelines shall take effect upon its approval and subsequent issuance to the concerned offices, schools and CLCs. Previous Division issuances inconsistent with this Memorandum are hereby repealed and modified accordingly.

11. Please see the enclosed policy and implementing guidelines for reference.

12. Immediate dissemination of and strict compliance with this Memorandum is desired.

ROMMEL C. BAUTISTA, CESO V
Schools Division Superintendent

parord/07/21/2023

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[Enclosure to DM No. _524_, s. 2023]

DEPED QUEZON'S POLICY AND GUIDELINES ON ADOPTING THE POLICY AND IMPLEMENTING GUIDELINES FOR THE IMPLEMENTATION OF PROGRAMS, ACTIVITIES AND PROJECTS (PAPs)

I.   Background and Rationale

In line with Republic Act (RA) No. 9155 or the Governance of Basic Education Act of 2001 and RA 10533 or the Enhanced Basic Education Act of 2013, the Department of Education (DepEd) has been implementing programs, activities and projects (PAPs) to ensure access to and improve the quality of basic education.

In connection, DepEd developed the Basic Education Development Plan (BEDP) 2030 to respond to issues and challenges in basic education, as well as to the global and national education commitments. This also seeks to pursue the goal of the Department that all Filipinos realize their full potential and contribute meaningfully to a cohesive nation through the protection and promotion of the rights to education.

In support to the call of DepEd to quality and accessible education, the policy framework on Basic Education Monitoring and Evaluation Framework (BEMEF) was developed and implemented through DepEd Order (DO) No. 029, s. 2022, to track and measure the achievement of the 2030 BEDP per DO 024, s. 2022.

The BMEF is also linked to the planning and budget strategy of the Department to explicitly identify and articulate the indicators and targets, for measuring performance in the development of plans and policies of all DepEd operating units at all governance levels. It further aims to complement the planning and budget strategy by setting up the framework for agency-wide monitoring and evaluation (M&E).

DepEd Quezon is one with DepEd's quality thrust, especially in improving access to education and the delivery of quality teaching in the unique school settings of the province, through the effective and efficient implementation of different PAPs. It is evident in the visionary leadership of the Top Management embodied in the mantra "Serbisyong Tapat

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at Sapat", a new-fangled strategy which skewers the objectives of the Department's MATATAG Agenda, as well as the BEDP pillars and enabling mechanisms, into the "KALILAYAN Project".

All Division PAPs were aligned with "KALILAYAN Project" which has been derived from the old nomenclature of the province in 1591. The acronym stands for the following:

K—*"Kumbinsihing pumasok ang mga mag-aaral at maiwasan ang pagtigil hanggang sila ay makapagtapos"*;

A—*"Angkopan ng nararapat at sapat na mga paaralan, pasilidad, at kagamitan ang mga komunidad"*;

L—*"Likhain ang mga programang magtataguyod sa mga kabataang nasa kalagayang nangangailangan ng higit at agarang pagtugon"*;

I—*"Ibigay ang nararapat na serbisyong tumutugon sa pangangailangan ng mga mag-aaral at kawani nang walang pinipiling kasarian, kultura at paniniwala"*;

L—*"Linangin ang kaalaman, kasanayan at pagpapahalaga ng mga mag-aaral at kawani sa iba't ibang larangang ayon sa kasalukuyang kurikulum"*;

A—*"Agapayan ang bawat paaralan sa pagbuo ng kontekstwal na kagamitang pampagtuturo at pag-aaral"*;

Y—*"Yakapin ang paggamit ng mga otentikong pagtatasa upang masukat ang nakamit na pagkatuto"*;

A—*"Alalayan ang mga mag-aaral at kawani para sa kanilang kaligtasan at kalusugan"*; and

N—*"Naising bigyan ng proteksyon ang mga mag-aaral at kawani laban sa anumang uri ng pang-aabuso at karahasan"*.

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Figure 1

Framework for the KALILAYAN Project of DepEd Quezon

To attain the objectives of the KALILAYAN Project, this Office, through the School Governance and Operations Division - School Management Monitoring and Evaluation (SGOD-SMME), commits to issue a localized policy and implementing guidelines for the implementation of PAPs in the whole of Schools Division of Quezon Province. This shall inform and direct all operating units, schools, community learning centers, and offices in the strict implementation, monitoring and evaluation, and reporting of PAPs accomplishments with reference to the approved Annual Implementation Plan (AIP), and Work and Financial Plan (WFP).

II. Scope of the Policy and Implementing Guidelines

This Division Memorandum provides for the adoption and implementation of DepEd Quezon's Policy and Implementing Guidelines for the Implementation of Programs,

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Activities and Projects (PAPs), covering all PAPs implemented in schools, community learning centers (CLSs), offices and operating units in SDO Quezon. It shall guide all Division teaching personnel, teaching-related personnel, and non-teaching personnel in the implementation of PAPs and attainment of committed outputs in the AIP/WFP.

In addition, it covers the BEMEF along with its structures and mechanisms to be adopted and implemented by all DepEd operating units, which identifies those with oversight M&E functions and articulates the M&E processes that shall be performed at each governance level. It also follows the BEMEF guiding principles (i.e. improved governance, development-oriented, undertaken ethically, utilization-oriented, methodologically-sound and appropriate, operationally effective, and shared responsibility) which are embedded in the 2030 BEDP.

Figure 2

Basic Education M&E Framework

GOAL
All Filipinos are able to realize their full potential and contribute meaningfully to a cohesive nation

SECTOR OUTCOME
Basic education Filipino learners have the physical, cognitive, socio-emotional and moral preparation for civic participation and engagement in post-secondary opportunities in their local, national and global communities

INTERMEDIATE OUTCOMES

ACCESS
All school-age children, out-of-school youth, and adults accessed relevant basic learning opportunities

EQUITY
Disadvantaged school-age children and youth, and adults benefited from appropriate equity initiatives

QUALITY
Learners complete K-12 basic education having attained all learning standards that equip them with the necessary skills and attributes to pursue their chosen paths

RESILIENCY AND WELL-BEING
Learners are resilient and know their rights, and have the life skills to protect themselves, claim their rights and respect others' rights as productive Filipino citizens

ENABLING MECHANISMS-GOVERNANCE
Efficient, nimble and resilient governance and management processes

III. Definition of Terms

1. **Activity Request-** a plan implementation document secured prior to the conduct of an activity which is included in the approved WFP (Original and Adjusted) and within the set threshold (DO 011, s. 2021)

2. **Authority to Conduct-** a plan implementation document that is secured prior to the conduct of an activity which is not included in the approved WFP, or for conduct of any activity that has major deviations from the approved plan, such as increase in budget requirement for an activity exceeding a given threshold, and change in the nature or scope of an activity (DO 011, s. 2021)

3. **Basic Education Monitoring and Evaluation Framework (BMEF)-** a guide of DepEd's operating units across governance levels in the conduct of monitoring and evaluation; its framework aims to ensure that the agency's plans, policies, systems, and processes are geared towards the achievement of organizational and learner outcomes; set the performance measures of the agency where all operating units are expected to contribute; guide DepEd bureaus, services, regional and schools division offices, schools and learning centers in developing their respective M&E plan; and define the roles and responsibilities of DepEd operating units in the M&E system and processes (DO 29, s. 2022)

4. **Community Learning Center (CLC)-** a physical space to house learning resources and facilities of a learning program for out-of-school youth and adults, and a venue for face-to-face learning activities and other learning opportunities for community development and improvement of the people's quality of life (RA 9155)

5. **Division Education Development Plan (DEDP)-** an output of the local planning process at the Division level which is based on a rigorous assessment of education needs and analysis of data statistics in order to make basic education more relevant to the needs of local communities

6. **Effectiveness**- refers to the realization of outcomes as manifested by the Key Performance Indicators (DO 29, s. 2022)

7. **Efficiency**- refers to the accomplishments of the outputs and activities, and the utilization of budget (DO 29, s. 2022)

8. **Evaluation**- aims at determining the relevance, impact, effectiveness, efficiency and sustainability of interventions and the contributions of the intervention to the results achieved (Gage and Dunn, 2009 as cited in School of Public Health, n.d.)

9. **Inclusive Education**- the philosophy of accepting all children regardless of race, size, shape, color, ability, or disability with support from school staff, students, parents and the community (DO 72, s. 2009)

10. **Key Performance Indicators (KPIs)**- the critical (key) quantifiable indicators of progress toward an intended result (kpi.org, 2022)

11. **Learning Recovery Program (LRP)**- a strategy to address the learning gaps among students that were heightened by school closures and disruption due to the COVID-19 pandemic

12. **Level of Governance**- a term used to describe the way authority is spread vertically between DepEd; the highest level is the Central Office, followed by the Regional Office, Schools Division Office, and Schools (DO 011, s. 2021)

13. **Monitoring**- conducted after a program has begun and continues throughout implementation. It is sometimes referred to as process, performance or formative evaluation (Gage and Dunn, 2009 as cited in School of Public Health, n.d.)

14. **Monitoring and Evaluation**- a systematic process of collecting, analyzing, and evaluating a program's progress towards attaining set objectives and guiding management decisions

15. **Operating Unit**- any unit in DepEd across all governance levels that provides support and/or implement programs, projects and activities

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relative to the delivery of basic education in line with the provisions of RA 9155 (DO 011, s. 2021)

16. **M&E Plan-** a document that provides guidance on the purpose and process of conducting monitoring and evaluation of any programs, policies, projects, office mandates, and activities (DO 29, s. 2022)

17. **Program Implementation Review and Plan Adjustment-** conducted quarterly to measure the performance of PAPs in terms of efficiency and effectiveness; the quarterly review is a mechanism that allows DepEd to get updated information on the performance of PAPs, and timely response on the bottlenecks, challenges and constraints encountered by the program proponents affecting the delivery of basic education services; after the conduct of the PIR, program proponents are given 10 working days to revise their Work and Financial Plan through Plan Adjustment (DO 011, s. 2021)

18. **Program Management Information System (PMIS)-** a web-based information system designed to improve DepEd's progress monitoring of the status of program and project implementation; it provides quality, relevant, and timely information that can be used for planning and budgeting, results monitoring and evaluation, and for policy decisions across governance levels (DO 011, s. 2021)

19. **Project Procurement Management Plan (PPMP)-** the procurement plan of a specific PAP of an implementing office; this includes information on whether the PAPs will be contracted out, implemented by administration or consigned, the type and objectives of contract to be employed, the extent/size of contract scope/packages, the procurement methods to be adopted, time schedule for each procurement activity and contract implementation, and the estimated budget for the general components of the contract (DO 011, s. 2021)

20. **Work and Financial Plan (WFP)-** an operational planning document generated from the uploaded Expenditure Matrix (EM) that outlines the

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complete course of action (activities) to be undertaken, indicators, major deliverables and milestones, schedule and duration, and the budgetary requirements; the WFP in the PMIS consists of the Physical Plan, Monthly Obligation Program, and Monthly Disbursement Program as prescribed by the Department of Budget and Management (DBM).

IV.   Policy Statement

To ensure that PAPs are effectively and efficiently implemented in accordance with the Department's BEMEF and this set of implementing guidelines, this policy hereby lays down the guiding principles in the strict implementation, monitoring and evaluation, and reporting of PAPs accomplishments in all operating units, schools and offices of DepEd Quezon.

V.   Integrating M&E into the Learning Recovery Plan

M&E is a crucial element of the operationalization of the Division's Learning Recovery Plan (LRP) for the unhampered delivery of quality instruction and learning while recovering from the national health crisis, and beyond. The critical activities in basic education, as well as the programs and work processes have been adjusted based on local needs of schools and CLCs to ensure sustainability of education and achievement of learning outcomes. Through the M&E mechanism, SDO Quezon has ensured that the implementation of PAPs in the areas of curriculum and operations is observed and controlled, as well as assessed periodically to arrive at performance inputs for plan adjustments and/or policy actions.

M&E consists of two indispensable elements: a) monitoring, and b) evaluation. Monitoring is the systematic process of collecting, analyzing and using information to track the progress of Division PAPs towards attaining objectives and guiding management decisions. It generally focuses on processes, and proceeds from planning to implementation stage.

On the other hand, evaluation is the systematic assessment of an activity, program, strategy, policy, or institution's performance. In context, it focuses on planned targets and accomplishments, the results chain (inputs, activities, outputs, outcomes and long-term impacts), processes, contextual factors and causality, in order to understand achievements or failures. The evaluation aims at determining the relevance, impact, effectiveness, efficiency and sustainability of the intervention and its contributions to the results achieved, as well as to the broader regional and national goals (UN Norms for Evaluation, 2005 as cited in International Atomic Energy Agency, 2013).

The following table describes the major M&E strategies of SDO Quezon in the next six years which supports the DEDP implementation.

Table 1

Division M&E Initiatives Covered in the DEDP Implementation

M&E Initiatives	Key Data & Information to Collect	Purpose of M&E Initiative	Unit or Person Responsible
Establish Baseline Information			
Baseline for ALS - OSC & OSY	Total number of OSC, OSY, and adults interested in ALS	To compute for incidence of OSC & OSY in the SDO	CID - ALS focal person
Baseline for ALS - Learners in a situation of disadvantage	Total number of school-age learners in a situation of disadvantage in school	To compute for transition rate and retention rate	CID - SPED, IPEd, Madrasah focal person
Baseline on Reading Competencies	Total number of learners per key stage at frustration, instructional, and independent levels	To assess the effectiveness of reading programs and determine remediation requirements	CID - Reading Program focal person

Baseline on Learners Displaced by disasters and others	Total number of learners displaced, who are in school and not in school	To assess the effectiveness of reading programs and determine remediation requirements	CID - DRRM focal person
Strengthen Capability to Do M&E Work			
Trained School Heads in managing the school M&E system	Number of School Heads who completed the training on managing school M&E system	To ensure all schools and CLCs are ready to implement and manage the school M&E system	SGOD - Planning & Research Personnel, and SMME Specialists
Operationalized School M&E system in all schools	Number of schools with functional M&E system	To operationalize an integrated M&E system between schools and SDO	SGOD - Planning & Research Personnel, and SMME Specialists
Operationalized CLC M&E system in all schools	Number of CLCs with functional M&E system	To operationalize a dedicated mechanism for tracking CLCs	CID - ALS focal person
Operationalized Division level ALS M&E system	Number of schools/CLCs with functional M&E system	To operationalize a dedicated mechanism for tracking ALS learners at the SDO level	CID - ALS focal person
Implement Progress Monitoring and Evaluation System			
Conduct Annual or Year-end Review	End-of-year Physical Accomplishment and Utilization Rate	To determine the efficacy of the programs and projects implemented and to determine enhancements to next year's plan	SGOD - Planning & Research Personnel, and SMME Specialists
Conduct Quarterly Program Implementation	Percent of Physical Accomplishment, and Utilization Rate	To ensure efficient implementation of programs and	SGOD - Planning & Research

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Review	to Date	projects outlined in the annual plan	Personnel, and SMME Specialists
Evaluate Programs and Projects			
Conduct Mid-Term DEDP Implementation Review	Improvements in competencies and practices of teachers, School Heads, and Supervisors	To determine major adjustments in the strategies outlined in the DEDP; identify programs to continue, stop, and enhance	SGOD - Planning & Research Personnel, and SMME Specialists
Evaluate school effectiveness (after three years)	Validate achievements of school targets - school level KPIs	Results of the evaluation will be used as input or directives to schools for their next SIP	SGOD - Planning & Research Personnel, and SMME Specialists
Conduct impact evaluation of programs and project	Benefits gained or derived from programs and projects	Results of the evaluation will be used as input to improve program designs and systems	SGOD - Planning & Research Personnel, and SMME Specialists

Note: This section is adopted from the DEDP 2022-2028.

VI. Theory of Change

According to the United Nations Development Assistance Framework (UNDAF) Manual (n.d.), **Theory of Change (TOC)** is a method that explains how a given intervention, or set of interventions, is expected to lead to specific development change, drawing on a causal analysis based on available evidence. As explained during the national orientation on BEMEF, the TOC is a roadmap of "where we are going (results), and how we are getting there (process)". It supports and guides the implementation of DepEd PAPs and their M&E.

Similar to the results chain, the TOC describes how inputs and activities are turned to outputs, which then lead to outcomes and attainment of goals. Any program,

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policy, or service requires inputs—resources of some kind required to carry out activities that deliver an output where a group of people or an organization has improved capacities, abilities, skills, systems, policies, or if something is created, built, or repaired. This leads to an outcome that implies institutions or people do something differently (behavioral change), or something better (change in performance), contributing to long-term and broader impact that implies a detectable improvement in people's lives (Winderl, 2002).

Figure 3

Theory of Change Components
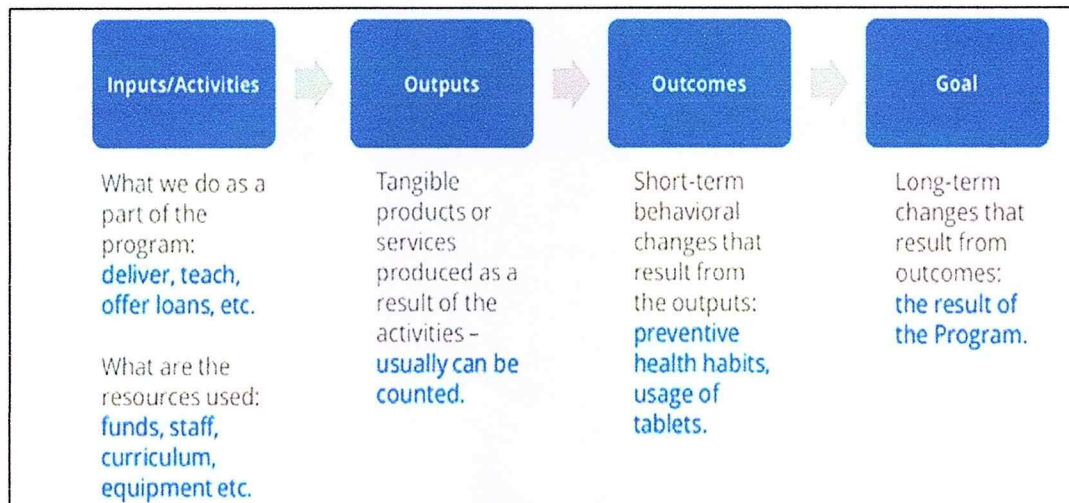
Source: Innovations for Poverty Action. Theory of Change lecture slides.

VII.   M&E Systems

As stated in DO 029, s. 2022, the SDO M&E system shall serve as an integrating mechanism across governance levels and within operating units of the Department. It shall provide the DepEd's decision-makers with evidence-based information on the applicability and feasibility of formulation and implementation of policies, programs, projects, and major activities.

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The M&E system is expected to function at all governance levels. Hence, DepEd Quezon emphasizes the vertical and horizontal integration of all offices, including schools and CLCs, within the system.

The **vertical integration** of the M&E system across governance levels is the systematic alignment of development and implementation of basic education plans, policies, programs, projects, major activities, and M&E processes from national to region, region to schools division, and schools division to school level and vice versa.

Figure 4

Vertical Integration of the M&E System
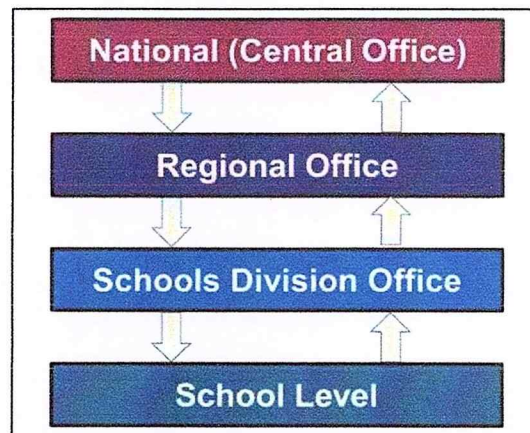
The **horizontal integration** of the M&E system within governance levels shall align the development and implementation processes of basic education plans, policies, programs, projects, major activities, and M&E processes among operating units in a particular governance level.

Figure 5

Horizontal Integration of the M&E System
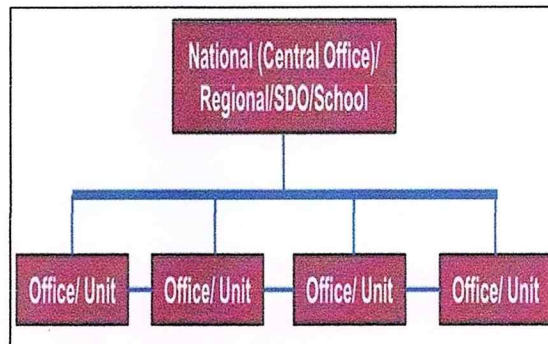
A. Schools Division M&E System

The **Schools Division M&E System** shall focus on determining effectiveness and inclusiveness of schools in providing basic education services, and shall serve as a mechanism for reflection on the SDO's capacity to provide timely and needs-based basic education support services to schools.

It has the following specific functions:

a. establish a results-based M&E at the schools division level;

b. strengthen the link of M&E systems between SDO and schools;

c. ensure the integration of M&E initiatives of SDO operating units;

d. monitor the effective and efficient implementation of education policies and programs;

e. ensure that M&E standards and processes are implemented at the SDO and school levels;

f. facilitate exchange of information, practices, insights, lessons and issues between and among operating units and external stakeholders;

g. provide feedback to RO on the SDO M&E results;

h. ensure the integration of M&E results in developing local education plans and programs, and in implementing national education policies and systems both at the SDO and school levels;

i.   provide M&E technical support and capacity building intervention to schools; and

j.   link M&E results to the organizational and individual performance.

B. School M&E System

On the other hand, the **School M&E System** shall make teaching and learning process more learner-centered and school-based management more effective and inclusive; shall provide a platform for shared governance in developing, implementing, and sustaining effective inclusive schools; and shall provide school heads, teachers, non-teaching staff, and communities with critical insights, lessons, and timely information on the performance of learners.

It has the following specific functions:

a.   ensure the periodic conduct of M&E in all school operations and processes in accordance with existing standards;

b.   track operational bottlenecks and issues to update, calibrate, and differentiate response every school year and regularly examine and customize teaching strategies;

c.   formalize interface between and among school head, teachers, and non-teaching staff to discuss operational issues and challenges;

d.   facilitate participation of learners, communities, and other key stakeholders in the exchange of information, practices, insights, lessons and issues;

e.   maintain records of M&E results and integrate such in the preparation of the School Improvement Plan (SIP), Office Performance Commitment and Review Form (OPCRF), and other school projects and programs; and

f.   report to the SDO the M&E results for appropriate technical support; and link M&E results to the organizational and individual performance.

VIII. Roles and Responsibilities

The **Schools Division Superintendent (SDS)** shall be the "overall lead" of the Schools Division M&E System, while the SGOD shall be the "process owner".

At the school level, the **School Head** shall be both the "overall lead and process owner" of its M&E system.

Table 2

Roles in the M&E System

M&E System	Overall Lead	Process Owner	Responsible Offices
Schools Division Office	Schools Division Superintendent	School Governance and Operations Division	All Operating Units
School	School Head	School Head	All Personnel and School Stakeholders

A. Responsibilities of the Overall Lead

a. Schools Division Superintendent

i. develops and implements division education development plans and programs;

ii. implements national education policies and systems at the SDO and schools;

iii. leads the institutionalization of the basic education M&E system in the Schools Division Office;

iv. provides decisions and directions on Division education issues and matters arising from various M&E activities such as PIRs, stakeholders' forum, inter-agency meetings, among others;

v. communicates education concerns to other national/regional/Division offices and other development partners during meetings, fora, or conferences;

vi. proposes educational policies and program recommendations from internal and external stakeholders based on evidences presented, such as completed researches, statistics, among others; and

vii. determines additional performance indicators and other adjustments in the M&E plan as necessary.

b. **School Head**

i. is the authority, accountable, and responsible for ensuring that information generated from the school M&E system is used in the development and implementation of plans, programs, projects, and major activities to make the school more effective and inclusive;

ii. leads the institutionalization of the school M&E system;

iii. provides decisions and directions on school issues and matters arising from various M&E activities such as school PIRs, stakeholders' forum, inter-agency meetings, among others;

iv. communicates school concerns to the Division during meetings, fora, or conferences;

v. oversees the conduct of M&E activities in the school and ensures that these are according to established standards;

vi. engages different stakeholders in the conduct of school M&E activities such as the members of the School Planning Team (SPT), School Governance Council (SGC), among others;

vii. conducts quarterly PIR in the school to track physical and financial accomplishments and assess the progress of implementation of plans, programs, projects, and major activities;

viii. maintains records of M&E results and integrates such in the preparation of SIP/AIP, OPCRF, and other school programs, projects, and major activities;

ix. develops M&E plan for their respective SIP;

x. prepares school M&E reports for dissemination to internal and external stakeholders such as the School Report Card (SRC), Transparency Board, Learning Action Cells (LAC), among others; and

xi. determines additional performance indicators and other adjustments in the school M&E plan as necessary.

B. Responsibilities of the Process Owner

a. School Governance and Operations Divisions/ School Head

i. oversees and manages the conduct of M&E of all operating units within their governance level and ensures that they are adhering to established standards;

ii. reviews and provides input to the M&E plan of DepEd offices;

iii. maintains a Division/school database facility to ensure that data and information gathered from M&E activities are properly managed;

iv. consolidates and analyzes M&E reports from Division operating units and schools for the preparation of Division reports to be disseminated to internal and external stakeholders;

v. leads the conduct of quarterly PIR among Division operating units and schools to track physical and financial accomplishments and assess the progress implementation of plans, programs, projects, and major activities;

vi. oversees and provides assistance in the conduct of evaluations on DepEd's programs, projects, and major activities; and

vii. provides technical assistance and capacity building support to Division operating units and schools on the management and conduct of M&E within their respective M&E systems.

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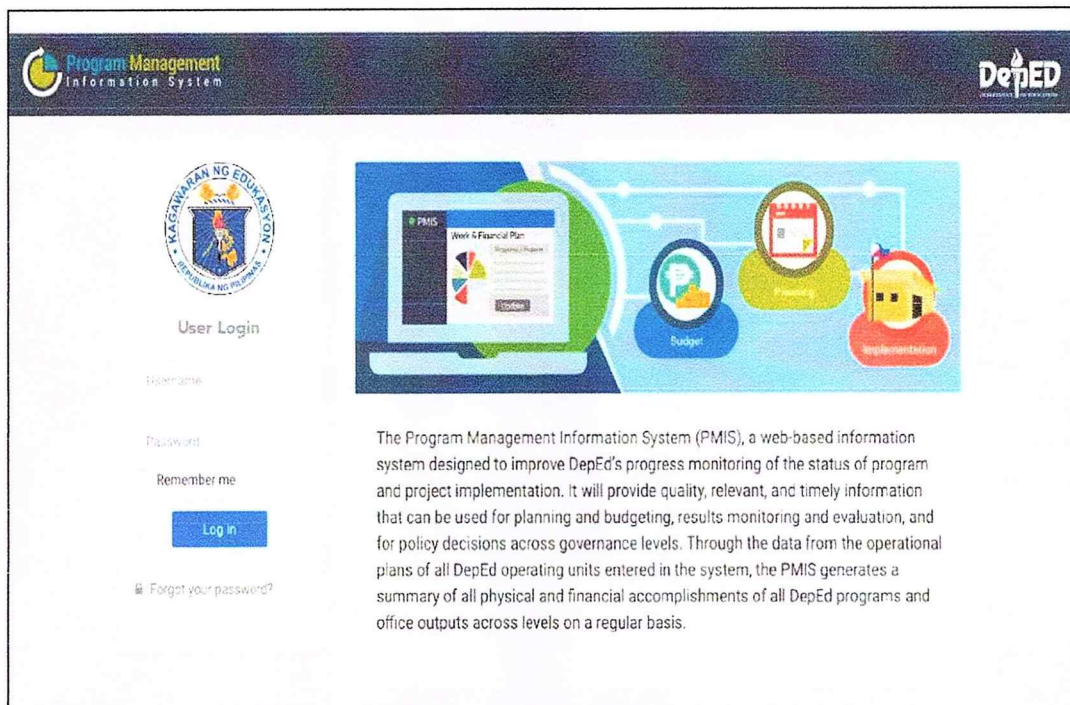**Website: www.**depedquezon.com.ph

C. Responsibilities of the Responsible Office

   a. All Schools Division Office Units/ All Personnel and School Stakeholders

      i.   are responsible to conduct M&E of their respective PAPs;

      ii. establish results-oriented and evidence-based M&E within their respective offices;

      iii. adhere to the established M&E standards in performing M&E activities and processes;

      iv. partake in strengthening the horizontal and vertical integration of M&E system by engaging other operating units during development of local education plans and programs, implementation of national education policies and systems, and M&E;

      v.   develop M&E plan for their respective education plans, programs, and policies;

      vi. provide feedback, insights, lessons, and other issues gathered from their respective M&E activities to relevant operating units;

      vii. participate in M&E initiatives such as PIRs, periodic reporting of accomplishments of plans and PAPs, submission of O/IPCRF, among others; and

      viii. applies M&E results in improving office and individual performance.

IX. Program Management Information System

The **Program Management Information System (PMIS)**, a web-based information system designed to improve DepEd's progress monitoring of the status of program and project implementation, shall be strictly implemented per DO 011, s. 2021 or the Guidelines on the Operationalization of the Program Management Information System. It shall be used for planning and budgeting, results monitoring and evaluation, and for policy decisions.

The PMIS was developed to support the Department's Planning and Budget Strategy , which shall be the official source data on programs, projects and activities of DepEd from planning to implementation.

Per DO 011, s. 2021, the system aims to support the effective and efficient management of palns and programs, increase transparency of plans and programs at all levels of governance from DepEd Central Office to schools, provide a platform that encourages a more diligent and systematic preparation of plans and utilization of budget, aid in policy formulation and decision-making, and enforce standards for planning and plan implementation.

Figure 6

DepEd's PMIS Interface
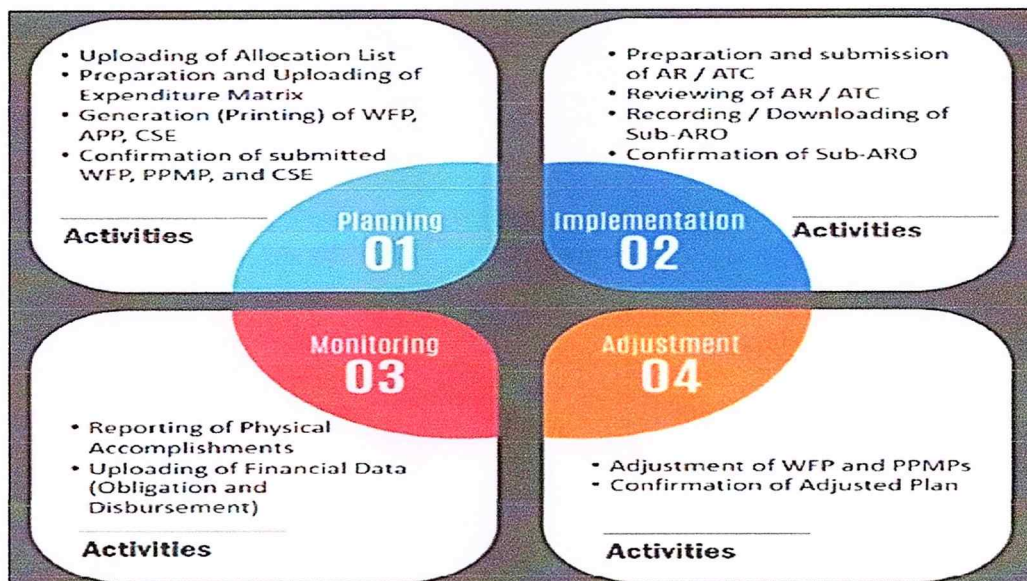
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Figure 7

Summary of Plan Implementation Stages

X.   Program Implementation Review

The **Program Implementation Review (PIR)** shall be established as the reporting platform of DepEd operating units at all governance levels. It shall be conducted on a **quarterly basis** to measure the performance of PAPs in terms of efficiency and effectiveness. In terms of efficiency, the review tracks the accomplishemnts of the outputs and activities, and the utilization of the budget. On the other hand, effectiveness focuses on the realization of outcomes as manifested in the Key Performance Indicators (KPIs).

The PIR is an important aspect of **performance accountability**—measuring and reporting the results of educational programs and administrative/operational functions, and support services based on a school system's clearly stated goals, objectives, and measurable outcomes. According to the Metropolitan Nashville Public School (2014), an effective performance accountability system integrates planning and

budgeting, along with reviewing, evaluating and reporting results used to improve the performance of programs, operations, and cost efficiency. Therefore, the KPIs must be clearly set at the planning stage. These KPIs are the critical (key) quantifiable indicators of progress toward an intended result. Managing with the use of KPIs includes setting targets (the desired level of performance), and tracking progress against those targets (kpi.org, 2022).

In addition, the quarterly review is a mechanism that allows DepEd to get updated information on the performance of PAPs, and timely response on the bottlenecks, challenges and constraints encountered by the program proponents affecting the delivery of basic education services.

Definitely, the PIR shall become an integral part of the Division Monitoring and Evaluation and Plan Adjustment (DMEPA), which highlights M&E of the attainment of important KPIs along the pillars and enabling mechanisms of the 2030 BEDP, including but not limited to enrolment, dropout, performance in the learning areas, numeracy, reading literacy, etc.

XI.   Plan Adjustment

Adjustments of the WFP can be done quarterly after the conduct of the PIR, within 10 working days. **Plan adjustment** is done online through PMIS, based on adjusted and approved Expenditure Matrix (EM). The system will allow the adjustment of WFP after each operating unit has done their physical accomplishment reporting.

The Work and Financial Plan's existing Monthly Physical, Obligation, and Disbursement targets can be adjusted. Operating units can also add new or update programs, outputs, and activities, if necessary. With that, upon implementation, they can now use Activity Request (AR) to implement these additional program, output, and activity.

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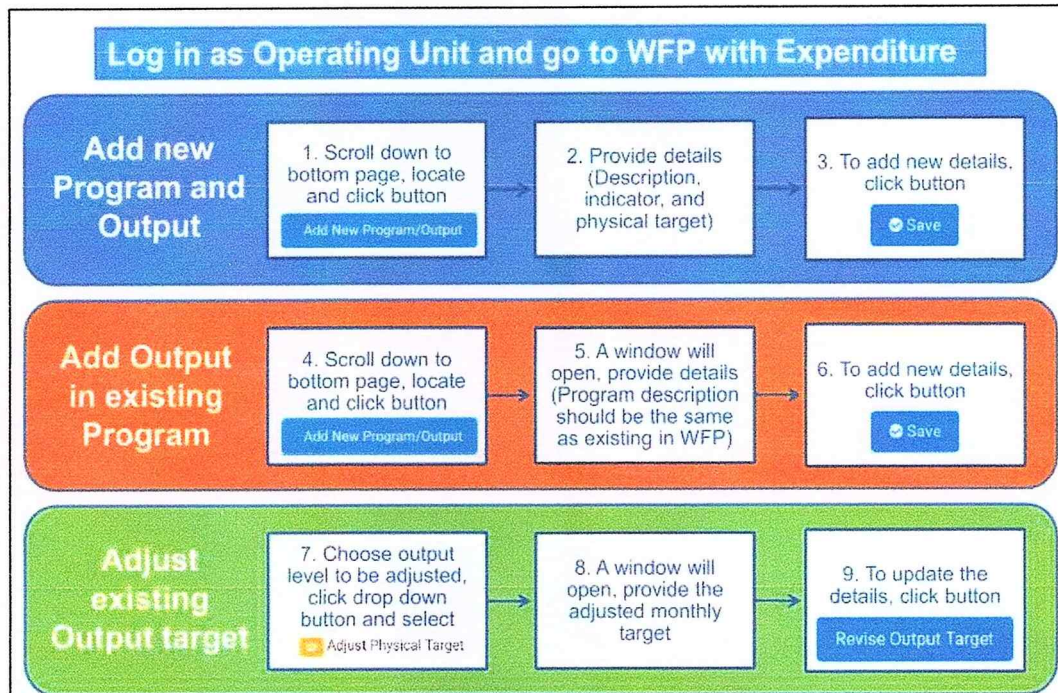*"Creating Possibilities, Inspiring Innovations"*
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Figure 8

Process on the Adjustment of Program and Output Levels

XII. M&E Core Processes and Tools

A. M&E Core Processes

In operationalizing the conduct of M&E, all operating units are required to develop M&E Plans for their respective education plans, programs, and policies. The **M&E Plan** is a document that provides guidance on the purpose and process of conducting monitoring and evaluation of any programs, policies, projects, office mandates, and activities.

The M&E plan contains four **core M&E processes** enumerated below:

b) establishment of purpose and scope;

c) data collection and management;

d) data analysis; and

e) information dissemination, reporting and dissemination.

i. Establishment of Purpose and Scope

It is the reference point for the M&E system, guiding key decisions, such as informational needs, methodological approaches, capacity building and allocation of resources.

Guide Questions:

- What should you be monitoring and evaluating?
- What are the corresponding indicators?

ii. Data Collection and Management

It is the collection or gathering of relevant data to be managed for analysis. It involves processes and systems for how a project/program will systematically and reliably store, manage and access M&E data.

Guide Questions:

- What are the possible sources of data?
- Who (office/personnel) is responsible in data collection?
- How frequent will you collect this data?
- How will you organize and store the collected data?
- Who are the possible users of the data (internal and external), and what are the possible uses of these data?

iii. Data Analysis

It is the process of converting collected (raw) data into usable information. It involves looking for trends, clusters or other relationships between different types of data, assessing performance against plans and targets, forming conclusions, anticipating problems and identifying solutions and best practices.

Guide Questions:

- How will you process and analyze the data you have collected?
- Who are responsible in data analysis?
- How often do you conduct data analysis?

iv. Information Dissemination, Reporting, and Utilization

It is the most visible part of the M&E system. Collected and analyzed data is presented as information for use of key stakeholders.

Guide Questions:

- To whom will you communicate the M&E results? (identify type of stakeholder/audience)
- How will you communicate the results? What communication/ reporting strategies will you employ?
- When do you report M&E results?

B. M&E Tools

The **M&E plan templates** found in the attachments shall be used by Division operating units and schools.

Aligned with the M&E plan required by BEMEF, program proponents are also expected to use the **Program Implementation Monitoring (PIM) Tool** for progress monitoring. The use of the PIM tool (also attached to this policy) aims to strengthen the PMIS and implementation of the PIR. It shall be collated by the SMME and included in the final Program Implementation Review and Plan Adjustment (PIRPA) Report, in collaboration with the PAR, Budget Office and Accounting Office.

C. Other Tools for M&E

Operating units may craft their tools to monitor their respective PAPs. However, the development of tools for data collection/requirements shall be guided by the M&E plan to be established per program, policy, and plan.

Schools are required to submit the year-end **School Report Card (SRC)** and the **Project Monitoring Report Form (PMRF)** per DO 44, s. 2015 or the Guidelines on the Enhanced School Improvement Planning (SIP) Process and the SRC.

As the Order stated, "Documents passed to the SDO are for their reference as they coach schools and monitor the implementation of the SIP." On the other hand, the year-end SRC shall also be submitted annually to provide the SDO a summary of the progress of project implementation and the status of the school. The SRC is a tool for advocating and communicating the school situation, context, and performance to internal and external stakeholders, in order to further strengthen shared governance through increased understanding and stronger participation in making the school a better place to learn. On the contrary, the PMRF is used to monitor the progress and accomplishments on school projects after each school year of the three-year cycle.

XIII. Capacity Building

The Schools Division Office, through the SGOD and the Division Planning Team, shall conduct trainings to update program implementers on strategies and developments in basic education M&E, specifically to facilitate orientations on the Division plans, policies, systems, and processes towards the achievement of organizational and learner outcomes; set the performance measures of the Division where all operating units are expected to contribute; guide the operating units in developing their respective M&E plans; and define roles and responsibilities in the different M&E systems.

XIV. Funding

Division PAPs implementation and M&E shall be funded through the Division Maintenance and Other Operating Expenses (MOOE), Human Resource Development (HRD) Fund, and/or Special Allotment Release Order (SARO), whereas school PAPs

implementation and M&E shall be funded through their respective school MOOE or other legitimate sources, subject to the usual accounting rules and regulations.

XV. Monitoring and Evaluation of the Policy and Implementing Guidelines

M&E is a systematic process of collecting, analyzing, and interpreting data to arrive at information needed to track the implementation of this policy and implementing guidelines, and compare targets and achievements.

Progress monitoring shall be done systematically and objectively to assess the ongoing implementation of the plan. The SGOD Chief, in coordination with the PAR and SMME, shall have the main responsibility to supervise its strict implementation and report regularly to the Schools Division Superintendent.

Monitoring explains the efficiency and effectiveness of operations while evaluation provides information on the benefits achieved. Monitoring results provide bases for critical management decisions, such as resource allocation or realignment, target setting, corrective actions or strategy development. On the other hand, evaluation results provide valuable lessons and insights that can be used in crafting strategic decisions for the future.

All M&E findings and feedback from internal and external customer shall be analyzed and shall serve as input for the continuous improvement of this policy and implementing guidelines.

XVI. References

DepEd Order No. 11, s. 2021. Guidelines on the Operationalization of Program Management Information System (PMIS).

DepEd Order No. 024, s. 2022. Adoption of the Basic Education Development Plan 2030.

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DepEd Order No. 029, s. 2022. Adoption of the Basic Education Monitoring and Evaluation Framework (BEMEF).

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DepEd Order No. 72, s. 2009. Inclusive Education as Strategy for Increasing Participation Rate of Children.

Division Education and Development Plan (DEDP) 2022-2028. Filed at the Planning & Research (PAR) Section.

International Atomic Energy Agency. (2013). Monitoring and Evaluation Manual. Technical Cooperation Projects. https://www.iaea.org/sites/default/files/documents/tc/TCP_MandE_Manual.pdf

Kpi.org. (2022). *What is a key performance indicator (KPI)?* https://www.kpi.org/kpi-basics/

Metropolitan Nashville Public School (2014). *Performance accountability systems.* McConnell Jones Lanier & Murphy LLP. https://filetransfer.nashville.gov/portals/0/sitecontent/InternalAudit/docs/FY2015/MNPSAudit/15PerformanceAccountabilitySystemsChapter%2012.pdf

Republic Act No. 9155. An Act Instituting a Framework of Governance for Basic Education, Establishing Authority and Accountability, Renaming the Department of Education, Culture and Sports as the Department of Education, and for Other Purposes.

Republic Act No. 10533. An Act Enhancing the Philippine Basic Education System by Strengthening Its Curriculum and Increasing the Number of Years for Basic Education, Appropriating Funds Therefor and for Other Purposes.

School of Public Health. (n.d.). *Key concepts in DHS.* Unit1- Session 2. https://soph.uwc.ac.za/wp-content/uploads/2021/06/Unit-1-Session-2.doc

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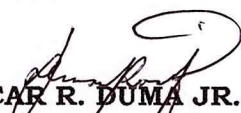**Website:** www.depedquezon.com.ph

United Nations Development Assistance Framework (UNDAF) Manual. (n.d.). Theory of Change- UNDAF Companion Guidance. https://unsdg.un.org/sites/default/files/UNDG-UNDAF-Companion-Pieces-7-Theory-of-Change.pdf

Winderl, T. (2002, November 27). *The results chain: a beginner's guide.* https://winderl.net/result-chain-a-beginners-guide

XVII. Repealing, Effectivity, and Adoption Clause

Previous Division issuances inconsistent with these guidelines are hereby repealed and modified accordingly. It shall take effect upon its approval and publication on the Division website and official social media pages open to public, and shall be adopted in the Division, districts and schools, thereafter.

Prepared:

OSCAR R. DUMA JR., EdD
Senior Education Program Specialist
Planning & Research
OIC-SEPS, School Management Monitoring & Evaluation

Noted:

ELIZABETH M. DE VILLA
SGOD Chief

Recommending Approval:

HERBERT D. PEREZ
Assistant Schools Division Superintendent

Approved:

ROMMEL C. BAUTISTA, CESO V
Schools Division Superintendent

Title:

Goal:

Outcome:

Operating Unit:

IMPLEMENTATION PLAN 2023-2024

Critical Action	Responsible/Accountable Unit	Timeframe	Estimated Budget	Budget Source
What actions/activities must be completed to implement the policy?	Who is responsible for the action/activity?	When must the action/activity be completed?	How much will it cost to implement the action?	Where will the funding come from? (internal and external funding source)
OUTPUT 1				
Activity 1				
Activity 2				
OUTPUT 2				
Activity 1				
OUTPUT 3				
Activity 1				
Activity 2				
OUTPUT 4				
Activity 1				
Activity 2				
OUTPUT 5				
Activity 1				

Note: This template was provided during the national orientation on BEMEF.

Title:

Operating Unit:

Objective Statement	Indicators	Description of Indicators	Data collection method/ Data Source	Responsible Office in Data Collection	Schedule/ Frequency of Data Collection	User(s) and use(s) of Data Collected	Data Analysis to be Used	Responsible Office for Data Analysis	Frequency of Data Analysis	Audience of M&E Results	Communication Strategies to be Employed	Reporting Schedule/ Frequency
Goal												
Outcome												
OUTPUT 1												
Activity 1												
Activity 2												
OUTPUT 2												
Activity 1												
OUTPUT 3												
Activity 1												
Activity 2												
OUTPUT 4												
Activity 1												
Activity 2												
OUTPUT 5												
Activity 1												

Note: This template was provided during the national orientation on BEMEF.

School Monitoring & Evaluation Plan
SIP [Inclusive School Years]
SY [Year 1]

I.   PURPOSE

(The M&E Plan is a document that provides guidance on the purpose and process of conducting M&E of any programs, policies, projects, office mandates, and activities. Establish your rationale of M&E of school PAPs and explain why it is necessary. Discuss legal references. Cite your expected *organizational* and *learner outcomes*.)

II.   SPECIFIC OBJECTIVES

(Enumerate the School M&E Plan's objectives for the year in relation to your AIP. Begin with a one-line introductory statement.)

III.   SCOPE

(Discuss the *coverage* of the plan in terms of implementers, beneficiaries, timelines, budget, deliverables, etc.)

IV.   DATA COLLECTION AND MANAGEMENT

(Discuss the M&E activities to undertake in the first paragraph. Identify also the modality to use (online, onsite, or blended). In the second paragraph, explain the process of data gathering, and give a brief overview of the tools to use. In the last paragraph, describe how the collected data will be organized, and who are the people to manage and keep such data for analysis later.)

A. Pre-Monitoring Activities:

- SPT/SGC Meeting
    - ✓ Minutes of the Meeting
    - ✓ Crafted/approved SIP
    - ✓ Photo documentation

- Crafting/Approval of School M&E Plan
  - ✓ Approved School M&E Plan
  - ✓ M&E Schedule/Gantt Chart
  - ✓ List of Project Teams and Members
- Project Team Planning Meetings
  - ✓ Minutes of the Meeting
  - ✓ Newsletter Reports
  - ✓ Action Plans
- Crafting/Approval of M&E Tools
  - ✓ Project Monitoring/Evaluation Checklist
  - ✓ Survey Questionnaire
- Adoption of M&E Tools
  - ✓ List of M&E Tools from Division/Regional/Central Office
  - ✓ Compilation of Monitoring Tools

(Feel free to add or delete activities or outputs.)

B. Monitoring Activities

- Project/Program Level Monitoring
  - ✓ Monitoring Reports
  - ✓ Accomplished Monitoring Tools
- Conduct of Quarterly SMEPA/Program Implementation Review
  - ✓ Newsletter Reports
  - ✓ Minutes of the Meeting
  - ✓ Quarterly Status Reports
  - ✓ Plan Adjustments
- Regular/Special Meetings
  - ✓ Minutes of the Meeting
  - ✓ List of Attendees
  - ✓ Photo documentations

(Feel free to add or delete activities or outputs.)

C. Post-Monitoring Activities

- Analysis/Interpretation of SMEPA Data
  - ✓ Quarterly SMEPA Reports
- Project/Program Level Evaluation
  - ✓ Project/Program Accomplishment Reports
  - ✓ VOC/Survey Reports
- AIP Post-Implementation Review
  - ✓ Adjusted AIP for next year
  - ✓ SBM Self-Assessment
  - ✓ Lessons Learned
- Reporting, Dissemination and Utilization
  - ✓ SOSA Report
  - ✓ Posted BEIS Data/School Data
  - ✓ Provided SRC to Stakeholders

(Feel free to add or delete activities or outputs.)

V. TERMS OF REFERENCE

(Determine specific roles and responsibilities of people to be involved in the M&E. Explain here the importance of individual roles and teams towards successful M&E. The school head is the Chairperson, and other team/committee members may be designated or created. Existing Project Teams may be included, together with the SPT and the SGC. Be able to explain how members or teams will communicate with one another to ensure collaboration and accountability of results.)

Team No.	Roles	Responsibilities	Program/Project
1	Team Lead:		
	Asst. Team Lead:		
	Members:		
2	Team Lead:		
	Asst. Team Lead:		

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	Members:		
3	Team Lead:		
	Asst. Team Lead:		
	Members:		
4	Team Lead:		
	Asst. Team Lead:		
	Members:		

(The above table and its format are optional. The school may devise their own provided that the Terms of Reference of each member or group are clearly stated.)

VI.   SCHEDULE OF M&E

(Outline the agreed schedule of regular monitoring, and post-implementation evaluation. In reference to the SIP [which is in School Year], the M&E should be scheduled from BOSY to EOSY. Highlight the frequency of monitoring. It should be included in the local school calendar.)

Team No.	Program/Project	Date of Monitoring
1		
2		
3		
4		

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(The above table and its format are optional. The school may devise their own provided that the Dates of Monitoring are clearly stated, and availability of teams are considered.)

VII.   DATA ANALYSIS AND TOOLS

(Discuss the process of analyzing gathered data [statistically or using software], and how they will be presented [e.g. graphical, tabular, pictorial, etc.]. Likewise, identify who will be primarily responsible in processing specific groups of data. Decide whether to adopt existing M&E tools and/or develop your localized tools (e.g. checklist, survey questionnaire, interview schedule, etc.]. Explain the parts of the tools and how they will be employed.)

(Enumerate separately the monitoring tool/s, and evaluation tool/s.)

A. Monitoring Tool/s
   a. [Tool 1]
   b. [Tool 2]

B. Evaluation Tool/s
   a. [Tool 1]
   b. [Tool 2]

(Feel free to add or delete M&E tools. Please attach the tools in the Appendices labeled with letters A-Z.)

VIII.   FINANCIAL RESOURCES

(Discuss here the funding requirements—the sources and estimated amounts. You may present here a tabulated computation whenever possible.)

IX.   REPORTING, DISSEMINATION & UTILIZATION

(Discuss how to and who will prepare specific reports. Written reports of all Project Teams must be consolidated into a single M&E report at the end of all M&E activities which

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should be kept in the SBM corner, displayed in conspicuous areas of the school, and included in the SRC. Other plans for dissemination and utilization of report/s should be explained here, and tabular presentation/s may be added.)

(**Final Note:** The SGOD-SMME provides this to aid schools in the crafting of their School M&E Plan as per DO 029, s. 2022. You may localize this M&E Plan based on your needs. You can place it in your school's stationery template as per the DepEd Manual of Style [DMOS] and the DepEd Service Marks and Visual Identity Manual [DSMVIM]. This Plan may be adjusted based on results of progress monitoring. The year-end results will serve as input in developing or improving this Plan in subsequent school years of the SIP—year 2 and year 3.)

Prepared:

_____
Signature Over Printed Name of School Head

Date: _____

Noted:

_____
Signature Over Printed Name of PSDS

Date: _____

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Instructions: Kindly read the following items before accomplishing this template.

1. The term *Programs* shall refer to all programs, activities, and projects (PAPs) which are reflected in the Division's Work and Financial Plan (WFP), as well as in the approved annual Action Plan per functional division, section and unit.

2. It shall be accomplished by the *Program Owner* on a quarterly basis for status reporting during the conduct of quarterly Program Implementation Review (PIR), and shall be reviewed together with the immediate head and the Top Management at the middle and end of the fiscal year.

3. On the upper portion, the concerned office shall indicate its *Profile*, such as: name of section/unit/office, name/s of program owner/s, name of Division Chief or immediate head, Review period, and Inclusive months.

4. It will show details on the programs' *Physical Accomplishments* (Phys Accomps) and *Financial Accomplishments* (Fin Accomps), including *Plan Adjustments* (Plan Adj).

5. Phys Accomps shall present *Planned Programs* (as per approved WFP/ Action Plan) comparing *Physical Targets* and *Actual Outputs* ; and *Percent of accomplishment*. Please write the reason/s in full sentence/s.

6. Fin Accomps shall present *Planned Programs* (as per approved WFP/ Action Plan) comparing *Budget Allocated/Released* and *Budget Utilized*; *Percent of utilization*; and *Balances* . Please write the reason/s in full sentence/s. *Source of fund* must also be indicated.

7. *Plan Adjustments* (Plan Adj) shall contain the list of programs which need to be changed due to unavoidable and justifiable circumstances.

8. *Strong Points* shall contain factors that facilitated the success of program implementation. Please write in full sentence/s.

9. *Weak Points* shall contain factors that hindered/challenged program implementation. Both the SP and WP are experienced/noted by the program owner/s which may be based on quality assurance reports, observations, and/or customer feedback.

10. Hover your cursor over the cells, and read carefully the *Comments* for further instructions.

11. Add rows as needed.

12. Each accomplished tool must be saved using the file name: **Office Name_Monitoring_Quarter No._2023.xlsx** (e.g. SMME Section_Monitoring_Q1_2023.xlsx).

13. It shall be submitted to the School Governance and Operations Division (SGOD), through the School Management Monitoring and Evaluation (SMME) Section for the preparation of the PIRPA Report.

Status of Physical Accomplishments - This shows details on the Physical Targets and Actual Outputs per planned program.

Status of Financial Accomplishments - This shows details on the Financial Targets and Amount Utilized per planned program.

Plan Adjustments - This shows details on the Planned Programs which will be adjusted in the following quarters upon careful analysis of factors that affected the original plan.

No.	PLANNED PROGRAMS	PHYSICAL ACCOMPLISHMENTS			FINANCIAL ACCOMPLISHMENTS					PLAN ADJUSTMENTS			
										WHAT WENT WELL/WHAT WENT WRONG?			
		PHYSICAL TARGETS (No. of planned outputs)	ACTUAL OUTPUTS (No. of attained outputs)	PERCENT OF ACCOMPLISHMENT (No. of Attained Outputs / No. of Planned Outputs x 100)	FUND SOURCE	AMOUNT ALLOCATED/ RELEASED (Budget)	AMOUNT UTILIZED	PERCENT OF UTILIZATION (Amount Utilized / Amount Allocated x 100)	VARIANCE (Underspending/ Overspending)	STRONG POINTS/ FACILITATING FACTORS	WEAK POINTS/ HINDERING FACTORS	DECISION (Report, Move, Terminate)	DETAILS OF ADJUSTMENT
1													
2													
3													
4													
5													
TOTAL NO. OF PLANNED PROGRAMS												TOTAL NO. OF IMPLEMENTED PROGRAMS	
SECTION/OFFICE AVERAGE (No. of Programs Implemented / Total No. of Programs x 100)													

*Add rows as necessary.

**Two decimal places for percentage