



## **Strategic planning workshop for PTF project partners** 29-30 October 2012, Dagupan City, Pangasinan, Philippines

### **Background**

The Partnership for Transparency Fund (PTF), the Coalition Against Corruption-Makati Business Club (CAC-MBC), and the Affiliated Network for Social Accountability in East Asia and the Pacific (ANSA EAP) have embarked on a joint project to provide capacity building and grant support to citizen groups in monitoring the performance of local governments and sustaining constructive engagements. The consortium initiated partnership building with the Northern Luzon Coalition for Good Governance (NLCGG), a sub-national network of about twenty four (24) organizations and individuals operating in Regions 1, 2, and the Cordillera Autonomous Region (CAR). During a partnership meeting in Baguio City last 12 October 2012, NLCGG's Convenor Group identified network members who could pilot citizen monitoring projects under the project, including their potential pilot sites (Pangasinan and CAR), and discussed possible partnership parameters. As a next step, the PTF consortium and NLCGG set a strategic planning workshop late in October to come out with customized approaches for engagement in the selected project sites.

### **Objectives**

The **overall objective** for the proposed strategic planning workshop will be to effectively situate the proposed PTF interventions within the social accountability contexts of selected sites and in the governance programs and approaches of partner citizen groups and network.

**Specific objectives** include the following:

1. Come to an initial shared understanding of the social accountability contexts in the selected project sites as a prelude to the partners' strategy development and customization;
2. Identify existing capacities, capacity gaps, and urgent learning needs of partners in terms of the proposed citizen monitoring and constructive engagement under the project;
3. Share experiences and lessons from similar initiatives in localizing social accountability tools and approaches as starting point for collective reflection and planning;

4. Customize the PTF project’s results framework in the selected project sites by identifying a focus theme or issue, performance targets, and possible monitoring indicators;
5. Come out with initial project ideas for the proposed citizen monitoring that is grounded on the partners’ strategic plans for sustaining social accountability initiatives; and,
6. Draft indicative operational plan and budget for next six (6) months based on agreed upon strategic plan, including interventions for capacity building and learning.

## Proposed design

Suggested activities and processes for the strategic planning workshop:

### 29 October 2012 (Monday)

Morning sessions	Welcome and opening remarks Preliminaries: introductions and expectations check Presentations by participating NLCCG members: <ol style="list-style-type: none"> <li>1) Assessment of social accountability context</li> <li>2) Assessment of existing capacities and gaps</li> </ol> Plenary processing and discussion
Afternoon session	Sharing on GWatch social accountability localization project Small group reflection and discussion: <ol style="list-style-type: none"> <li>1) Previous social accountability work</li> <li>2) Possible approaches under the PTF initiative</li> </ol> Customizing the PTF results framework: <ol style="list-style-type: none"> <li>1) Identification of impact and target outcomes</li> <li>2) Identification of key assumptions and risks</li> </ol>

### 30 October 2012 (Tuesday)

Morning session	Presentations on initial project ideas for citizen monitoring: <ol style="list-style-type: none"> <li>1) Focus issue or thematic area</li> <li>2) Proposed monitoring tools and partner agencies</li> <li>3) Suggested sustainability strategies</li> </ol> Signing of Memorandum of Understanding (MOU)
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<p>Afternoon session</p>	<p>Operational planning:</p> <ul style="list-style-type: none"> <li>▪ Identification of activity packages/interventions</li> <li>▪ Suggested time frames and deadlines</li> <li>▪ Detailing of key outputs and deliverable</li> <li>▪ Identifying resource and fund requirements</li> </ul> <p>Closing remarks and ritual</p>
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## Outputs

The proposed planning workshop is expected to come out with the following outputs:

- 1) Initial site information including key aspects of the local social accountability environment (presence of citizen groups, responsiveness of local government, access to information, and cultural factors that could facilitate or hinder citizen monitoring and engagement);
- 2) Capacity assessment report, detailing existing capacities (individual competencies as well as organizational capacities), capacity gaps, and urgent learning needs of partner CSO;
- 3) Identified lessons in terms of localizing social accountability approaches, customizing citizen monitoring tools, and sustaining constructive engagement for good governance;
- 4) Initial project results model for each of the identified pilot sites, outlining key interventions, key result areas, and assumptions and possible risks for the proposed project;
- 5) Identified project idea for citizen monitoring, including focus area or issues, proposed tools or monitoring approaches, and sustainability strategies; and,
- 6) A six months operational plan for each selected pilot areas detailing major activity packages or proposed interventions, time frame, and resource requirements.

## Pre-workshop preparation

ANSA EAP’s Learning Team will prepare and circulate customized tools on: 1) Assessing the local social accountability context (based on the network’s previous work with social accountability localization projects); and, 2) Assessing individual competencies and organizational capacities for social



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accountability work. Copies of overall PTF project results framework will be circulated to participating NLCGG member organizations to allow familiarization with the document prior to the workshop. Finally, the ANSA EAP team will also provide participating groups with guides or outlines in thinking through their project ideas for the citizen monitoring.