

# Towards effective planning and management of emergency and development projects

## *Application of PIEIP<sup>1</sup> on Housing, Disaster, Water and Sanitation Projects*



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## Abstract

The monitoring and evaluation (M&E) of development projects provides an important quantity of information about the step by step process, helping to achieve the required quality if we make sure that outputs, outcomes and the specific objective or impact are reached in the projects. I propose here a method for joining the social-economic-technical indicators towards an effective management and a participative and dynamic systematization using this data, called PIEIP (Project Integral Evaluation and Implementation Plan), which was developed since 1996 with field teams, families, schools, local authorities and financial supervisors, and used as a learning tool for improving future planning. The logical framework was elaborated with SMART integral goals, objectively verifiable indicators (OVI) and consistent verification means, which with the geo-population, time schedule, personnel chart and budget information build the static data lists, and help all actors to make together better opportune decisions using the dynamic tables of PIEIP. The method was applied in spite of local difficulties in housing, water and sanitation projects with

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<sup>1</sup> PIEIP = Project Integral Evaluation and Implementation Plan

simple Excel inter-connected tables, which can be used in any municipal capital in the country and can be improved to manage more effectively larger data bases.

## 1 Shelter, municipal development and Poverty Analysis

Bolivia is divided in nine departments (see map in next page), each with its elected Head, these are subdivided in 112 provinces and 327 municipal sections. This last political division has an own yearly budget for planning and implementing its development expecting to achieve the Millennium Development Goals.

**Table 1 Bolivian Political Division**

Departments	Provinces No.	Municipal Sections (1994) No.	Total Sections Up to date No.	Cantons No.
Chuquisaca	10	28	Equal	100
La Paz	20	75	80	438
Cochabamba	16	44	45	145
Oruro	16	34	35	160
Potosí	16	38	Equal	241
Tarija	6	11	Equal	82
Santa Cruz	15	50	56	143
Beni	8	19	Equal	43
Pando	5	15	Equal	32
<b>TOTAL:</b>	<b>112</b>	<b>314</b>	<b>327</b>	<b>1.384</b>

Source: Prepared by the author based on information of INE and the Statistical Atlas of Municipalities 2005 published by UNDP and INE (Instituto Nacional de Estadísticas).

The main laws for planning and implementation of municipal development are the Popular Participation Law 1551, Municipal Organization-Expenses 1956-2296, 2140 for Risk Management and 2335, and Decentralization 1654 laws.

The main tasks of municipal governments are shown in the next table, but many still lack of a method, training and the experience for planning, implementing, managing, monitoring and supervising their projects let alone the sustainability.

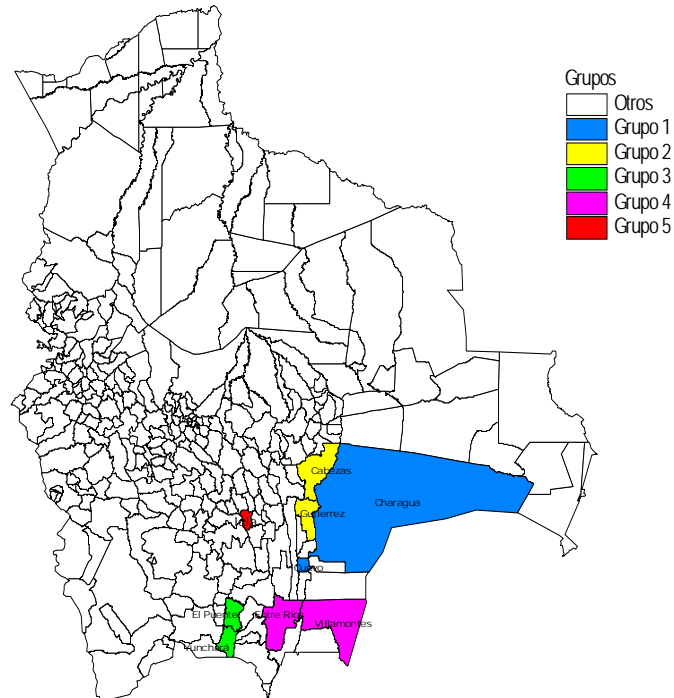
**Table 2 Relations between tasks and municipal programs**

Programs:	Production	Social	Environment	Strengthening
<b>Tasks:</b>	Rural development Electrification Micro irrigation	Education - Health Basic sanitation Housing	Conservation and Protection Risk management	Institutional strengthening
Design	*	*	*	*
Construction	*	*	*	*
Education-training	**	**	**	**
Supervisión	**	**	**	**

The map in the next page shows the municipal division in Bolivia, and the colored sections are located in Santa Cruz, Chuquisaca and Tarija, where a Housing

Programme of PROCOSI was taken place for three years (5/07 – 4/10) with 8.227 families participating in the improvement of their houses, which is our case study.

BOLIVIA: GRUPOS PROGRAMA MEJORAMIENTO DE VIVIENDAS (5)



(Guachalla, et al 2007)

According to the Unsatisfied Basic Needs (UBN) index of the last population census from 2001, which provides a level of structural poverty, there are in Bolivia five groups: the non poor 16.6%, at the edge of poverty 24.8%, moderated poor 34.2%, indigent 21.7% and marginalized 2.7%. 62.43% of the population were living in the urban areas and 37.57% in the rural regions, with a population increase rate of 3.62% in the urban areas and 1.42% in the rural and a 2.74% in average (INE, 2001). In year 2007 the population was about ten million and in this year the country lost above 400 million USD due to natural disasters for the lack of a risk management program.

**Table 3 Unsatisfied basic needs according the area**

CONCEPT	AREA	URBAN	RURAL	TOTAL
Not adequate housing materials		15.6%	75.7%	39.1%
Insufficient housing spaces		68.9%	76.3%	70.8%
Not adequate water services		44.3%	78.9%	58.0%
Low energy consumption		14.1%	91.2%	43.7%
Insufficiency in Education		36.5%	70.9%	52.5%
Inadequate attention in health		31.0%	54.5%	37.9%

NOTE: The data was taken from the Census from 2001.

The UBN in the table show the situation in the urban and rural areas, as for example, how low is the housing satisfaction in the country in general with 39.1% of not

adequate housing materials and 70.8% of insufficient housing spaces. The situation of the water services is still low in the country with 58% of not adequate water services, 44.3% in the urban area and 78.9% in the rural regions.

In relation to shelter projects, the law N° 3374 from 23.03.06 declared chagas as one of the main health problems including 1.8 million of persons affected.

Therefore, the National Programme against Chagas included the improvement of houses with a goal to decrease the percentage of infections by triatomines below 3%, what shows us again that development projects are related to the HDI and UBN.

The HDI in year 2005 ranked Bolivia in the 114 position out of 177 countries with a yearly national per capita income of 980 USD, infant mortality 60 (o/oo), life expectancy at birth of 64 years and the literacy at 86% in adults (United Nations report on HDI, 2005).

## 2 Organization

The NGO network PROCOSI (Program of Coordination for Integral Health) is the largest health network founded in year 1988 by 12 international PVO, which later included other national and international NGO, reaching 34 (PROCOSI, 2007).

PROCOSI has managed mainly Infant-Mother health programmes, and went in 1999 into the housing improvement area due to the situation of Chagas. Besides, several NGO of the network work on W&S and some are doing risk management as well, aware of the need to reach a sustainable level including this topic, as the international cooperation agencies propose (Unicef, 2008).

Explaining the case study analyzed later in this document:

**Table 4 Summary of the new housing program**

Municipality	Phase I		Phase II		Phase III		Total		Observation
	N° Cmmty	N° Houses	N° Cmmt	N° Houses	N° Cmmty	N° Houses	N° Cmmty	N° Houses	
Charagua	7	482	8	331	5	291	20	1.104	Initial activities
Cuevo	0	0	3	200	0	0	3	200	Idem
Cabezas	4	179	0	0	3	177	7	356	Idem
Gutiérrez	2	70	4	345	0	0	6	415	Idem
El Puente	6	445	12	552	17	448	35	1.445	In execution
Yunchara	16	437	28	543	0	0	44	980	Idem
Entre Ríos	13	468	18	522	6	510	37	1.500	Idem
Villamontes	4	370	11	541	18	516	33	1.427	
Icla 354/7	11	446					15	800	1ª.finish., 2ª.exsect.
<b>Total: 354/7</b>	<b>63</b>	<b>2.897</b>	<b>84</b>	<b>3.034</b>	<b>49</b>	<b>1.942</b>	<b>200</b>	<b>8.227</b>	Final information

NOTE: 354 houses were done in Icla in April 2007.

From 1999 till 2003 about 14.000 houses were build by seven NGO of the network with financial support of the national government and international

cooperation, then in 2005 started a new program with two NGO to improve 8.227 houses more with support of USAID plus the departmental and municipal governments as the previous Table shows (see also map in pag. 3). The Executive Direction asked me before I left PROCOSI, to write a document explaining the method of PIEIP, which I finished and delivered in May 2008. I would like to train field teams in depth in the application of PIEIP; for this, it would be advisable to implement the method in at least three different projects, so that PIEIP can be refined to be used in the future by other implementers, programs and the international cooperation.

Before this period, I had worked for several years in all phases of development and emergency projects, as for example: planning, implementing, monitoring, evaluating and learning together with communities, their authorities, financial institutions, national and international programs. Today I work for an international cooperation agency, and in all cases I found the need to implement a method to joint together the social – technical – economic indicators towards improving the management of development and risk reduction projects.

### 3 Problems in Development Projects

I would like to address in this document the answer to the question how to joint social – economic – technical (S-E-T) indicators with SMART integral goals with consistent verification means in development projects in a dynamic systematization of the project cycle that includes the stages of Planning, Implementation, Monitoring, Evaluation and Learning.

The problem that most of the development and risk reduction projects have in general and the housing, risk management and W&S projects in particular in my country and probably in other developing countries, is that the process of planning, M&E and learning is responding mainly to a list of indicators and expected results, without a clear distinction between indicators of process, results, changes and impact, nor a plan of measurement of OVI according to a time table, frequency and level of accountability among the field, project and financial teams, to be used by authorities and donors. With the consequence that we learn little and we mix different types of indicators with an inadequate time table and what is worst without a follow up of those indicators according to levels of responsibility. Let alone the

absence of measurement of efficiency, efficacy, relevancy, impact and sustainability (EERIS, see Guachalla 2005, chapter 5.5 pag. 88, library <http://www.procosi.org.bo>).

Here I emphasize the importance of strengthening the municipal technical teams in planning, designing, implementing, monitoring, evaluating development project in a learning process summarized in a participative and dynamic systematization, in order for them to be in charge of future social and risk reduction projects, searching for a higher level of integral sustainable development in their territorial sections.

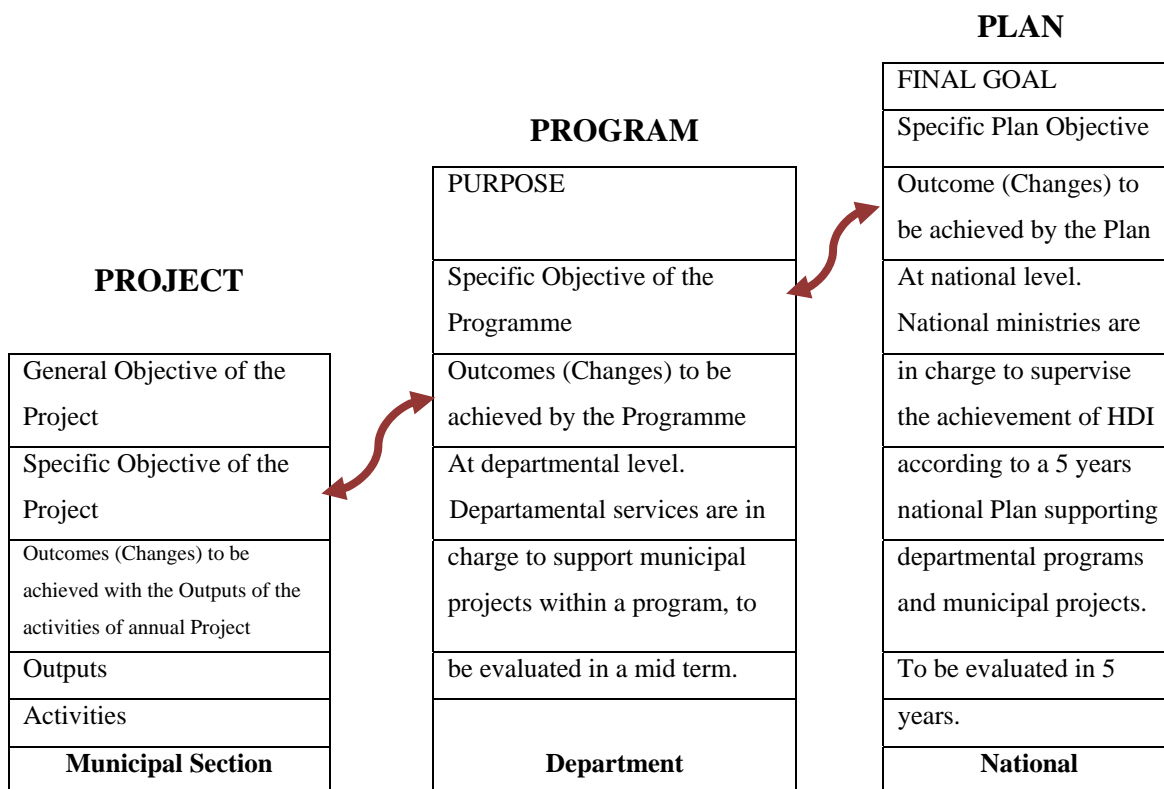
Since I presented my preliminary Ph.D. exam in 1984 at CSU, I raised the need to joint the S-E-T verifiable indicators with SMART integral goals. PIEIP is probably an important step to achieve this in order for us to learn from the process of a participative and dynamic project systematization.

## 4 Proposal for Change and Improvement

### 4.1 The Relation between Project – Program – Plan project cycle

The previous explained situation shows the importance to rethink the approach of development as well risk reduction management projects. So, I propose here:

**Diagram 1 Relation between Project – Program - Plan**



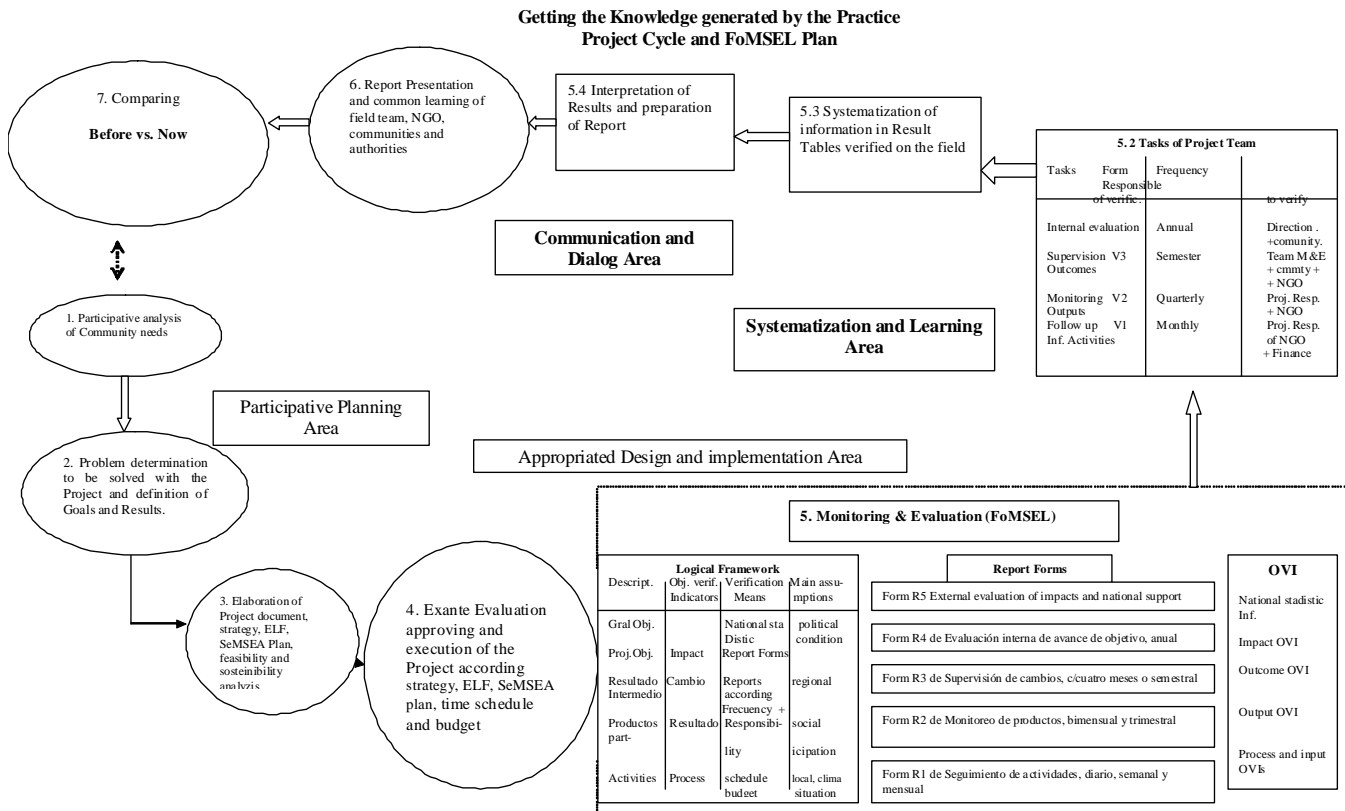
a method that integrates social – economic – technical variables and indicators of development through projects – programs - plans to the national Human Development Index (HDI) in order to achieve a sustainable level.

The previous diagram shows that while the Objective of a Project impacts on the lives of the inhabitants of communities of a municipal section, a program could link the project with the national Plan, for doing so the departmental level should be in charge to supervise that municipalities of its territory accomplish yearly goals through supported projects. While ministries would make sure that the departmental programs reach the goals linked to the national plan, so the IDH and UBN indicators improve with the time in a consistent and coherent form.

### 4.2 The Project Cycle

The following diagram helps to joint the different periods of a project:

**Diagram 2**



The cycle is subdivided in four big areas, the first of participative planning, which starts with the situational analysis, the problem determination, the expected objective and results, plus the strategy to reach them, the M&E and Learning process,

including the appropriate transformation of the Logical Framework (LF) in the FoMSEL (Follow up, Monitoring, Supervision, Evaluation and Learning) Plan plus the budget and time schedule, all in the project document.

The second area is the implementation according to the designed strategy, time schedule, budget and the application of the FoMSEL plan.

The third area of Systematization and Learning comprehends the moments when the information of the advances of the project is gathered, analyzed and prepared for the discussion among all actors.

The fourth and final area is the period of Dialogue and Analysis of the information of the previous stage. Here, all actors participant families, authorities, field team, directors, even the donors should get together, in order to see how is the project improving and what opportune adjustments need to be done.

### 4.3 The Curve of Systematization

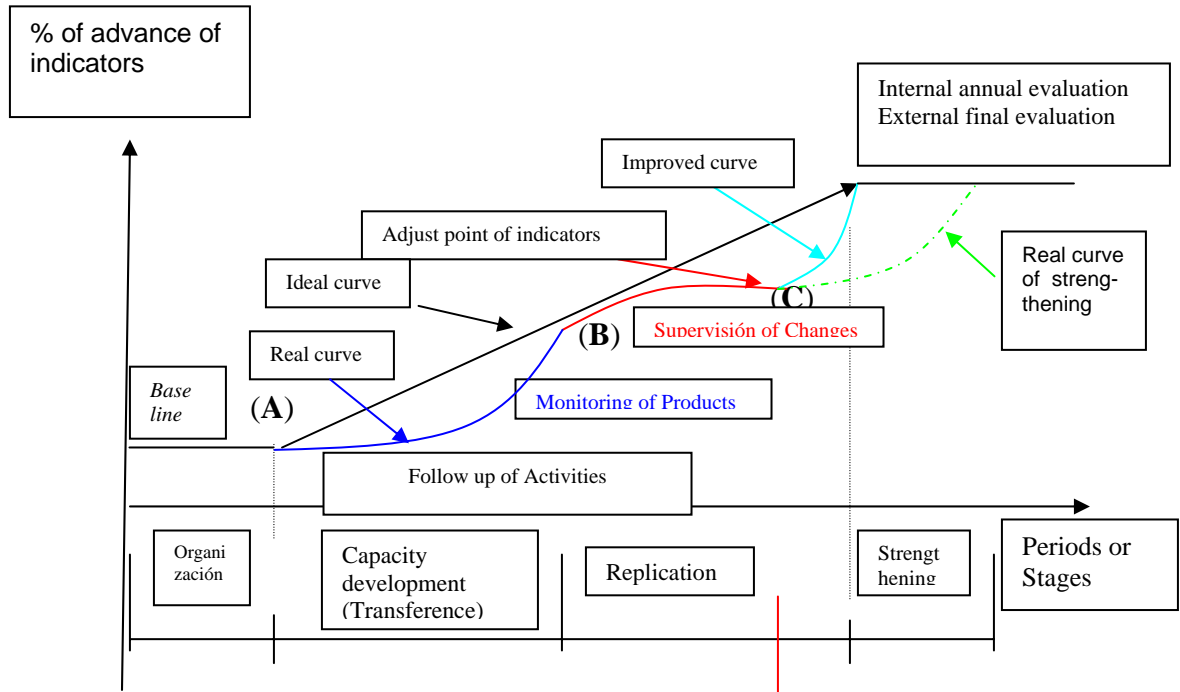
We have two ways of measuring periodically the advance of the projects, in the following diagram (see next page) we first have that:

- while the field team is responsible to follow up the activities of the project with process indicators and reports of the advances quite frequently (weekly)
- outputs are monitored, at least in a monthly frequency by the project manager with product indicators, and
- the outcomes are supervised by an office Manager, who will report to the donor within at least a quarterly frequency informing about the advances of the change indicators and
- External evaluation of the advance towards the Project Goal with impact indicators are made in mid term (in projects with duration of three or more years) and a final period. However, internal annual evaluations should also be conducted by the donor-technical team, using the same indicators that are reported (see for example the FoMSEL form at the end of this chapter).

A second form to measure this advance could be by using **Benchmarks**. For example for every period of the project we could have one expected benchmark or said in other words, we could subdivide the Goal in two or three sub-goals, according to the project periods, so that when we finish one period we measure how much we








advanced in that time and see if the sub goal was achieved or not and explained the advance according to the corresponding indicators.



**Diagram 3**

**Systematizations Curve (SIS-Curve)**

- Where:
-  is the ideal line that advances straight and systematic.
  -  is the line of the real advance curve during the period of transference from point (A) till point (B)
  -  is the line of the curve during the period of replication from point (B) till point (C), measure according the OVI in each village.
  -  is the improved curve, from point (C) till the goal according the planned time period of replication.
  -  is the real curve of strengthening, from point (C), till the planned goal, using an extra time for strengthening.

**4.4 The FoMSEL Plan**

In order to measure the indicators of the LF in an appropriate time and level of responsibility, we transform it into a FoMSEL (**F**ollow up, **M**onitoring, **S**upervision, **E**valuation, **L**earning, see next page) Plan using the Smart integral goals, the s-e-t objective indicators, showing the frequency of reporting and the responsible.

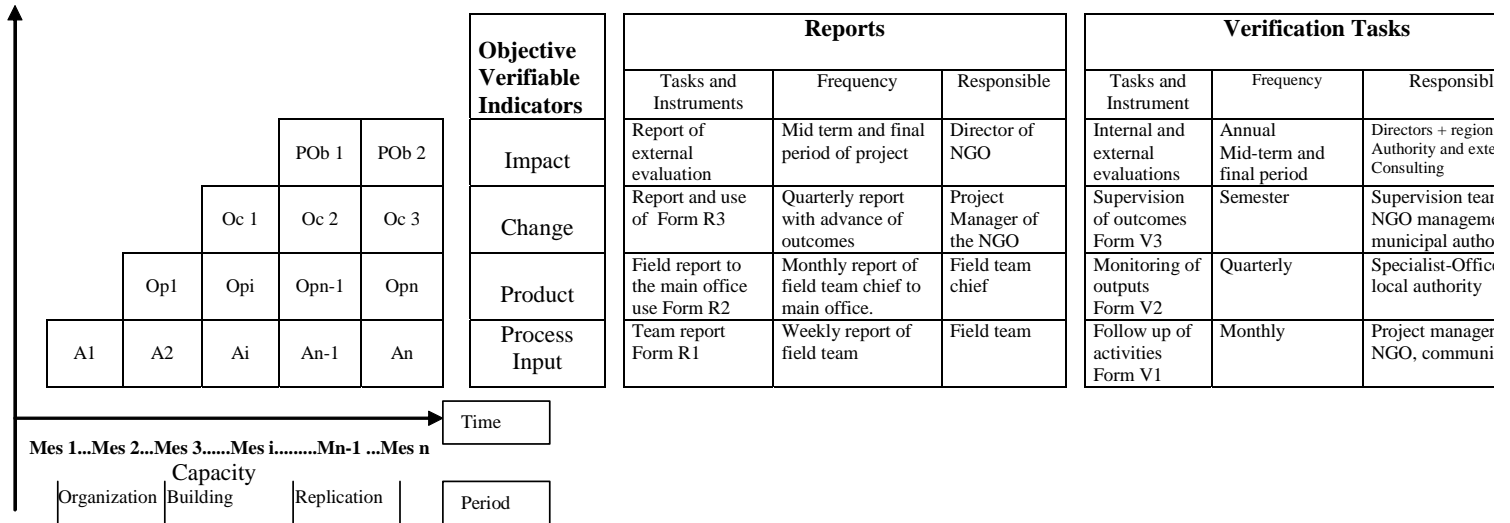
The first left part in stair form shows that the LF is transformed into a two axis diagram (time vs. % of advance of OVI), where we see that while activities are

executed during the length of the project, outputs and outcomes are reached at certain times and the specific objective at the end of the project. The column of OVI shows the S-E-T indicators (impact, change, result and process, inputs are also considered), we will use to measure the advance of the project.

**Diagram 4**

**Organization of the tasks of the FoMSEL Plan**  
(Follow up, Monitoring, Supervision, Evaluation and Learning)

% advance  
towards objective



Where:

- Ai = Activities according a time schedule
- Opi = Outputs
- Oci = Outcomes
- PObi = Project Objectives or Specific Objectives (SO)
- Form Ri = Report forms
- Form Vi = Verification forms

The **Reports** part is subdivided by Tasks, Instruments, Frequency and Responsible, where the field team is in charge to report every week and month through its team chief to the office about the advances of the activities and products, while the Project Manager is in charge to report by-monthly or quarterly about the advances of the outcomes, and finally the Director of the NGO is responsible for the execution of the external evaluation(s) (final meanly but in 3 or 5 years projects, also a midterm evaluation).

On the final right part, we see that the PROCOSI team, or in previous projects where I started this method, the international NGO was in charge of verifying the information about the outputs and outcomes quarterly or at latest every semester and

to prepare a yearly internal participative evaluation. The same process is advisable for regular and risk reduction management projects supported by international cooperation agencies, like Unicef.

#### 4.5 The PIEIP: Project Integral Evaluation and Implementation Plan

The chart in Table 5 shows the way to joint the social – economic – technical (SET) information of the project so that a manager can be informed about the advances and difficulties of the project and all actors can be aware about it.

**Table 5 Organization of PIEIP**

Tables of Static Information	Logical Framework	Geopopulation map	Time Schedule	Personal Chart	Budget
	↓	↓	↓	↓	↓
List of Information	List of OVIs and Smart Goals	List of Cmnty by municipality and phase of the project	List of Phases, Periods and Stages of the project	List of Personnel by position and Responsibility	List of Items and major accounts by period and financial source
	<ul style="list-style-type: none"> <li>• RI Flies.improve ES</li> <li>• RI Flies.improve BS</li> <li>• RI Flies.improve houses</li> <li>• RI Comty.is well organized</li> <li>• RI contributions up to date</li> <li>• RI Interinstitutional coordination</li> <li>• RI Health support</li> </ul>	List of 8.227 families, 200 cmtys. in 9 municipalities with location of N° of houses to improve	Phases I – II – III Stages 1-2-3-4-5 Semesters 1 a 3 Quarters 1 to 5 or 1 to 6 Month 1 to 15 or 1 to 18	Project Manager Regional Coordinator IEC Responsible of Technical Responsible Team Chief Facilitators Constructors	1. Assets 2. Personal 3. Operation Financial source: USAID Prefectura Municipality ONG Families (in cash) Families (in specie)
Tables of Dynamic Information	↓		↓	↓	↓
	<b>Project Implementation Plan</b> <b>PIP</b>		↓	<b>Financial Implementation Plan</b> <b>PIF</b>	
	<b>Project Integral Evaluation and Implementation Plan</b> <b>PIEIP</b>				

In summary, we have the static information of the LF, the Geo-population Map, the Timetable schedule, the Personnel chart and the Budget, which are transformed in data lists: OVI and SMART Goals, Families by community, municipality and Phase

of the project, Phases, periods and stages, Personnel with responsibilities, location and position, and items by financial source and period.

The combination of this information along the project will provide us with the dynamic tables:

- Project Implementation Plan (PIP)
- Financial Implementation Plan (FIP or in Spanish PIF)

Finally for preparing the quarterly reports to the financial cooperation agency plus the main counterparts, we calculate the PIEIP. At the end of this chapter we have an example how PIEIP can be implemented by using Excel tables. With the limitations that Excel has to manipulate a large quantity of information but at the same time the advantage to be accessible in any municipal capital in the country.

#### 4.5.1 The Project Implementation Plan PIP

Base on the tables of the LF and FoMSEL Plan, the PIP was developed for each municipal section according the next Table 6 (see the example of Municipality El Puente at the end of the chapter).

**Table 6 Scheme of the table PIP**

**General Information of the Project (first page):**

Implementer NGO, Period – No. Phases – Length of phase	Start and End dates – Length of the project	Municipality – No. Communities – No. Families – No. Houses
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**Information of the Logical Framework of the Project:**

Code	GOAL %	Narrative description of the goals	No. target by project	No. target by phase	Description of the unit of the target
	SO 1				
	SO 2				
	Oc 1.1				
	Oc 1.2				
	Oc 1.3				
	Oc 2.1				
	Oc 2.2				
	Oc 2.3				
	Etc....				

PIP allows us to calculate in an objectively form the advance of the (numerical) social - technical indicators towards the targets, which in turn have been calculated according the goals of the project given in % .In the second page of PIP the % advanced of each indicator is qualified according to the % of time of the project; this part can be repeated if the project has more than one phase. The qualification of the

advance of the indicators is important, because the percentages of the indicators and the time need to be compared among each other. The last column with the average facilitates the summary for reporting.

**General Information of the Phase** (second page):

No. Phase – Start and End of Phase Length of the Phase	<b>Report Date</b>	Elapsed time (months, % of phase) accumulated (months, % of project)	Municipality – No. commy. No.Fmlies.-No.Houses phase
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**Calculation of the advance of the indicators during the phase:**

Code	List of indicators OVI	Target of the phase	Executed	added	difference	% of advance	qualification	Average by objective
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(During the quarter of report)

SO 1								
SO 2								
Oc1.1								
Oc1.2								
Oc1.3								
Oc2.1								
Oc2.2								
Oc2.3								
Etc.								

The information of this last page will be later trespassed to the PIEIP (see 4.4.3) where it will be used to compare the social – technical objective indicators with the economic indicators and the goals.

#### 4.5.2 The Financial Implementation Plan (PIF)

The PIF calculates the monthly balance of the budget according to the disbursements and the expenditures. PIF has the following description for each financial source:

- A first upper part with the general information of the Project.
- The second box no. I is a list of disbursements according to date, amount, exchange type, and % of disbursement in relation to the budget.
- The third box No.II has a cash flow and total balance of the present quarter.
- The final box has the cash flow of each item according of the expenditures of the quarter, the accumulated sum minus the total budget and the balance and a column of the % of total expended to total budget per item.
- At the end of PIF there are a few small summary tables with the total amount of disbursed, expended, budgeted and the percentages of advance plus the qualification of these advances towards the time and the total budget.

**Table 7 Financial Implementation Plan of the project (municipality)**

General information: No. and Name of Project – Dates (start – end) – Length and NGO				Quarter – year – Date of Report – Period and No. of Report – Time elapsed - % of total time			
<b>I. Disbursements to implementer</b>							
No.	Source	Month	Date	Amount LC	Type change	Amount \$us	% of budget
<b>II. Financial Activities:</b> (Only for the month of report):							
Cash flow:			AMOUNTS IN LOCAL CURRENCY			% expended during the month in relation to the total amount available in the month	
Balance last month:							
Disbursement during this month:							
Total amount available for expenditures:							
Expenses during this month:							
Balance at the end of this month report:							
<b>Budget Control:</b>							
Item code	Description	Expenditure in month	Accumulated expenses	<b>Budget</b>	Balance end of the month	% execution	Explanation
Total by financial source:							

Finally this information will be trespassed to the table of PIEIP, where we will be able to compare the advances with the social - technical (SET) indicators towards the goals and the time advance.

#### 4.5.3 The PIEIP

The results of the PIP and PIF tables are joined in the PIEIP table in one page, where we have the following four boxes:

- The first box has a summary of the general information of the Project, which is taken from the PIP and PIF tables, here we have the NGO name, the length of the project and the period of report, the start and end dates of the project, the elapsed time and the % of advance of time, plus the name of the Municipality, the No. of communities, and houses. We also have here a summary of the targeted goals of each phase as a summary of the project.
- The second box has the base information of the logical framework of the Project taken from the PIP table, which we summarized already in 4.4.1.
- The third box (right upper corner) has the budget of each financial source and the summary financial information we got in the PIF table, with the total disbursements, expenses, and the % in relation to the budget and the qualification in relation to the budget.
- Finally the fourth box summarized the advances of the social and technical indicators by phase, the total sum and the qualification of this advance with a balance average of each indicator in relation to the elapsed time of the project. In the last column of this box we have a balanced average of the

indicators of each objective and outcome. In other projects we would have also the balanced averages of the outputs.

**Table 8 PIEIP Project Integral Evaluation Implementation Plan**

General Information of the project by municipality:										
NGO – Time – No. Phases – Report period		Start – End dates – Proj.duration- Time		Report date	Municipality – No. of cmnty – No. houses	Start-end + No.cmty-Houses by phase of the project				
Summary of financial advance in the project										
Total budget by financial source				No.of Report	Balance by financial sources: disbursements – expenses					
Logical Framework information					Summary of Social – Technical advance					
Code	Goal %	Goal description	Target	Unit goal	Code	Advance	Added	% advance	Qual.	Avr.
	SO 1				SO 1					
	SO 2				SO 2					
	Oc 1.1				Oc 1.1					
	Oc 1.2				Oc 1.2					
	Oc 1.3				Oc 1.3					
	Oc 2.1				Oc 2.1					
	Oc 2.2				Oc 2.2					
	Oc 2.3				Oc 2.3					
	Etc...				Etc...					

#### 4.5.4 The Report Table of PIEIP

Finally a Report table has been developed for informing and given comments about the results and advances calculated in the dynamic tables of PIP, PIF and PIEIP by municipality, which in time can be added to have the corresponding totals for a department, or by NGO or the total HIProgram.

In order to facilitate the synthesis of the results, here are used the percentages calculated by outcome (in complete calculations, by product as well). The report also includes the spaces to explain the advances of the financial indicators.

Therefore, in this form PIEIP has facilitate me as Manager of those projects to joint and analyze the SET indicators (social – economic – technical) into integral SMART goals, what our goal was at the start of the process.

#### 4.5.5 The tools for collecting the information of the project

The field teams will require the necessary tools for collecting or measuring and reporting the information needed to fill the PIP, PIF and PIEIP tables. For doing so, we developed forms for reports and verification, however also the NGO had them and facilitated the field teams to fill in a monthly basis. The verification team has developed forms, which could be used during the verification visits to the field.

Among them, the FoMSEAL form (see next page) has been a special effective tool, for persons who new the indicators to be measured in a practical way.

It is worthy to explain some more detail of the FoMSEL form. This one page form has been designed having in mind the seven groups of targets of the HIP, which is summarized in the List of OVI and SMART goals in the first table of the Annex. In the first part of the form we have a space for writing the values of the indicators of family advances in improving the sanitation, house improvement and counterpart. In the second part we have space for the information of the advances in accomplishing the tasks of the community leaders in charge of the project, as the Housing Committee, Promoters, Warehouse keepers and the health support of promoters. Finally we have in the lower part space to fill the information of the municipal level with the task of the municipal technician, the municipal committee and the support of the departmental authority, which has an important counterpart together with the municipalities. This form has been designed in Excel and can be used as a good summary of the advances by community.



**Table 9 The FOMSEL Form**

Municipality: \_\_\_\_\_  
 Community: \_\_\_\_\_

Date: \_\_\_/\_\_\_/\_\_\_

Phase of project: I - II - III  
 Semester in the Phase: 1 - 2 - 3 (Use a circle)

Information of the families:			1. Family practice environmental sanitation			2. Family practice basic sanitation				3. Family house improvement			4. Family counterpart														
Nº	Name of family responsible	Code of house	Sleep room			Bad room			Kitchen		Water	hygiene	excreta - solid waste	stove	contract	start	advance	foreseen end	Bs								
			in use	clean	in order	in use	clean	in order	in use	clean	in order	protected	boiler/ other	after toilette, before eat	hand wash	no excreta around house	solid waste buried	igood use	signed	date	%	approx.date	date last payment	Amount Bs.	Total payed up to date	equivalent to advance	in kind
1																											
2																											
3																											
4																											
5																											
% average of advance of OVI:																											
Total e.g.information cmnty.:																											

Note 1 The HIP team will collect this information starting the 2nd.semester  
 Note 2 To write the information of the indicators, one can use the scale from 1=bad, 2=regular and 3=good  
 Note 3 This table is to qualify the changes and improvements. For the previous stages write only No.of workshops, visits, participants and use the form for follow up and monitoring

**Information of the community organization (Committee, Promotor, Warehouse keeper, Health promoters):**

Nº	Name	Position	5. Community organization accomplish tasks										6. Health support						
			Committee					Promotor			Warehouse keeper		Chagas	Health					
			Monthly tasks					Weekly tasks			Place	Tasks	Monthly tasks						
			collected amount	total collected	Balance in cash	Report to community	Reflexion to families	No.families in charge	visited families No.	No.receipts assigned	Existing warehouse	Up dated book	Up dated family book	Complete material	visited families No.	Report to health service	visited families No.	Report to health service	
1																			
2																			
3																			
4																			
5																			
6																			
7																			
8																			
9																			
10																			

Note: Use the empty places.

**Information of the regional coordination (Municipal technician, Municipal committee, and Department authority):**

Nº	Name of the interviewed authority	Position	7. Regional coordination achieved																
			Municipal Technician tasks					Municipal committee				Department support							
			Date	team follow up			Date	date	last disbursement Bs.	Date disbursement	Total (Bs) disbursed up to date	Signed contract	Date of signature	last disbursement date	Total disbursed up to date				
	meeting w/team	Commit visit	No. committee visited	Period of tasks	Report to supervisor	last report	ast meeting												
1																			
2																			
3																			

Space for some clarification, complementation or suggestion:

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Person that fills: \_\_\_\_\_  
 Authority stamp: \_\_\_\_\_

## Results Framework of Municipality El Puente

Project: M-5 Municipality: EL PUENTE  
 Implementor: Esperanza Bolivia No.Houses + Cmmties: 1.445 houses in 35cmmts  
 Project Period: 21.5.07 - 30.4.10 Length of Project: 3 years

Explanation of expected results	Objective Verifiable Indicators	Targets	Means of verification	Critical assumptions	
<b>General Objective:</b> Se han reducido de manera factible y sostenible los factores de riesgo de la población del municipio de El Puente de Tarija de quedar enferma o morir por causa del Chagas u otras enfermedades de EDAs o IRAs relacionadas con su vivienda y entorno saludable	% de índices de infestación intradomiciliaria y peridomiciliaria por triatominos. % de incremento en prácticas de higiene y saneamiento. N° y % de viviendas mejoradas. Nivel de aportes, organización y coordinación alcanzado.	Reducción al 3% y 1% o menos de la infestación peri- e intra-domiciliaria. 50% incremento en prácticas de higiene y saneamiento. 100% de 1.445 viviendas mejoradas. ... .. 50% de aportes, organización y coordinación alcanzados.	Reportes de infestación domiciliaria del programa nacional de Chagas, encuesta CAP, Actas de entrega de viviendas, SIG de PROCOSI e informes de evaluaciones externas.	Las autoridades nacionales apoyan el proyecto departamental de mejoramiento de viviendas.	
<b>Specific Objectives (SO)</b>					
SO.1 Families improve their knowledge and practices to prevent chagas and achieve environmental sanitation.	% knowledge about chagas prevention, % of increase in healthy practices of environmental sanitation.	50% of 1.445 families improve their knowledge and practices to prevent chagas and achieve environmental sanitation in their homes	KAP survey reports	Cumplimiento de contrapartes no prolonga la fase de MV ni impide las tareas de CCC pos construcción	
SO.2 Families improve their practices of hygiene and basic sanitation to prevent illnesses of EDA and IRA.	% of increase in practices of hygiene and basic sanitation.	50% of increase in practices of 1.445 families in three years in hygiene and basic sanitation with community health practices	KAP survey reports		
SO.3 Families improve their houses according technical especifications.	% of house improvement and delivered according technical especifications.	100% of 1.445 houses are improved or build in three years according technical especifications	Delivery documents, evaluation reports and field visits. Quarterly report of PIEIP.		Cumplimiento de contrapartes impulsa la implementación del proyecto
SO.4 Communities and local authorities achieve counterparts, organization and institutional coordination.	% of communities that pay counterparts, get organized and coordinate with families, organization and local authorities.	100% of cash counterparts payed up to date, 50% of achievement of organization tasks and 75% of supervision and coordinated support	Monthly control financial reports. Coordinated M & E reports. Quarterly reports of PIEIP.		la política nacional no afecta el plan de aportes ni de coordinación de las contrapartes públicas locales ni familiares.
<b>Outcomes (Oc)</b>					
C 1.1 Improved practices of sanitation in the houses	1.1.1 % of families improve practices of use, cleanness and order in the sleeping rooms	50% of 1.445 families in three years use, clean and have in order the sleeping rooms	Quarterly reports of verification by family survey (IDMA), report of advance of the tasks in IET, CCC and PIEIP.	La coordinación con el paquete básico es buena y no hay retraso en la provisión de materiales para la aplicación correcta de CCC	
	1.1.2 % of families improve practice of use, cleanness and order in the bad room	50% of families use and clean the bad rooms in 1.445 houses in three years			
	1.1.3 % of families improve practices of use, cleanness and order in the kitchen	50% of 1.445 families use, clean and have in order the kitchen in three years			
C 1.2 Epidemiologi vigilance achieved in each community	1.2.1 % of chagas promoters implemented and in function	90% of 35 chagas promoters that train families in preventing chagas. 80% of promoters report to the health service in monthly bases	Reports of promotor and the project	No existen conflictos socio-políticos que afecten los compromisos de coordinación de salud	
C 2.1 Improved practices of hygiene and basic sanitation at home by the families of the project	2.1.1 % of families with protected water	60% of 1.445 families protect the water in three years	Quarterly reports of verification by family survey (IDMA), report of advance of the tasks in IET, CCC and PIEIP.	La coordinación con el paquete básico es buena y no hay retraso en la provisión de materiales para la aplicación correcta de CCC	
	2.1.2 % of persons that wash their hand oportune (before eating or prepare food, after use of bad room)	60% of persons of project that wash their hand before eat, after use of bad room and before preparing food			
	2.1.3 % of families clean the excretas around their houses and in bad rooms	60% of 1.445 families do not have in three years excretas around their homes			
	2.1.4 % of families that dispose the solid waste properly	60% of 1.445 families of project dispose the solid waste properly			
C 2.2 Mejores prácticas de uso de los fogones en las cocinas.	2.2 % de fogones bien utilizados	80% de las 1.445 familias manejan bien sus fogones en las cocinas mejoradas.	No existen conflictos socio-políticos que afecten los compromisos de coordinación de salud		
C 2.3 Vigilancia epidemiológica lograda en cada comunidad	2.3.2 % de ACS participan y apoyan el proyecto	70% de ACS capacita familias en prevención de EDA-IRA y reporta a establecimiento de salud			
C 3.1 Viviendas de familias mejoradas y entregadas según especificaciones técnicas del proyecto	3.1.1 % de viviendas concluidas y entregadas	100% de 1.445 viviendas del proyecto en 35 cmmts del municipio El Puente son mejoradas y entregadas en tres años.		Reporte del proyecto y de verificación por muestreo Actas comunales de entrega de viviendas. Informes de observación directa. Informes de evaluaciones anuales (internas) y de medio término y final (externas), ... Reporte PIEIP	El clima y la provisión de materiales de construcción no afecta la construcción de las viviendas familiares. ... Los desembolsos de financiamiento no se atrasan afectando la compra de materiales. La tecnología utilizada es apropiada por las familias. Cumplimiento de contrapartes impulsa la implementación de los proyectos.
	3.1.2.1 % de viviendas mejoradas en ejecución	indicador temporal de medición de avance/fase			
	3.1.2.2 % de avance de las viviendas en ejecución	indicador temporal de medición de avance/fase			
C 3.2 Cobertura de viviendas en cada comunidad lograda con el proyecto	3.2 % de cobertura comunitaria con viviendas mejoradas	90% de viviendas habitadas de cada comunidad han sido mejoradas con el proyecto.	Reporte del proyecto, mapeo e inspección		
C 4.1 Aportes de contraparte al día en el transcurso del proyecto	4.1.1 % de aportes familiares al día	90% de aportes en especie y 100% de aportes en efectivo de 1.445 familias al día en los 3 años.	Informe trimestral financiero	Las familias no se ven afectadas por falta de cumplimiento de los aportes de	

Table of Housing improvement program by phase

Implementor: **Esperanza Bolivia**Municipality: **El Puente**

Contract: 1445 houses

Factor de posible ejecución: 73%

1	2	3	4	5	6	7	8	9	10	11	12	13	14
N°	Name of District	Community Name	General information				Intervention phase						Total houses
			N° dist.	N° hab.	N° flías.	total h	2007-8		2008-9		2009-10		
							N° hou.	% cov.	N° hou.	% cov.	N° hou.	% cov.	
1	El Puente	Chinchilla	1			30					22	73%	22
2		Chaupiuno	1			6					4	73%	4
3		Ircalaya	1			22					16	73%	16
4		Monte chico	1			11					8	73%	8
5		El Puente	1			180					131	73%	131
6		Septapas	1			44					32	73%	32
7	San Juan	Carrizal	2			39					28	73%	28
8	del Oro	Pampa Grande	2			17					12	73%	12
9		Ovando	2			14					10	73%	10
10		Verdiguera	2			13					9	73%	9
11		Chayasa	2			42					31	73%	31
12		Cazón Pampa	2			16					12	73%	12
13		Animas	2			14					10	73%	10
14		Santa Ana de Belén	2			12					9	73%	9
15		Pirguapampa	2			30					22	73%	22
16		Pompeya	2			17					12	73%	12
17		S/N									78		78
18	Iscayachi	Carolina	6			38			28	73%			28
19		Campanario	6			86			63	73%			63
20		Papachacra	6			86			63	73%			63
21		Sta.Ana de agua rica	6			50			37	74%			37
22		Villa Nueva	6			42			31	73%			31
23		San Roque	6			36			26	73%			26
24		San Antonio	6			75			55	73%			55
25		San Lorencito	6			51			37	73%			37
26		Tres Cruces	6			20			15	73%			15
27		El Molino	6			96			70	73%			70
28		El Cruce Alta Gracia	6			151			110	73%			110
29		Corral Grande	6			24			18	73%			18
30		Chorcuya Méndez	6			87	87	100%					87
31		Pueblo Nuevo	6			100	100	100%					100
32		Quebrada Grande	6			54	54	100%					54
33		Sama	6			76	76	100%					76
34		El Puesto	6			63	63	100%					63
35		Chilcayo	6			65	65	100%					65
		Total communities:				34	6		12		17		35
		Total houses:		0	0	1707	445	100%	552	73%	448	73%	1445
													85%
													100%

Coverture of houses / community:

% of achievement with proposal:

**General Budget of the Municipality of El Puente  
in Bs.**

Code	Description	USAID	Department	Municipality	Community		NGO	Total El P.
		Bs.	Bs.	Bs.	Bs.	Bs.	Bs.	Bs.
<b>I.</b>	<b>Assets</b>	<b>442,600.00</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>520,545.75</b>	<b>963,146</b>
1.1	Equipment	160,302.70					114,147.39	274,450
1.2	Furniture	20,855.00					9,000.00	29,855
1.3	Vehicles, motos, bicislos	261,442.30					397,398.36	658,841
<b>II.</b>	<b>Personnel</b>	<b>1,494,111.00</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1,494,111</b>
2.1	Salaries	1,168,536.00						1,168,536
2.2	Social benefits	325,575.00						325,575
<b>III.</b>	<b>Operation costs</b>	<b>3,788,297.00</b>	<b>17,104,092.58</b>	<b>1,326,116.00</b>	<b>164,156.58</b>	<b>33,057,932</b>	<b>82,104.25</b>	<b>55,522,698.45</b>
3.1	Trips and per diems	281,855.25						281,855
3.2	Training and workshops	407,410.00						407,410
3.3	Printing forms	86,776.00						86,776
3.4	Desk materials	123,650.00						123,650
3.5	communications	84,290.00						84,290
3.6	Mails	20,509.00						20,509
3.7	Electricity and water	0.00					43,257.25	43,257
3.8	Vehicle maintenance	229,920.00						229,920
3.9	Fuel	170,960.00						170,960
3.10	Building maintaining	60,000.00						60,000
3.11	Equipment maintenance	24,000.00						24,000
3.12	Furniture maintenance	24,000.00						24,000
3.13	Photocopies	31,290.59						31,291
3.14	Cleaning costs	0.00					37,347.00	37,347
3.15	Legal costs	68,849.50						68,850
3.16	Insurance	32,400.00						32,400
3.17	Rent	121,077.00						121,077
3.18	Consultancies	1,198,720.00	2,149,412.98	1,095,494.00				4,443,627
3.19	Publications	86,160.00						86,160
3.20	Team equipment	206,523.00						206,523
3.21	Transport costos	0.00		230,622.00				230,622
3.22	Banking charges	7,800.00					1,500.00	9,300
3.23	Construction materials	522,106.66	14,954,679.60		164,156.58			15,640,943
3.24	Hand labor	0.00				22,684,658.22		22,684,658
3.25	Local materials	0				10,373,273.82		10,373,274
3.30	Overhead	0						0
	<b>Total</b>	<b>5,725,008.00</b>	<b>17,104,092.58</b>	<b>1,326,116.00</b>	<b>164,156.58</b>	<b>33,057,932</b>	<b>602,650.00</b>	<b>57,979,955.20</b>
	TC=	8	7.98					
	<b>Total \$US</b>	<b>715,626</b>	<b>2,143,370</b>	<b>166,180</b>	<b>20,571</b>	<b>4,142,598</b>	<b>75,520</b>	<b>7,263,865</b>

**Summary table for contract:**

Cod.	Description	USAID	Department	Municipality	Community		NGO	Total
		Bs.	Bs.	Bs.	Bs.	Bs.	Bs.	Bs.
I.	Assets	442,600	0	0	0	0	520,546	963,146
II.	Personnel	1,494,111	0	0	0	0	0	1,494,111
III.	Operation costs	3,788,297	17,104,093	1,326,116	164,157	33,057,932	82,104	55,522,698
	<b>Total Bs.</b>	<b>5,725,008</b>	<b>17,104,093</b>	<b>1,326,116</b>	<b>164,157</b>	<b>33,057,932</b>	<b>602,650</b>	<b>57,979,955</b>
	% in cash	23%	69%	5%	1%		2%	24,922,023
	Total percentages:	10%	30%	2%	0%	57%	1%	100%
	TC=	8	7.98					
	<b>Total USD</b>	<b>715,626</b>	<b>2,143,370</b>	<b>166,180</b>	<b>20,571</b>	<b>4,142,598</b>	<b>75,520</b>	<b>7,263,865</b>

## Project Implementation Plan of El Puente

## General information of the project

<b>Implementor:</b>	Esperanza B.	<b>Start date</b>	21/05/07	1	<b>Municipality:</b>	El Puente	<b>Total</b>
<b>Period:</b>	3.0 years	<b>end project:</b>	30/04/10		<b>N° communities:</b>	35	35
<b>No.phases</b>	3	<b>Length proj.:</b>	36 meses		<b>N° families:</b>	1445	1445
<b>Length phase:</b>	15 months				<b>N° houses:</b>	1445	1445

## Information of the Results Framework of the project

Goals:			Target indicators:		
			Project	Phase	by phase or 3 years project:
<b>Specific objectives:</b>					
SO1: in 3 years	50%	families of 35 cmdds/mun.El Puente.with practices on chagas	722	241	flies.improve chagas practices
SO2: in 3 years	50%	families 35 cmdds.mun.El Puente w/practices againstEDA-IRA	722	241	flies.improve EDA-IRA practices
SO3: in 3 years	100%	of 1.445 houses in 35 cmmties/.munp.El Puente improved	1445	482	Improved houses
SO4: in 3 years	50%	cmdds.achieve counterparts, organization and local coordination	18	6	Counterparts-organization-coord.
<b>Outcomes:</b>					
Oc 1.1 in 3 years	50%	flies.use sleeping rooms properly (use-clean-in order)	722	241	flies.use sleeping rooms prop.
	50%	flies.use bad rooms properly (use-clean-in order)	722	241	flies.use bad rooms properly
	50%	flies.use kitchen properly (use-clean-in order)	722	241	flies.use kitche properly
Oc 1.2.1 in 3 years	90%	Chagas promotor train families in prevention	32	11	chagas promotor train families
Oc 1.2.2 in 3 years	80%	Chagas promotor report to the health services	28	9	chagas promotor report service
Oc 2.1 in 3 years	60%	families aplyed practices of good protection of water	867	289	flies.protect well the water
	60%	of participants wash their hand oportune	867	289	oportune hand wash
	60%	families without excretas around their houses	867	289	no excretas around houses
	60%	families dispose properly the solid waste	867	289	properly disposed solid waste
Oc 2.2 in 3 years	80%	families use properly the stoves in the kitchen	1156	385	flies.use stoves properly
Oc 2.3.1 in 3 years	70%	Health promotor train families in IET to prevent EDA-IRA	25	8	health promotor train families
Oc 2.3.2 in 3 years	70%	Health promotor reports to health service	25	8	health promotor reports service
Oc 3.1.1 in 3 years	100%	improved houses delivered	1445	482	improved houses delivered:
		N° of improved houses in construction			N° of houses in construction
		% of advance in the houses in construction			% advance of houses in execution
Oc 3.2 in 3 years	90%	reached coverture in the communitiy with improved houses	1605	535	reached coverture
Oc 4.1.1.1 in 3 years	90%	of family counterpart in kind up to date	33,057,932	11,019,311	counterpart families in kind
Oc 4.1.1.2 in 3 years	100%	of family counterpart in cash up to date	164,157		counterpart families in cash
Oc 4.1.2 in 3 years	100%	disbursment of departmet of Tarija up to date	17,104,093		Department counterpart up to date
Oc 4.1.3 in 3 years	100%	counterpart of municipality El Puente up to date	1,326,116		Municipal counterpart up to date
Oc 4.1.4 in 3 years	100%	of counterpart of the NGO up to date	602,650		NGO counterpart up to date
Oc 4.2.1 in 3 years	90%	committe participate in project and support supervision	32	11	committees participate
Oc 4.2.2 in 3 years	75%	House promotors weekly support to families in charge	108	36	promotors support family work
Oc 4.2.3 in 3 years	85%	warehouse keepers maintain books and materials up date	119	40	Warehouses up date tasks
Oc 4.3.1 in 3 years	100%	Municipal committee achieve task of project support	3		Municipal committee w.tasks
Oc 4.3.2 in 3 years	100%	Municipal technitian achieve supervision tasks	1		Supervision of municipal technitian
Oc 4.3.3 in 3 years	100%	departmental authorities support the project	3		authorities support project

## Monitoring and Supervision of Products and Outcomes

## General information of the phase:

Phase:	First	Report date	Elapse	7.5 months	Municipality:	El Puente	Total
start date of the phase:	21/05/07	date	time	51% of phase	N° Cmnty:	6	6
end date of phase:	31/07/08	31/12/07	accumulated:	7.5 months	N° Families.:	445	445
Length:	15 months		% advance proj.	21% of project	N° houses.:	445	445

## Table to calculate the advance of the indicators of the project during the phase:

Cod.	List of indicators	planned for the phase	Accomplished		Difference (to be achieved)	% of advance in Phase	Q 1-5	Average by group of indicators
			Quarter	Accumulated				
<b>Advance of the objectives:</b>								
OE 1	flies.improve chagas practices	223	0	0		0%	1	
OE 2	flies.improve EDA-IRA practices	223	0	0		0%	1	
OE 3	Improved houses	445	38	38		8%	1	
OE 4	Counterparts-organization-coord.	3				61%	5	
							1.8	
<b>Advance of the outcomes:</b>								
C 1.1.1	flies.use sleeping rooms prop.	223		0	223	0%	1	
C 1.1.2	flies.use bad rooms properly	223		0	223	0%	1	0%
C 1.1.3	flies.use kitche properly	223		0	223	0%	1	
C 1.2.1	chagas promotor train families	5		0	5	0%	1	0%
C 1.2.2	chagas promotor report service	5		0	5	0%	1	
C 2.1.1	flies.protect well the water	267		0	267	0%	1	
C 2.1.2	opportune hand wash	267		0	267	0%	1	0%
C 2.1.3	no excretas around houses	267		0	267	0%	1	
C 2.1.5	properly disposed solid waste	267		0	267	0%	1	
C 2.2	flies.use stoves properly	356		0	356	0%	1	0%
C 2.3.1	health promotor train families	5		0	5	0%	1	0%
C 2.3.2	health promotor reports service	4		0	4	0%	1	
C 3.1.1	improved houses delivered:	445		0	445	0%	1	
C 3.1.2.1	N° of houses in construction	445	291	291	154			8.5%
C 3.1.2.2	% advance of houses in execution		12.96%	37.7		8.5%		
C 3.2	reached coverture	494	291	291	203	59%	5	59%
C 4.1.1.1	counterpart families in kind	10,182,161.58	0.00	0.00	10,182,161.58	0%	1	
C 4.1.1.2	counterpart families in cash	50,561.81	165,379.57	165,379.57	-114,817.76	327%	5	
C 4.1.2	Department counterpart up to date	5,268,225.31	2,172,640.22	4,335,280.44	932,944.87	82%	5	85%
C 4.1.3	Municipal counterpart up to date	408,456.50	100,000.00	100,000.00	308,456.50	24%	2	22%
C 4.1.4	NGO counterpart up to date	185,622.01	114,125.42	433,027.10	-247,405.09	233%	5	
C 4.2.1	committees participate	5		0	5	0%	1	
C 4.2.2	promotors support family work	33		0	33	0%	1	37%
C 4.2.3	Warehouses up date tasks	20	22	22	-2	108%	5	
C 4.3.1	Municipal committee w.tasks	3		0	3	0%	1	
C 4.3.2	Supervision of municipal technitian	1		0	1	0%	1	0%
C 4.3.3	authorities support project	3		0	3	0%	1	

## Financial Implementation Plan of the Municipality El Puente

No. of Project: M-3  
 Name of project: House improvement in El Puente  
 Period of the project: 21/05/07 30/04/10  
 Length: 36 months  
 Implementor: Esperanza Bolivia

Trimestre - año III-07  
 Report date 31/12/07  
 Report No. 7  
 Elapsed time: 7 months  
 % of elapsed time: 21%  
 Average Exchange type: 7.74 Bs/1 USD

I. Disbursements to implementor:							
N°	Source of financing	Month	Up to date	Amount Bs.	Exchange rate	Amount USD	%
1	USAID	1	6/30/2007	707,417.69	7.94	89095.43	12.4%
2	USAID	2	7/31/2007	0.00	7.82	0.00	0.0%
3	USAID	3	8/31/2007	89,632.73	7.82	11461.99	1.6%
4	USAID	4	9/30/2007	207,211.04	7.76	26702.45	3.6%
5	USAID	5	10/31/2007	75,453.85	7.70	9799.20	1.3%
6	USAID	6	11/30/2007	75,567.90	7.60	9943.14	1.3%
7	USAID	7	12/31/2007	60,026.50	7.53	7,971.65	1.0%
8	USAID	8					0.0%
9	USAID	9					
10	USAID	10					
11	USAID	11					
12	USAID	12					
<b>Total</b>				<b>1,215,309.71</b>	<b>7.74</b>	<b>154,973.86</b>	<b>21.2%</b>

II.- Financial activity - Only for the reported month:			
Cash flow		Amounts	% expended
		Bs.	in the period
Balance last month		13,093.50	
Disbursement in this month		60,026.50	
Available for this month		73,120.00	
Expenditures during this month		66,590.77	91%
<b>Balance at the end of the month:</b>		<b>6,529.23</b>	

Code	Budget control	Expended by	Expended by	Accumulated	Budget	Balance	%
	USAID	PROCOSI	Implementor	TOTAL	Bs.	Bs.	executed
<b>I.</b>	<b>Assets</b>	<b>0.00</b>	<b>585.00</b>	<b>417,344.22</b>	<b>442,600.00</b>	<b>25,255.78</b>	<b>94%</b>
1.1	Equipment		585.00	149,961.22	160,302.70	10,341.48	7%
1.2	Furniture			20,855.00	20,855.00	0.00	100%
1.3	Vehicles, motos, bicis			246,528.00	261,442.30	14,914.30	94%
<b>II.</b>	<b>Personnel</b>	<b>0.00</b>	<b>39,635.67</b>	<b>204,431.03</b>	<b>1,494,111.00</b>	<b>1,289,679.97</b>	<b>14%</b>
2.1	Salaries		22,538.00	167,464.00	1,168,536.00	1,001,072.00	14%
2.2	Social benefits		17,097.67	36,967.03	325,575.00	288,607.97	11%
<b>III.</b>	<b>Operation costs</b>	<b>0.00</b>	<b>26,370.10</b>	<b>587,005.23</b>	<b>3,788,297.00</b>	<b>3,201,291.77</b>	<b>15%</b>
3.1	Trips and per diems		2,438.00	18,452.65	281,855.25	263,402.60	7%
3.2	Training and workshops		233.00	29,942.10	407,410.00	377,467.90	7%
3.3	Printing forms			6,670.00	86,776.00	80,106.00	8%
3.4	Desk materials		703.50	18,358.11	123,650.00	105,291.89	15%
3.5	communications		1,915.86	7,828.65	84,290.00	76,461.35	9%
3.6	Mails		104.00	2,163.00	20,509.00	18,346.00	11%
3.7	Electricity and water			0.00	0.00	0.00	
3.8	Vehicle maintenance		5,678.00	16,687.00	229,920.00	213,233.00	7%
3.9	Fuel		1,835.60	12,289.50	170,960.00	158,670.50	7%
3.10	Building maintaining		903.50	3,296.50	60,000.00	56,703.50	5%
3.11	Equipment maintenance			3,644.50	24,000.00	20,355.50	15%
3.12	Furniture maintenance			0.00	24,000.00	24,000.00	0%
3.13	Photocopies		479.50	8,350.00	31,290.59	22,940.50	27%
3.14	Cleaning costs			0.00	0.00	0.00	
3.15	Legal costs		-5,770.00	13,202.50	68,849.50	55,647.00	19%
3.16	Insurance		-3,274.66	8,459.74	32,400.00	23,940.26	
3.17	Rent		891.00	4,845.00	121,077.00	116,232.00	4%
3.18	Consultancies		20,369.80	89,053.40	1,198,720.00	1,109,666.60	7%
3.19	Publications		2,050.00	6,827.73	86,160.00	79,332.27	8%
3.20	Team equipment		-2,187.00	38,573.80	206,523.00	167,949.20	19%
3.21	Transport costos			0.00	0.00	0.00	
3.22	Banking charges			1,470.50	7,800.00	6,329.50	19%
3.23	Construction materials			296,890.46	522,106.66	225,216.20	57%
3.24	Hand labor			0.00	0.00	0.00	
3.25	Local materials			0.00	0.00	0.00	
3.30	Overhead			0.00	0.00	0.00	
<b>Total USAID</b>		<b>0.00</b>	<b>66,590.77</b>	<b>1,208,780.48</b>	<b>5,725,008.00</b>	<b>4,516,227.52</b>	<b>21%</b>

Note: Expended by PROCOSI for the implementor, for example vehicle acquisition.

## Summary table of the financial implementation:

Source of financial support	Budget	Disbursements		Expenditures		% counterpart	
		Bs.	% advance	Bs.	% advance	total	cash
USAID	5,725,008.00	1,215,309.71	21.2%	1,208,780.48	21.1%	10%	23%
Department	17,104,092.58	4,335,280.44	25.3%	1,413,022.96	8.3%	30%	69%
Municipality El Puente	1,326,116.00	100,000.00	7.5%	94,912.60	7.2%	2%	5%
Esperanza Bolivia	602,650.00	433,027.10	71.7%	417,539.66	69.3%	1%	2%
Community in cash	164,156.58	165,379.57	100.5%	0.00	0.0%	0%	1%
Community in kind	33,057,932.04			0.00	0.0%	57%	
<b>Total in cash:</b>	<b>24,922,023.16</b>	<b>6,248,996.82</b>	<b>25.1%</b>	<b>3,134,255.70</b>	<b>12.6%</b>	<b>43%</b>	<b>100%</b>
<b>Total budget:</b>	<b>57,979,955.20</b>			<b>3,134,255.70</b>	<b>5.4%</b>	<b>100%</b>	

Capacity to expend: 48% 2,716,716.04 5,650,590.15 = expend/disburs.

Time advance: 21%

% of advance of family counterpart 100%

## Qualification table in relation to the financial implementation of the project:

Source of financial support	Disbursement	Expended in cash		Qualification	explanation of the qualification	
		in relation to time	in relation to budget			
USAID	5	5	1	Capacity to expend	good	5
Department	5	2	1		acceptable	4
Municipality El Puente	2	2	1	% of advance	regular	3
Esperanza Bolivia	5	5	3		insuficiente	2
Community in cash	5	1	1	family counterpart	deficient	1
<b>Total in cash:</b>	<b>5</b>	<b>3</b>	<b>1</b>		<b>5</b>	
<b>Total project:</b>	<b>1</b>	<b>2</b>	<b>1</b>	<b>1</b>		
<b>Community in kind:</b>		<b>1</b>	<b>1</b>			

Table PIEIP of the project in El Puente

<b>Implementor:</b> Esperanza Bolivia	<b>Start date:</b> 21/05/07	<b>Date Rpt.</b> 31/12/07	<b>1 Municipality: El Puente</b>		<b>Total</b>
<b>Length:</b> 3 years	<b>End date:</b> 30/04/10		<b>No. communities</b> 35		35
<b>No. phases:</b> 3 phases	<b>Length project:</b> 36 months		<b>No. houses</b> 1445		1445
<b>Report period:</b> IV 07	<b>Elapsed time:</b> 7 months	<b>21%</b>	<b>Date of report presentation:</b> 30/01/08		
<b>Counterparts</b>	<b>USD/house</b>	<b>Total budget</b>	<b>% fin.</b>	<b>TC</b>	<b>% fin.</b>
USAID	\$495	5,725,008	23%	8	57%
Department	\$1,480	17,104,093	69%	Bs/USD	0.3%
Municipality El Puente	\$115	1,326,116	5%	for quarter	39%
Esperanza Bolivia	\$52	602,650	2%	report	18%
Comty.in cash	\$14	164,157	1%	3°	up 31.12.07
Comty.in kind	\$2,860	33,057,932			
<b>Total in cash:</b>	<b>\$2,156</b>	<b>24,922,023</b>	<b>100%</b>		
<b>Total budget:</b>		<b>57,979,955</b>			
	USD/house	Bs.			

Financial implementation summary of the project

Phase	1a	N° cmdds	2a.	N° cmdds	3a.	N° cmdds		Tot.cmdds
Start	21/05/07	6						6
End	31/07/08	N° vivds.						N° vivds.
Months	15	445						445
Source	Desemb.	% desm/pres	cal.av.pres.	Gasto	% gasto/pres	cal.av.des.	a.g./trp	aapt.cnd.
USAID	1,215,309.71	21.2%	5	1,208,780.48	21.1%	5	13%	100%
Depart.	4,335,280.44	25.3%	5	1,413,022.96	8.3%	2	3	5
Munic.	100,000.00	7.5%	2	94,912.60	7.2%	2		
NGO	433,027.10	71.9%	5	417,539.66	69.3%	5		cap.gasto
In cash	165,379.57	100.7%	5	0.00	0.0%	1		48%
In kind				0.00	0.0%	1		2
Tot.in cas	6,248,996.82	25.1%	5	3,134,255.70	12.6%	3		
Total bud				3,134,255.70	5.4%	1		

Information of the Results framework of the project

Goals:	Target indicators		
Specific objectives:	Project	for three years	
SO1: in 3 years	50%	families of 35 cmdds/mun.El Puente.with practices on chag	722
SO2: in 3 years	50%	families 35 cmdds.mun.El Puente w/practices againstEDA	722
SO3: in 3 years	100%	of 1.445 houses in 35 cmmties/munp.El Puente improved	1445
SO4: in 3 years	50%	cmdds.achieve counterparts, organization and local coordi	18
<b>Outcomes:</b>			
Oc 1.1 in 3 years	50%	flies.use sleeping rooms properly (use-clean-in order)	722
	50%	flies.use bad rooms properly (use-clean-in order)	722
	50%	flies.use kitchen properly (use-clean-in order)	722
Oc 1.2.1 in 3 years	90%	Chagas promotor train families in prevention	32
Oc 1.2.2 in 3 years	80%	Chagas promotor report to the health services	28
Oc 2.1 in 3 years	60%	families applied practices of good protection of water	867
	60%	of participants wash their hand oportune	867
	60%	families without excretas around their houses	867
	60%	families dispose properly the solid waste	867
Oc 2.2 in 3 years	80%	families use properly the stoves in the kitchen	1156
Oc 2.3.1 in 3 years	70%	Health promotor train families in IET to prevent EDA-IRA	25
Oc 2.3.2 in 3 years	70%	Health promotor reports to health service	25
Oc 3.1.1 in 3 years	100%	improved houses delivered	1445
		N° of improved houses in construction	1445
		% of advance in the houses in construction	
Oc 3.2 in 3 years	90%	reached coverture in the community with improved houses	1605
Oc 4.1.1.1 in 3 year	90%	of family counterpart in kind up to date	29752139
Oc 4.1.1.2 in 3 year	100%	of family counterpart in cash up to date	164157
Oc 4.1.2 in 3 years	100%	disbursement of departmet of Tarija up to date	17104093
Oc 4.1.3 in 3 years	100%	counterpart of municipality El Puente up to date	1326116
Oc 4.1.4 in 3 years	100%	of counterpart of the NGO up to date	602650
Oc 4.2.1 in 3 years	90%	committe participate in project and support supervision	32
Oc 4.2.2 in 3 years	75%	House promoters weekly support to families in charge	108
Oc 4.2.3 in 3 years	85%	Warehouses keepers maintain books and materials up date	119
Oc 4.3.1 in 3 years	100%	Municipal committee achieve task of project support	3
Oc 4.3.2 in 3 years	100%	Municipal technitian achieve supervision tasks	1
Oc 4.3.3 in 3 year	100%	departmental authorities support the project	3

Summary of the social - technical advance of the project

Code	Implemented			Accumulated execution	% advance	Q 1-5	Group average
	1st.phase	2nd.pha.	3rs.phase				
OE 1 (%)	0%	0%	0%		0%	1	
OE 2 (%)	0%	0%	0%		0%	1	
OE 3 (%)	0%	0%	0%		8.5%	2	
OE 4 (%)	0%	0%	0%		6%	2	
<b>Outcomes:</b>							
C 1.1.1	0			0	0%	1	
C 1.1.2	0			0	0%	1	0%
C 1.1.3	0			0	0%	1	
C 1.2.1	0			0	0%	1	0%
C 1.2.3	0			0	0%	1	
C 2.1.1	0			0	0%	1	
C 2.1.2	0			0	0%	1	0%
C 2.1.3	0			0	0%	1	
C 2.1.4	0			0	0%	1	
C 2.2	0			0	0%	1	0%
C 2.3.1	0			0	0%	1	0%
C 2.3.2	0			0	0%	1	
C 3.1.1	0			0	0%	1	
C 3.1.2.1	291			291		1	8.47%
C 3.1.2.2	8.5%			8.5%	8.5%	2	
C 3.2	291			291	18%	4	18%
C 4.1.1.1	0			0.00	0.0%	1	
C 4.1.1.2	165380			165,379.57	100.7%	5	
C 4.1.2	4335280			4,335,280.44	25.3%	5	10%
C 4.1.3	100000			100,000.00	7.5%	2	
C 4.1.4	433027			433,027.10	71.9%	5	
C 4.2.1	0			0	0%	1	
C 4.2.2	0			0	0%	1	8%
C 4.2.3	22			22	20%	5	
C 4.3.1	0			0	0%	1	
C 4.3.2	0			0	0%	1	0%
C 4.3.3	0			0	0%	1	



## PIEIP report of El Puente

Information:

Time elapsed:	/ mes	21% proy.
Total expenses:	6,248,996.82 Bs.	
% of expen/budget	25.1% pres.	

in execution	actual	%	Total	delivered
No.houses	291	20%	1445	0
No.cmmtty:	6	17%	35	0
No.municip.	1	100%	1	0

Quarter:	IV 07
Report date:	31/12/07
No.month rep.	7
No.quarter rep.	3°

## % advance of the specific objectives:

	Target	Advance	
SO 1	<1% y 3%	0%	1
SO 2	50%	0%	1
SO 3	100%	8.5%	2
SO 4	50%	6%	2

	comments summary	economic index	value group OVI
infestation intra-& around house:			
increase of healthy practices EDA-IRA			
1.445 houses improved:			
level of counterparts-organiz-cood.:			x

## % advance of the outcomes:

Oc 1. Individuals, families and communities improve practices to decrease the chagas disease:

Oc 1.1 Better practices in house sanitation (use-cleaness-in order):

Oc 1.1.1	50%	0%	1	sleeping rooms (in use-clean-in order):			0%	
Oc 1.1.2	50%	0%	1	bad room (in use-clean-in order):				R 1
Oc 1.1.3	50%	0%	1	kitchen (in use-clean-in order):				

Oc 1.2 Epidemiologic vigilance achieved in communities:

Oc 1.2.1	90%	0%	1	Chagas promotor train families			0%	R 2
Oc 1.2.2	80%	0%	1	Chagas promotor report services:				R 3

Oc 2. Individuals and families improve practices of hygiene and basic sanitation to decrease EDA-IRAdiseases:

Oc 2.1 Improve hygiene and basic sanitation in their homes:

Oc 2.1.1	60%	0%	1	water protected:			0%	R 1
Oc 2.1.2	60%	0%	1	opportune hand washing				x
Oc 2.1.3	60%	0%	1	no excretas around the houses				R 1
Oc 2.1.4	60%	0%	1	well dispose solid waste:				R 1

Oc 2.2 Improve practices to use the stoves in the kitchen:

Oc 2.2	80%	0%	1	stoves well used:			0%	R 1
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Oc 2.3 Health promotors participate and support the project:

Oc 2.3.1	70%	0%	1	Health promotor train families:			0%	?
Oc 2.3.2	70%	0%	1	Health promotor report to service:				?

Oc 3. Improved houses according to technical especifications:

Oc 3.1 improved houses delivered according technical especifications:

Oc 3.1.1	100%	0.0%	1	finished houses delivered:	0 vvds.		8.47%	x
Oc 3.1.2.1	100%		1	houses in construction:	291 vvds.			x
Oc 3.1.2.2	100%	8.5%	2	% advance of houses in execution:				x

Oc 3.2 achieved coverture of improved houses in community:

Oc 3.2	90%	18.1%	4	reached coverture:			18%	R 4
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Oc 4. High level of counterparts, organization and coordination achieve by the actors of the project:

Oc 4.1 counterparts up to date:

Oc 4.1.1.1	90%	0.0%	1	family counterpart in kind up to date				x
Oc 4.1.1.2	100%	100.7%	5	family counterpart in cash up to date				x
Oc 4.1.2	100%	25.3%	5	departmental counterpart up to date			10%	R 5
Oc 4.1.3	100%	7.5%	2	municipal counterpart up to date				R 5
Oc 4.1.4	100%	71.9%	5	NGO counterpart up to date				x

Oc 4.2 Community organization of the project achieving tasks:

Oc 4.2.1	90%	0%	1	committee achieve tasks:			8%	R 2
Oc 4.2.2	75%	0%	1	housing promotors support families				x
Oc 4.2.3	85%	20%	5	warehouses up to date				x

Oc 4.3 Internstitutional coordination achieved at municipal and departmental level:

Oc 4.3.1	100%	0%	1	municipal committee achieve tasks:			0%	x
Oc 4.3.2	100%	0%	1	municipal technician supervise proj.:				R 5
Oc 4.3.3	100%	0%	1	authorities are informed:				x

Comments to the advance of the impact indicators in relation to the indicators of change, time and expenditures:

OE 1		It was not possible to account the two first objectives because the teams are starting working the first semester in the communities.
OE 2		
OE 3		The information of the houses should be complemented
OE 4		The counterparts of the municipality and families should be motivated.

## Summary table of the financial advances of the project in El Puente:

Financial source	Budget	Disbursements		Expenditures		% of counterpart	
	Bs.	Bs.	% advance	Bs.	% advance	total	in cash
USAID	5,725,008.00	1,215,309.71	21.2%	1,208,780.48	21.1%	10%	23%
Department	17,104,092.58	4,335,280.44	25.3%	1,413,022.96	8.3%	30%	69%
Municipality El Puente	1,326,116.00	100,000.00	7.5%	94,912.60	7.2%	2%	5%
Esperanza Bolivia	602,650.00	433,027.10	71.9%	417,539.66	69.3%	1%	2%
Community in cash	164,156.58	165,379.57	100.7%	0.00	0.0%	0%	1%
Community in kind	33,057,932.04			0.00	0.0%	57%	
<b>Total in cash:</b>	<b>24,922,023.16</b>	<b>5,033,687.11</b>	<b>25.1%</b>	<b>3,134,255.70</b>	<b>12.6%</b>	43%	100%
<b>Total budget:</b>	<b>57,979,955.20</b>			<b>3,134,255.70</b>	<b>5.4%</b>	100%	

Control in USD: 391,781.96

<b>Capacity to expend in a month:</b>	<b>48%</b>	2,716,716.04	5,650,590.15	= expend/disbur.
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<b>Advance of time:</b>	<b>21%</b>
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<b>% advance family counterparts</b>	<b>100%</b>
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## Qualification of the financial advances of the project:

Financial source	Disbursed	Expenditure		Qualification	Qualification explanation	
		in relation to time	in relation to budget			
USAID	5	5	1	Capacity of expenditure 2.0	good	5
Department	5	2	1		acceptable	4
Municipality El Puente	2	2	1		regular	3
Esperanza Bolivia	5	5	3	% of advance family counter. 5.0	insufficient	2
Community in cash	5	1	1		faulty	1
<b>Total in cash:</b>	<b>5</b>	<b>3</b>	<b>1</b>			

Community in kind:	In kind expended	<b>1</b>	<b>1</b>
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Summary T.C.= 8 Bs/\$us

Financial source	Expend/unit	Assets	Personnel	Operation	Total	% counterpart	House cost
	USD/house	\$US	\$US	\$US	\$US	%	USD/house
USAID	1234.02	52,168.03	25,553.88	73,375.65	151,097.56	39%	1,234.02
Department Tarija	1442.53			176,627.87	176,627.87	45%	1,442.53
Municipality El Puente	96.89			11,864.08	11,864.08	3%	96.89
Esperanza Bolivia	426.26	51,384.17	0.00	808.29	52,192.46	13%	426.26
Community in cash	0.00			0.00	0.00	0%	0.00
<b>Total:</b>	<b>3,199.71</b>	<b>103,552.20</b>	<b>25,553.88</b>	<b>262,675.89</b>	<b>391,781.96</b>	<b>100%</b>	<b>3,199.71</b>
%	(temporal)	26%	7%	67%	100%		

% advan. expen /time	% advan. famly. count.	% disbur./time	% advan. house/real	cap. expend. donat.
13%	100%	25.1%	8.5%	48%
3.0	5	5		2

## Advance of expenditure in relation to budget:

Expense donation	The expenditures of the USAID disbursements are good, while the other donors is still insufficient or faulty	
counterpart advan.	municipality and communities still lack	
House unit cost	it is high because the little advance of the housing	
Disbursements:	the disbursements are in good order, but not the municipal disbursement.	

## Comments to the summary of advances of the project:

	What difficulties and solutions were given:	What tasks are for the next quarter?
Advance of indicators towards the goals in relation to the expenditures	El comité técnico municipal ya se ha reunido una vez.	Report about the No. of family contracts signed, N° of houses starting, training achieved, and the first practices of the new knowledge, at least in the improvement of houses.
Advance of indicators towards the goals in relation to time, expenditures and financial support	Only the indicator of the counterparts is in 13%, what correlates well with the elapsed time of 12%, but not the expenditures that still is low with 2%. Also the capacity of expenditure is low.	

## 5. Case Study – Housing Projects

In the next pages I'd like to present the results I accomplished as the Manager of the Housing Improvement Programme (HIP) in PROCOSI working with the field teams and executives of the two NGO using PIEIP.

We came out first with the Table of FoMSEL PLAN using the Logical Framework of the project and following the process explained before. The table facilitated us and the field teams to see the importance of their work, the products to show and the reports to present according to a timetable. This helps us to organize the work to present the quarterly reports to the main financial cooperation agency, which was USAID. This report was presented first to the Executive Direction of PROCOSI so that they also knew about the advances of the project and a Recommendation letter was written to each NGO, so that improvements could be taken in place.

**Table 10 The FoMSEL Plan for the HIProgram**

**Follow up, Monitoring, Supervision, Evaluation and Learning (FoMSEL) Plan**

Stages	organization	training	practice	replication	strengthening	Frequency report - verification	Responsible		Tool of FoMSEL	
	Period (months):	1-3	4-6	7-9	10-12		13-15	Implementor		HIP-PROCOSI
Tasks										
External evaluation of impact						Targets of SOs reached. Nº families improve their OVI of ES and BS, Nº improved houses	mid term and final	Director de ONG	Executive Director	External evaluation according ToR
Internal evaluation of advance toward impact						Counterparts up to date, continued support of MT and MC. Nº families improve their OVI of ES and BS, Nº houses improved.	annual	Gerente Proyecto	Program Manager	Analysis of advance towards SO, with Oc, Op and Activities
Supervision of changes						Nº committees, promoters, warehouses, PIV/ACS that train families, have the books up dated, collect counterparts and report..	quarterly to semesterly	Coordinador	HIP Manager	Sheet of FoMSEL and Form V-3
Monitoring of Outputs	Nº participant fmlies., signed contracts by fmlies., municipal and counterparts, Nº Comittees, Promotors, Warehouses, PIVs y ACS named, municipal Technician and Committee formed	Nº fmlies.Comittees, Promotors, Warehouse keepers, PIV/ ACSs, who knows his tasks. Demonstration House for training built. Report of Campaign I. Municipal Committee informed.	Nº of families visited by Committee, Promotors, PIV/ACS. Report of campaign II. Warehouses installed. Municipal committee informed and counterparts up to date	Nº of visited families by committees, promoters, PIV/ACSs. Report on campaign III. warehouses in function. MT informed and counterparts up to date.	Nº of families visited by committees, promoters, PIV/ACSs. Report on campaign III. Warehouses open. MT informed and with counterpart up to date.	monthly to quarterly	Responsables de IED y MV,	Specialist on HI	Forms V-2 and V-1	
Follow up of activities	Explanation meetings with communities, authorities, Base line, Community assessment.	Training of families, Comittees, Promotors, Warehouse keepers, PIV / ACS in roles and funtions. training about campaign I. Follow up of MT	Internal training for campaign III. Family visits by PIVs/ACSs. begin of house improvement. Conforming the Providers Bank, adquisition and delivery of materials. MT follow up.	Internal training for campaign III. Visits to families to control the replication of trainings. Adquisition and delivery of materials. MT follows the project.	Activities according to change indicators to be improved to reach the target of the specific objective.	weekly to monthly	equipo y jefe de equipo	Regional Coordinator	Formatos V-1 y V-2	
	Socialization workshop of information with project team	Workshop for PIVs/ACSs for campaign I	Workshop for PIVs/ACSs for campaign II	Workshop for PIVs/ACSs for campaign III	Start ToR for external evaluation.					

## Final Words – Conclusions and Recommendations

There was the need of putting together a system to joint social – economic – technical indicators within SMART integral goals for monitoring and evaluating the development projects in general and the housing, risk management and water & sanitation projects in particular for the important reason to learn by the practice in order to improve planning and design of future projects.

For achieving this, I have developed with field teams, the PIEIP, which joints the different ordered information of a project subdivided in static lists, together:

- List of OVI and SMART integral goals, taken from the Logical framework
- List of families and communities / municipality from the geo-population map
- List of the periods and phases of the project, taken from the Time schedule
- List of the field team members organized in a Personnel Chart (organigram)
- List and amount of items taken from the detailed budget by source and period

Which once jointed provided the information of the dynamic tables of:

- Project Implementation Plan (PIP)
- Financial Implementation Plan (PIF)

And these together generate PIEIP and the report to the financial donors and the corresponding ministry.

With the use of this system, we are able to monitor and supervise these large projects in an objective form and provide the NGO with advisable comments to improve the project every quarter and to discuss with the different actors of the project its situation to make opportune adjusts to be reported to the financial donors.

As it was shown some improvements still need to be done in PIEIP, which are related with developing a more efficient computer program, which could managed the quantity and quality of information in a more friendly form, which the explained Excel tables developed so far. A second task is the use of PIEIP in three different development projects, probably in Asia, Africa and Central America, one in each continent, using the chances that HDM of the University of Lund has among the many students that passed through Lund. And finally a Ph.D. dissertation can be finished based on the results of the three projects in order to generalize PIEIP for different development projects to be used by NGO (national and international), public bureaus and cooperation agencies like SIDA, USAID, JICA, etc.

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## Annexes

Summary of the OVI and smart goals of the HIP				
Cod.	Sigla	Description	Goal	Criteria for measuring the advance of VIO
<b>1 SO Prevention of chagas</b>				
1 1	RI 1	Appropriated use of sleep rooms	50%	Appropriated use, cleanness and order in the sleep rooms
1 2	RI 1	Appropriated use of bathroom	50%	Appropriated use, cleanness and order in the bad room
1 3	RI 1	Appropriated use of kitchen	50%	Appropriated use, cleanness(food, tools) and order in the kitchen
<b>2 SO Prevention of Diarrhea and Respiratory infections</b>				
2 1	RI 1	Appropriated use of water	60%	Drinking water protected and disinfected (boiled or other)
2 2	RI x	Opportune wash of hands	60%	Before eating and preparing food, alter use of bathroom and clean the children
2 3	RI 1	No eases in around the house	60%	No sees in backyard
2 4	RI 1	No garbage in house	60%	Garbage dumping
2 5	RI 1	Good use of stoves	80%	Neither smoke nor ashes
<b>3 SP Family houses improved</b>				
3 1	ISP x	Finished houses	100%	Nº of finished houses and delivered to the familias
	IT x	Houses in implementation		Nº of houses being implemented
	IT x	% advance of houses in construction		% of advance of these houses
3 2	RI	Reached coverage in town	90%	Nº houses. improved/Nº inhabited houses
<b>4 GO Reached village organization</b>				
4 1	RI s	Housing committee accomplish tasks	90%	Collect family contributions, present reports and talk to late familias
4 2	RI x	Promoters accomplish tasks	75%	Weekly visit and support to familias in charge, report advance of house
4 3	RI x	Warehouse up to date	85%	Data base and family books up dated, materials counted and in order
<b>5 GO Support of health service</b>				
5 1	RI 2	PIV visit to familias in the village	90%	Nº of visited familias
5 2	RI 3	PIV report to health service	80%	Latest report date
5 3	RI i?	ACS visit to familias in village	70%	Nº of visited familias
<b>6 GO Contributions in cash up date</b>				
6 1	RI	Contributions of USAID up dated	100%	Amount contributed / amount budgeted
6 2	RI 5	Contributions of Dept. gov. up dated	100%	Amount contributed / amount budgeted
6 3	RI 5	Contributions of Municipality up dated	100%	Amount contributed / amount budgeted
6 4	RI x	Contributions of NGO up dated	100%	Amount contributed / amount budgeted
6 5	RI x	Contributions of familias in cash up dated	100%	Amount contributed / amount budgeted
6 6	RI x	Contributions of familias in species up dated	100%	Amount contributed / amount budgeted
<b>7 GO Regional Coordination accomplished</b>				
7 1	RI	Municipal Technician accomplishes his/her tasks	100%	MT meets with team each month or week, makes supervision visits and reports to the Major
7 2	RI	Technical committee meets	100%	TCM meetings, reports and authorize disbursements
7 3	RI	Departmental authority informed	100%	Informed depart. Authority authorize disbursements

In the next pages I present a summary of the interpretation we made at the program to present the first quarterly reports, using the information of the field teams.

Explaining The Data Obtained Using information provided by the NGO for the PIEIP

In the table at the end of this part, I organized the information, which we received from the two NGO in PROCOSI according to the main list of indicators of the Annex. The team of HIP had the task to organize with the NGO team the monitoring of outputs and mainly the supervision of the advance of the change indicators of outcomes expected to be achieved during the project. For doing so, we use a set of tables, which are:

- For systematizing the reported information of the NGO: Summary of advancement of the Housing Improvement Project (quarterly)

These tables plus the Summary of the financial control report will be used to put together the next table:

- Summary of advances up to date

The field supervisions was done by myself using forms which are useful to keep the information of the families, community leaders or responsible for the activities in the project and the municipal technician. The data collected during the supervision was introduced into a summary Table (see more details in the Summary Tables at March.31.08).

Let's take the data of the Municipalities M-5 and M-8, which are El Puente and Villamontes, two of the municipal sections in Tarija, to show how we interpreted the data. According of the table Summary of advances up dated by 3.31.08. We can say that during the Phase I:

- 445 families of 6 communities from El Puente and 370 families in 4 neighborhoods from Villamontes was participating

According to the data reported by the NGO the reported results are as follows:

***Process:***

- 439 families in El Puente what makes 99% and 370 (100%) in Villamontes are participating
- 439 families have signed the contract with the NGO in El Puente and 370 in Villamontes
- 34 (39%) community responsible have been elected in El Puente and 9 (14%) in Villamontes
- 5 financial counterparts are contributing in El Puente while 4 in Villamontes
- The Municipal Technical Committee and the Municipal Technician have been elected in both municipalities.
- In neither municipal section have been elected the health promoters.

***Output:***

- 439 families are working in the improvement of their houses in El Puente and 370 in Villamontes, however the advancement in El Puente is 18.3% of the total Phase I project, and only 4.5% in Villamontes.
- 6 COVILO (Community Housing Committee) have been trained in El Puente and 3 out 4 in Villamontes, while the promoters in other 6 villages have been trained in El Puente and 2 in

Villamontes. Here is clear that the information sent by the NGO is N° of villages instead of N° of promoters, which makes the huge difference. 22 (92%) Warehouse keepers have been trained in El Puente while only 4 (25%) Villamontes.

- The Technical Committee has met 2 times in El Puente.
- According to the data 6+6 health promoters in El Puente have been trained, and none in Villamontes. Here, we see an inconsistency in the NGO data, because they don't report about the nomination of these persons, but yes about their training.

### ***Outcomes:***

- According to the table, we can see that the NGO has been working mainly in the start of the housing improvement, however the main work of NGO, and that distinguish them; the Education part has been in some way neglected, in particular if we see that the running time of Phase I is already 56% and neither of the NGO have presented information about the development of the IEC (Information, Education, Communication) tasks, which worries much because NGO should be aware about the importance of this kind of work.
- The housing improvement as we mentioned above has advanced in El Puente 18.3% and in Villamontes only 4.5%, which comparing with the 56% of advances of the time of the Phase is still too low.
- The NGO has sent some information about the community responsible, who would be already accomplishing some of their duties, and however this needs some revision in order to transfer their information correctly. In order to do so, we will meet with the planning responsible of both NGO and revise the main indicators of the PROCOSI list, and see what corresponds to which indicator at what level.

The financial information is introduced at regional level of the municipalities, which as explained above is part of the PIEIP. For example; if I get the information up dated in December 31, 2007 of the two municipalities, we would see that the financial advance in the two municipalities was about 21% and 32%, however the advance of the Phase in Tarija was only 21% and the whole program had advanced 29%.



Fase: I

## CUADRO RESUMEN DEL AVANCE DEL PMV A MARZO 2008

Duración: 18 meses		inicio: Jun-07		fecha medición: Mar-08															
NIVEL META	Grupo	META	Indicador	M-1			M-2			M-3			M-4			Santa Cruz			Observación
				meta	avance	%	meta	avance	%	meta	avance	%	meta	avance	%	meta	avance	%	
				Nº Flia. y Cmdds.	482	7 cmd		0	0 cmd		179	4 cmd		70	2 cmd		744	13 cmd	
Resultado Intermedio (cambios)	Flia. S.A	50%	Nº vds us-lr-Or. Dom-bañ-cocin.	241						90			35			366	0		
	Flia. S.B	60%	Nº flia. agus-lav. mano-excrt-bas.	289.2						107			42			439	0		
	Viviendas	100%	Nº viviendas concluidas	482	0.0%					179	0.1%		70	0.1%		731	0		
	Organización	80%	Nº covilo, prom. almac.cumple tar	385.6						143			56			585	0		
	Aportes	100%	Pref. HAM, ONG y familias al día	482						179			70			731	0		
	Coordinación	100%	TM y CMT cumple tareas	1	1					1	1		1	1		3	3		
	Apoyo salud	80%	Nº PIV y ACS visitan flia.	385.6						143			56			585	0		
Productos (resultado directo)	Flia. S.A	100%	Nº flia. capacit. campaña chagas	482						179			70			731	0		
	Flia. S.B	100%	Nº flia. capacit. campñ.E DA-IRA	482						179			70			731	0		
	Viviendas	100%	Nº convenios y vnds. ejecución	482	9	2%				179	4	2%	70	2	3%	731	15	2%	
	Organización	100%	Nº covilo capacit.	7						4			2			13	0		
		100%	Nº promot.capct.	48						18			7			73	0		
		100%	Nº almacn.capct.	28						16			8			52	0		
	Aportes en efectivo	100%	US AID/PROCOS I Prefectura al día			23%						36%		26%		0	0	28%	
		100%	Prefectura al día													0	0		
		100%	HAM al día													0	0		
		100%	ONG al día													0	0		
	100%	familias al día													0	0			
Coordinación	100%	Convenios HAM y P ref.firmados	1	1		1	1		1	1		1	1		4	4			
			1												1	0			
Apoyo salud	100%	Nº PIV capacitd.	7						4			70			81	0			
	100%	Nº ACS capacitd.	7						4						11	0			
Actividades (proceso)	Flia. S.A	100%	Nº familias que participarán	482	486	101%	0			179	74	41%	70	39	56%	731	599	82%	
	Flia. S.B	100%	Convenios firmados	482	486	101%	0			179	74	41%	70	39	56%	731	599	82%	
	Viviendas	100%		482	486	101%	0			179	74	41%	70	39	56%	731	599	82%	
	Organización	100%	Repsbils.cmdds. nombrados	97	50	51%	0			46	14	31%	21	11	52%	164	75	46%	
	Aportes	100%	contrapartes conocidas	5	2	40%	5			5	2	40%	5	2	40%	5	2	40%	
	Coordinación	100%	CTM conformado y TM nombrado	1	1	100%	1			1	1	100%	1	1	100%	4	3	75%	
			P IV y ACS nombrados	14	14	100%	0			4	4	100%	2	2	100%	20	20	100%	

NOTA: M-1 Charagua M-2 Cuevo M-3 Cabezas M-4 Gutiérrez

## CUADRO RESUMEN DEL PRESUPUESTO GENERAL

Cod.	DESCRIPCIÓN	USAID	Prefectura		Alcalda		Comunidad		Esperanza		PCI	Total	Total Proy.
			Efectivo	Especie	Efectivo	Especie	Efectivo	Especie	Efectivo	Especie			
I.	ACTIVOS	2.786.200	13.200	0	76.400	0	0	0	972.511	432.000	351.000	1.845.111	4.631.311
II.	PERSONAL	6.715.859	3.166.987	0	506.676	0	0	0	1.546.644	0	0	5.220.307	11.936.166
III.	COSTOS OPERACIÓN	23.962.001	81.958.740	2.205.155	11.989.894	20.000	4.843.101	201.371.596	1.139.795	0	0	303.538.281	327.490.282
	Total Bs.	33.464.060	85.138.927	2.205.155	12.572.969	20.000	4.843.101	201.371.596	3.658.950	432.000	351.000	310.593.699	344.057.759
	Porcentajes	10%	25%	1%	4%	0%	1%	59%	1%	0%	0%	90%	100%
	TC=		8										
	Total \$US	4.183.008	10.642.366	275.644	1.571.621	2.500	605.388	25.171.450	457.369	54.000	43.875	38.824.212	43.007.220
	Porcentajes:	10%	25%	1%	4%	0%	1%	59%	1%	0%	0%	90%	100%

## Tabla de control \$US:

DESCRIPCIÓN	USAID	Prefectura		Alcalda		Comunidad		Esperanza		PCI	Total	Total Progs. y PMV	Costo viviend=	
		Efectivo	Especie	Efectivo	Especie	Efectivo	Especie	Efectivo	Especie					
Grupo 1 Ch.-Cu.	639.315.98	1.140.243.11	275.644.36	274.612.91	2.500.00	178.986.20	2.479.570.47				4.349.057.05	4.988.373.03	3825	
Grupo 2 Ca.-Gu.	385.356.74	979.532.09		163.502.02	2.500.00	82.370.84	1.931.429.51			43.875.00	3.203.209.46	3.588.566.20	464	
Grupo 3 I. EP	715.626.00	2.143.370.00		166.180.00		20.571.00	4.142.598.00		75.520.00		6.548.239.00	7.263.865.00	5027	
Grupo 3.2 Yu.	156.000.00	1.840.726.65		21.546.00		57.777.70	2.873.995.07		120.975.84		4.914.821.25	5.070.821.25	5174	
Grupo 4.1 ER	1.273.892.91	1.705.437.00		249.600.00		97.470.00	7.437.735.00		103.013.98	18.000.00	9.611.255.98	10.885.148.89	7257	
Grupo 4.2 Vi.	189.607.13	2.833.057.00		667.449.00		142.700.00	5.955.841.00		113.178.99	18.000.00	9.730.225.99	9.919.833.12	6952	
Icla II	823.208.75	0.00		28.731.25		25.711.88	350.280.50		44.680.00	18.000.00	467.403.63	1.290.612.38	2894	
Total Aportes \$US	4.183.007.51	10.642.366.85	275.644.36	1.571.621.18	2.500.00	605.387.61	25.171.449.55		457.368.81	54.000.00	43.875.00	38.824.212.35	43.007.219.86	5112
Porcentajes:	10%	25%	1%	4%	0%	1%	59%		1%	0%	0%	90%	100%	
Aporte por vivd.:	531	1352	35	200	0	77	3197		58	7	6	4931	5463	
Total Aportes \$US	4.183.007.51	10.642.366.85		1.571.621.18		605.387.61			457.368.81			13.276.743.44	17.459.750.96	2218
Porcentajes:	24%	61%		9%		3.5%			2.6%			76%	100%	
Aporte por vivd.:	531	1352		200		77			58			1686	2218	
7873 vinds.														
354 Icla I														
8227 Total PMV														



## Shelter and Water & Sanitation Related Fact and Figures

Housing stock: 1.210.962 houses in the urban areas and 766.703 houses in the rural

Occupancy: 70.8% of the houses have not enough space, in the urban area 68.9% and in rural 76.3%

Housing standard: Houses 75.04%, departments 3.38%, rooms 21.55%

Tenure of households: own houses 64.63% 15.27% rented, 10.74% of houses given to relatives

Rental (formal and informal); 15.27%, with a 21.13% in the urban area and 4.59% in the rural

Ownership (formal and informal): 64.63% in Bolivia, 54.46% in urban areas and 83.15% in rural

Building materials: 39.1% inadequate housing materials, 15.6% in urban area and 75.7% in rural

Main building material for walls is brick and cement blocks in the urban area with 64.29% and adobe

in the rural area with 76.11%, while for roofs are sink sheets 48.55% and Spanish stile with 30.24%

the floor is mainly earth in the rural area with 65.23% and cement in the urban with 46.70%

2 persons per sleeping room 42.92%, more than 3 persons 39.41%. The percentage of houses with

kitchen is 77.32%. Water and sanitation: 18.81% has no water with pipes and 45% accesses to

sanitary sewage water, in rural area 41.57% have no water with close conduits and 57.68% no sewage system or latrine

44.79% uses public service for disposing the garbage, in rural area near 81% throw the garbage on the land, to the river or burn it. In urban area 67.97% uses public collection services (INE, 2001).

The Ministry of Public Works through its Vice ministry of Housing and Urban work is in charge to

define the Norms and Bylaws in relation to the sector; lately, the VMVU has launched a programme

to build social houses mainly in the peri-urban areas, where individuals or firms could get the work for building house projects. According to Arq. Sara Rivas, who wrote about the Program of

Improvement of Neighbourhoods the new policies in the housing sector are related with the Provision

of Land, Provision of social infrastructure, legal regularization, land tenure, Community participation

and Community Development. While in the sector of W&S the Ministry of Water through it's Vice

ministry of Basic Services is in charge of Norms and Bylaws.

The Vice ministries are head of sectors. After the Popular Participation Law (PPL) the Vice ministry of Housing has promoted with help of HDM and support of SIDA a program of nine housing

workshops in all departments of the country. After that in 1998 a five years Program of

Neighbourhood Improvement was launched with support of \$US 48.10 Millions of the World Bank and the National Government (Rivas, 2007).

Consulting firms and private working architects are in charge of designing houses. However, in

the area of social housing, NGO or national programs have professional teams who are in charge to

design, and implement the project in a self-help way, something similar happens in the sector of

W&S.

The Vice-ministries are in charge to define and dictate the Norms and Codes in each sector. One

can use for example the web site [www.vivienda.gov.bo](http://www.vivienda.gov.bo) to access to the new Norms and instruction of the VMVU.