



**PROCESS MANUAL**  
**BUREAU OF LOCAL GOVERNMENT**  
**FINANCE**

**BLGF-PM-02-01**

Revision Code: 00

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Section: **PLANNING**

Effectivity Date: 01-19-2018

Subject: **STRATEGIC PLANNING**

**1. PURPOSE:**

- a. To ensure that the development and implementation of plans and programs are aligned with the overall strategy and direction of the organization and that resources are properly and efficiently used.
- b. To ensure that the plans and programs of the organization conform with the service requirements of the agency and its Quality Management System.

**2. SCOPE:**

This procedure covers activities from the receipt of proposed plans and programs, consolidation and deliberation in an Annual Planning Conference; monthly and quarterly monitoring of accomplishment of plans and programs.

**3. DEFINITION OF TERMS:**

- a. **PP** – Plans and programs
- b. **APC** – Annual Planning Conference
- c. **ISMD** - Information Systems Management Division
- d. **CABSEC** – Office of the President, Cabinet Secretariat

**4. RECORDS:**

TITLE/CODE	LOCATION	RETENTION CRITERIA	RETENTION PERIOD	DISPOSAL METHOD
1. Consolidated Quarterly Accomplishment Report (PLN-001)	Central Records Files	NAP R.A. 9470	Archived	NA
2. Quarterly Accomplishment Report per office. (PLN-002)	Planning Office	NAP R.A. 9470	10 years	Shred
3. Monthly Accomplishment Reports per office. (PLN-003)	Planning Office	NAP R.A. 9470	10 Years	Shred

**5. REFERENCES:**

5.1 ISO Clause Reference

- a. Clause 6 –Planning 6.1, 6.1.1, 6.1.2 – Actions to Address Risks and Opportunities
- b. Clause 6.2, 6.2.2 – Quality Objectives and Planning to Achieve them

PREPARED BY: DIVISION CHIEF

REVIEWED BY: AFMS DIRECTOR

APPROVED BY: EXECUTIVE DIRECTOR



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5.2 Any document which supports the implementation of the procedure

PH Local Government Code of 1999

5.3 Related documents linked to the procedure

- a. Budgeting Procedure
- b. Corrective Action Procedure

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**6. PROCEDURE:**

ACTIVITY FLOW	RESPONSIBLE	DETAILS
	<p><b>Planning Officers</b></p>	<p>Consolidate quarterly reports of the CO and RO (accomplishments of previous year and target setting for the coming year).</p>
	<p><b>Directors</b></p>	<p>Check and review accuracy and completeness of the consolidated accomplishment report.</p>

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ACTIVITY FLOW	RESPONSIBLE	DETAILS
<pre> graph TD     A{{A}} --&gt; D{WITH CORRECTIONS?}     D -- YES --&gt; B[REVISE DRAFT DECISION FOR FINALIZATION]     B --&gt; B2{{B}}     D -- NO --&gt; C{{C}}           </pre>		
<p align="center"><b>REVISE DRAFT DECISION FOR FINALIZATION</b></p>	<p align="center"><b>Planning Officers</b></p>	<p>When there are corrections/revisions to be made, the draft is returned to the Planning Officer for editing/finalization.</p>
<p align="center"><b>SCHEDULE ANNUAL PLANNING CONFERENCE (APC)</b></p>	<p align="center"><b>Planning Officer</b></p>	<p>Schedules and arranges for logistics of the Annual Planning Conference (APC).. Prepares materials that will be used in the APC.</p>

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ACTIVITY FLOW	RESPONSIBLE	DETAILS
<p align="center">D</p> <p align="center">↓</p> <p align="center"><b>REVIEW AND APPROVE QUARTERLY ACCOMPLISHMENT REPORTS</b></p>	<p align="center"><b>CO Division Chiefs, Service Directors, Deputy Executive Director, Executive Director</b></p>	<p>Route the consolidated Quarterly Report to approving authorities.</p> <p>Executive Director makes the final approval and signs the document for release.</p>
<p align="center">↓</p> <p align="center"><b>FORWARD SOFT COPY FOR UPLOADING IN WEBSITE</b></p>	<p align="center"><b>Planning Officers</b></p>	<p>Forward soft copy of Quarterly Report to ISMD for uploading in the website and monitoring/compliance with Good Governance Conditions.</p> <p>Retain a copy of the Quarterly Report in the Planning files.</p>
<p align="center">↓</p> <p align="center"><b>SUBMIT CONSOLIDATED REPORT TO VARIOUS GOVT BODIES</b></p>	<p align="center"><b>Planning Officers</b></p>	<p>Submit consolidated report to DOF, COA, DBM, NEDA, and CABSEC (Office of the President Cabinet Secretariat)</p> <p>Forward copy of consolidated report to Records Section.</p>
<p align="center">↓</p> <p align="center"><b>RECORD AND RETAIN CONSOLIDATED ACCOMPLISHMENT REPORT</b></p> <p align="center">↓</p> <p align="center">E</p>	<p align="center"><b>Records Officer</b></p>	<p>Records the date and details of the Quarterly Accomplishment Reports. Retains a copy of the document for file and reference purposes.</p>

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ACTIVITY FLOW	RESPONSIBLE	DETAILS
	<p align="center">Division Chief</p>	<p>Reviews activities of the process to see where quality improvements can be done in the process.</p>
	<p align="center">Division Chief</p>	<p>Determine if performance targets were achieved.</p> <p>For unmet targets:  <b>Refer to Corrective Action Procedure.</b></p>

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