



PROCESS MANUAL

BUREAU OF LOCAL GOVERNMENT FINANCE

BLGF-PM-02-01

Revision Code: 00

Page 1 of 7

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

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Page 2 of 7

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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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Page 3 of 7

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ACTIVITY FLOW	RESPONSIBLE	DETAILS
<p>START</p> <p>↓</p> <p>RECEIVE QUARTERLY ACCOMPLISHMENT REPORTS</p> <p>↓</p>		
<p>↓</p> <p>CONSOLIDATE QUARTERLY ACCOMPLISHMENT REPORT</p> <p>↓</p>	Planning Officers	Consolidate quarterly reports of the CO and RO (accomplishments of previous year and target setting for the coming year).
<p>B</p> <p>↓</p> <p>REVIEW CONSOLIDATED REPORT</p> <p>↓</p> <p>A</p>	Directors	Check and review accuracy and completeness of the consolidated accomplishment report.

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Page 4 of 7

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ACTIVITY FLOW	RESPONSIBLE	DETAILS
<p>A</p> <p>YES</p> <p>WITH CORRECTIONS ?</p> <p>NO</p> <p>REVISE DRAFT DECISION FOR FINALIZATION</p> <p>B</p>		
<p>SCHEDULE ANNUAL PLANNING CONFERENCE (APC)</p> <p>C</p>	Planning Officers	When there are corrections/revisions to be made, the draft is returned to the Planning Officer for editing/finalization.
	Planning Officer	Schedules and arranges for logistics of the Annual Planning Conference (APC).. Prepares materials that will be used in the APC.

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Page 5 of 7

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ACTIVITY FLOW	RESPONSIBLE	DETAILS
<p style="text-align: center;">C</p> <p style="text-align: center;">↓</p> <p style="text-align: center;">PRESENT AND DELIBERATE PPs AND BUDGET FOR THE COMING YEAR</p> <p style="text-align: center;">↓</p>	<p style="text-align: center;">Executive Director, Deputy Executive Director, Service Directors, CO Division Chiefs, RO Directors, Technical Staff</p>	<p>The accomplishments, plans, programs, and budget per office are discussed and deliberated in the Annual Planning Conference.</p>
<p style="text-align: center;">↓</p> <p style="text-align: center;">REVISE PLANS AND PROGRAMS</p> <p style="text-align: center;">↓</p>	<p style="text-align: center;">Directors (CO and RO)</p>	<p>Based on the deliberations in the APC, the plans and programs for the coming year are revised.</p>
<p style="text-align: center;">↓</p> <p style="text-align: center;">UPDATE AGENCY PLANS AND PROGRAMS</p> <p style="text-align: center;">↓</p>	<p style="text-align: center;">Planning Officer</p>	<p>Based on the revised plans and programs from the APC.</p>
<p style="text-align: center;">↓</p> <p style="text-align: center;">REVIEW AND CONSOLIDATE QUATERLY ACCOMPLISHMENT REPORTS</p> <p style="text-align: center;">↓</p> <p style="text-align: center;">D</p>	<p style="text-align: center;">Planning Officer</p>	<p>After the plans and programs of the year are approved and implemented. The offices send a Quarterly Accomplishment report for review and consolidation/</p>

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<p style="text-align: center;">D</p> <p style="text-align: center;">↓</p> <p style="text-align: center;">REVIEW AND APPROVE QUARTERLY ACCOMPLISHMENT REPORTS</p> <p style="text-align: center;">↓</p>	CO Division Chiefs, Service Directors, Deputy Executive Director, Executive Director	<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 style="text-align: center;">↓</p> <p style="text-align: center;">FORWARD SOFT COPY FOR UPLOADING IN WEBSITE</p> <p style="text-align: center;">↓</p>	Planning Officers	<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 style="text-align: center;">↓</p> <p style="text-align: center;">SUBMIT CONSOLIDATED REPORT TO VARIOUS GOVT BODIES</p> <p style="text-align: center;">↓</p>	Planning Officers	<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 style="text-align: center;">↓</p> <p style="text-align: center;">RECORD AND RETAIN CONSOLIDATED ACCOMPLISHMENT REPORT</p> <p style="text-align: center;">↓</p> <p style="text-align: center;">E</p>	Records Officer	<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
<pre>graph TD; E{{E}} --> Review[REVIEW AND IMPROVE ACTIVITIES]; Review --> Targets{TARGETS ACHIEVED?}; Targets -- YES --> End([END]); Targets -- NO --> Corrective[CORRECTIVE ACTION PROCEDURE]; Corrective --> Targets;</pre>	Division Chief	Reviews activities of the process to see where quality improvements can be done in the process.
	Division Chief	Determine if performance targets were achieved. For unmet targets: Refer to Corrective Action Procedure.

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