

SHARING APPROACHES THAT WORK  
International Exposition of Rural Development

## PHILIPPINE NATIONAL STEERING COMMITTEE

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### RESEARCH/DOCUMENTATION PROCEDURES MANUAL

The Philippine National Steering Committee is studying various projects in the Philippines to learn more about what has been effective in Rural Development. Research Teams are being delegated to visit local projects to learn from the villagers and agencies themselves. They will then produce a document on the project their team has visited. The Research/Documentation Procedures Manual has been created to facilitate this study.

The manual contains the following guidelines and procedures:

1. Basic Mode of Operation for the Site Visit and Suggested Schedule for the three days.
2. Outline of the Final Document
3. Procedures for basic orientation session and building an initial geo-socio profile of the community (Gridding Workshop)
4. Two suggested workshops to be done with Community Residents:
  - a. History and Learnings Workshop
  - b. Community Decision-Making Process Workshop
5. Recommended questions for Conversation with Agency involved in the project
6. Series of questions that can be used as a screen for interviews, community visits and informal conversations, to get comprehensive data.
7. Pre-Document Reflection and Document Writing Workshop
8. Conversation Guidelines for reflection:
  - a. General reflections during the visit
  - b. Final evaluation

May 1, 1983

Philippine National  
Steering Committee

RESEARCH/DOCUMENTATION PROCEDURES  
BASIC GUIDELINES FOR  
MODE OF OPERATION

Each of the projects selected has received a letter requesting a site visit. The project has invited a team to come to the project site. The National Steering Committee has assumed responsibility for the costs of these visits, but hope to keep costs to a minimum. In addition, individual Research Team members have assumed personal financial responsibility. The visits are being done totally on a volunteer basis. The following guidelines have been recommended for the Research Teams:

1. **LODGING:** if possible, the team stay in residents' homes. If this is not possible, then the local community center, or another public facility.
2. **FOOD:** keep food costs to a minimum. However, the Research Team (National Steering Committee) will cover whatever expenses are incurred by the local agency and/or local people.
3. **WORKSPACE:** The letters requesting the visits have included a request for space for the Research Team to work, including workshop space as well as team space for reflection and writing.
4. **MATERIALS:** Requests have been made for a typewriter (relative to production of the document) and blackboard (for workshops). However, the team is responsible for ALL materials needed: manila paper, magic markers, typing paper, chalk, etc..
4. **AGENCY PARTICIPATION IN THE RESEARCH:** It has been requested that agents be available throughout the visit, to assist in setting up the workshops, interviews, visiting, etc., as well as to be available to provide information and local guidance to the Research Team.
5. **PRE-SITE VISIT STUDY:** It is recommended that the research team study any written materials available PRIOR TO their site visit.
6. **AUDIO-VISUAL MATERIALS:** It is recommended that the team view any audio-visual materials available. If this is not possible prior to the visit, then during the visit itself.
7. **SCHEDULE:** Though the schedule is fairly tight, it is recommended that the team schedule "dallying time" for informal conversations, visits with local residents and agency staff.
8. **TAKING NOTES:** The primary role of the research team is to listen and to learn. Therefore their primary role in workshops, interviews, etc. is to take notes and listen to the reflections of the local people as well as the agency personnel involved in the project.

May 1, 1983

Philippine National  
Steering Committee

RESEARCH/DOCUMENTATION PROCEDURES  
GUIDELINE FOR USE OF TIME

	DAY 1	DAY 2	DAY 3
M O R N I N G	<p><b>BREAKFAST</b></p> <p>Research Team Gathers</p> <ul style="list-style-type: none"> <li>- Team Orientation</li> <li>- Review Process</li> <li>- Delegation of Tasks</li> </ul>	<p><b>BREAKFAST - Reflective Conversation</b></p> <p>Interviews, site visiting</p>	<p><b>BREAKFAST - Reflective Conversation</b></p> <p>Pre-Document Writing Workshop</p> <p>Document Writing</p>
A F T E R N O O N	<p><b>LUNCH</b></p> <p>Briefing with Agency</p> <p>Initial Visiting (Gridding Workshop)</p>	<p><b>LUNCH</b></p> <p>Workshop with community leadership</p> <p>Additional Visits</p>	<p><b>LUNCH</b></p> <p>Evaluation of 3 Days</p> <p>Assignments for final editing</p>
E V E N I N G	<p><b>DINNER</b></p> <p>Workshop with community leadership</p>	<p><b>DINNER</b></p> <p>Interview/Conversation with Agency</p>	<p><b>DINNER</b></p> <p>Travel</p>

RESEARCH/DOCUMENTATION PROCEDURES  
DOCUMENT: FINAL OUTLINE

The primary objective of the site visits is to get a first-hand picture of the projects selected, to learn what methods have been used and in particular what has been most effective in the process of Rural Development. A document will be produced out of these visits, which will inform the selection of four to five projects to be a part of a delegation from the Philippines to the INTERNATIONAL EXPOSITION OF RURAL DEVELOPMENT, to be held in New Delhi, India, in February, 1984. In addition, there will be a NATIONAL SYMPOSIUM ON RURAL DEVELOPMENT to be held in the Philippines in October of this year.

Projects to be visited have been selected using the following criteria as guidelines:

1. GEOGRAPHICALLY REPRESENTATIVE: coverage of as many Regions as possible as well as variety of geography: flatlands, mountain, sea, tribal, etc..
2. VARIETY OF SPONSORING AGENTS (Public, Private, Volunteer and Local)
3. VARIETY OF ECONOMIC SITUATIONS (farming, fishing, crafts, etc..)
4. VARIETY OF PROJECT APPROACHES: (Health, Education, Economic, etc.)
5. Comprehensiveness of the project
6. Focus on local, self-help approach and emphasis on local participation in the process of developing the project
7. Replicability of the Methods: Methods used could be replicated in other barangays as well as other villages in other nations around the globe.
8. An established sponsoring agent.

The Document on each of the Projects will include the following basic elements:

1. GEO-SOCIO PROFILE OF THE COMMUNITY
2. JOURNEY OF THE COMMUNITY/PROJECT
  - Historical Picture, Description of Significant Events, Informative Anecdotes
  - Indications of Change
3. PARTICIPATING AGENCY
  - History, Purpose; Underlying Presuppositions; Mode of Operation; Process/Methods Used
4. SIGNIFICANCE OF THE PROJECT (From the perspective of the Research Team/National Steering Committee)
5. APPENDICES
  - Research team, models developed by the agency/community that may be useful, other relevant information

RESEARCH/DOCUMENTATION PROCEDURES  
PROJECT ORIENTATION SESSION

OBJECTIVE

The basic objective of this session is to orient the research team to the project, and to the local community: to provide an overview and initial images of the work. It would be helpful to do this in conjunction with the Gridding workshop. The questions below are simply listed as guidelines to the type of information that would be helpful in this kind of briefing session.

1. Overview of the Project: origin, purpose, history, current situation. Why started, how? When? Who initiated?
2. Changes that have happened since the start.
3. Overview of the community - basic profile (see gridding workshop) What was the situation before the project started? What was the reason for the agency becoming involved with this particular community?
4. What does the team need to visit?
5. Who do you suggest we need to talk with?
6. Check to see if any workshops have been set up, where a group will be gathered. If not, request that.
7. What other agencies have been involved? What is any current involvement?
8. How is the project funded?
9. What would you say have been the result of the project?
10. How long is the agency planning to stay?
11. An initial picture of the agency: origin, objectives, etc. (A much more detailed picture will be worked through in the later conversation with the agency.)
12. What would you say are the top priorities for the research team?

NEXT: DO THE GRIDDING WORKSHOP, or at least get a geo-socio picture of the community.

ALSO: If there any printed materials available, it would be helpful to get them now, to give the research team a chance to study them. If there are any video materials (slide show, photos, etc.) ask when it would be possible to see them.

RESEARCH/DOCUMENTATION PROCEDURES  
GRIDDING WORKSHOP

OBJECTIVE OF  
WORKSHOP

MAJOR OBJECTIVE OF THE WORKSHOP

The Major Objective of this workshop is to get an overall picture of the community in which you are doing the research/documentation, to provide a broad context in which you can decide where you want to then focus your visiting. It will give the research team a feel after the whole community and a sense of particular locations in relation to the whole.

NOTE: This does not need to be a lengthy workshop. Maximum time required: 1½ to 2 hours. It is essential to have local 'guides' who can help to build the grid and provide accurate information.

I  
INITIAL  
PICTURE

I. BUILDING AN INITIAL PICTURE.

1. Study community maps and other information available.
2. Ask a representative from the agency or local resident to draw a rough sketch of the community on a black board or large sheet of paper. It would be helpful for this sketch to include the following information:
  - Boundaries of the community
  - Major divisions (puroks, etc.)
  - Major pathways in the community
  - Commercial centers, schools, etc.
  - Other major gathering places (nodes)
3. Ask for other basic information on the community: population, percentage of youth, economic information, etc..

II  
INITIAL  
VISITING

II. INITIAL VISITING.

1. Take a tour of the community - ride, walk - to have a chance to see the whole community. At this point you are mainly interested in getting an initial picture. Focused visits will happen later. The tour does not need to take a long time: 30-45 minutes.

III  
BUILDING A  
COMMUNITY  
GRID

III. BUILDING A COMMUNITY GRID.

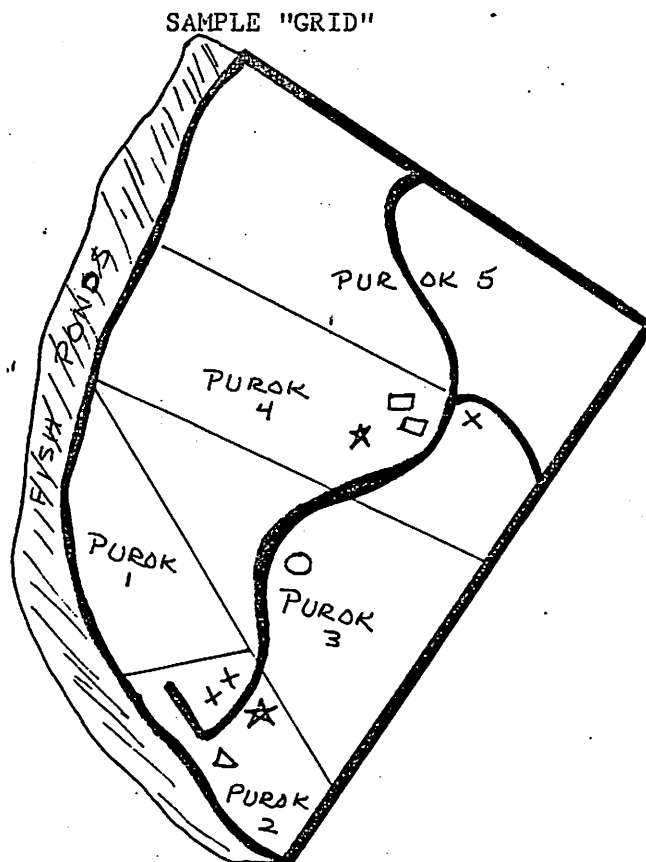
1. After returning to your meeting place, reflect briefly on what you had a chance to see:
  - a. What caught your attention?
  - b. What particularly stood out, as you toured the community?
  - c. Where did you get reminded of another community you have lived in, visited?
  - d. Where did you see something unique?
  - e. What did you learn, relative to a picture of the community?
2. Looking at the original sketch created before the trip, build a "Grid" (which simply means an artistic or symbolic representation or picture of the community).
  - a. Draw the borders of the community. You are not interested

RESEARCH/DOCUMENTATION PROCEDURES  
GRIDDING WORKSHOP  
- Page 2 -

- fine details, but a simple picture that could be easily remembered and reproduced.
- b. Divide the community into major sections -- puroks.
  - c. Using simple symbols, mark the following:
    - Gathering places ★
    - Schools □
    - Churches, religious centers △
    - Commercial centers ×
    - Health Centers ○
    - Major pathways in the community ~
  - d. If it would be helpful, you may want to shade in residential areas or land used for farming, agriculture.

Be sure, during this whole process, to consult with local residents and/or agency staff to ensure accuracy.

3. Ask someone in the group to draw up a final copy of this on typing paper so that it can be used as part of the report.



RESEARCH/DOCUMENTATION WORKSHOP  
HISTORY/LEARNINGS WORKSHOP

- Page 1 -

OBJECTIVE  
OF THE  
WORKSHOP

This workshop is one of the most important workshops of the Research/Documentation visit. It is important that it be done with local community residents. You are interested in the LOCAL PERSPECTIVE. It is a fairly lengthy workshop and could be divided into two sessions if that would be more convenient. Recommended time frame is indicated in the chart below.

There are really four Major Objectives:

1. To get a comprehensive picture of this history of the project and the community, as well as a sense after their vision for the future.
2. To discover what the community considers to have been the major accomplishments as well as what they have learned in the process.
3. To learn from the community what they see to be the major indications that significant change has happened.
4. To learn what they sense has been the role of the participating agency.

SUGGESTED TIME FRAME FOR THE WORKSHOP PROCESS			
<b>I</b> JOURNEY	<b>II</b> ACCOMPLISHMENTS LEARNINGS	<b>III</b> INDICATIONS OF CHANGE	<b>IV</b> ROLE OF THE AGENCY
45 - 60 min	30 - 45 min	20 min	20-- 30 min
TOTAL SUGGESTED WORKSHOP TIME: 2½ - 3 hours			

MATERIALS  
NEEDED

1. 2 large charts (either use the blackboard or manila paper - see procedures for design of the charts).
2. Chalk or magic markers.
3. A scribe to take notes!!!

RESEARCH/DOCUMENTATION PROCEDURES  
HISTORY/LEARNINGS WORKSHOP

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I  
JOURNEY OF  
THE COMMUNITY

1. Put up the Journey Chart before the session starts.  
(Basic outline of chart below. See sample from Gen. Ràcarte for sample chart filled in.)

JOURNEY OF _____	
(DIVISIONS, TITLES)	
(DATES)	1983
(EVENTS)	

2. What have been some major events in this community in its history? Ask them to give the approximate year, and name the event. Put the data on the chart under the line, in relation to the years.
3. Who can tell us when this barangay was started? What are the earliest memories? (Again, get dates) How did the barangay get its current name?
4. Are there other events that you want to have listed on the timeline? More recent events?
5. What have been the major turning points in the journey of the community? Were there events related to those turning points? Mark the turning points on the line. *Painful events?*
6. If you were going to choose the 2 - 3 most important (significant) events out of this whole list, what would they be? (Give them a chance to think individually before answering this question.) Get out 4 - 6 total significant events. Ask them to talk about why they consider these important events. Get a consensus from the group on the most significant events, and circle them on the chart.
7. If you were going to divide the history of this community into 4 - 5 major periods (eras) where would you make the divisions? (You may want to review the turning points they mentioned, though these are not necessarily the same as the sections). Divide the history into time periods, using the recommendations of the group.
8. Now, if you were going to name those periods in time, what would you call them? Assume that you are writing an important book to tell the story of this community, and these titles would be like chapters in the book. (You want the book to SELL, so use poetic titles!)

RESEARCH/DOCUMENTATION PROCEDURES  
HISTORY/LEARNINGS WORKSHOP

I  
JOURNEY OF  
THE COMMUNITY  
? FUTURE  
(continue!)

9. As you look into the future of \_\_\_\_\_, (till the year 2000) what are some of your hopes for this community? (List under the section on the far right of the chart).
10. Where do you have hopes that you never even would have considered ten or so years ago? (You would have said 'that's impossible!') Add those to the list, if there are any new ones.
11. What kind of title would you give to the 'future' section of your journey?
12. Now, why don't we give a title to the whole journey (like the title of a book). Write the title they select at the top of the chart.

II  
ACCOMPLISH-  
MENTS AND  
LEARNINGS

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You may want to take a little break, celebrate the work that has just been completed, serve some refreshments or something. Then, put up the new chart. It needs to be separate, and not cover up the journey chart, because the data from the first chart will inform the work of the rest of the workshop. (Basic outline of chart is below:

LEARNINGS				
	ECONOMIC	SOCIAL	HUMAN	ROLE OF THE AGENCY
ACCOM				
LEARN				
MAJOR INDICATIONS OF CHANGE :				

1. Describe the next part of the process. Introduce the categories on the chart: Economic -- Self Sustenance, Social -- Self Reliance, and Human -- Self Confidence (Use the Human Development Program Chart as a Reference, and illustrate the categories with the sub categories on the chart. Illustrate each of the dimensions.) Explain the fact that because the National Steering Committee/IERD is interested in the total (comprehensive) development of a community, we have found it helpful to use these categories to learn as much as we can about what a community has done. (Note: because some of the projects are a special emphasis, be careful not to make them feel like they "should" have done something in all of the arenas

RESEARCH/DOCUMENTATION PROCEDURES  
HISTORY/LEARNINGS WORKSHOP

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II  
ACCOMPLISHMENTS AND  
LEARNINGS  
(Continued)

2. Ask the group to list, what have been the major accomplishments:
- In the arena of the Economic (Self Sustenance)
  - In the arena of the Social (Self Reliance)
  - In the arena of the Human (Self Confidence)

It may be very helpful to use the sub categories on the program chart to get concrete accomplishments.

ECONOMIC	SOCIAL	HUMAN
Cooperative Agri.	Preventative Care	Living Environment
Appropriate Industry	Functional Educ.	Corporate Patterns
Commercial Services	Community Welfare	(Fiestas, assemblies)
		Identity Systems

Get a list under each of the major categories. Remind them that some of the events may not be well known, but in the long run really had an impact on the community. Ask about accomplishments relative to different groups in the community (Youth, etc.) (May want to get out failures as well, especially if a learning resulted.)

3. Learnings: What have been some of the most important things you have learned - in the area of economic development, social, human. What would you want to share with other communities? (If you were giving advice to another barangay, what advice would you give.)  
"What we have learned... Don't forget to..."

Get out a list under the learnings, for each.

4. Look at the total list, of accomplishments and learnings. Choose 3 - 4 out of the total list of accomplishments, and total list of learnings, as the most significant.

III  
INDICATIONS  
OF CHANGE.

1. Introduction. Reflect on the amount of work they have done so far, and the reflection it represents. Now, we want to take a step back and look at all of it and ask a different kind of question. One of the questions most frequently asked about development, is the question: "What are the indications that significant change has happened?" The problem is that people have discovered that this is a difficult question, because noone is really sure how to define indications. (People are getting clear that for example, more chickens does not necessarily mean significant development!!)

We are very interested in your own answers to that question. What for you are indications that significant (meaningful) change has taken place?

2. Get them to get out a list of indications. Does not need to be a long list. You are interested in substantial indications. Ask for details and take careful notes. Get them to give illustrations of the indications they mention.

IV  
ROLE OF THE  
AGENCY

3. As you look at these indications, what would you say is the most long-lasting? What has affected the most people?

An important part of the research we are doing is on the agency or agencies that have been involved with your barangay in the process of development. We would particularly like to get your picture of the role that \_\_\_\_\_ agency has played. For example, what services have they provided? Where have they been helpful? And where have they been unhelpful? (What advice would you give THEM!)

1. What are some of the services that have been provided? (Get our list on the board.)
2. Where have they been most helpful? (And unhelpful - though you may not want to list that on the board.)
3. As you look at this list, why would you say these have been helpful to the barangay? (Point out to the group that we hope the research will assist agencies in learning what they need to do in the future - that the villagers are being advisors to agencies around the world.)

CLOSING

Comment, reflect a few minutes on the amount of work that has been done, and the insights, etc.. Thank the group for their assistance, etc..

Make any announcements needed.

Rehearse the fact that this information will be part of the data that will go to India to the IERD - Sharing Approaches that Work.

RESEARCH/DOCUMENTATION PROCEDURES  
WORKSHOP: COMMUNITY ORGANIZATION

OBJECTIVE

The primary objective of this workshop is to learn from the community how it organizes itself, makes decisions and how it sustains involvement in the projects of the community.

INFORMATION

1. How does your community make decisions? (Barangay Council, Community Co-op, other?)
2. How do you get input from all the residents?
3. Do you ever hold community assemblies?
4. What kind of meetings do you have regularly? (Councils, Puroks, etc.) How often do they meet? What are they responsible for?
5. How do you work through difficult decisions, where there is a strong difference of opinion?
6. How does the community hear about accomplishments, plans? Relative to the project, other?
7. Do you have community workdays? Who organizes them? What kind of work do they involve?
8. How does the community handle community-raised money? (From benefits, etc.) How do you raise money?
9. How do you get people to come to meetings?

LEARNINGS,  
ADVICE TO  
OTHER  
VILLAGES

10. What have you learned about organizing a community, or getting it to work together, that you think is important for other villages to learn?
11. What have been the key factors in the community's development?
  - Initially
  - Along the way
  - Currently
12. What have you learned about sustaining interest in projects, community work that you would like to share with other villages?
13. What has been the most difficult part of organizing and sustaining a community's interest?
14. If you were going to say what is the most important factor in a community making decisions, what would you say?

RESEARCH/DOCUMENTATION PROCEDURES  
INTERVIEW/CONVERSATION -AGENCY  
- Page 1 -

OBJECTIVE

The objective of this conversation is to get a depth picture of the agency involved in the project being research. The questions listed below are related to the four sections of the final product related to the agency itself:

I. PROFILE OF THE AGENCY

History, Purpose, Own Evaluation of Effectiveness

II. UNDERLYING PRESUPPOSITIONS

III. PRACTICAL MODE OF OPERATION

IV. METHODS/PROCESS USED IN WORKING WITH LOCAL COMMUNITIES

The questions listed below are not intended to be an inclusive list, now is it necessary to follow them in order. They simply provide a screen for the data needed to write the section on the agency.

I.  
PROFILE OF  
THE AGENCY

1. What is the history of the agency?  
When started, by whom, why came into being?
2. Legal description (private, NGO, public, etc.)
3. Purpose of the agency?
4. History of projects involved with - types, how long, etc..
5. Other projects currently involved with - in the Philippines, in other parts of the world.
6. How has the agency's sense of purpose evolved? Changed?
7. Long term vision of the role of the agency? Future plans?
8. How many staff do you currently have? Where located?  
Staff profile: age, sex, education, experience
9. What consider your strengths and weaknesses?
10. How do you evaluate your effectiveness?
11. How talk about effectiveness relative to this particular project?
12. What changes have you seen in this community? In individuals?
13. How do you measure indications of change?
14. What do you find the hardest to measure?
15. What would you say are the key factors that have enabled this project to work?
16. What methods would you say are applicable to other communities?
17. What do you see this project doing in the next 3 to 5 years?
18. If you were starting in another village, what would you go different?
- 19.

II  
UNDERLYING  
PRESUPPOSITNS

1. What motivates you? As a group? Individually?
2. What would you say is fundamental in the work you are doing?
3. How would you describe your underlying purpose as an organization?

RESEARCH/DOCUMENTATION PROCEDURES  
INTERVIEW/CONVERSATION WITH AGENCY

- Page 2 -

III  
PRACTICAL  
MODE OF  
OPERATION

1. How do you recruit staff?
2. What is the training process?
3. What is the process for deciding whether they will be 'staff' or not?
4. How do you pay your staff?
5. How does your staff operate on a day-to-day basis?  
(Planning process, daily schedules, celebrations, other)
6. How are you funded?
7. How do you get new sources of funding?
8. In your projects, what input do you require of the community?  
Relative to money, time, in-kind, etc.
9. What is the average length of stay for staff?
10. How do you make decisions? Change directions?

IV  
METHODS FOR  
WORKING IN  
COMMUNITIES

1. How do you select a project site? How launch a project?
2. How do you involve local residents?
3. How do you motivate people to get involved? Stay involved?
4. How do you relate to, involve other agencies and groups?
5. Who do you look to as a key resources for your work?
6. What type of assistance do you basically provide?  
(illustration: training, management, funds, other)
7. How do you inject funds into the community?
8. How do you transfer methods to local community residents?
9. What type of training programs do you have?
10. How do you determine training needs?
11. How do you select training participants? What do you require of participants? (Financial, time, other)
12. Do you have a basic curriculum?  
(content, length, modules, style of teaching, involvement of other resources)
13. What other methods of transfer do you use?
14. How do you structure the project to enable continuation of the work if your agency is no longer present?
15. How would you summarize your basic method of approach?
16. What have you learned about doing development work?  
Especially, what would you like to share with other groups working around the world?
17. What do you sense is the future of rural development?

The next three pages contain a series of questions that can be used in interviewing local residents, in casual conversations and visits in homes, as well as the agency involved in the project. The screen for these questions is the "PROGRAMMATIC CHART" developed by the ICA for work in Human Development Projects. A copy of that chart is also attached.

The list of questions is not intended to be exclusive, and if your research team discovers other questions that you find helpful, please make note of them so the questions can be added to the list.

# PROGRAMMATIC CHART

Toward the Actuation of Comprehensive Human Development Projects on the Local Level

ICA

thirty-six programs — nine structures — three dynamics — one project

<p style="text-align: center;">A ECONOMIC DEVELOPMENT LOCAL PRODUCTIVITY —toward self-sustenance</p>	<p style="text-align: center;">B HUMAN DEVELOPMENT LOCAL MOTIVITY —toward self-confidence</p>	<p style="text-align: center;">C SOCIAL DEVELOPMENT LOCAL SOCIALITY —toward self-reliance</p>
<p>Enabling local—</p> <p style="text-align: center;">COOPERATIVE AGRICULTURE</p> <div style="border: 1px solid black; padding: 5px;"> <ul style="list-style-type: none"> <li>1 expanded cultivation</li> <li>2 intensified production</li> <li>3 water delivery</li> <li>4 equipment pool</li> </ul> </div>	<p>Reconstructing local—</p> <p style="text-align: center;">LIVING ENVIRONMENT</p> <div style="border: 1px solid black; padding: 5px;"> <ul style="list-style-type: none"> <li>13 domestic housing</li> <li>14 public facilities</li> <li>15 village design</li> <li>16 essential services</li> </ul> </div>	<p>Creating local—</p> <p style="text-align: center;">PREVENTIVE CARE</p> <div style="border: 1px solid black; padding: 5px;"> <ul style="list-style-type: none"> <li>25 intermediate sanitation</li> <li>26 total nutrition</li> <li>27 systematic immunization</li> <li>28 primary treatment</li> </ul> </div>
<p>Developing local—</p> <p style="text-align: center;">APPROPRIATE INDUSTRY</p> <div style="border: 1px solid black; padding: 5px;"> <ul style="list-style-type: none"> <li>5 cottage production</li> <li>6 agro-business</li> <li>7 processing plants</li> <li>8 ancillary industry</li> </ul> </div>	<p>Catalyzing local—</p> <p style="text-align: center;">CORPORATE PATTERNS</p> <div style="border: 1px solid black; padding: 5px;"> <ul style="list-style-type: none"> <li>17 total engagement</li> <li>18 community commons</li> <li>19 consensus assemblies</li> <li>20 corporate workdays</li> </ul> </div>	<p>Establishing local—</p> <p style="text-align: center;">FUNCTIONAL EDUCATION</p> <div style="border: 1px solid black; padding: 5px;"> <ul style="list-style-type: none"> <li>29 early learning</li> <li>30 formal schooling</li> <li>31 youth training</li> <li>32 adult education</li> </ul> </div>
<p>Initiating local—</p> <p style="text-align: center;">COMMERCIAL SERVICES</p> <div style="border: 1px solid black; padding: 5px;"> <ul style="list-style-type: none"> <li>9 common marketing</li> <li>10 local merchandising</li> <li>11 savings &amp; loans</li> <li>12 basic transport</li> </ul> </div>	<p>Recovering local—</p> <p style="text-align: center;">IDENTITY SYSTEMS</p> <div style="border: 1px solid black; padding: 5px;"> <ul style="list-style-type: none"> <li>21 community self-story</li> <li>22 symbol systems</li> <li>23 corporate rituals</li> <li>24 village celebrations</li> </ul> </div>	<p>Instituting local—</p> <p style="text-align: center;">COMMUNITY WELFARE</p> <div style="border: 1px solid black; padding: 5px;"> <ul style="list-style-type: none"> <li>33 family development</li> <li>34 women's advancement</li> <li>35 youth task-force</li> <li>36 elderly engagement</li> </ul> </div>

RESEARCH/DOCUMENTATION PROCEDURES  
QUESTIONS: ECONOMIC DEVELOPMENT

GENERAL

1. What are the major sources of income for the community?
  - In the past?
  - Currently?
2. What is the average income of families?
3. Has the average income increased? If so, how?
4. What are the major resources being used?
5. What resources are not being used, but could be tapped?
6. How do you decide which economic ventures to start?
7. Which have been the most successful? Why? Least successful? Why?
8. Which have been built on established skills?
9. Which have required learning new skills?
10. What local raw materials have been used?
11. What sources of funding have you used for capitalizing new ventures?
12. What do you sense is needed for this community to be really self-sustaining, economically?
13. What advice would you give to other villages? What have you learned that you really want to share?

COOPERATIVE  
AGRICULTURE

1. What have been the traditional agricultural products from the barangay?
2. What new products have been developed?
3. What changes have been initiated? In the products, in the methods of production?
4. Where have you utilized shared labor? Tools, equipment? Labor?
5. How have you marketed your products?
6. Which agri. products have been the most profitable? Why? Which have been the biggest failures? Why?
7. What future economic projects do you sense are needed?

APPROPRIATE  
INDUSTRY

1. What industry is already present in the community?
2. What industry has been initiated since the beginning of the project?
3. How have new industries been developed? How funded? Marketed? Managed?
4. What raw materials have been used? Local? Imported?
5. What have been the benefits to local residents? Costs?
6. Do you have any cottage industries? (repeat questions)

COMMERCIAL  
SERVICES

1. What commercial services are available to the local residents?
2. What have been initiated since the beginning of the project?
3. What banking services do you have?
4. What access services do you have? Roads? Public transport? How has this improved in recent years?
5. What loans have been taken out by the community? How much? What is the plan for repayment?
6. What future plans do you have for commercial services?
7. What outside resources have been most helpful?
8. What advice would you offer to other communities re commercial services?

RESEARCH/DOCUMENTATION PROCEDURES  
QUESTIONS: HUMAN DEVELOPMENT

GENERAL

1. Where have you seen a new sense of self-confidence growing, in the community? In individuals?
2. How would you talk about the cause of this self-confidence?
3. Where do you see the community lacking in self-confidence?
4. What would you say is the greatest need, relative to building a sense of self-assurance?
5. What are your future hopes for the community relative to its own sense of being able to do whatever it needs to do?

(NOTE: YOU ARE NOT INTERESTED IN A FALSE SENSE OF PRIDE OR 'COCKINESS' BUT RATHER AN AUTHENTIC SENSE OF SELFHOOD)

ENVIRONMENT

1. What major environmental changes have happened in the past few years? In housing, roads, parks, public spaces, community facilities, other?
2. What have been the most important improvements?
3. Where have you seen people taking individual initiative in making improvements in the environment? Of their own property? Of community space?
4. Do you have community workdays? How do you organize them? Who takes the initiative?

CORPORATE  
PATTERNS

(See questions in the Decision making process workshop - if this workshop is not done with a group, it is important to ask the questions with various individuals. )

COMMUNITY  
IDENTITY

1. What are the major occasions that the community celebrates? (Festivals, weddings, funerals? Other?)
2. What are the major forms of recreation? In the community? Outside the community? Where?
3. What community 'symbols' have been generated? Relative to the community's name, statues, etc.
4. What symbols have been created as a result of the project? How has this changed the community?
5. What was the self-story of the community prior to the project? What is the current self-story?
6. How would you describe the basic stance of the community relative to the past, the present and the future? (Illus. Is it fatalistic, is there a tendency to blame, etc..)
7. Who are the key symbolic figures for the community? In the community? Outside? Alive? Dead? How do they affect the practical life of the community? (Note: this could be either a positive or negative effect.)
8. What are the unifying factors, or dynamics in the community?

RESEARCH/DOCUMENTATION PROCEDURES  
QUESTIONS: SOCIAL DEVELOPMENT

GENERAL

1. What are the major social services offered to the community? (Health, Education, Welfare)
2. What have been initiated since the start of the project?
3. When the community wants to start a social service program, how do you go about it?
4. What programs have been the most successful? What have been the most difficult? Why?
5. How does the community support social programs (funding)?
6. Where do you find leadership for those programs?
7. What outside resources have you found most helpful?
8. What social programs would you like to launch in the future?
9. What have you learned about doing social programs that you would like to share with other villages?

HEALTH

1. What major programs do you have? What have been started recently? What have been the direct result of the project?
2. Where do you feel there are still needs for health programs?
3. What are the major sources of health care? In the community? Outside?
4. What has been the involvement of the public agencies? Municipal, Provincial?
5. What assistance has been provided?
6. Where is the greatest need? Relative to sanitation, nutrition, etc.?
7. What are your future plans for health programs?
8. What do you see the role of education to be relative to health?

EDUCATION

1. How many schools do you have in the community?
2. What other educational programs do you have? Adult?
3. What is the average educational level of residents?
4. What educational programs have been launched as a part of the project?
5. How have people been recruited to those programs?
6. Where have you seen major progress being made in education?
7. Where do you sense the greatest need for education?
8. What are your future plans?

WELFARE

1. What programs do you have for the youth in the community?
2. Other programs, other groups?
3. How do you involve elders in the community in the community work?
4. What is the basic role of women? How has this changed, if any?
5. How do you fund basic welfare programs?
6. What is your greatest source of leadership for these programs?
7. What do you sense is the current understanding of family planning?
8. What are your future plans?

RESEARCH/DOCUMENTATION PROCEDURES  
DOCUMENT WRITING WORKSHOP

OBJECTIVE  
OF THE  
WORKSHOP

The Major Objective of this workshop is to complete a first draft of the research document on the project visited by the research team. The first draft needs to be completed before the team finishes the site visit. Second, third and final drafts will be completed at a later time (but do need to be scheduled in by the research team.)

There are three major sections to this workshop:

- I. Reflection on the Research Visit
- II. Pre-Document Writing Workshop
- III. Document Writing, Reporting

Below is a general guideline for use of time for this workshop:

I. REFLECTION ON VISIT  20 min.	II. PRE-DOCUMENT WRITING  45 - 60 min.	III. DOCUMENT WRITING REPORTING  3 hours
TOTAL WORKSHOP TIME 4 1/2 HOURS		

MATERIALS  
NEEDED FOR  
THIS  
WORKSHOP

- 1. Blackboard or large manila paper
- 2. Chalk or magic markers
- 3. Typing paper, carbon paper
- 4. Typewriter (s)

I  
REFLECTIVE  
CONVERSATION

Introduction: Before we get into the process of writing the document itself, we would like to take a little time and just sit back and reflect on the experience we have just had. Not worried right now about what we want to write, but just have a chance to share our experience of the last couple of days as a team, with the people of this community and the agency working here.

- 1. Out of the last couple of days, what are major events you remember? (Use the analogy of a movie - we've just been in a movie - what are the scenes you recall most vividly?)
- 2. Who are some of the people that have caught your attention? Unforgettable characters you have met?
- 3. What are some noises you remember?  
colors you recall?
- 4. What are some smells? Tastes you remember?
- 5. What were some remarks you heard, or quotes you will remember?
- 6. What were some incidents that were particularly fun, humorous?
- 7. Where did you find yourself getting excited?  
bored?  
frustrated?
- 8. Where did you find yourself really getting involved? Wishing you could stay longer?

RESEARCH/DOCUMENTATION PROCEDURES  
DOCUMENT WRITING WORKSHOP

- Page 2 -

9. Where did you find yourself really overwhelmed? Awestruck?
10. We have talked a lot about the journey of this community, and have learned a lot. We have also had a journey ourselves, as a team. We've only been together \_\_\_\_\_, and been very intensely involved in those few hours;  
How would you talk about the journey we have been on, as a team?
11. When you go back home and your friends and family ask you, what have you been doing the last three days? How would you talk about it, describe it?

II  
PRE-DOCUMENT  
WORKSHOP

We probably need to get down to work - have a lot to do in the next few hours. Our job is to write up the basic document describing what we have learned. Before we start writing, it would be helpful to share with each other what we think is really important to include in the document. We need to recall, that this is NOT a document about the history of this barangay - we are mainly interested in sharing methods, approaches that have worked, for the sake of other communities in the Philippines and the world.

FORMAT  
CATEGORIES

The National Steering Committee has laid out a basic format which they recommend be used for these documents. Obviously, we can alter that if we think there are sections to be added, etc.. But let's start with that format. (Note, at this point, it would be good to review the four basic sections. While you are describing them, lay the categories out horizontally on a black board or paper, so that you can brainstorm information under each of the categories in a few minutes.. See below for example.)

1. Are there questions about any of these categories? Unclarities? Spend a few minutes talking them through. You can refer to the Ricarte document for specific illustrations, if needed.
2. Is there any arena you sense would not be covered by these categories? If so, make a list to the side of the board.

FORMAT - DATA BRAINSTORM			
I GEO-SOC PROFILE	II JOURNEY OF COMMUNITY	III AGENCY	IV SIGNIFICANCE OF PROJECT
(note - see page 3 of workshop for sub-categories)			

RESEARCH/DOCUMENTATION PROCEDURES  
DOCUMENT WRITING WORKSHOP

- Page 3 -

DATA  
BRAINSTORM

3. Do a brainstorm under each of the categories, and sub categories to get the group's wisdom on what needs to be included in the document. Give people time to write individually and then share the data. Also, if there is written material that has been made available, it would be helpful to list which materials would be particularly helpful in writing up the different categories. (For example, if there are any documents on the history of the community/project, for the Geo-Socio Profile, etc..)

CATEGORIES

- A. Geo-Socio Profile
- B. Journey of the Community and Project
  - 1. Historieal Journey chart
  - 2. Significant Events
  - 3. Anecdotes that need to be shared.
  - 4. Description of the Major Indications of Change
- C. Agency
  - 1. History and Purpose of the Agency
  - 2. Agency Presuppositions (interested in the more theoretical description of the underlying foundations of the agency)
  - 3. Basic Process for working with a community
  - 4. Mode of Operation (practical application of the agency's presuppositions in their style of operation in working in the community.
- D. Significance of the Project
  - Note: this is a statement of the significance from the perspective of the research team. When it is time to list under the category, more time needs to be taken here. suggest the following questions, procedure.
  - a. Individually, write down what three-four elements of this project are particularly important.
  - b. Star which for you is the one most important element.
  - c. Share these with each other.
  - d. What would you add?
  - e. From the perspective of other villages around the world, what is the value of this project?
  - f. What for you is worth replicating in other communities?
  - g. Consensa on a list of 5 - 8 items to be included under "Significance of the Project"

III  
DOCUMENT  
WRITING

- 1. Divide into writing teams (Note - if it is possible that people from the agency can participate, it would be helpful, given the size of the writing project!)
- 2. Assign categories to the teams.

RESEARCH/DOCUMENTATION PROCEDURES  
DOCUMENT WRITING WORKSHOP

- Page 4 -

3. Rehearse a writing process the team may find helpful.

- a. Gestalt the data listed under the categories assigned to their team into 4-5 major components.
- b. Add other data to the individual components that was not included in the initial brainstorm list.
- c. Think through the most critical elements to be communicated in each component and in the categories as a whole.
- d. Write.

NOTE: A GOOD AMOUNT OF TIME NEEDS TO BE ALLOCATED FOR THIS PROCESS. ALSO, IT IS VERY HELPFUL TO ASSIGN ONE PERSON TO KEEP AN EYE ON THINGS. IF A TEAM IS BLOCKED, OR HAVING TROUBLE WRITING AND NEEDS HELP, ETC.. It is not easy to do this amount of writing in a short period of time, but it can be done, especially if facilitated by someone to work with the writers when they get blocked. The key is: THIS IS A FIRST DRAFT!!! It is going to go through many editing processes, but it is impossible to edit something until it has first been written. So keep reminding the writers, get something written.

4. Gather back together and share writings with the whole team. Give people a chance to talk about where they are most unsatisfied with their writing, where they sense a lot more work needs to be done, where more factual information is needed, etc.
5. Work out a plan for rewriting, editing, final documents production over the next week or two.

RESEARCH/DOCUMENTATION PROCEDURES  
GENERAL REFLECTION CONVERSATION

OBJECTIVE  
OF  
CONVERSATION

This is a general conversation which could be used at various points during the research visit: after interviews in the community, at the end of a day, etc.. It simply gives the team to step back from their immediate experience in the community and reflect on what they have been experiencing. By using this kind of reflective process during the course of the visit, it helps the team begin to give form to their own evaluation of the project they are researching.

The conversation can be done in 5 minutes or 30 minutes, depending on how much time the team has. It can be done with the agency people or the team by itself, whichever is most appropriate.

QUESTIONS

1. What caught your attention? What did you see, hear that particularly you remember?
2. What comments, events to you recall?
3. What activities did you see going on?
  
4. What would you like to visit again?
5. Where did you find yourself surprised by what you saw, heard?
6. Where did you find yourself getting angry?
7. Where " " " " delighted?
8. Where did you find your mind wandering? What were you reminded of?
9. What questions did you want to ask?
10. What did you want to change?
  
11. What did you learn?
12. What did you find yourself saying, I wish other people could see this?
13. What else would you like to share with other communities, groups?
14. Where do you sense it is important to do some more data gathering?
15. What new questions would you like to ask?
16. If you were going to name one thing that it will be important for us to include in the document, what would that be?

RESEARCH/DOCUMENTATION PROCEDURES  
FINAL EVALUATION CONVERSATION

OBJECTIVE  
OF THIS  
CONVERSATION

This conversation is to be done at the very end of the research trip, and is primarily an evaluation on the methods used for the research process, for the sake of assisting future research teams.

QUESTIONS

1. What for you were the most important methods we used for this research?
2. What methods would you recommend we continue to use on future trips?
3. What methods need to be refined?
4. What new methods, or elements of research would you want to be sure to add?
5. What would you say has been the impact of this research trip
  - on the community itself?
  - on the agency involved?
  - on us as a research team?
  - on the overall work of the National Steering Committee?
6. What practical suggestions would you make to the next research team?