

## ANNEX L

### PROJECT EVALUATION/APPRAISAL SHEET FOR GROUP PROJECT

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Department of Labor and Employment  
DOLE Regional Office \_\_\_\_

### PROJECT EVALUATION/APPRAISAL TEMPLATE FORM FOR GROUP PROJECT

#### A. PROFILE

<b>PROJECT TITLE</b>	
<b>PROJECT ACP</b>	
<b>PROJECT COST</b>	
DOLE	
Proponent	
<b>FUND SOURCE</b>	

#### B. MINIMUM REQUIREMENT

<b>MINIMUM CRITERIA</b>	<b>FINDINGS</b>	<b>RECOMMENDATIONS</b>
Documentary Requirements		
Target Beneficiaries		
Need to be Addressed		
Purpose/Objective		
Eligibility of the Proponent-ACP/Proponent-Beneficiary <ul style="list-style-type: none"><li>• Equity</li><li>• Liquidation of cash advances</li></ul>		

#### C. TECHNICAL AND FINANCIAL EVALUATION

<b>BUSINESS ASPECTS</b>	<b>FINDINGS</b>	<b>RECOMMENDATIONS</b>
<b>Marketing Plan</b> <ul style="list-style-type: none"><li>• Potential market</li><li>• Market share</li><li>• Buying habits</li><li>• Quality and affordability of products/services</li><li>• Pricing strategy</li><li>• Competitiveness in terms of price, quality, appearance</li><li>• Promotion strategy</li></ul>		

BUSINESS ASPECTS	FINDINGS	RECOMMENDATIONS
<ul style="list-style-type: none"> <li>• Distribution channel</li> <li>• Competitive advantage</li> </ul>		
<b>Production Plan</b> <ul style="list-style-type: none"> <li>• Production details</li> <li>• Source of raw materials</li> <li>• Equipment, tools, materials required</li> <li>• Location, size and lay-out of production area</li> <li>• Proportion of workers vis volume of production</li> <li>• Safety and health measures</li> </ul>		
<b>Organization and Management Plan</b> <ul style="list-style-type: none"> <li>• Project Management Team (PMT)</li> <li>• PMT duties and responsibilities</li> <li>• Assignment of tasks to production/service workers</li> <li>• Operational and managerial skills</li> <li>• Training needs</li> <li>• Commitment from stakeholders</li> <li>• Compensation/salary methods</li> <li>• Profit sharing scheme</li> </ul>		
<b>Financial Plan</b> <ul style="list-style-type: none"> <li>• Working capital</li> <li>• Cost estimates</li> <li>• Total project cost</li> <li>• Financial statements (Income Statement, Cash Flow, Balance Sheet)</li> <li>• Cash/working capital for operations</li> </ul>		
<b>Financial Viability</b> <ul style="list-style-type: none"> <li>• Realistic projections</li> <li>• Break-even/Positive Rate of Return</li> </ul>		

BUSINESS ASPECTS	FINDINGS	RECOMMENDATIONS
<ul style="list-style-type: none"> <li>Sustainability of operations</li> </ul>		

EQUALLY IMPORTANT FACTORS TO CONSIDER	FINDINGS	RECOMMENDATIONS
<b>Social Acceptability</b> Acceptability to the community, family members and other stakeholders		
<b>Environmental Friendliness</b> Inflict, minimal or no harm at all to the environment		
<b>Gender Sensitiveness</b> Recognize issues and problems on stereotyping and discrimination		
<b>Sustainability</b> Ability to maintain its operations, services and benefits during its projected lifetime		

#### D. OVERALL EVALUATION

Criteria	Percentage (%)	Rating
<b>I. Relevance</b> <ul style="list-style-type: none"> <li>Purpose/Objectives</li> <li>Priority Beneficiaries</li> </ul>	25%	
<b>II. Effectiveness</b> <ul style="list-style-type: none"> <li>Marketing Plan</li> <li>Production Plan</li> <li>Management Plan</li> <li>Financial Plan</li> </ul>	25%	
<b>III. Efficiency</b> <ul style="list-style-type: none"> <li>Financial Viability <ul style="list-style-type: none"> <li>Financial Projection</li> <li>Positive Return of Investment</li> <li>Sustained Operations</li> </ul> </li> </ul>	25%	
<b>IV. Impact</b> <ul style="list-style-type: none"> <li>Potential effect to the target beneficiaries and other stakeholders</li> </ul>	25%	
<b>TOTAL SCORE</b>	<b>100%</b>	

**E. RECOMMENDATION**

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Reviewed/Evaluated By:

Date:

\_\_\_\_\_  
Position/Designation

\_\_\_\_\_

Noted By:

Date:

\_\_\_\_\_  
PO/FO Head

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