**ANNEX L**

**PROJECT EVALUATION/APPRAISAL SHEET FOR GROUP PROJECT**

Department of Labor and Employment

DOLE Regional Office \_\_\_

PROJECT EVALUATION/APPRAISAL TEMPLATE FORM FOR GROUP PROJECT

* 1. **PROFILE**

|  |  |
| --- | --- |
| **PROJECT TITLE** |  |
| **PROJECT ACP** |  |
| **PROJECT COST** |  |
| DOLE |  |
| Proponent |  |
| **FUND SOURCE** |  |

* 1. **MINIMUM REQUIREMENT**

|  |  |  |
| --- | --- | --- |
| **MINIMUM CRITERIA** | **FINDINGS** | RECOMMENDATIONS |
| Documentary Requirements |  |  |
| Target Beneficiaries |  |  |
| Need to be Addressed |  |  |
| Purpose/Objective |  |  |
| Eligibility of the Proponent- ACP/Proponent-Beneficiary   * Equity * Liquidation of cash advances |  |  |

* 1. **TECHNICAL AND FINANCIAL EVALUATION**

| **BUSINESS ASPECTS** | **FINDINGS** | RECOMMENDATIONS |
| --- | --- | --- |
| **Marketing Plan**   * Potential market * Market share * Buying habits * Quality and affordability of products/services * Pricing strategy * Competitiveness in terms of price, quality, appearance * Promotion strategy * Distribution channel * Competitive advantage |  |  |
| **Production Plan**   * Production details * Source of raw materials * Equipment, tools, materials required * Location, size and lay-out of production area * Proportion of workers vis volume of production * Safety and health measures |  |  |
| **Organization and Management Plan**   * Project Management Team (PMT) * PMT duties and responsibilities * Assignment of tasks to production/service workers * Operational and managerial skills * Training needs * Commitment from stakeholders * Compensation/salary methods * Profit sharing scheme |  |  |
| **Financial Plan**   * Working capital * Cost estimates * Total project cost * Financial statements (Income Statement, Cash Flow, Balance Sheet) * Cash/working capital for operations |  |  |
| **Financial Viability**   * Realistic projections * Break-even/Positive Rate of Return * Sustainability of operations |  |  |

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

* 1. **OVERALL EVALUATION**

| **Criteria** | **Percentage (%)** | **Rating** |
| --- | --- | --- |
| 1. **Relevance**  * Purpose/Objectives * Priority Beneficiaries | 25% |  |
| 1. **Effectiveness**  * Marketing Plan * Production Plan * Management Plan * Financial Plan | 25% |  |
| 1. **Efficiency**  * Financial Viability * Financial Projection * Positive Return of Investment * Sustained Operations | 25% |  |
| 1. **Impact**  * Potential effect to the target beneficiaries and other stakeholders | 25% |  |
| **TOTAL SCORE** | **100%** |  |

* 1. **RECOMMENDATION**

|  |
| --- |
|  |

Reviewed/Evaluated By: Date:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Position/Designation

Noted By: Date:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

PO/FO Head