**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:

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 PO/FO Head