

ASSESSMENT OF THE DSWD SOCIAL PENSION PROGRAM IMPLEMENTATION

ABSTRACT

This study assessed the implementation of the social pension program of the Department of Social Welfare and Development (DSWD) and determined how well it performed in its first year of implementation as perceived by the beneficiaries and implementers. A total of 1,100 beneficiaries, 77 years old and above, and 42 implementers were interviewed for this study in 2012. These participants were purposively sampled from 26 cities and 29 municipalities in 11 regional divisions of the country. Survey and focus group discussions were conducted to obtain the research data.

The major findings of the study revealed that most of the beneficiaries are properly informed of the program and are aware of the source of the stipends they receive. They find the program to be good and express gratitude for their pension, although insufficient. Similarly, they consider as acceptable and convenient the present system of receiving their stipends, inspite of the difficulty of some in travelling to the LGU pay-out center, resulting in many cases to the sending of representatives to receive the assistance.

Coordination with the local Offices of the Senior Citizens Association is found to be in place; nevertheless minor problems were noted with respect to the dissemination of information, particularly in remote areas. The limited number of the Regional Social Pension Staff Unit which oversees the operation of the program even faces a problem with some members being pulled out and reposted to other assignments. The identification and validation of potential beneficiaries equally poses as a constant issue in most of the LGUs. Also needing improvement are the monitoring and reporting systems related to the program.

In general, the implementation of the social pension program requires a lot of refinement in order to make it friendlier both to the clients and the service providers. These include the following: (1) updating the database of the National Household Targeting Office to facilitate faster identification and selection of beneficiaries; (2) deputizing a site-based private forwarder, like the LBC, to release the stipends; (3) maximizing the participation of the local barangays in communicating the program to the community; and (4) assigning regular staff to implement the program. Two recommendations that stood out from the study include (1) the clamour to increase the amount of the pension and (2) the inclusion of the younger group of senior citizens, i.e., those below age 77 years old, as beneficiaries. Periodic study about the social pension program and its impact upon the senior citizens are strongly indicated.

INTRODUCTION

The Social Pension for indigent Filipino senior citizens is one of the commitment programs of the National Government through the Department of Social Welfare and Development (DSWD) on social protection for the most vulnerable sector. The implementation of this program is also in fulfillment of Republic Act No. 9994 or the “Expanded Senior Citizens Act of 2010” providing additional benefits and privileges for senior citizens maximizing their participation in nation building.

Having an estimate of 6.3 million elderly Filipinos aged 60 years old and above (NSCB CY 2010), the Department has to maximize the efficiency and effectiveness of the initial implementation of social pension by issuing Administrative Order Nos. 15 Series 2010 and 13 Series 2011. The first year of implementation of the social pension program needs proper guidelines and procedures to be able to properly target areas, identify beneficiaries and distribute funds nationwide. Thus, the implementation of these administrative orders and other related procedural guidelines needs to be evaluated whether or not the Department’ has met its program objectives and target number of beneficiaries.

Looking at it on a social development perspective, the Social Pension also needs to be evaluated on the side of the beneficiaries. The need for an assessment, especially on its pilot year of operations, is very crucial to the evaluation in terms of how well it is serving the welfare of senior citizens. It has always been a doubt for critics that any sort of dole out coming from the national government does not particularly lead to success or better well-being of beneficiaries. It is hoped that this study will provide evidence to the contrary, and so that government may be helped to adjust or improve the program.

This research will practically serve as the primary source of data for evaluation to be conducted by the Policy Development and Planning Bureau (PDPB) of the DSWD as indicated in the *Post Implementation Phase* under Section 10. *Evaluation and Research of Administrative Order No. 15 Series of 2010.*

RESEARCH OBJECTIVES

A. General Objective

This research study is an assessment of the social pension program to determine how well the program performed as perceived by the beneficiaries and implementers in its first year of implementation (2011).

B. Specific Objectives:

1. To examine the program's performance in terms of reaching its target beneficiaries, its implementation, and strategies in the delivery of payment to the social pensioners;
2. To identify problems encountered, challenges, issues and concerns during program implementation of the social pension

METHODOLOGY

This is a descriptive research that used both survey and focus group discussion to obtain data. A total of 1,100 beneficiaries were interviewed for this study. Samples were taken from 26 cities including 5 in NCR, and 29 municipalities in 11 regions. The sampling and selection process considered the number of beneficiaries served, pilot regions, urban and rural characteristics, and other socio-economic and cultural conditions. On the regional level, sampling distribution was done through simple random sampling of beneficiaries in provinces, municipalities and cities having a large number of registered social pensioners.

Table 1. Sampling and Distribution of Respondents

	REGION - Province	City/Municipality			REGION - Province	City/Municipality	
1	Region I (ILOCOS REGION)			7	Region VI (WESTERN VISAYAS)		
	ILOCOS NORTE ILOCOS SUR	Laoag City Narvacan San Fernando	20 20 20		ANTIQUE ILOILO	Sibalom San Joaquin	20 20
	LA UNION	City	20		ILOILO CITY (CAPITAL)	Iloilo City	20
	PANGASINAN	San Carlos City San Fabian	20 20		BACOLOD CITY (CAPITAL) NEGROS OCCIDENTAL	Bacolod City Cadiz	20 20
2	Region II (CAGAYAN VALLEY)			8	Region IX (ZAMBOANGA PEN.)		
	ISABELA	Ilagan Dupax Del Norte	20 20		ZAMBOANGA DEL SUR	Aurora Zamboanga City	20 20
	NUEVA VIZCAYA QUIRINO CAGAYAN	Aglipay Baggao Tuguegarao City	20 20 20		ZAMBOANGA CITY ZAMBOANGA SIBUGAY ZAMBOANGA DEL NORTE	Buug Dapitan City Sindangan	20 20 20
3	Region III (CENTRAL LUZON)			9	Region X (NORTHERN MIND.)		
	BULACAN PAMPANGA TARLAC NUEVA ECIJA	SJDM Candaba Tarlac City Guimba Cabanatuan	20 20 20 20 20		BUKIDNON LANAO DEL NORTE MISAMIS ORIENTAL MISAMIS OCCIDENTAL	Talakag Lala Balingasag Ozamis City Oroquieta	20 20 20 20 20
4	Region V (BICOL REGION)			10	Region XIII (Caraga)		
	ALBAY CAMARINES NORTE CAMARINES SUR	Legazpi City Vinzons Libmanan	20 20 20		AGUSAN DEL NORTE SURIGAO DEL NORTE SURIGAO DEL SUR	Butuan City Surigao City Bislig City Bayugan	20 20 20 20
	MASBATE	Masbate City	20		AGUSAN DEL SUR	City San Francisco	20 20
	SORSOGON	Sorsogon City	20				
5	CAR			11	NATIONAL CAPITOL REGION (NCR)		
	ABRA APAYAO	Tayum Flora	20 20		MANILA QUEZON CITY		20 20

	BENGUET	Baguio City	20		MANDALUYONG		20
	IFUGAO	Tinoc	20		PASIG		20
	KALINGA	Tabuk	20		CALOOCAN		20
6	Region VII (CENTRAL VISAYAS)						
	BOHOL	Loon	20				
	CEBU	Tuburan	20				
		Barili	20				
	NEGROS ORIENTAL	Guihulngan					
		City	20				
		Siaton	20				
					TOTAL		1,100

Focus Group Discussion (FGD) was done in each region involving a total of 53 participants coming from the City/Municipal Social Welfare Development Office, Senior Citizen Federation/Associations, and the Regional DSWD offices. The FGDs covered program implementation concerns including procedures, strategies, target beneficiaries, and related issues and problems.

RESULTS

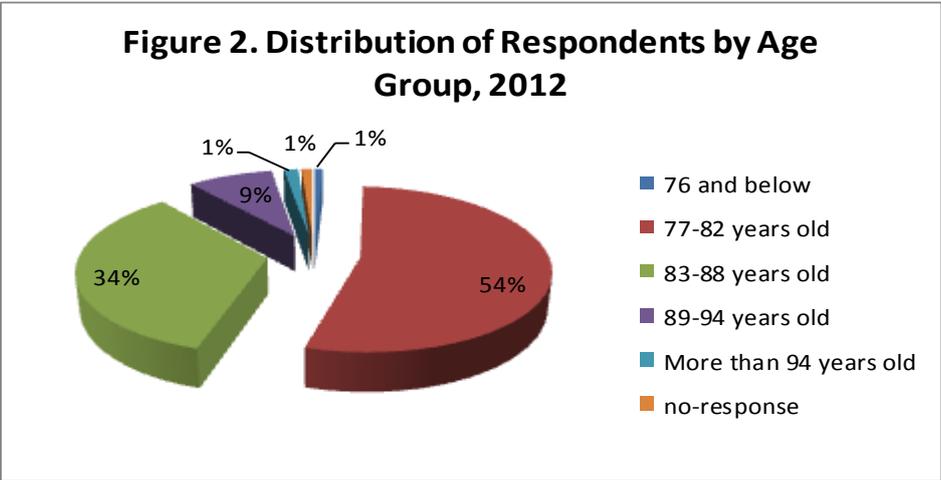
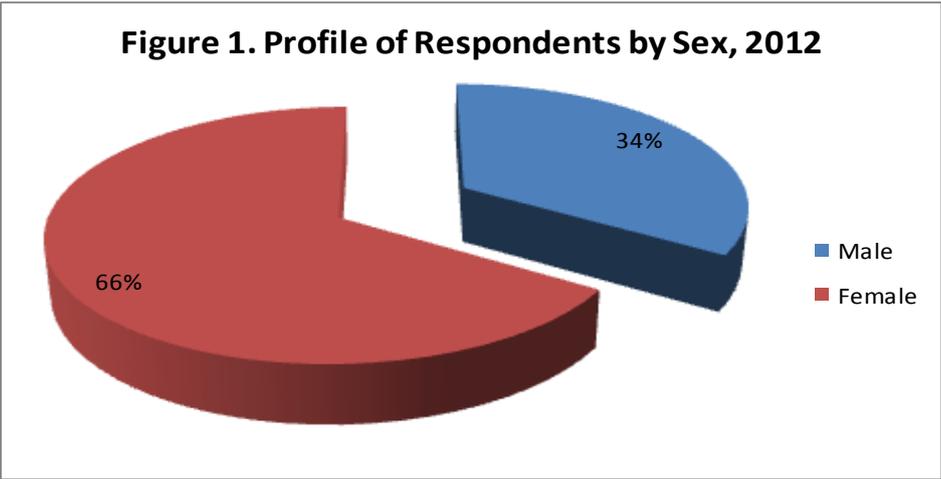
I. Profile of Respondents

Respondents to the study numbering a total of 1,100 social pensioners come from eleven (11) regions in the country [Table 1: Distribution of Respondents by Region]. Of these, female social pensioners number more (727 or 66%) than the male pensioners (373 or 34%) [Figure 1: Profile of Respondents by Sex]. Majority (53.8%) of these respondents have ages between 77-82 years old. It must be mentioned, however, that there are five regions (i.e., CAR, 1, 2, 5 & CARAGA) where beneficiaries to the program have ages 76 years and below [Figure 2: Distribution of Respondents by Age Group].

Table 2 (Social Pension): Percentage distribution of respondents by region, 2012

Region	Frequency	Percent
CAR	103	9.4
Region I	104	9.5
Region II	102	9.3
Region III	100	9.1
Region V	78	7.1
Region VI	99	9.0
Region VII	105	9.5
Region IX	102	9.3
Region X	103	9.4
CARAGA	103	9.4
NCR	101	9.2
Total	1100	100

For the eleven (11) regions where the FGDs were conducted there were a total of 28 C/MSWDOs, 14 DSWD-FO personnel, and 4 Senior Citizens groups who made up the FGD participants.



II. Program Performance

A. Advocacy and Information

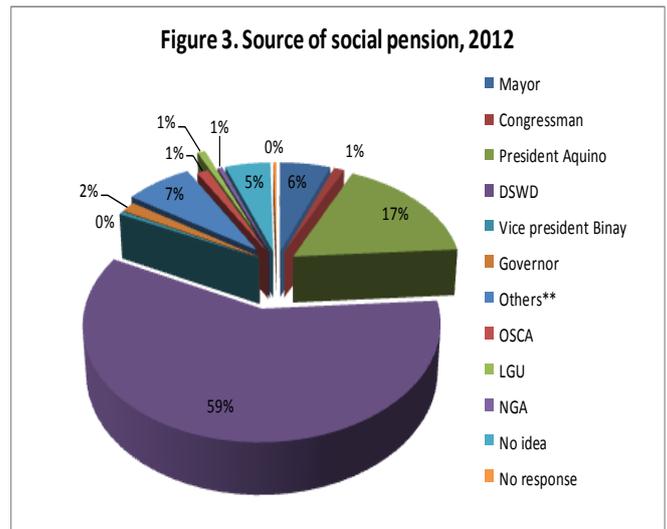
Awareness about the social pension program stem in part from activities being conducted as part of Advocacy and Information, which include the conduct of barangay assembly and unit resident meetings about the program; orientation sessions; information dissemination through radio stations; tarpaulin printing; printing and dissemination of flyers on Frequently Asked Questions about the program; launching of the social pension program in coordination with media; radio and TV guesting; and audio-visual presentation on the experiences of beneficiaries.

For instance, asked about the source of the social pension, the study shows there is a high level of awareness about where the stipend they are receiving is coming from with majority of respondents (59%) saying this came from the DSWD [Figure 3: Source of Social Pension].

Nevertheless, even with this high level of awareness and the many efforts to provide information gaps still remain in this respect.

Clarity and understanding of the program could still be strengthened in many regions, and more participants still feel the need for more advocacy efforts and information campaigns. Presidents of senior citizens' associations themselves are hard put to explain the reasons for excluding from the program the elderly who are below 77 years old. Neither are some OSCA officials familiar with all the procedures and technicalities involved in implementing the program.

There are many simple procedures that have not really been explained or answered by the DSWD regional offices to the senior citizens themselves in terms of implementation. Since there are already operational guidelines as well as supplemental rules in place, there is just a need to capacitate FO elderly point persons as well as the senior citizens themselves.



B. Coordination

Coordination exists between the Field Offices and the local governments. Both recognize that coordination is critical with regard to finalizing the list of beneficiaries. In most cases the Office of the Senior Citizens Association (OSCA) is tapped to be involved in the validation and verification of beneficiaries, including the finalization of the list and replacements. Coordination is also evident in cases where Senior Citizen (SC) Presidents are invited to provide orientation about the program to the elderly in the barangays.

Meanwhile, coordination does pose a challenge for some regions. For instance, in Region I, it was reported that the FSCAP was not involved in the initial phase of the Program. But that this has since been improved through clarification of roles and key stakeholders, including the OSCA and FSCAP.

In Region II coordination is a challenge owing to lack of signal in some mountain municipalities, which made disseminating information difficult. As a result, other than using current communications technology, implementers resorted to local customary practices, such as relaying information through “bulong” system with the help of OSCA and SC federations or associations. Alternatively, early preparations are done to give enough time to disseminate and/or collect information to ensure better coordination. They also mentioned that coordination was insufficient owing to roles not being defined well.

In Region VII, the FO said it has no problem coordinating with the LGU of Cebu City, and their CSWDO staff are very cooperative. The local FSCAP members as well as the OSCA Head are also very much involved, although as “new appointees”, they admit they are still not very familiar with all the procedures and technicalities.

In Region X, coordination between the MSWDO and the OSCA became a problem in 2011 during the planning phase where they were not included. However, for 2012, planning has since been coordinated with them.

C. Roles of Regional Social Pension Staff

Clearly, the role of the Regional Social Pension Staff (RSPS) is well-known. Besides providing technical assistance to LGUs, they are identified as the overseer of program implementation at the regional level playing a key role during pay-out. FGD participants know it is the RSPS who provide the cities or municipalities with the list of potential beneficiaries for validation and verification by the LGUs and the OSCAs, and the ones who maintain a data bank or master list of social pensioners. While it is admitted that those involved in the program are presently functional and operational, a comprehensive orientation on the Social Pension Program would still be helpful as a backgrounder and to further familiarize them with their roles. Additionally, occasions (e.g., conventions) where senior citizens congregate may be optimized to strengthen partnerships and clarify roles in program implementation. Technical assistance and advocacy efforts could also be increased.

Issues pertaining to the RSPU include the lack of manpower, which in the CAR Region caused problems in the planning phase of the pay-out. Add to this is the high turn-over amongst staff who were previously assigned to the program and were moved or replaced but who did not adequately transfer information or technology to the new staff. This was the case for Region VII.

In Region X, participants said that explanation was not made to the senior citizens that the listing of potential beneficiaries is provided by DSWD.

D. Identification/Verification and Selection of Social Pensioner

All the FGD participants are aware that the identification and selection process is based on the National Household Targeting System for Poverty Reduction (NHTS-PR), and that it is the RSP Units that provide the lists of potential pensioners to cities and municipalities for validation and verification. Participants explained that verification/validation is jointly undertaken by the LGU through its C/MSWDO and the senior citizens association. They said that from an original list of potential beneficiaries delisting and replacement are done based on a priority list given by LGUs as part of the validation process. Even then delisting may still be done upon reassessment of eligibility after the actual payout.

It is therefore not surprising that a number of issues raised by many FGD participants stem from the NHTO database. For instance, in CAR, it was found that there were senior citizens who were not qualified to receive pension but were included in the list. In Region II, questions have been raised relative to the number of approved beneficiaries and the targeting method owing to the low number of approved beneficiaries, and the reasons why senior citizens have not been chosen yet. In Region III, participants raised the accuracy of the listings or that information from the master list of beneficiaries is wrong, such as beneficiaries could not be located, the name listed is not a senior citizen, and the address is different.

In Region V it was mentioned that the selection process was a challenge to social workers and staff of the LGU because of the difficulty in explaining to the senior citizens the process or criteria of selection due to the limited number of slots approved per municipality by DSWD. Particularly in Region V, there were no additional guidelines at that time in how the new selection process and replacement process were to be conducted. They were unaware that a certain percentage has been allotted by the LGU for the selection and approval of their waitlisted beneficiaries and replacements.

In Region VI, there is a sense that the use of the targeting system in the initial determination of beneficiaries has become problematic for some LGUs and has resulted into continuous conduct of validation and spot checking from the local SWDO. In fact, they think the list is outdated. They believe the criteria using the

targeting system do not cater to all indigent senior citizens. They mentioned that age alone as a basis for disqualifying the senior citizens regardless of his/her medical condition defies the purpose of the pension, and that physical and medical condition of the senior citizen should be considered as a basis for inclusion as beneficiary. Accordingly, this matter is not directly answered by the Targeting system. In addition, they pointed out that the low number of actual beneficiaries approved as against the expected number has created a long list of eager senior citizens hoping to get into the program. It would seem as well that the basis for the actual number of approved beneficiaries provided by DSWD to the different LGUs was not properly explained to them. Such explanation is requested for them to disseminate to the hundreds of waitlisted indigents. Those in the LGU as well expressed the desire to have greater participation in the selection process, validation and approval of beneficiaries.

Similarly, Region VII senior citizen and government representatives alike raised the issue of proper identification of target beneficiaries without “politicking”. Senior citizens especially continue to make an issue of the intended beneficiaries as not being the correct “universe” covered by the SPMO masterlist. Even at the LGU level, as validated by the OSCA Heads and C/MSWDOs, there are still many “exclusion than inclusion errors”. They allege that there are seniors who may be considered poor and “indigent” based on the law’s strict definition, but are not identified according to the National Household Targeting Office. Meanwhile, there are those names which appear in the list from the NHTO but are found out to be undeserving of the P500 monthly social pension. The NHTO data as validated by the SPMO still needs to be cleaned up to qualify as a credible “masterlist” because of the numerous exclusion and inclusion errors encountered.

Again, in both Regions X and CARAGA, senior citizens qualified to receive pension were excluded from the list while those senior citizens who are not qualified were included in the list. There was reportedly a COA finding in CARAGA where the recipients of social pension are below 77 years of age. For both Regions I and X, there were potential beneficiaries who were found to be ineligible considering that the NHTS-PR assessment had been done two years ago.

The data above show that while everyone is familiar with the NHTO data as basis for the social pension beneficiaries, many are convinced it is not the accurate database due to the numerous exclusion/inclusion errors. Thus, it must be explained to them that while the law specified use of the NHTO data to identify the poorest senior citizens in the poorest areas of the Philippines, it was a mere

'reference point' since the purpose of NHTO is different and targeted households, not individuals. As such, the importance of the validation/verification process must be emphasized.

Some regions, however, like CARAGA expressed that the one-week verification/validation is insufficient especially when there is only the focal person to do it or when personnel is limited or when the process has to be undertaken in far-flung areas. Relative to this process, it was recommended that there be closer coordination, for instance, with the Social Security System during verification/validation. In addition, more senior citizen federations/associations could be maximized as additional manpower for validation/verification down to their barangay and district counterparts. The LGU's other staffing complement are likewise already being maximized for validation and for pay-outs. Additionally, mixing the list from the targeting system and the list from the LGU is being recommended as an effective method in the final validated list of beneficiaries and approval of replacements.

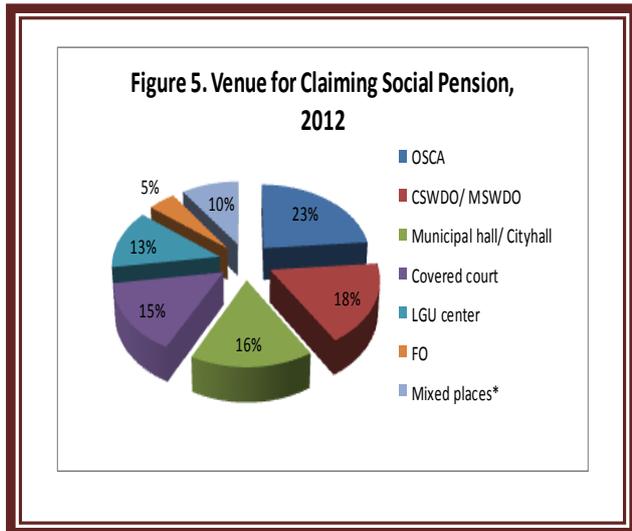
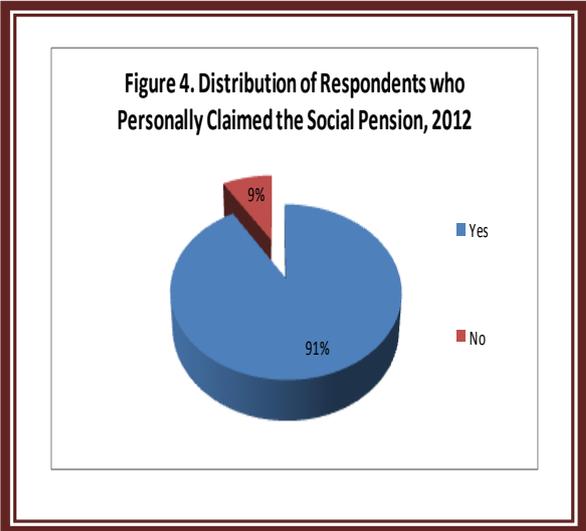
E. Claiming and Releasing Social Pension

In general, three major groups participate in the distribution or pay-out of the social pension. These are the Regional DSWD Field Offices through their RSPUs and SWADT members; the LGUs through their City/Municipal Social Welfare Development Office; and, the senior citizen associations, such as the OSCA and provincial federations of senior citizens organizations. In few instances, volunteer organizations are requested for assistance, such as in Region 1 where the Pag-asa Youth Association of the Philippines (PYAP) was invited. These groups disseminate information of the schedules of pay-out prior to its actual distribution to beneficiaries. In the case of NCR, information is disseminated anywhere from one to two weeks depending on the number of social pensioners per district. Additionally, a unified form, which serves as notice of the pay-out schedule is provided by NCR to all social pension beneficiaries.

The venue of the pay-out is generally the discretion of the LGUs, which is often conducted at the municipal hall annex, gymnasium, MSWDO or senior citizen centers. Convenience of pensioners is a consideration for some LGUs in choosing the venue with them aiming for enough ventilation and space. Assistance in ensuring order and safety is augmented by additional personnel coming from the LGUs through the Mayor's office, the public safety office or the MSWDO during the actual pay-out. In some cases, transportation is provided by

LGUs to social pensioners residing in far-flung areas, or for senior citizens who suffer from physical conditions that prevent them from easily traveling to and from the venue of pay-out. LGUs likewise strive to make the pay-out as comfortable as possible with those having budgets providing snacks, as the Mayor's counterpart, to beneficiaries while they wait. A good practice of some LGUs is assigning a schedule of pay-out per barangay to avoid overcrowding.

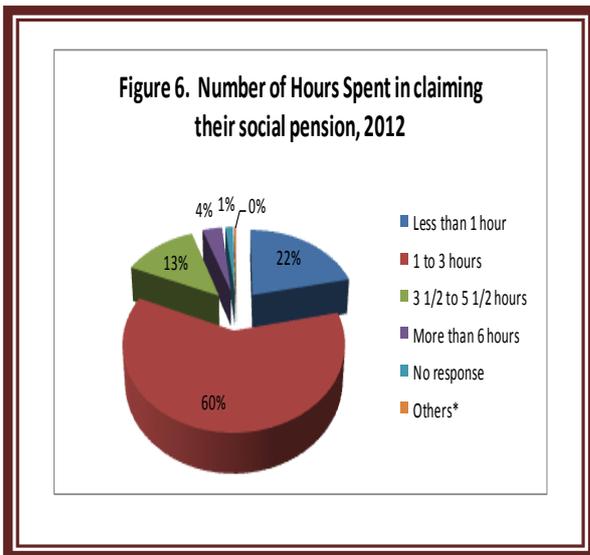
In the survey of beneficiaries that was done, the study shows that almost all (91%) beneficiaries say they personally claimed their social pension [Figure 4: Distribution of Respondents who Personally Claimed SP] and that the claims were made mostly at the Office of the Senior Citizens Affairs (23%) [Figure 5: Venue for Claiming SP].



Payment of pension is done through cash advance. There are regional offices, such as FO 1, which has devised a mechanism to involve other divisions in the pay-out like giving them their own provincial assignments. One of the best practices shared by FO 1 during actual payment is the use of claim stubs and assigning of permanent number per beneficiary to fast track the transaction. It also considered the

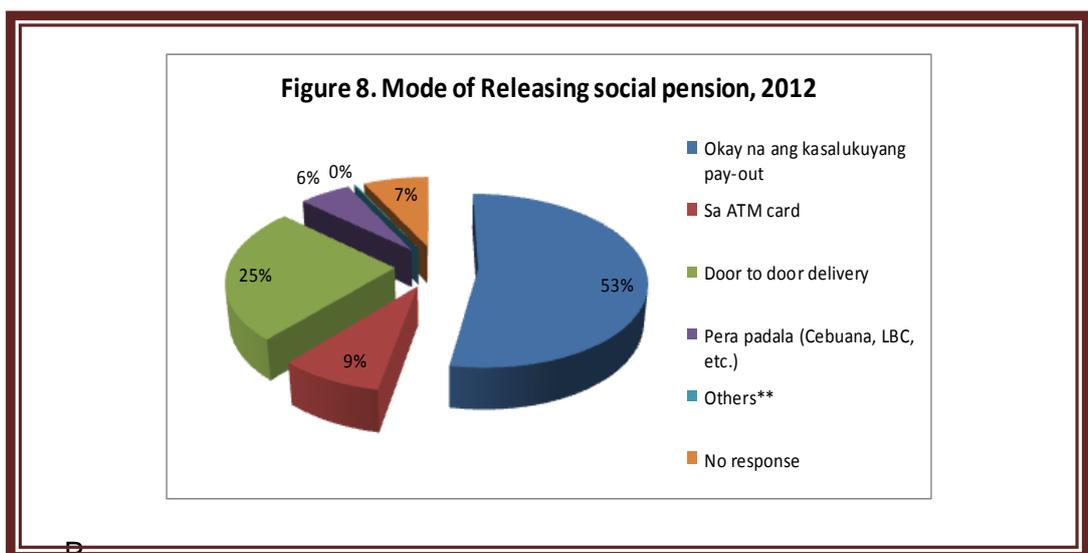
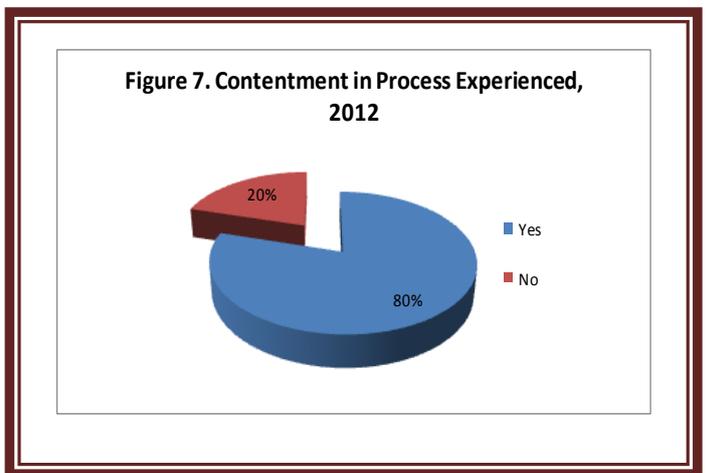
schedule of 'market day' in timing the pay-out.

During pay-outs, verification is conducted by both the DSWD personnel present and the social workers of the LGU. Accordingly, processing takes only a few minutes per pensioner, however, receiving the pension could take longer owing to the simultaneous arrival of pensioner by batches and by municipalities, in the case of FO 2. And even then, the length of time varies from region to region, and could be anywhere from an hour to two. Still, pensioners are willing to wait as long as they get their pension.



In the survey, it shows that a good number of them (60%) mention having had to wait for an hour to three before being able to claim their pension [Figure 6: Number of Hours Spent Claiming SP] with FO Region 1 registering the higher number of beneficiaries (88) waiting for that amount of time. Meanwhile, it is notable that FO Region IX showed the higher number (51) of respondents having to wait for less than an hour¹.

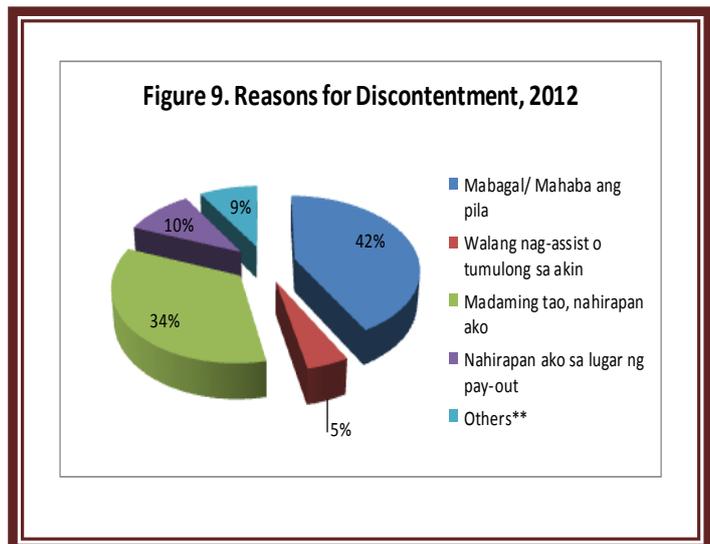
Notwithstanding the number of hours spent waiting to claim their social pension, majority of beneficiaries (80%) say they are content with the process they experienced [Figure 7: Contentment in Process Experienced]. This is supported by the fact that more than half (53%) of respondents find the present pay-out procedure acceptable while others suggest a door-to-door delivery (25.2%) [Figure 8: Mode of Releasing Social Pension].



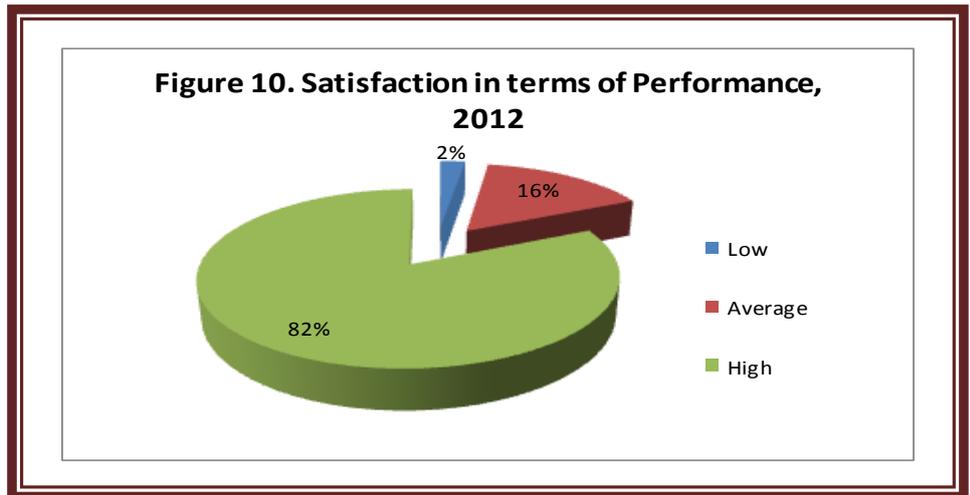
¹ See Annex for Table 6: Distribution of Respondents by Number of Hours Spent Claiming Social Pension, 2012

Pensioners in FO 1 find the actual pay-out an “emotional” event because they truly appreciate the assistance from DSWD. In fact, some even have to really make an effort and be helped by their children just so they could get to the venue. In FO 6, the actual distribution conducted by the RSPU and the FO has been generally acceptable and is appreciated by most beneficiaries with not a few saying they prefer the current pay-out system rather than the alternatives. This is a sentiment echoed by those in FO 7 who said the current system of actual cash pay-out is preferred by a majority of the seniors because they enjoy being able to hold money in their hands. Accordingly, ATMs won’t work because they tend to forget their PIN numbers or are not really knowledgeable about ATM machine operation. Moreover, while door-to-door would be ideal especially for those who are too sick or bedridden, or need transportation money and/or a companion or chaperone to claim the benefit, they do enjoy the opportunity to get out of the house and to be able to ‘socialize’ with fellow senior citizens. Others say that if it would be through *‘pera padala’* they would still need to go out of the house anyway so it is just the same as going to the city hall lobby where they are comfortable sitting in chairs while provided with snacks and lunch while they wait.

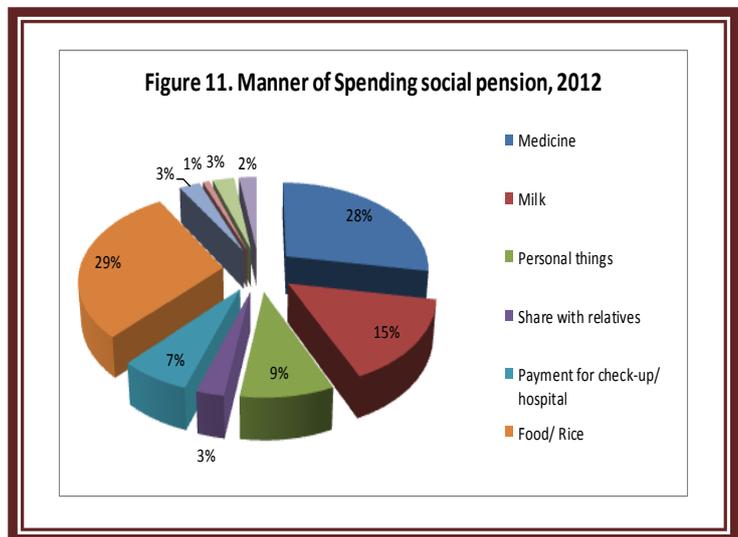
On the other hand, fewer than a third (20%) say they are not content with the process and it is worthwhile to pay attention to the reasons accounting for this. Close to half of the beneficiaries (42%) and over a third (34%) explained experiencing long lines and the volume of claimants, respectively, as difficulties in the process of claiming their pensions that account for their discontent [Figure 9: *Reasons for Discontentment*].



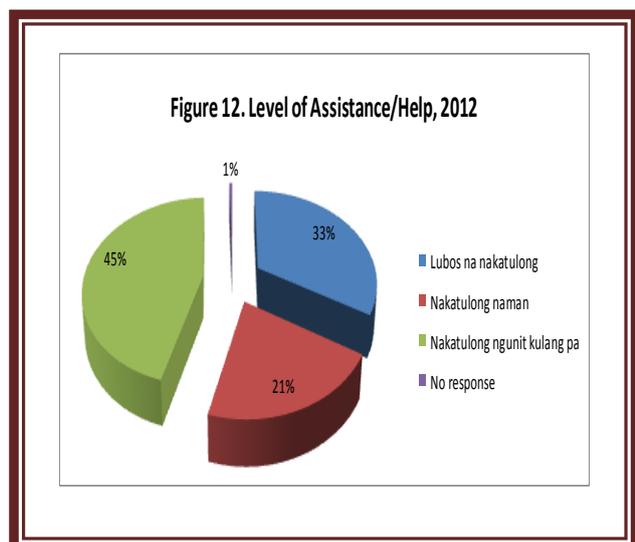
In general, most of the beneficiaries (82%) gave high marks in terms of their satisfaction in the process of distributing social pensions [Figure 10 Satisfaction in terms of Performance].



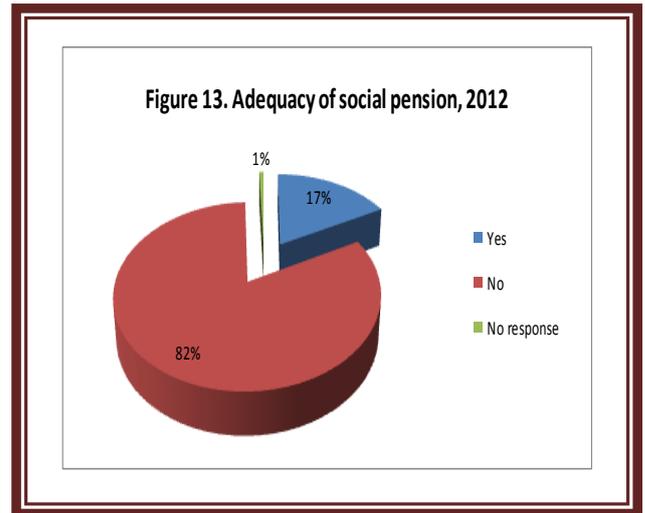
They also acknowledge the relevance of the social pension. This is so because pensioners admit it helps meet some of their needs. Social pension beneficiaries claim that the amount they receive is usually generally spent for food/rice (29%), medicine (28%), and milk (15%) while the rest are expended for such items as personal stuff, payment for check-up or the hospital, repayment of debts, shared with relatives, savings, and others [Figure 11: Manner of Spending social pension].



Having said this, however, many beneficiaries also note the inadequacy of the amount of the pension since almost half (45%) of the respondents feel this is so [Figure 12: Level of Help Received]. A fact borne out by beneficiaries who say that the amount is not adequate (82%) [Figure 13: Adequacy of Social Pension].

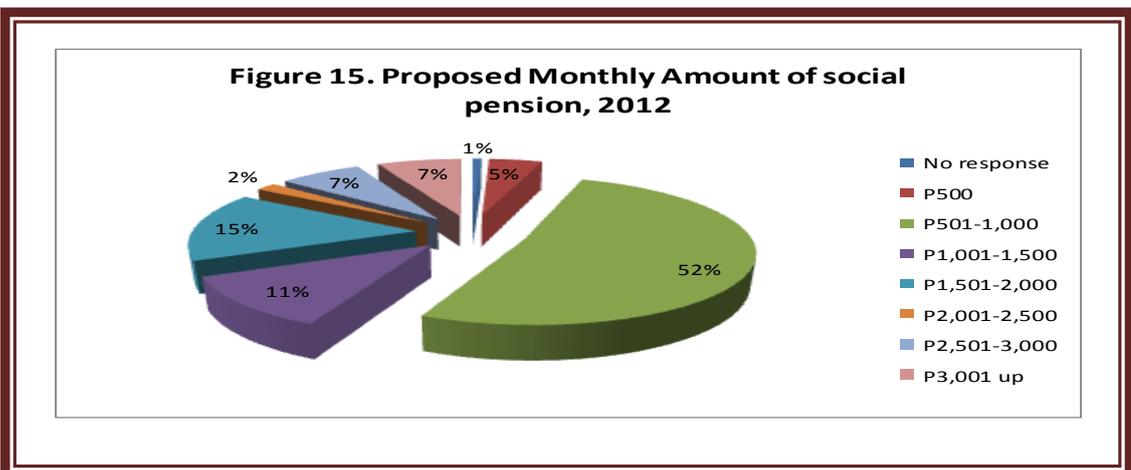
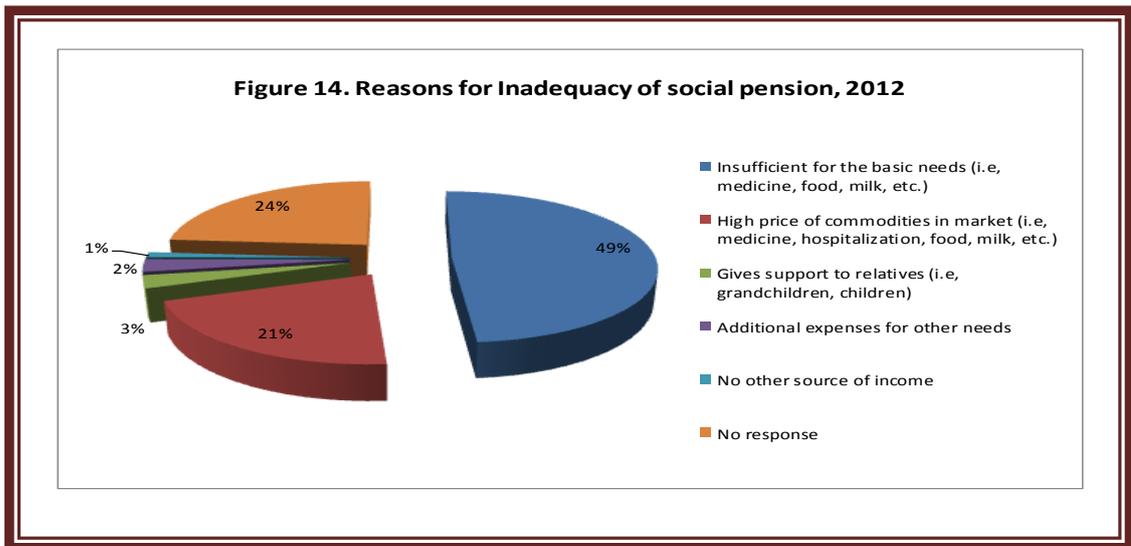


When asked for their reasons explaining the inadequacy of amounts received, most beneficiaries just either reiterate the insufficiency (49%) of the amount, point out to the high price of commodities (21%) or give no reason at all (24%) [Figure 14: Reasons for Inadequacy of Social Pension].

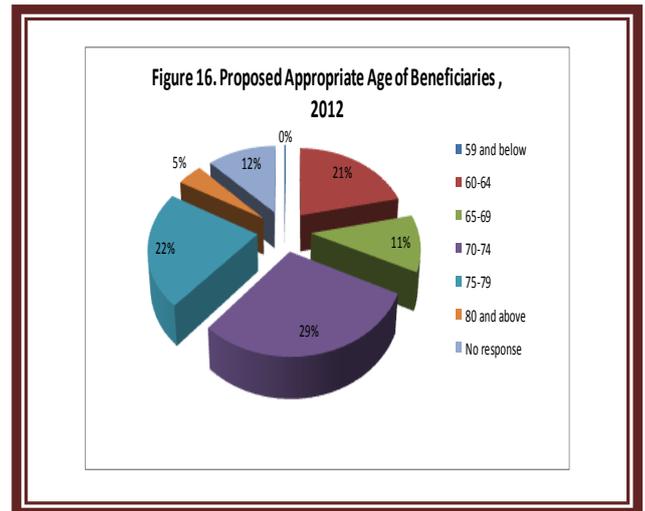


On the other hand, a third (33%) say that the social pension they are receiving is a big help in meeting their needs and about a fifth (20%) thinks it is quite helpful [Figure 12].

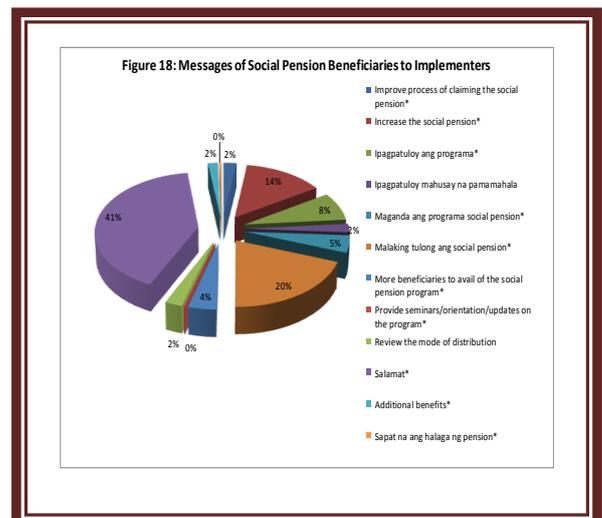
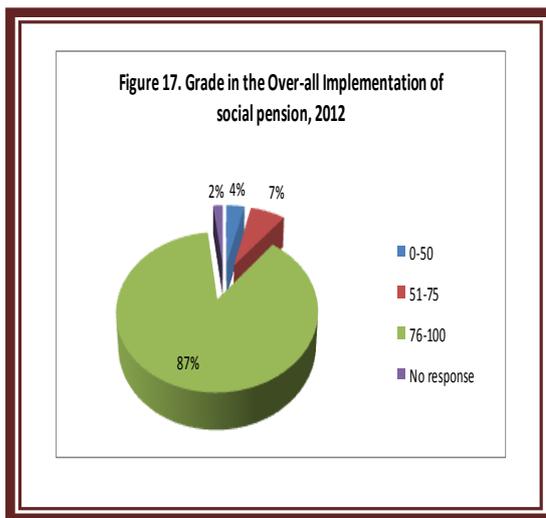
Slightly more than half (52%) of beneficiaries think the social pension should amount to anywhere from P501-1,000 monthly [Figure 15: Proposed Monthly Amount].



And in terms of the appropriate age for beneficiaries to receive the social pension responses seem to suggest a general tendency toward lowering the age with nearly a third (29%) suggesting age be lowered between 70 – 74 years, 75 – 79 years (22%) and 60 -64 (21%) [Figure 16: Proposed Appropriate Age of Beneficiaries].



Overall, majority of respondents (88%) believe the social pension program and its implementation deserve to be continued as shown by the high marks given to it [Figure 17: Grade in the Over-all Implementation] and the expression of gratitude (41%) from beneficiaries saying this has been a big help to them (20%) but suggesting, however, that this be increased (14%) [Figure 18: Messages of Social Pension Beneficiaries to Implementers].



There are, however, also a number of issues that affect both the program implementing teams and the beneficiaries.

For instance, accessibility is a concern of senior citizens living in far-flung areas or for those areas where disasters occur and the only available transportation is through water. Conversely, accessibility is also problematic for implementing teams because it adversely affects and limits their efforts at coordination and disseminating information of scheduled pay-outs. In cases like these, it was recommended that greater coordination with barangay officials be made.

It was also mentioned that the limited time or schedule to undertake the pay-outs vis-à-vis the coverage of areas results to the frequent tardiness of paymasters not to mention the limited vehicles available during pay-out compounding the problem. Conversely, shortness of time and the short period of notice of scheduled releases of benefits lead to the inability of beneficiaries to immediately claim benefits especially for those living in far-flung areas. One suggestion here is to extend the schedule of pay-out, or to change the mode of distribution (e.g., house to house), or to explore barangay level distribution. Other recommendations had to do with considering the geographical location for ensuring delivery and receipt of social pension.

Concern was expressed over the uncertainty surrounding the actual receipt of social pension by the intended beneficiary when only representatives receive the money. Conversely, disallowing actual immediate family members of beneficiaries to claim the pension on their behalf also poses a problem.

The lack of clarity about the reasons for de-listing beneficiaries in subsequent pay-outs has been mentioned. There was also an instance where it was reported that a social pensioner is deceased and had been replaced by the LGU but who is in fact still alive. Conversely, there are deceased beneficiaries who are not de-listed quickly enough to facilitate replacements. On this, it has been recommended to have better coordination with the local registrars for a regular update of submitted Death Certificate of senior citizens.

FOs have noted the lack of manpower during pay-outs given that only regular employees are allowed to bring money for the social pensioners. In addition, is the concern over the security of DSWD personnel and MSWDOs during pay-outs especially for those traveling in far-flung areas.

The resistance by some LGUs to release benefits via cash transfer as recommended because it would entail additional accountability for them was also noted along with the observation that retroactive payments are not made to the new beneficiaries or the replacements but remain with the LGU.

Some participants also relayed concerns, which they have encountered as part of program implementation like the recurring requests for supporting documents being requested from beneficiaries, such as medical certificates during each pay-out and the difficulty of obtaining the same given the scarcity of available doctors. Additionally, the number of payroll to be signed by senior citizens can be quite problematic and inconvenient for them especially as some already have difficulty writing. Too, there are some LGU representatives who

complain about the lack of provision for meals during pay-out since not all LGUs provide the same.

F. Monitoring and Reporting

Post-implementation activities center mainly on the conduct of monitoring and submission of reports. Monitoring is done by the LGUs, OSCA and Federation representatives who then submit updated list to the DSWD RSPS as basis for pay-out.

Reports submitted to the DSWD are the registry of paid beneficiaries (per province, city or municipality), the fund utilization, and accomplishment reports. According to FGD participants from FOs 9 and CARAGA, required reports are submitted by the LGU and the FO forwards the same to the Central Office on the specified date on the guideline. Meanwhile, the focal person of FO 10 mentioned preparing a monitoring template to be utilized by the C/MSWDO in making their monthly reports.

Issues raised by participants during this phase focus the frequency of reporting, the report template, and resources surrounding accomplishment of this task. It was mentioned that the monthly reporting is cumbersome given that social pension benefits are released on a quarterly basis. The frequency of reporting makes compliance as required low. Meanwhile, in the case of Region II, there appears to be no feedback and reporting method being used by the social workers office, and are reportedly unaware if such materials exist. There are also claims that the monthly report template is not effective given the low submissions of or submissions that are lacking from the LGUs. Perhaps this is due to other observations that the monitoring and feedback mechanism of the LGUs has not been properly established. There is lack of a technical person to attend to the issue of reporting and monitoring, or the lack of training and personnel to handle such task. In Region VII, participants expressed the preference to have the template or formatted report forms to facilitate submissions. Moreover, it was suggested that the “unified comprehensive” computerized social pension database/master list be pursued to facilitate updating and submission of reports.

Quite apart from monitoring and reporting, some LGUs said there is insufficient material time for the liquidation and auditing processes, which are necessary before the next scheduled pay-out, and lack of personnel in the LGUs to handle financial documents.

III. Challenges and Issues

A. Pre-implementation

1. Insufficient/lack of clarity and understanding of the program and its procedures and technicalities.
2. Difficulty in coordination, in information dissemination, and in the verification/validation of beneficiaries.
3. Lack of manpower in the RSPU and the high turn-over of staff previously assigned to the program.
4. Accuracy of the list of beneficiaries because of numerous exclusion and inclusion errors.

B. Implementation

1. Accessibility for senior citizens living in far-flung areas or else the difficulty in conducting the pay-out when disasters occur and transportation available is only through water. Conversely, the difficulty of coordinating and informing them of scheduled pay-outs.
2. The uncertainty surrounding actual receipt of social pension by intended beneficiary when only representatives receive the money. Conversely, disallowing actual immediate family of the beneficiaries to claim the pension on their behalf also poses a problem.
3. The limited time or schedule to undertake the pay-outs vis-à-vis the coverage of areas results to the frequent tardiness of paymasters not to mention the limited vehicles available during pay-out. Conversely, the shortness of time leads to the inability of beneficiaries to immediately claim benefits especially for those living in far-flung areas.
4. Lack of clarity on the reasons for de-listing beneficiaries in subsequent pay-outs. Conversely, deceased beneficiaries are not de-listed quickly enough to facilitate replacements.
5. Lack of manpower in FO during pay-out given that only regular employees are allowed to bring money for the social pensioners. Corollary to this, is the security of the DSWD personnel and MSWDO during pay-out especially in far-flung areas.
6. Recurring requests for supporting documents, such as medical certificates during each pay-out and the difficulty of obtaining the same given the scarcity

of available doctors. Add to this is the number of payroll to be signed by senior citizens, which can be quite problematic and inconvenient for them.

7. Resistance by some LGUs to release benefits via cash transfer as recommended because it would entail additional accountability for them. At the same time, there are some LGUs where retroactive payments are not made to new beneficiaries or the replacements but remain with the LGUs.
8. Lack of provision for meals of LGU representatives during pay-out since some LGUs do not provide the same.

C. Post-implementation

1. Monthly reporting is cumbersome given that social pension benefits are released on a quarterly basis. The frequency of reporting makes compliance as required low. Meanwhile, in some regions there appears to be no feedback and reporting method being used by the social workers office, and are thus, unaware if such materials exist.
2. The monthly report template is accordingly not effective given the low submissions of or submissions that are lacking from the LGUs.
3. The monitoring and feedback mechanism of the LGUs has not been properly established. There is a lack of a technical person to attend to the issue of reporting and monitoring, or the lack of training and personnel to handle such task.
4. Insufficient material time for the liquidation and auditing processes, which are necessary before the next scheduled pay-out, and the lack of personnel in the LGUs to handle financial documents.

D. Other Concerns

1. Multiple tasks assigned to social pension focal persons.
2. High turn-over among FO and LGU staff previously assigned to the program.
3. Incentives for MSWDOs and OSCA who participate in the conduct of verification and validation as well as monitoring.

CONCLUSION & RECOMMENDATIONS

This research study's objective aimed at assessing the social pension program in its first year of implementation. Judging by the response of the beneficiaries to the program, there is reason for cautious optimism given that a good number of them expressed satisfaction, gratitude and the hope that the program continue well into the future with many more senior citizens to be eventually benefited. As some of them have said, "*malaking bagay ang P500 kada buwan*" even if there is also a pronounced view that the amount is insufficient and could still be increased or doubled. Precisely because it is seen as a good program for the elderly, many more senior citizens urge extending the coverage to consider even the younger seniors or those below 77 years of age.

Moreover, it is undeniable that an immediate positive effect is the relief offered because even with the meagre amount given out and their collective wish to have this increased, clearly the pension supports part of the important needs of one of our most vulnerable sectors. In our society where the ageing population is steadily growing and the elderly are over-represented among the chronically poor people, regular cash transfers, such as the social pension, are a source of ready help to reduce deprivation and increase the life chances of older people.

On the other hand, the program is not without its deficiencies and could be improved further as such, the following recommendations are put forward for PSB's consideration:

Provide regular and frequent information about the overall objectives of the Program

Clarity and understanding about the program can be facilitated if both beneficiaries and the implementers are reminded that the Social Pension Program stems from a social welfare legislation aimed to assist the poorest and neediest of our senior citizens. Even with the limited resources of the government, the small financial assistance is hoped to aid indigent senior citizens in procuring basic needs like food and medicines. This background must be constantly reiterated to everyone involved in the program. In addition, updates about the program could be included in the regular meetings of SC federations/associations.

Review the Administrative Order on the Program's Operational Procedures

- **Identification and selection of beneficiaries.** The study cites the NHTO database as being a source of disgruntlement because of the perceived numerous exclusion and inclusion errors encountered. While adherence to

the NHTO database remains fundamental, there is a need to revisit whether or not other criteria for identification and selection of beneficiaries may be considered in coming up with the list of potential and/or replacement beneficiaries while ensuring the list is free from being politicized.

- **Release of social pension stipend.** While disbursing social pension through the most cost-effective and efficient mode is the standard, and while the current pay-out system is preferred by majority of beneficiaries, there must also be consideration given to geographical constraints in undertaking releases.
- **Monitoring and reporting.** Enhance the reporting template for greater utility, and to help ensure complete, regular and timely submissions of reports. Add to this is the provision of technical assistance to LGUs to determine and address difficulties in accomplishing the reports.

Shorten the number of hours beneficiaries spend in claiming the stipend.

The study recommends reducing the number of hours spent by beneficiaries in claiming their social pension given that on the average they spend anywhere from 1 to 3 hours for this. This is in part due to the volume of claimants and the resulting long lines.

Lengthen or extend the schedule of pay-outs.

Allowing for an extended schedule of pay-out helps implementers complete their assigned areas of coverage and enables beneficiaries to claim their benefits, especially for those living in far-flung areas.

Lower the age of social pension beneficiary-recipients.

The study suggests that the prevailing view among senior citizens is that the age at which the elderly should begin to receive social pension is lower than the mandated 77 years of age.

Increase the amount of social pension.

The study suggests increasing the amount of social pension to at least double the current amount as this is perceived to be insufficient for their needs.

Increase security for FO personnel facilitating stipend payments.

Quite apart from the lack of manpower during pay-outs is the more serious concern over the security of FO personnel who undertake the pay-outs especially for those covering far-flung areas.

Provide clarification on entitlement of pension of a recently deceased senior citizen.

More senior citizens want to clarity about whether or not a recently deceased elderly (or at least his family) can still claim or is entitled to get his/her pension on the months that he is still alive and/or qualified. As such, there is much discussion on who is considered a valid or legitimate heir or beneficiary of a recently deceased senior citizen, and what legal documents s/he may present to prove their filiation and/or familial relationships.

In addition, further study may be conducted to add to the current body of knowledge about the social pension program:

1. Perspectives of beneficiaries in far-flung barangays to determine the extent to which the social pension makes a difference in their lives.