**PDM IMPLEMENTATION IN KAYUNGA DISTRICT FROM INCEPTION TO AUGUST 2023: ACHIEVEMENTS, BEST PRACTICES, LESSONS AND CHALLENGES.**

**30th December 2023**

**Introduction:**

The PDM was introduced by government during the FY 2021/2022. During its implementation in Kayunga district, we have been able to register critical achievements as highlighted here below;

**Achievements**

|  |  |
| --- | --- |
|  | **FINANCIAL YEAR 2021/2022** |
| **Sn** | **PDM Activity Description** | **Realised Output**  |
| 1 | Formation of the District PDM Steering Technical Committee | * Constituted the District PDM Steering Committee.
* 13 members identified depending on their background and the objectives of the PDM (as were outlined in the initial draft guidelines).
* Oriented the committee on the PDM and effectively converted it into the district level ToT on the PDM.
 |
| 2 | Orient the DTPC members on the PDM. | * Members of the DTPC oriented on their roles and responsibilities on PDM.
* Improved awareness of the technical staff of the PDM and
 |
| 3 | Orient District Council on the PDM. | * Oriented District Council on its roles and responsibilities in PDM implementation.
* Improved awareness among council members of the PDM.
* Improved awareness of council members on their roles and responsibilities in the PDM.
 |
| 4 | Orient LLG councils on PDM. | * Oriented 263 LLG councilors from 13 LLGs councils on the PDM.
* Oriented them on their roles and responsibilities in its implementation.
 |
| 5 | Orient special Interest groups leaders on the PDM. | * Oriented Leadership structures of Special Interest groups on the PDM.
* 13 LLGs (Women, Youths and Elderly Persons S/c councils) on PDM and their roles and responsibilities in its implementation.
 |
| 6 | Train LLG Technical staff (Parish Chiefs/Town Agents, CDOs, Health Assistants and Extension Staffs) on PDM. | * Trained 88 LLG Technical staff from 13 LLGs (Parish Chiefs/Town Agents, CDOs, Health Assistants and Extension Staffs) on their roles and responsibilities in the PDM.
 |
| 7 | Recruit Parish chiefs and fill vacant posts. | * Recruited 17 Parish chiefs.
* All parishes now filled.
* New parish chiefs were inducted into service.
* All 71 Parish chiefs trained on the PDM.
 |
| 8 | Constitute PDCs in all parishes and train them on the PDM. | * Constituted 71 PDCs in all 71 parishes.
* Trained 497 PDCs members from 71 parishes on PDM at 13 LLG levels on their roles and responsibilities in the implementation of the PDM.
* Also gave them reference materials on the PDM (copies of Manuals).
 |
| 9 | Conduct community meetings to create community awareness on the PDM. | * Facilitated Parish chiefs to hold PDM community awareness meetings.
* 235 meetings were held in 71 parishes in the 13 LLGs.
 |
| 10 | Train the community in participatory techniques like poverty ranking to assess themselves.  | * Facilitated Parish chiefs, Extension staff and CDOs to train the community using participatory techniques like wealth ranking, transect walks, village mapping and PDM Enterprise groups, enterprise groups formation and PDM SACCOs formation.
* 1,304 enterprise groups have been formed.
* 355 enterprise groups issued with certificates
* 71 PDM SACCOs formed and fully registered with the registrar of Cooperatives (MTIC).
* 71 SACCOs undertook e-registration with MoFPED.
* 71 PDM SACCOs Accounts opened with commercial banks.
* 71 PDM SACCO Accounts, each credited with 7.3M PDM Parish Revolving Funds.
* 30 PDM Accounts with Centenary Bank, credited with 219,000,000/=, 30 PDM Accounts with Postbank credited with 219,000,000/= and 11 PDM Accounts with Finance Trust bank, credited with 80,300,000/=.
 |
| 11 | Ministerial launch of the PDM in the district (June 2022). | * Launch of the PDM in the district done.
* Function presided over by Hon. Lugoloobi Amos
* Attended by 100 invited participants drawn from across the entire local government leadership structures in the district.
 |
|  | **FINANCIAL YEAR 2022/2023 (JULY 2022-JUNE 2023)** |
| 12 | Collect Household Data to inform the PDM (June-September 2022) | * Collected Household Data to inform the PDM.
* Data collection was undertaken in 407 gazetted villages.
* 407 community data collectors recruited, trained and facilitated to undertake the exercise.
* Created community awareness on the household data collection exercise to raise awareness and improve community participation.
* Household data collection exercise supervised by the District Supervisors and other stakeholders.
* By closure of the exercise, 76,053 households were reached to during the enumeration exercise, out them 75,967 accepted and consented to be enumerated. Thus, 99.88% of the visited households accepted to be enumerated.
 |
| 13 | Supervise and monitor PDM implementation. | * Conducted support supervision and monitoring of PDM implementation.
* District PDM Steering committee, CAO, DEC, RDC and DISOs offices were all supported to supervise and monitor PDM implementation in the district.
 |
| 14 | Mobilise communities to form new Enterprise groups and revamp the inactive groups in line with the guidance of the PDM guidelines and formed 71 PDM SACCOs. | * 1,528 Enterprise groups formed in 71 parishes.
* 1,261 Enterprise groups details compiled and submitted to the PDM Secretariat.
* Facilitated the court to endorse the Parish revolving Funds Agreements for the 71 PDM SACCOs by the Magistrate’s office.
* Ensured that all the 71 PDM SACCOs had at least 5 groups to facilitate their formal registration by the Registrar of cooperatives.
* The 71 PDM SACCOs constituted interim PDM Leadership structures.
* 71 PDM SACCOs formally registered by the Registrar of Cooperatives, MoTC
 |
| 15 | Facilitate the process of holding the pre-first General Meetings by the PDM SACCOs (Oct 2022). | * 71 PDM SACCOs held their first General Meetings.
* Formally admitted new enterprise groups as new members in the 71 PDM SACCOs.
* Constituted 71 PDM SAOOCs Vetting committees to lead in the PDM SACCO Leadership election exercise.
* Vetting committees received and vetted potential candidates for the various leadership positions on the Executives and Supervisory committees.
 |
| 16 | Facilitate the process of holding the first General Meetings by the PDM SACCOs (Oct 2022). | * 71 PDM SACCOs held their first General Meetings to elect their leadership structures.
* Interim leadership presided over the meetings.
* Vetting committees presented their reports to the first General Meetings.
* Executive Committees of 9 members were constituted in all 71 PDM SACCOs through a free and fair transparent election exercise using ballot papers. The Vetting committees presided over these elections.
* Supervisory committees (SUPCOs) were formed in all the 71 PDM SACCOs.
* Executive committees of the PDM SACCOs held their first executive meetings to constituted relevant subcommittees.
* Loans/Investment/finance, Production and Marketing sub-committees. The loans sub-committee is chaired by the treasurer and composed of 2 other members that are committee members of the executive. The other 2 committee members of the executive are elected by the Executive committee as chairs to the Production and Marketing committees.
* The executive committee elected from the members of the general assembly, 2 members each to the production and Marketing sub-committees to make these also full and ready to operate.
 |
| 17. | Train all elected leaders of the PDM SACCOs on their roles and responsibilities (Nov 2022). | * Leaders from 71 PDM SACCOs were trained.
* Trained 12 leaders per PDM SACCO (9 Executive committee members and 3 SUPCO members).
* 852 trained.
* Some PDC chairpersons attended the trainings in some parishes.
* Trainings took place at the nearest primary schools to minimize costs of training materials.
 |
| 18 | Prepare Enterprise groups from two pilot parishes (one urban and one rural) for the PRF (Dec 2022). | * Bukujju parish in Kayunga Sc and Namagabi parish in Kayunga Tc were selected for the pilot (ease of access and cost reduction reasons).
* Undertook trainings of Enterprise groups in the two parishes.
* Conducted a community visioning exercise (focus on the parish we are in and the parish we desire to live in and how we may get there).
* Encouraged members to do household visioning based on the skills picked from the community visioning session. Enabled the members to pick ideas from their family members as well as making the business idea more of a family idea, as well as identifying and sharing roles and responsibilities on the business idea by the family members.
* Trained hhs members using the enterprise value chain approach. This session was staggered across 2 weeks to complete since time for the sessions is agreed on as per the convenience of the participants.
* Hhs within the same enterprise category eg, Dairy, poultry, piggery, coffee etc were clustered according to the various segments of the value chain to which they belonged. Each cluster requires different skills to manage their associated business idea. For example, hhs in ‘egg buying and selling’ require different skills from those in ‘local poultry management’ or ‘buying and selling of local chicken’!
* Once they are fully trained, then they are ready to undergo the PRF process.
 |
| 19. | Assist the Hhs in the pilot parishes to complete the PRF application process (Dec 2022). | * The PRF process required a lot of patience and effort.
* There are many forms to be filled by the applicants before they access the PRF. These include;
* Loan Application form
* Business plan
* Loan Agreement
* Loan repayment schedule.
* Loan Recommendation form
* Parish chiefs assisted the households to fill the relevant forms during the PRF application process.
* The loans committees undertook the relevant steps to ensure that thy applicant hhs meet the basic minimum requirements
* Conducted Field Appraisal on all applicants.
* Conducted desk appraisal on all applicants.
* Held the recommendation meeting and prepared reports to the Executives for approval of the applicants that met the basic requirements.
* 15 hhs were approved in Bukujju parish and 21 hhs were approved in Namagabi parish for the PRF.
* We encouraged CDOs and Parish chiefs to be part of the pilot phase as a strategy to build their capacity and prepare them for the roll out in their respective parishes.
* Entered approved hhs from the 2 parishes on the PDMIS. This exercise was supported by a team from the Ministry of ICT.
* Note: before a household access the PRF, its details on the PDMIS must correspond with the UBOS guided Household data base.
* Undertook the re-focusing training for the hhs that received PRF. This exercise is aimed at ensuring that the households that receive the PRF are remined of their business ideas and cautioning them against diverting the funds from the intended business plans to other projects. This activity is normally a group engagement for a maximum of 2 hours.
 |
| 20. | Launch of access to PRF by the 36 hhs in the pilot parishes (14th Dec 2022). | * National launch of the PRF was held in Kayunga district on the 14th December 2022.
* Function was presided over by Her Excellency the Vice President of the Republic of Uganda, Hon. Jesca Alupo at Ntenjeru Football grounds.
* Each hhs received a PRF loan of 1,000,000/=.
* A total of 36,000,000 was given out to the beneficiary households.
* Continued support to the pilot hhs to ensure their compliance with the IT requirements (NINs and Tel contacts).
 |
| 21 | Supervise PRF beneficiary hhs (Dec 2022 onwards and on-going). | * Supervised PRF beneficiary hhs in the pilot parishes to assess they progress is being done by relevant staff (CDOs, Parish chiefs and Extension staff).
 |
| 22 | Prepare for the PRF district wide roll out (Jan -Feb 2023. | * During the preparation for the pilot exercise, we documented lessons and challenges encountered.
* Convened a capacity building session for the District steering committee, Parish chiefs, CDOS and Extension staff to learn from the lessons we picked from the pilot and prepare for the roll-out activities to the rest of the 69 parishes.
* Conducted district wide PRF roll-out activities in all the 71 parishes.
* Trained all Enterprise groups in all the 71 parishes through the visioning process and the Enterprise value chain approaches.
* Supported the Hhs through the PRF application process.
* Supported the Loan committees in the 71 PDM SACCOs to conduct their loans processing activities (field and desk appraisals and recommendation).
* Supported the Executive committees of the 71 PDM SACCOs to approve the recommended applicants for the PRF.
* Conducted PDMIS hands-on trainings for the CDOs, Parish Chiefs, IT Officers and commercial officers to build their capacity for the roll out exercise.
* Conducted hands on training for PDM SACCO Leaders on the PDMIS at 13 LLGs for the 71 PDM SACCOs. The loans committee members, PDM SACCO chairpersons all have key roles on the PDMIS whose accomplishment must be preceded by a hands-on training on the system.
* Undertook data cleaning on the UBOS guided database and the PDMIS to ensure that all households to be supported by the PRF and aligned and adequately correspond.
* Opened up bank accounts for all PRF approved hhs in the 3 banks where the PDM SACCO Accounts are held. These are Centenary bank (30 PDM SACCO accounts), Post Bank (30 PDM SACCO accounts) and Finance Trust bank (11 PDM SACCO accounts). Approximately 2,000 bank accounts have been opened up as at 15th February 2023.
* Entered bank accounts of the PRF approved hhs into the PDMIS in preparation for transferring of the funds to the respective hhs PRF bank accounts.
 |
| 23. | Facilitated PDCs conduct their roles and responsibilities (Feb 2023 and on-going). | * Conducted 71 PDC meetings in 71 parishes to discuss issues of PDM SACCOs activities implementation.
* Monitored PDM SACCOs activities in 71 parishes and compiled relevant reports.
 |
| 24. | Preparation for the district wide PRF roll out to the 71 parishes (Feb -April 2023). | * Conducted necessary trainings of the EGs member hhs along the various value chains (emphasis is on the value chain segments which constitute the business idea to which the borrower intends to invest the funds).
* Conducted community Visionning at both community and Household levels to assist the hhs and community understand their parishes and household status, and aspirations for the future they desire to attain and live in.
* Supported the EG hhs to fill the relevant PRF forms in preparation for the loans (Loan process).
* Harmonized the UBOS guided data collection system and the PDMIS to ensure that all the PRF eligible hhs are on the two systems and qualify for the PRF.
* Guided the Banks to open individual bank accounts for the PRF recipient households. So far, over 2,955 individual accounts were opened (1,307 with Post bank, 1,210 with Centenary bank and 438 with Finance Trust Bank).
* The loans committees of the various PDM SACCOs have conducted the appraisal processes and recommended potential beneficiary hhs to the PDM SACCOs executives for approval.
* Coordinated the PDM SACCOs to ensure that lists of the approved hhs fully endorsed by the 3 signatories of the PDM SACCOs, are submitted to the banks (copied to the DCO) for banks to disburse the funds to the approved households. The disbursement is going on and expected to be done by 17th March 2023.
* Conducted beneficiary re-focusing exercises. This is aimed at ensuring that the beneficiaries are kept on course with regard to their enterprise/business ideas.
 |
| 25 | Status by May 2023 | * So far, we have disbursed two billion, two hundred and twenty million, Two hundred and seventy-six thousand shillings (2,220,276,000/=) to a total of 2,764hhs across the 71 parishes in the district.
* Monitoring of beneficiary hhs is on-going and some parishes have begun receiving re-payment instalments. Kangulumira ward has so far received a total of 5,000,000 shillings in repayments. Other parishes such as Namagabi ward, Bukujju parish and Natteta parish have also registered repayments. Monitoring is an on-going activity in all the 71 parishes.
 |
| 26 | Receipt of Cycle 2 of the PRF | * As by end of May 2023, all our 71 Parishes had received additional 25,000,000/= as second PRF batch.
* Thus, a total of 1,775,000,000/= has been sent to all our 71 parishes PDM Accounts.
* Preparation of the beneficiary hhs is on-going in all the parishes to enable them access this fund as soon as possible (receipt of PRF Applications in the EGs, recommendation by the EGs, receipt of applications by the loans committees, preparation for the appraisal process-field appraisal, desk appraisal and recommendation to the PDM executive of lists of applicants that have met the requirements for the PRF by the loans committees, approval of the list of members for the PRF and give feedback to the deferred PRF applicants.
* Conduction of trainings of the community and the successful PRF applicants to make them ready for the use of the PRF
* Community and household visioning processes,
* Training on Enterprise selection,
* Training on Enterprises using the enterprise value chain approach,
* Training of PRF recipients in enterprise management (each on the enterprise they are undertaking to give them the necessary skills).
* Support the PRFapproved hhs to fill the relevant PRF forms in preparation for the loans (Loan process) on the PDMIS.
* Print out the payment vouchers for the PRF approved households.
* Guide the banks on opening accounts for the PRF approved beneficiary households.
* Banks disburse funds to the PRF approved households on their individual bank accounts within the same bank.
* PRF beneficiary households supported to effectively put to use the funds received to the enterprises for which they applied for through effective supervision, trainings, monitoring and mentoring.
 |
| 27 | Receipt of additional PRF (30th June 2023) | * All 71 PDM SACCO Accounts were credited with additional 50 million from BoU. Thus, a total of 3,550,000,000 shillings was received (3.55billion).
* This meant that preparations for the households to receive this fund would roll out to the new FY 2023/2024.
 |
|  | **FINANCIAL YEAR 2023/24 PDM ACTIVITIES** |
| 28 | Display/dissemination of information on the status of the PRF on PDM SACCO accounts in the parish by the PDM SACCO (Chairperson of the PDM receives notification from the bank) and guidance offered to members to apply for the PRF (June 2023). | * 71 PDM SACCOs reported receipt of 50 million shillings from BoU by end of June 2023. Thus, a total of 3.55billion shillings was transferred.
* Messages received on the telephones of the PDM SACCO chairpersons. These are expected to share this information with the members of their SACCOs and other stakeholders like the Parish Chiefs, PDC chairpersons and the PDM SUPCO members.
 |
| 29. | Receipt of PRF applications from EG members in the community. | * Loans committees of the various PDM SACCOs received PRF application forms from the EG members.
* Loans committees notify the Executive on the PRF application status and triggers for commencement of the conduction of PRF loans appraisal process.
 |
| 30 | Conduction of community/village meetings to vet PRF applicants (the guideline provides that the UBOS household and the PDMIS databases automatically generate information regarding 39% poor households in the country. The system registered errors and replace by community meetings) June -Aug 2023. | * Commenced PRF loan process (receipt of PRF Applications in the EGs, recommendation by the EGs, receipt of applications by the loans committees).
* Conducted approximately 407 village level PRF applicant verification meetings in all the 71 parishes to vet applicants. Lists of vetted PRF applicants are generated from these meetings.
* Preparation of the vetted beneficiary hhs (is on-going) in all the parishes to enable them access this fund, (preparation for the appraisal process-field appraisal, desk appraisal and recommendation to the PDM executive), lists of applicants that have met the requirements for the PRF by the loans committees, approval of the list of members for the PRF and give feedback to the deferred PRF applicants).
* Conduction of trainings of the community and the successful PRF applicants to make them ready for the use of the PRF
* Community and household visioning processes,
* Training on Enterprise selection,
* Training on Enterprises using the enterprise value chain approach,
* Training of PRF recipients in enterprise management (each on the enterprise they are undertaking to give them the necessary skills).
* Support the PRF approved hhs to fill the relevant PRF forms in preparation for the loans (Loan process) on the PDMIS.
* Print out the payment vouchers for the PRF approved households.
* Guide the banks on opening accounts for the PRF approved beneficiary households.
* Banks disburse funds to the PRF approved households on their individual bank accounts within the same bank.
* As by 7th Aug 2023, 800 had received PRF of the second cycle (75 million per parish).
* PRF beneficiary households supported to effectively put to use the funds received to the enterprises for which they applied for through effective supervision, trainings, monitoring and mentoring.
 |
| 31 | District wide roll out of the PRF in all the 71 Parishes. | * All PRF approved hhs to underwent trainings along enterprises value chains by the field teams (Extension staff, CDOs, Parish chiefs).
* All approved hhs entered on the PDMIS before accessed the PRF.
* As by 30th October 2023, our disbursement was standing as follows;
	+ Total funds disbursed was 7,618,300,000.
	+ Total households that received PRF- 8,398
	+ Women beneficiary households- 4,053 (3,612,440,000).
	+ Youth beneficiary households – 1,880 (1,730,141,000)
	+ PWD beneficiary households – 415 (400,230,000)
	+ Elderly beneficiary households – 1,041 (921,230,000).
* Youths and PWDs categories were short of the set program targets and we require more concerted efforts to realise these in the next PRF cycle.
 |

**Best practices/Must-do activities.**

1. Routine/regular supervision and monitoring. If we do not ensure routine support supervision and monitoring of the beneficiary hhs, we risk diversion and misuse of the funds and failure to pay back, hence collapse of the program.
2. Continuous mobilisation and sensitisation of communities. Recruitment of the hhs into EGs should be continuous to ensure continued benefits to the community and cause rural economic transformation.
3. Continuous trainings for all households in the community with particular emphasis on PRF beneficiary households to ensure that they are managing their enterprises well and realizing profits and improving their lives as at household level.
4. Conduct regular meetings. Regular meetings of the enterprise groups members strengthen them and makes the groups more sustainable, creative and relevant to the community.
5. Data collection and compilation. This is a must continuous activity as a basis of planning and program implementation.
6. Financial Literacy sessions. This shall ensure improved financial practices among the community.

**Lessons**

While the PDM can transform communities by improving their incomes, the following have been very big lessons that we have picked along the path of implementation over the period;

1. Trust among Ugandans has faded to very low levels that we need to strengthen mindset change at all levels including the household level if we are to cause the desired transformation.
2. Youth attitude towards government programs is too low despite efforts to mobilise them and government putting aside 30% of the PDM PRF as tagged to youths only.
3. Ugandans want quick money. They are unwilling to gain through pain. We must be careful on who really take the funds from the PDM or else we risk the funds going to those unwilling to pay back.
4. Households formed enterprise groups for the sake of accessing the PRF, but not as a key requirement that has the potential to push them forward.
5. The PDM success relies on the willingness of the technical implementors to go an extra mile in understanding the program and also digging out alternative ways of causing improvements in its implementation.
6. Value chain approach to training of the enterprise groups requires deep training even among the technical staff to bring them to speed with the needs of the program.
7. There is need to build a strong team of the technical staff at all levels for full and effective implementation of the program. The team requires to be maintained as a unit of Parish chiefs, CDOS, Extension staff and GISOs. If you split them, you risk losing cohesion and creating boundaries and silos among the staff. Keeping them as a unit builds the confidence among the parish chiefs to believe in themselves and deliver the program effectively.
8. CDOs may require more mobilization to fully support the program.
9. Having all steps on the system requires skills, equipment, time and resources.

**Policy /Technical Challenges**

Most of the challenges related to the effective implementation of the PDM relate to the use of PDMIS-FIS. They include the following;

1. The Individual Business plan template is too complicated for the beneficiaries to fill.
2. The system turns a subsistence Household into non-subsistence hhs which are not eligible to receive PRF even when the hhs are really in real poverty that is evident to all!!! There is need for improvement on the parameters of the PDMIS-FIS.
3. Lack of the required gadgets like Laptops to handle system issues and data to support the field teams is a very big challenge to the effective implementation of the program.
4. Inadequate facilitation of the implementation process activities of the program. We would be pretending to assume that we can effectively and efficiently implement the PDM without sustainable funding of field operations.

Dr. Mugabi David

**PDM Focal Officer**

December 2023.

|  |  |
| --- | --- |
|  |  |