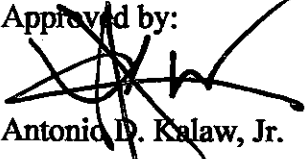




**development academy of the philippines**

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# **Project Management System Work Instructions Manual**

<p>Approved by:</p>  <p>Antonio D. Kalaw, Jr.</p>	<p>Position:</p> <p>President</p>
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## WORK INSTRUCTION

### PROJECT CONCEPTUALIZATION AND DEVELOPMENT

Code : DAP-WI-01

Revision No. : 3

Effectivity: August 16, 2016

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**1.0 PURPOSE.** To establish, document, implement and maintain work instruction for project conceptualization and development.

#### **2.0 SCOPE**

**2.1** This documented information starts with gathering of data and information: identification of possible needs of clients and opportunities for project intervention, and end with the presentation of the project proposal to the client.

**2.1** This work instruction is used in the conceptualization and development of projects-in-line with thrusts, programs, and needs of government, civil society and private organizations.

**2.31** This work instruction is applicable to client-initiated projects. This means that prospective clients of the projects being referred to in this document have signified their interest in writing, walk-in inquiry, or have inquired through phone or e-mail.

#### **3.0 DEFINITION OF TERMS**

**3.1 Consultant Services Fee (CSF)**– fees of experts, consultants, resource persons and other non-regular personnel including internal honoraria payment and honoraria of counterparts.

**3.2 Logframe** – Logical Framework, a matrix outlining the scope of the project and the overall goal it intends to achieve.

**3.3 Out-of-Pocket Costs (OPC)** – pertains to other direct costs of the project such as supplies and materials, workshops and conferences, traveling expenses, printing, communications, rental and other incidental expenses.

**3.4 Personnel Service Fee (PSF)** – covers the compensation of organic personnel including the institution's overhead to develop and maintain them.

**3.5 Terms of Reference (TOR)** – a document which covers project requirements and details on implementation.



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**PROJECT CONCEPTUALIZATION AND DEVELOPMENT**

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**4.0 DETAILS:**

Item No.	Activity	Responsibility	Interface
4.1	<p><b>Concept Development</b></p> <p>Starts with identifying and understanding the client needs and/or requirements. This is followed by the preparation of a Logframe and brief write-up to describe the key deliverables, activities and requirements, specific outputs, and project assumptions.</p>	Supervising Fellow Project Manager Technical Staff	Terms of Reference Invitation to Bid Letter of Intent Receipt of Inquiry from Client, Client Acceptance & Monitoring Form Inquiry Receipt & Endorsement Form, Contact Report Client Profile
4.2	<p><b>Proposal Writing</b></p> <p>A Project Proposal is the first formal document that a Client receives from the Academy. It presents the rationale, objectives, scope, strategy and approach, outputs, and timetables of the Academy's proposed intervention.</p>	Supervising Fellow Project Manager Technical Staff	Letter of Intent Prescribed Project Proposal format from Client/DAP
4.3	<p><b>Estimating the Project Cost</b></p> <p>On this stage cost estimates are made for purpose of giving the client an approximation of the total cost of the proposed intervention. As a rule, the Academy presents its major cost items including : PSF, CSF, OPC and VAT. The quotations to be given to the Client should reflect the full price of project deliverables.</p>	Center Head Supervising Fellow Project Manager Technical Staff Finance Office	Logframe Workplan Project Implementation Plan (PIP)

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Item No.	Activity	Responsibility	Interface
4.4	<p><b>Proposal Review</b></p> <p>Draft proposal should be submitted to the Supervising Fellow for initial review, then to the Center Head for approval, and/or endorsement to the Client's needs.</p>	Center Head Supervising Fellow Project Manager Technical Staff	Transmittal Letter Document Tracking Sheet
4.5	<p><b>Presentation of the Proposal</b></p> <p>All proposals follow the Academy's standards in terms of content, format, lay-out and presentation. Oral presentation could be done to give the Client an opportunity to raise questions and allow the Academy to clarify matters with them.</p> <p>If the proposal would lead to a degree, it would be subject to the approval of the Academic Council.</p> <p>All approved proposals shall be submitted to Central Records Unit.</p>	Center Head Supervising Fellow Project Manager Technical Staff	Leading to a Degree, Formal Presentation to Academic Council

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**5.0 REFERENCES:**

- 5.1 PD 205 Creating and Establishing the Development Academy of the Philippines, Defining its Powers, Functions and Responsibilities and for other Purposes
- 5.2 PD 1061 Amending Paragraphs Four and Nine of PD 2051
- 5.3 EO 288 Further Amending the Charter of the Development Academy of the Philippines, and for other Purposes
- 5.4 MC-2012-003 Guidelines for the Product and Project Development Investment Management System
- 5.5 MC-2009- 007 Guidelines in Preparing Letter Proposals
- 5.6 MC-2013-002 Flagship/Special Programs/Projects
- 5.7 Board Resolution No. 2013-01 Reconstituting the DAP Academic Council as Oversight Body for Its Educational Graduate Programs as well as Its Training Programs which could Lead to Graduate Degree(s)

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## WORK INSTRUCTION

### PROJECT NEGOTIATION AND CONTRACTING

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**1.0 PURPOSE.** To establish, document, implement and maintain work instruction for negotiating and contracting projects and to ensure that appropriate Terms of Reference are understood and incorporated in a contract.

#### **2.0 SCOPE**

**2.1** This documented information covers negotiation activities after conceptualization and development of a project starting from client's acceptance of the proposal up to distribution of approved final contract.

#### **3.0 DEFINITION OF TERMS**

**3.1 Certificate of Availability of Funds (CAF)** – a document issued by the client's accountant as proof that funds for a project are available.

**3.2 Letter of Conforme (LOC)** – is used to formalize the agreements with an agency related to a project or any undertaking amounting to below P500,000.00.

**3.3 Memorandum of Agreement (MOA)** – is used to formalize the agreements with an agency related to a project or any undertaking amounting to P500,000.00 and above.

**3.4 Memorandum of Understanding (MOU)** – is used to formalize the agreements with an agency related to a project or any undertaking without any financial obligations from both parties.

**3.5 Pro-forma contracts** – contracting instrument which varies in format, standards and requirements depending on the funding institution (such as UNDP, WB, AusAid, CIDA, et.)

**3.6 WorkPlan** – detailed lists of project activities.



**WORK INSTRUCTION**

**PROJECT NEGOTIATION AND CONTRACTING**

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**4.0 DETAILS:**

<b>Item No.</b>	<b>Activity</b>	<b>Responsibility</b>	<b>Interface</b>
4.1	<p><b>Project Negotiation</b></p> <p>The negotiation stage starts once the client either accepts the proposal or requests for modifications of the proposal. It is in this stage also that the details of the project proposal are discussed with the client in order to seek concurrence on the proposed intervention.</p>	<p>Institutional Marketing Center Group and/or Center Head with the assistance of concerned proposal writers</p>	<p>Project Proposal Client Contact Report</p>
4.2	<p><b>Contract Preparation and Review</b></p> <p>Contracting starts once the client gives the verbal/formal go signal to proceed with the Project. It is in this stage that agreements between the Academy and the client are captured in a contract either through a MOA, MOU or LOC, and other acceptable contracting instruments.</p> <p>Program Manager completes all documents and certified by Center Head and Group Head</p> <p>A parallel contract review by the Finance and Legal Office of the Academy follows.</p> <p>Proposed amendments, if any, are then incorporated to the final contract.</p>	<p>Project Manager Group and/or Center Head with the assistance of concerned proposal writers</p>	<p>Draft MOA / MOU/LOC TOR or Project Proposal Approved Project Implementation Plan (PIP) CAF and Workplan Contract Review Routing Form</p>



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Item No.	Activity	Responsibility	Interface
4.3	<b>Contract Perfection</b>  The final contract is reproduced/printed in seven (7) copies (4 originally signed and 3 photocopies with original notarization as substantial compliance) and endorsed for signing of authorized representatives of both parties and their respective witnesses. The signed contracts are then notarized and distributed to the concerned parties. Distribution of final contract is as follows: Client, Center, Central Records Unit, Finance Dept, Legal, Notary Public (2 copies)	Project Manager Technical Staff	Final MOA / MOU/ LOC  Transmittal Letter to client





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## **WORK INSTRUCTION**

### **PROJECT NEGOTIATION AND CONTRACTING**

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#### **5.0 REFERENCES**

- 5.1 MC-2009- 007 Guidelines in Preparing Letter Proposals
- 5.2 Board Resolution 2008-05 Authorizing the President of the Academy, and his Duly Authorized Authorized Representative to Represent, Participate, Negotiate and be an Official in such Transactions wherein the DAP is Bidding for a Project Engagement
- 5.3 OO-2010-005 Contracting Instruments
- 5.4 MC-2010-010 Contract Preparation
- 5.5 MC-2010-024 Preparation of MOA
- 5.6 MC-2012-017 Project Related Contracting Instruments
- 5.7 SO-2013-229 Signatory to Certain Project-related Documents
- 5.8 Memorandum dated 12 July 2013 Request for Authority to Proceed without a Signed Contract

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## WORK INSTRUCTION

### PROJECT MOBILIZATION

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**1.0 PURPOSE.** To establish, document, implement and maintain work instruction on project mobilization. To ensure a smooth jumpstart of the project after the MOA/MOU/Contract has been perfected.

#### **2.0 SCOPE**

2.1 This documented information covers the activities involved in project mobilization starting from the formation and internal authorization of the project team and up to the collection of the mobilization fee.

#### **3.0 DEFINITION OF TERMS**

3.1 **e-Project Implementation Plan (e-PIP)** - an online project plan preparation and submission.

3.2 **Inception Report** – contains a detailed presentation of the design and methodology to be adopted by the project.

3.3 **Letter of Conformance (LOC)** – is used to formalize the agreements with an agency related to a project or any undertaking amounting to below P500,000.00.

3.4 **Letter of Invitation (LOI)** – is an alternative hiring instrument for engaging consultants to provide technical expert services or perform specific tasks for a particular period of time.

3.5 **Memorandum of Agreement (MOA)** - is used to formalize the agreements with an agency related to a project or any undertaking amounting to P500,000.00 and above.

3.6 **Memorandum of Understanding (MOU)** – is used to formalize the agreements with an agency related to a project or any undertaking without any financial obligations from both parties.

3.7 **Project Management Information System (PMIS)** – a facility that allows the project information to be enrolled in to aid and facilitate the generation of reports for various requirements of the Academy.

3.8 **Special Order** – authorization given to the DAP project team to undertake the project, within the given time frame by its specified team members.

3.9 **Terms of Reference (TOR)** – a blueprint of the required tasks and responsibilities including the corresponding outputs required from a contracting party. It details the necessary conditions or particulars for which services of another party is being sought for.

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**4.0 DETAILS:**

Item No.	Activity	Responsibility	Interface
4.1	<p><b>Identification of the Composition of Project Team</b></p> <p>Project team members are selected within the center/group. Members from other centers, executive offices and support services group of the Academy may also be involved or engaged if needed. Depending on the magnitude and requirement of the project, an inter-group collaboration may be adopted.</p> <p>Consultants may be engaged as part of the project team. All consultants should be categorized based on existing guidelines and policies. Approved LOI is submitted to HRMDO for evaluation.</p>	Project/Program Manager Director Center Head	Signed and notarized MOA  Memo Request for inter-center collaboration  Personnel Requisition Form  Approved LOI
4.2	<p><b>Internal Authorization</b></p> <p>The designation of the project team and project duration is formalized through a Special Order stating the roles of the team. External consultants are officially engaged through the signed LOI.</p> <p>A detailed Project Implementation Plan is then prepared/encoded in e-PIP template. The project is enrolled in the PMIS to generate e-PIP.</p>	Project/Program Manager Director Center Head	Approved Draft SO  Project Involvement Notification and Confirmation for inter-center collaboration  Signed and notarized MOA  Approved e-PIP  Approved LOI with Consultant's Conformance

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**PROJECT MOBILIZATION**

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Item No.	Activity	Responsibility	Interface
	<p>The signed MOA with annexes, signed e-PIP and SO are submitted to Finance Department as basis for the issuance of the project code. The Draft SO shall be finalized and approved by the President and submitted to Finance for the project code. The project is now authorized to mobilize and incur expenses in pursuit of its objectives.</p> <p>The evaluated LOI is forwarded to the consultant for conforme.</p>		
4.3	<p><b>Project Mobilization Meeting</b></p> <p>The PM calls a meeting with the project team and the client counterpart to discuss and clarify the following: Project Objectives, Deliverables and Schedules, Timetables, Project TOR, Tasks, Team Norms and Reporting arrangements.</p>	Designated Project Team	Logframe Workplan Approved Project Proposal Minutes of the Project Team Meeting Client Contact Report
4.4	<p><b>Preparing Project Inception Report</b></p> <p>The desired activities, milestones, schedules, outputs and working arrangements are clarified in the report based on mobilization meetings.</p> <p>The report is prepared by the team under close supervision of the Supervising Fellow for review by the Director and approval of the Center Head.</p> <p>An acknowledge receipt and acceptance of the said report is secured from the client.</p>	Project Manager Supervising Fellow Director	MOA/Contract TOR Approved Proposal Agreements Minutes of Meeting Inception Report Certificate of Project Deliverable Accepted

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Item No.	Activity	Responsibility	Interface
4.5	<p><b>Issuance of Billing Request for the Project's Deliverable / Output/Mobilization Fee</b></p> <p>This last stage ensures the compliance of the project with the contract and timely collection of the project's 1<sup>st</sup> deliverable/output/mobilization/fee.</p> <p>A billing request form is accomplished and submitted to FAO for the issuance of billing.</p>	Project Manager	<p>MOA</p> <p>LOC</p> <p>Billing Request Form</p>
4.6	<b>Functions and Roles of the Project Team</b>		
a.	<b>Supervising Fellow (SF)</b>	Has the overall responsibility to lead the delivery of technical requirements of the project and provide the technical guidance and direction to the Project Team. As the project's overseer, the SF has the duty to control the quality of project activities and outputs. The SF may also advise the Project Manager on client management and resource management.	
b.	<b>Project Manager (PM)</b>	Responsible for managing both the customer and the resources of the project. Upon perfection of the project contract, the PM assumes the responsibility to respond to customer's needs and requirements. The obligation of the PM to the customer continues until all duties and responsibilities of the Academy to the project have been served to the full satisfaction of the customer. Also responsible for the planning, effective deployment and/or coordination, and efficient use of human, financial, and other physical resource of the project.	
c.	<b>Technical Staff</b>	Specialists assigned to the project to perform particular tasks and/or product specific outputs. This may include the consultant's resource person, documenter, writer, financial analyst, programmer, systems analyst, etc. Technical staff may be required to perform research system/data analysis, training, process documentation, facilitation and other technical support services. The project technical staffs are accountable to the PM for the timely, thorough, and satisfactory completion of the tasks assigned them.	

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d.	<b>Administrative Staff</b>	Assists the PM in coordinating the needs of the customers and the rest of the project team. Among others, the administrative staff is responsible for the requisition/procurement of supplies and materials, arrangement of meetings and workshops, processing of payments (including preparation of supporting documents), filing and records keeping of project documents and the like. The administrative staff is accountable to the PM for the timely, efficient, and cost-effective completion of tasks assigned to him/her.
e.	<b>Consultants/Resource Persons</b>	<p>Refer to individuals who, in recognition of their expertise, are issued Letters of Invitation (LOIs) to render service and be engaged in institutional or in-house programs/projects of the Academy or in programs/projects that the Academy is undertaking for external clients.</p> <p>These are individuals who possess specialized knowledge and/or skills and are contracted to serve in either one or a combination of role/s as <i>Adviser, Systems Designer, Lecturer, Faculty member, Facilitator, Researcher, Data/Info Integrator, Writer/Editor, etc.</i> or to produce specific outputs (e.g., <i>concept papers, program design, analytical reports, project documentation, etc.</i>).</p>

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**5.0 REFERENCES**

- 5.1 OO-2000-004 Inter-group Collaboration in Projects
- 5.2 MC-2001-007 Project Counterparting
- 5.3 OO-2007-003 Policy on Engaging Regular and NRS, RP, Retainers and Consultants
- 5.4 MC-2007-013 Engagement of Regular, NRS, RP, Retainers and Consultants
- 5.5 MC-2009- 007 Guidelines in Preparing Letter Proposals
- 5.6 MC-2010-010 Contract Preparation
- 5.7 MC-2010-014 Designation of Project Team
- 5.8 MC-2010-014A Designation of Project Team (Amendment)
- 5.9 MC-2010-024 Preparation of MOA
- 5.10 MC-2012-001 Amending MC-2011-002 Standard Billing Rates for Staff and Standard Billing Factor for RP
- 5.11 MC-2012-017 Project -related Contracting Instruments
- 5.12 MC-2013-002 Flagship/Special Programs/Projects
- 5.13 MC-2013-003 Procedures on Billing and Collection
- 5.14 SO-2013-229 Signatory to Certain Project-related Documents
- 5.15 MC-2014-007 Guidelines on the Engagement and Payment to and Consultants & Resource Persons

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## WORK INSTRUCTION

### PROJECT IMPLEMENTATION

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- 1.0 **PURPOSE.** To establish, document, implement and maintain work instruction on project implementation.
- 2.0 **SCOPE**
  - 2.1 This documented information covers the activities involved in project implementation activities after mobilization of resources from engagement of services such as Resource Persons, Consultants, and Project staff up to preparation of Pre-termination Report. Also, covers procurement of supplies, equipment and other materials needed for project implementation.
- 3.0 **DEFINITION OF TERMS**
  - 3.1 **Consultant's Evaluation Form (CEF)** – an evaluation sheet on the performance of the Consultant engaged for the project.
  - 3.2 **Course Evaluation Sheet** – form accomplished by the training participants to evaluate delivery of training program or degree course.
  - 3.3 **Letter of Conformance (LOC)** – is used to formalize the agreements with an agency related to a project or any undertaking amounting to below P500,000.00
  - 3.5 **Memorandum of Agreement (MOA)** – is used to formalize the agreements with an agency related to a project or any undertaking amounting to and above.
  - 3.6 **Memorandum of Understanding (MOU)** – is used to formalize the agreements with an agency related to a project or any undertaking without any financial obligations from both parties.
  - 3.7 **Project Folio** – compilation of documents per project type as defined in the Academy's Records Management.
  - 3.8 **Project Manager (PM)** – an officer duly designated to manage/oversee a particular project at its every stage.

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**PROJECT IMPLEMENTATION**

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3.9 **Special Order (SO)** – authorization given to the DAP project team to undertake the project, within the given time frame by its specified team members.

3.10 **Terms of Reference (TOR)** – a document that specifies or describes all other agreements with the client not stated in the MOA.

3.11 **Work Plan** – detailed list of project activities.

**4.0 DETAILS:**

Item No.	Activity	Responsibility	Interface
4.1	<b>Management of Resources</b>  Project activities can be formally executed upon mobilization of resources and approval of the MOA. It involves proper matching of resources and activities to meet project delivery. This activities are based on the schedules stated in the MOA and Project Implementation Plan. This is also the stage the PM completes project staffing through hiring of Consultants/Resource Persons, acquisition of logistical requirements, mobilization of project team and monitoring of acquired resources.	Project Manager	MOA/MOU/LOC Approved Workplan / PIP LOI w/TOR PR RIS MR Abstract of Canvass Service Agreement Consultant's Evaluation Form

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Item No.	Activity	Responsibility	Interface
4.2	<p><b>Execution, Coordination and Monitoring of Progress</b></p> <p>The PM ensures the timely execution of the activities in the approved Work Plan and PIP. He/she must ensure that the indicated activities all lead to the completion of specific deliverables within the target timeframe and budget.</p> <p>When there are significant changes in the project, the PM ensures the changes in internal documents such as the PIP and SO pursuant to existing policies/guidelines.</p> <p>Confirmation of Graduates leading to a degree.</p>	Project Manager Project Assistant	Contact Report Minutes of the Meetings Interim Report or Progress Report Client's Acknowledgement Receipt Transmittal letter on Final Report Submission Revised SO Academic Council
4.3	<p><b>Review and documentation of Project Outputs</b></p> <p>The PM initiates debriefing sessions, upon completion of a major output to discuss the effectiveness of the methodologies used. Areas for improvement are also discussed during the said session. Project outputs such training interventions are documented through Contact Reports. While other types of project outputs are documented through Progress or Accomplishment Report.</p>	Project Manager Project Assistant	Contact Report Minutes of the Meetings Progress Report Accomplishment Report

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4.4	<b>Project Financial Monitoring and Management</b>  The PM ensures that the project expenses and revenues are properly accounted for. Project expenses must be matched with accruals of project revenues. Upon completion of a major activity, a statement of account is sent to the Client based on approved schedule and mode of payment.	Project Manager	CA Form Monthly Accrual Form Billing Statement MOA /TOR Memo for Budget Transfer and Project Extension
4.5	<b>Pre-termination of Project</b>  The PM prepares a Pre-termination Report for major activities that have been completed. He/She then creates a revised PIP reflecting the actual accomplishments or activities delivered to the Client.  The project team identifies the problem/s encountered during project implementation or any shortcoming that necessitated early termination. These are all recorded in the report as Lessons Learned.	Project Manager Supervising Fellow Center Head Project Assistant	Project Evaluation Report Consultant's Evaluation Report Project Completion Report Final Report Client Feedback Form Acknowledgement Receipt or Certificate of Client Acceptance Pre-termination Report

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**5.0 REFERENCES**

- 5.1 MC-2010-005 Guidelines on Adjustment of Project Activities
- 5.2 MC-2010-006 Guidelines on Project Reporting, Monitoring and other Transactions
- 5.3 MC-2010-009 Request for Billing and Collection
- 5.4 MC-2010-011 Vehicle Reservation
- 5.5 MC-2012-008 Procurement of Goods
- 5.6 MC-2010-026 Submission and Payment of Consultant's Outputs
- 5.7 MC-2012-017 Project Related Instruments
- 5.8 MC-2012-002 Issuance of Training Certificates and Citations
- 5.9 MC-2013-001 Official DAP Logo
- 5.10 MC-2013-007 Guidelines and Procedures on Request for Payment of Honoraria
- 5.11 MC-2013-007A Guidelines and Procedures on Request for Specific Cash Advance (Except CA for Travel Expenses)
- 5.12 MC-2013-008 Amendment of MC-2001-001B (Guidelines on Snacks/Meals for Workshops / Conferences/Official Meetings)
- 5.13 SO-2013-229 Signatory to Certain Project-related Documents
- 5.14 MC-2014-077 Guidelines on Engagement and Payment to Consultants and Resource Persons
- 5.15 MC-2015-002 Guidelines for the Centralized Land Motor Vehicle Service Management System

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**WORK INSTRUCTION**

**PROJECT EVALUATION AND CLOSURE**

Code : DAP-WI-05

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- 1.0 PURPOSE.** To establish, document, implement and maintain work instruction on project mobilization closure.
- 2.0 SCOPE**
- 2.1** This documented information starts from the preparation of the Terminal Report (TR) by the Project Manager up to the turnover of project folio to Central Records Unit (CRU).
- 3.0 DEFINITION OF TERMS**
- 3.1 Budget Disbursement Report (BDR)** - a summary of all expenses and advances of resources (Professional Services Fees (PSF), Consultant Services Fees (CSF), Out of Pocket Costs (OPC) related to a project.
- 3.2 Certificate of RP Output Submitted** - certifies that project outputs of a Resource Person engaged for the project were submitted to Central Records Unit.
- 3.3 Certificate of Project Deliverable Accepted** - issued by the Client upon receipt of project terminal reports and all other project deliverables.
- 3.4 Client Contact Report** – captures the discussions and agreements made, with concurrence of the client.
- 3.5 Client Satisfaction Survey** – form accomplished by the client, represented by project’s contact person to evaluate over-all delivery of the project conducted by the Academy.
- 3.6 Consultant’s Evaluation Form (CEF)** - an evaluation sheet on the performance of the Consultant engaged for the project.
- 3.7 Course Evaluation Sheet** – form accomplished by the training participants to evaluate delivery of training program or degree course.
- 3.8 Customer Evaluation Form( CEF)** - an instrument accomplished by the Client to evaluate Academy project delivery/performance.



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- 3.9 **Debriefing Report** - a documentation of the post project review and evaluation by the project team.
- 3.10 **Document Tracking Sheet** – a record of the reviews/remarks/comments, by whom and when conducted for a particular document.
- 3.11 **Final Project Billing** - statement of account issued by FAO to client upon submission of project's final outputs.
- 3.12 **PIP Plan Report** - summary of details and assumptions on project costing.
- 3.13 **Project Closure Meeting Form** - captures the discussions and agreements made, with concurrence of the Client.
- 3.14 **Project Insights and Learning** - a summary of best practices and “not so good” practices that may be used and shared as reference or inputs to improve future project undertakings.
- 3.15 **Resources Evaluation Form** - an evaluation sheet on the equipment, venue and other services except consultant services.
- 3.16 **Revenue Accrual Confirmation Sheet** - used to determine and verify a particular project's revenue based on activities and project deliverable due a client for a particular period
- 3.17 **Terminal Report (TR)** - the final output submitted by the Academy to the Client. The TR chronicles the key activities implemented, describes the main outputs and how they contributed to the accomplishment of the Project Objectives.



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**4.0 DETAILS:**

Item No.	Activity	Responsibility	Interface
4.1	<p><b>Preparation and Submission of Terminal Report</b></p> <p>This involves the preparation of the final report for submission/transmittal to the Client based on the project's TOR, following the Academy and/or Client's prescribed outline and format.</p>	<p>Project Manager Supervising Fellow Program/Office Director Center Head</p>	<p>Document Tracking Sheet Certificate of Project Deliverable Accepted Billing Request Form Terminal Report</p>
4.2	<p><b>Closing of Project Budget</b></p> <p>This activity involves the final accrual of the total project revenue, in the Revenue Confirmation Sheet upon settlement of all account payables and other project accountabilities. These are done so that the Client may be issued the final project billing.</p> <p>Center/PM should also ensure that billing is collected.</p>	<p>Project Manager Center Finance Officer Center Head FAO</p>	<p>Billing Request Budget Disbursement Report PIP Monthly Accruals Official Receipt Deposit Slip</p>
4.3	<p><b>Client Disengagement</b></p> <p>This activity involves: closure meeting with the Client; submission of the final report; soliciting client feedback; turn-over of responsibilities and project resources (if necessary); and seeking the Client's concurrence to close the project.</p>	<p>Project Team</p>	<p>Certificate of Project Closure Client Contact Report Project Closure Meeting Checklist</p>
4.4	<p><b>Client Satisfaction Survey</b></p> <p>This activity involves conduct of a survey to our client with reference to the overall delivery of the project/services.</p>	<p>COSM DAP Conference Center</p>	<p>Client Satisfaction Survey Form</p>

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<b>Item No.</b>	<b>Activity</b>	<b>Responsibility</b>	<b>Interface</b>
4.5	<b>Project Evaluation</b>  This activity constitutes the final project assessment among Project Team as inputs for continuous improvement of QMS, and to the implementation of the next similar project.	Project/Program Team	Debriefing Report Project Insights and Learning Best Practices
4.6	<b>Turn-over of Project Records</b>  This involves the turn-over of the Project Folio to CRU. The Project Folio is based on the standards and requirements prescribed by the Records Control Procedure (QP-02).	Project Manager Central Records Unit	Project Folio

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**5.0 REFERENCES**

- 5.1 MC-2012-005 Customer Satisfaction Survey
- 5.2 MC-2012-006 Access to Project Related Information
- 5.3 QP-02 Records Control Procedure
- 5.4 OO-2016-01 Establishing Central Repository of Institutional Records and Documents

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