



WORK INSTRUCTION			
PROJECT CONCEPTUALIZATION AND DEVELOPMENT			
Code : DAP-WI-01	Revision No. : 4	Effectivity: 8 November 2017	Page: 1 of 4

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.

WORK INSTRUCTION			
PROJECT CONCEPTUALIZATION AND DEVELOPMENT			
Code : DAP-WI-01	Revision No. : 4	Effectivity: 8 November 2017	Page: 2 of 4

4.0 DETAILS:

Item No.	Activity	Responsibility	Interface
4.1	Concept Development 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.	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	Proposal Writing 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.	Supervising Fellow Project Manager Technical Staff	Letter of Intent Prescribed Project Proposal format from Client/DAP
4.3	Estimating the Project Cost 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.	Center Head Supervising Fellow Project Manager Technical Staff Finance Office	Logframe Workplan Project Implementation Plan (PIP)



WORK INSTRUCTION			
PROJECT CONCEPTUALIZATION AND DEVELOPMENT			
Code : DAP-WI-01	Revision No. : 4	Effectivity: 8 November 2017	Page: 3 of 4

Item No.	Activity	Responsibility	Interface
4.4	Proposal Review 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.	Center Head Supervising Fellow Project Manager Technical Staff	Transmittal Letter Document Tracking Sheet
4.5	Presentation of the Proposal 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. If the proposal would lead to a degree, it would be subject to the approval of the Academic Council. All approved proposals shall be submitted to Central Records.	Center Head Supervising Fellow Project Manager Technical Staff	Leading to a Degree, Formal Presentation to Academic Council

WORK INSTRUCTION			
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Code : DAP-WI-01	Revision No. : 4	Effectivity: 8 November 2017	Page: 4 of 4

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 205
- 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)