



WORK INSTRUCTION

PROJECT MOBILIZATION

Code : DAP-WI-03

Revision No. : 4

Effectivity: 8 November 2017

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

3.4 **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>Identification of the Composition of Project Team</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	<p>Signed and notarized MOA</p> <p>Memo Request for inter-center collaboration</p> <p>Personnel Requisition Form</p> <p>Approved LOI</p>
4.2	<p>Internal Authorization</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	<p>Approved Draft SO</p> <p>Project Involvement Notification and Confirmation for inter-center collaboration</p> <p>Signed and notarized MOA</p> <p>Approved e-PIP</p> <p>Approved LOI with Consultant's Conforme</p>

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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>Project Mobilization Meeting</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	<p>Logframe</p> <p>Workplan</p> <p>Approved Project Proposal</p> <p>Minutes of the Project Team Meeting</p> <p>Client Contact Report</p>
4.4	<p>Preparing Project Inception Report</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	<p>MOA/Contract</p> <p>TOR</p> <p>Approved Proposal</p> <p>Agreements</p> <p>Minutes of Meeting</p> <p>Inception Report</p> <p>Certificate of Project Deliverable Accepted</p>

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Item No.	Activity	Responsibility	Interface
4.5	<p>Issuance of Billing Request for the Project's Deliverable / Output/Mobilization Fee</p> <p>This last stage ensures the compliance of the project with the contract and timely collection of the project's 1st deliverable/output/mobilization/fee.</p> <p>A billing request form is accomplished and submitted to FAO for the issuance of billing.</p>	Project Manager	MOA LOC Billing Request Form
4.6	Functions and Roles of the Project Team		
a.	Supervising Fellow (SF)	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.	Project Manager (PM)	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.	Technical Staff	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.	Administrative Staff	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.	Consultants/Resource Persons	<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