

WORK INSTRUCTION			
PROJECT EVALUATION AND CLOSURE			
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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.

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.

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	Preparation and Submission of Terminal Report 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.	Project Manager Supervising Fellow Program/Office Director Center Head	Document Tracking Sheet Certificate of Project Deliverable Accepted Billing Request Form Terminal Report
4.2	Closing of Project Budget 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. Center/PM should also ensure that billing is collected.	Project Manager Center Finance Officer Center Head FAO	Billing Request Budget Disbursement Report PIP Monthly Accruals Official Receipt Deposit Slip
4.3	Client Disengagement 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.	Project Team	Certificate of Project Closure Client Contact Report Project Closure Meeting Checklist
4.4	Client Satisfaction Survey This activity involves conduct of a survey to our client with reference to the overall delivery of the project/services.	CorPlan DAP Conference Center	Client Satisfaction Survey Form



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Item No.	Activity	Responsibility	Interface
4.5	Project Evaluation 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	Turn-over of Project Records This involves the turn-over of the Project Folio to Central Records. The Project Folio is based on the standards and requirements prescribed by the Retention of Documented Information Procedure (QP-02).	Project Manager Central Records	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 Retention of Documented Information Procedure
- 5.4 OO-2016-01 Establishing a Central Repository of Institutional Records and Documents