




MEMORANDUM

FOR : **PMT Members
All Concerned Personnel**

FROM : 
DR. ENRICO C. PARINGIT
Executive Director

SUBJECT : **Revised Templates**

DATE : **31 August 2021**

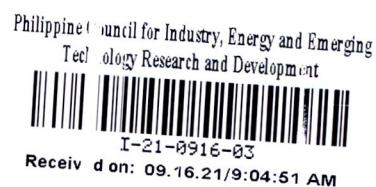
In line with the continuous improvement of our business processes, we are providing you herewith the following revised templates for your kind perusal on the evaluation of proposals and projects' requests.

1. Project Executive Brief
2. PM Eligibility Checklist

In this regard, the attached approved templates will be used.

Thank you.

/PCMD



EXECUTIVE BRIEF

Nature of Request					
Program Title					
Project Title					
Program Leader					
Project Leader					
Implementing Agency					
Collaborating Agencies					
Funding Agency					
Project Duration	<i>(original approved duration)</i>				
Extension, if any	<i>(itemize duration per approved/proposed extension/s)</i>				
Total Project Cost	Expense Class	Year 1	Year 2	Year n	Total
	PS				
	MOOE				
	EO				
	Total				
Project Description					
Project Objectives					
Target Beneficiaries					
Expected Output/s					
Justifications on the Request/s					
Highlights of Accomplishment/s					
<u>Technical:</u>					

Target Accomplishment/s	Actual Accomplishments	Assigned Weight	% Completion (cumulative)	%Completion (weighted)
Objective 1:				
Target 1				
Target 2				
Objective n:				
Target n				
Target n				
Total		1.00		

(Note: Provide a brief narrative discussion of accomplishments vis-à-vis the objectives)

Target 6Ps	Actual Accomplishments	% Completion (cumulative)
<i>Publications (in recognized journals)</i>		
<i>Patents (tangible measure of innovation)</i>		
<i>Products (commercial value of outputs)</i>		
<i>People services (increase in the scientific workforce)</i>		
<i>Places (facilities that enable increased 6Ps output)</i>		
<i>Policies (adopted science-based guidelines)</i>		
Total		

Financial:

Expense Class	Approved Budget*	Released Budget*	Expenditures	Unexpended Budget	% Fund Utilization	Remarks
PS						
MOOE						
EO						
TOTAL						

*Total budget (approved/released) including PCIEERD Indirect Cost (IC)

Problems Encountered:

Overall Assessment

Actions on Previous Request

Below is a summary of the chronology of actions taken related to the requests of the project:

Nature of Request	Date Received	Action Taken / Recommendation	Action Taken by (PCIEERD / DOST / Other Funding Agency)	Date of Action (completion of task)
SAMPLE				
Request for Change in Implementation Date (I-19-1016-48)	10 Oct 2019	Approval of Request for Change of Implementation (O-19-1114-28)	PCIEERD	14 Nov 2019

Request for 2 nd Extension and Use of UB (I-20-1210-25)	10 Dec 2020	Approval of 2 nd Extension and budget realignment without additional funding. (O-21-1223-27)	PCIEERD	22 Dec 202
		Endorsement of the Request for utilization of UB to DOST. (O-21-0119-04)		13 Jan 2021
		Approval of Request for utilization of UB	DOST	28 Jan 2021
Request for the grant of Gratuity Pay (I-21-0304-35)	04 Mar 2021	Approval of the request to use project funds for the grant of 2020 Gratuity Pay for contract of service personnel. (O-21-0310-24)	PCIEERD	10 Mar 2021
Remarks				

Prepared by:

Date Prepared: (DD-MMM-YYYY)

Signature over Printed Name

Project Manager

Endorsed by:

Date Endorsed: (DD-MMM-YYYY)

Signature over Printed Name

Division Chief

(if applicable)

Approved by:

Date Approved: (DD-MMM-YYYY)

DR. ENRICO C. PARINGIT

Executive Director

PROJECT MANAGER'S QUALITY CHECK OF PROPOSALS

(Prior to PCIEERD Management Team (PMT) Deliberation)

Title of Proposal:

Proponent/Project Leader:

Agency:

Address:

Contact Nos.:

Email Address:

	Yes	No
1. Is the proposal endorsed by the Head of the Agency? (Check for endorsement letter)	_____	_____
2. Is the proposal within the scope of the PCIEERD Call for Proposal?	_____	_____
3. Does the proposal have the following required components?		
a. Cooperating Agency/ies (Check for commitment letter)	_____	_____
b. Project Duration	_____	_____
c. Site/s of Implementation	_____	_____
d. Type of Research	_____	_____
e. R&D Priority Area/s	_____	_____
f. Sustainable Development Goal (SDG) addressed	_____	_____
g. Project Description	_____	_____
h. Significance	_____	_____
i. Review of Literature	_____	_____
j. Objectives (General and Specific)	_____	_____
k. Methodology	_____	_____
l. Technology Roadmap	_____	_____
m. Expected Outputs (6Ps)	_____	_____
n. Potential Outcomes	_____	_____
o. Potential Impacts	_____	_____
p. Target Beneficiaries	_____	_____
q. Sustainability Plan	_____	_____
r. Limitations of the Project	_____	_____
s. Risks and Assumptions	_____	_____
t. Literature Cited	_____	_____
u. Personnel Requirement	_____	_____
v. Line-Item-Budget (LIB)	_____	_____
4. Does the proposal have information about the Proponent/Project Team? (Check for Curriculum Vitae)	_____	_____
5. Does the institution have unliquidated funds? (Check for Institution's Track Record)	_____	_____
6. Did the proposal pass the GAD score?	_____	_____
7. Has the proposal been conducted before by other local researcher/s? (List down the apparent duplicated works)	_____	_____
8. Is/Are there commitment letter/s and/or counterpart funding?	_____	_____

Requirements enumerated in the DOST Guidelines Section VII.H for the private sector/non-government organizations and startups proposals:

Requirements	Yes	No
Up-to-date Securities and Exchange Commission (SEC) registration or Department of Trade and Industry (DTI) registration, or Cooperative Development Authority (CDA) registration certificate, or other authenticated copy of latest Articles of Cooperation and other related legal documents		
Co-signer Statement (if applicable)		
Copy of latest Income Tax Return		
Mayor's permit where the business is located		
Audited Financial Statements for the past three (3) years preceding the date of project implementation or in case of those with operations of less than 3 years, for the years in operation and proof of previous implementation of similar projects (or in the case of start ups, at least for one (1) year.		
Document showing that NGO/PO has equity to 20 percent of the total project cost, which shall be in the form of labor, land for the project site, facilities, equipment and the like, to be used in the project		
Disclosure of other related business, if any		
List and/or photographs of similar projects previously completed, if any, indicating the source of funds for implementation		
Sworn affidavit of secretary of the NGO/PO that none of its incorporators, organizers, directors or officers is an agent of or related by consanguinity or affinity up to fourth civil degree to the official of the agency authorized to process and/or approved the proposed MOA, and release of funds		
For CSOs , compliance to regulations as required by the General Appropriations Act (GAA) pertaining to fund transfers to Civil Society Organizations		
For Foundations , DOST certification as accredited by the Science and Technology Foundation Unit		

Remarks:

PM Comment/s and Recommendation/s:

Prepared by:

Project Manager

Noted by:

Division Chief

Date of Evaluation: