

Productivity and Development Center
2022 PROJECT ACCOMPLISHMENT REPORT

I. Project Information

Project Code	QCRAP
Project Title	Technical Assistance on the Expansion of the ISO 9001:2015-Certified Quality Management System (QMS) of the Department of Finance (DOF)
Project Start	October 27, 2023
Project End	December 30, 2024
Project Price	PHP 2,427,897.92
Client Organization	Department of Finance

II. Project Team

Project Manager	Angela C. Vargas
Team Members	Mary Anne I. Mayo, Carolyn Caudilla, Sir Rommel Principe, and Annalou Dela Paz
Supervising Fellow Consultants/ Resource Persons	Arnel D. Abanto/Rosandro Bertis

III. Project Details

Project Description	As part of its ongoing efforts to improve its operations, the DOF has initiated the expansion of the QMS scope to cover the processes involved in the Corporate Operations Office, an essential component of the DOF's operations. Specifically, it will include: (1) Issuance of Comments on GOCC Requests for Tax Subsidy and (2) Issuance of Recommendation on GOCC Requests to Open/Maintain an Account with Banks Other than Authorized Government Depository Banks. The decision to expand the QMS scope is a clear testament to the DOF's unwavering commitment to improving the quality of its services and enhancing its organizational efficiency. However, the DOF acknowledges that expanding the QMS scope is a complex undertaking that will require significant resources and the implementation of QMS-related activities to ensure its success. To achieve this goal, the DOF has requested the DAP to again provide technical assistance services for the project entitled, "Technical Assistance on the Expansion of the ISO 9001:2015-Certified Quality Management System (QMS) of the Department of Finance (DOF)." Thus, this proposal is being submitted by the DAP to outline the necessary steps to expand the QMS scope and ensure its effective integration into the DOF's processes.
Project Objectives	The project aims to facilitate the expansion of the established QMS, including the Issuance of Comments on GOCC Requests for Tax Subsidy and the Issuance of Recommendation on GOCC Requests to open/Maintain an Account with Banks Other than Authorized Government Depository Banks.
Focus Area	Productivity-Driven Economic Development
Project Type	Advocacy and Promotions Project
Project Beneficiary	Public Sector
Regional Coverage	Various

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IV. Project Accomplishments

Activities Implemented	ACTIVITY DATE
	• Training Course on ISO 9001:2015 QMS Requirements and QMS Expansion Feb. 5-8, 2024 • Technical Guidance on QMS Expansion Feb. 19-22, 2024 • Enhancement of QMS Documents Feb. 26-28, 2024 • Review/Enhancement of Procedure and Process Controls Mar. 18-19, 2024 • Finalization of all documents Apr. 4-5, 2024, May 13-14, 2024 • Training Course on ISO 19011:2018 Guidelines on Auditing Management Systems Jul. 1-4, 2024 • Training Course on Root Cause Analysis and Corrective Action Sept. 3-4, 2024
Major Outputs	1. Enhanced participants' awareness, understanding, and appreciation of the ISO 9001:2015 QMS requirements and their roles and responsibilities in the QMS expansion of DOF. 2. Enhanced versions of the following documented information: Agency-level process map, QMS scope statement, Quality policy (as necessary), List of internal and external issues (focusing on the additional processes), Relevant interested parties' needs and expectations (focusing on the additional processes), Risks and Opportunities and action plans (focusing on the additional processes), Reviewed Process Map and QMS scope statement, Quality policy, QMS Expansion Roadmap, Plan, and Checklist, Guidelines and Tools for identifying internal and external issues, Guidelines and Tools for identifying relevant interested parties' needs and expectations, Risks and Opportunities (focusing on the additional processes), QMS Manual, QMS Procedures (Control of Documented Information, Control of Nonconformity and Corrective Action, Internal QMS Audit, Customer Satisfaction Data Gathering and Processing, Management Review), Enhanced SIPOC matrix for the management, core, and support processes. 3. QMS Implementation Plan and Drafted/Enhanced cascading materials. 4. Expansion of QMS Audit Program and Plan to include additional processes.
Project Impact	1. Better QMS Understanding - Employees gain a clearer understanding of ISO 9001:2015, helping DOF establish a strong quality culture.

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	2. Stronger QMS Framework - Key processes, documents, and policies are refined, ensuring smooth integration and consistency across departments. 3. Improved Stakeholder Relationships - Focusing on stakeholder needs helps build trust and strengthen relationships both within and outside DOF. 4. Ongoing Improvement - Regular audits and assessments ensure continuous improvement, keeping DOF compliant and adaptable. 5. Skill Development - Training programs enhance employee skills, ensuring effective and sustainable QMS management. 6. Increased Efficiency - Streamlined processes lead to improved operations and performance, enabling DOF to deliver high-quality services. 7. Climate Actions - Climate change mitigation and adaptation actions are integrated into the QMS, aligning DOF's operations with sustainability goals.
Lessons Learned	1. During the course of the project, DOF management initially decided not to proceed with the requested scope expansion and opted not to conduct the readiness assessment. The project team convinced management to proceed with the readiness assessment within the current scope. However, DOF management still chose not to move forward with it, resulting in a reduced project price and a shift in the project's deliverables.

V. Attachments

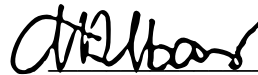
- Summary of Evaluation for Course and Resource Person (for training program)
- Certificate of Project Closure (for all completed projects)- not applicable
- Photos

Prepared by:



Angela C. Vargas
Project Manager

Noted / Approved by:



Arnel D. Abanto
Center Head

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Photo Documentation



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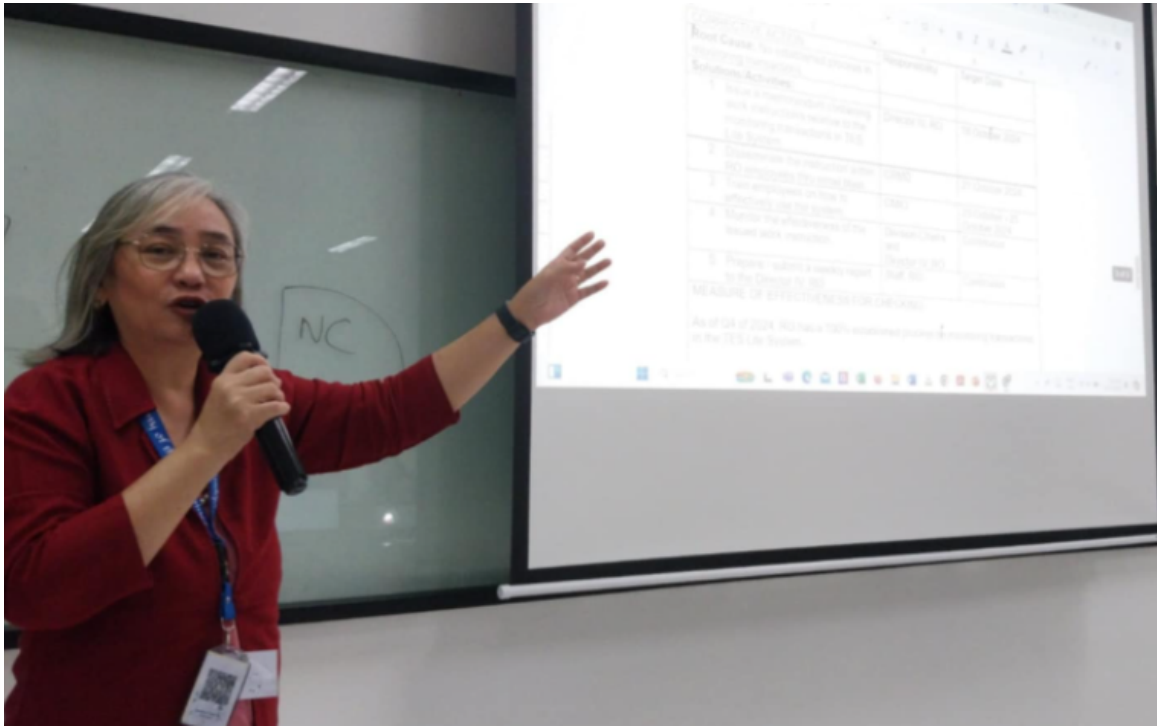
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**Summary of Evaluation for
Course and Resource Person**

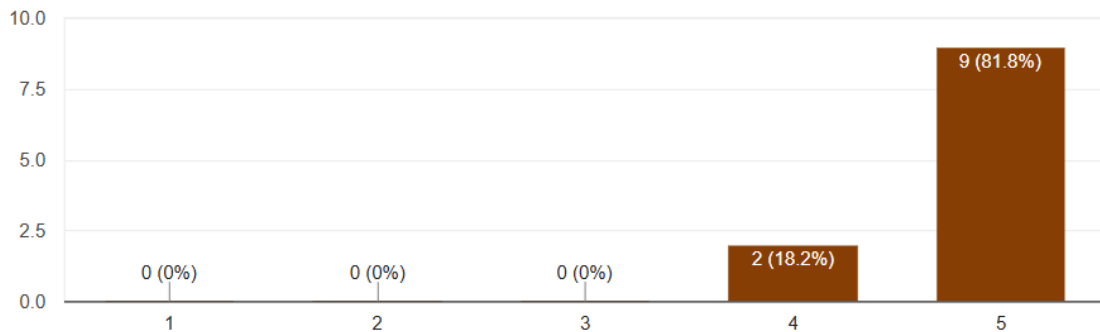
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Training Course on ISO 9001 QMS Requirements and Documents Enhancement

Course Objectives:

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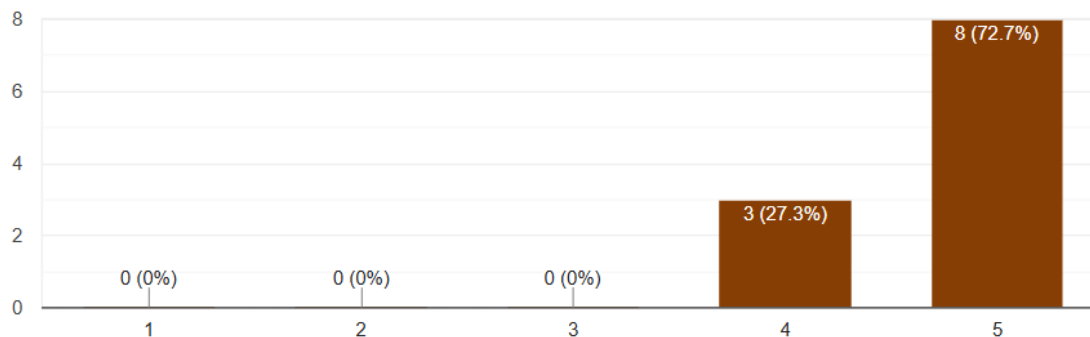
11 responses



Training Materials

 [Copy chart](#)

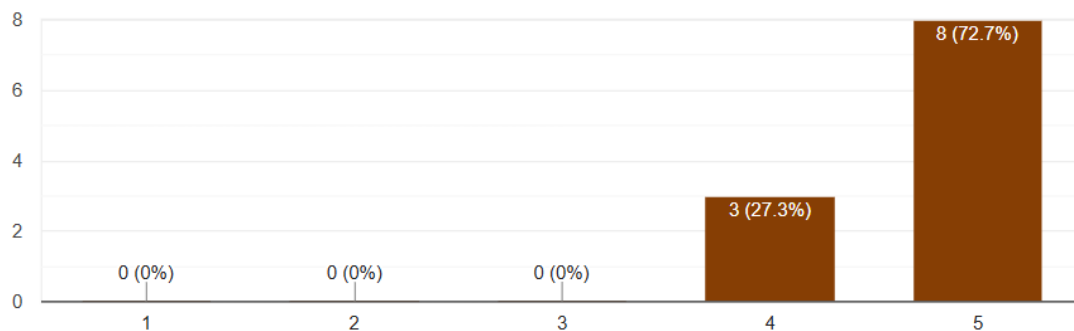
11 responses



Selection of topics

 [Copy chart](#)

11 responses

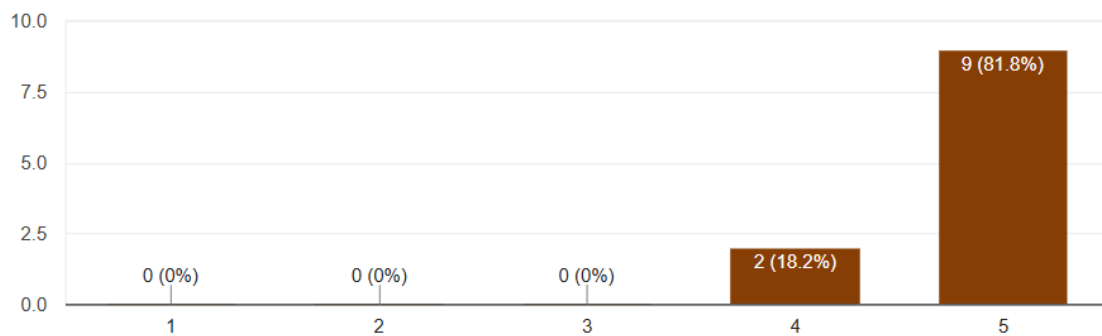


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Usefulness of course

 Copy chart

11 responses



Name	Agency	Email address	Course Objectives:	Course Expectations:	Training Materials	Selection of topics	Usefulness of course
Dianne Jemme S. Encart	Department of Finance	dencartado@dof.gov.ph	5	5	5	5	5
Rhafaël Larry T. Mauricio	Department of Finance	rmauricio@dof.gov.ph	5	5	5	4	5
Arron R. Esteban	Department of Finance	aesteban@dof.gov.ph	5	5	5	5	5
Genesis Ezra G. Edic	Department of Finance	gedic@dof.gov.ph	5	5	5	5	5
Kenneth Dwight M. Muñoz	DOF	kmunoz@finance.gov.ph	5	5	5	5	5
Vissan N. Nabor	Department of Finance	vnabor@dof.gov.ph	5	5	5	5	5
Heherson F. Marayag	Department of Finance	hmarayag@dof.gov.ph	5	5	5	5	5
Froilan De Vera	PCAG	fdevera@dof.gov.ph	4	4	4	4	4
Roselyn F. Salagoste	Department of Finance	rsalagoste@dof.gov.ph	5	5	5	5	5
Ma. Ricca Pearl Sulit	Department of Finance	msulit@dof.gov.ph	4	4	4	4	4
Maye D. Fortaleza	Department of Finance	mfortaleza@dof.gov.ph	5	5	5	5	5
			4.818181818	4.818181818	4.727272727	4.727272727	4.818181818

Sequencing of topics	Organization of course	Scheduling of activities	Length of course	Lectures/Discussions	Presentations	Exercises/Workshops	Appropriateness of instr	Training platform (Zoom)
5	5	5	4	5	5	5	5	5
5	5	4	4	4	4	4	4	4
5	5	5	5	5	5	5	5	5
5	5	5	5	4	5	5	5	5
5	5	5	5	5	5	5	5	5
5	5	5	4	5	5	5	5	5
5	5	5	5	5	5	5	5	5
3	4	4	4	3	4	4	4	1
5	5	4	4	5	5	5	5	4
4	4	4	4	4	4	4	4	4
5	5	4	4	4	5	5	5	5
4.727272727	4.727272727	4.363636364	4.454545455	4.727272727	4.727272727	4.727272727	4.727272727	4.363636364

Training platform (Zoom Video Communications, Inc.)	Other training applications used (to be specified)	Pre-training arrangements/coordination	Degree of learning acquired	Expectations were adequately met	Actively involved in the learning process	What did you find particularly rewarding/liked best about the course?	How can the delivery of the course be enhanced?
5	5	5	5	5	5	5 Workshops	None
4	4	4	4	4	4	Enough time was given to learn everything.	Better time management
5	5	5	5	5	5	The speaker is knowledgeable and entertaining at the same time.	Time management
5	5	5	5	5	5	New and fresh knowledge from a highly competent speaker and team.	Longer day/s for absorption.)
5	5	5	5	5	5	Deeper understanding of ISO 9001	Longer training period for this course.
5	5	5	5	5	5	After return to work, thinking that it will be a great help to my Division / work.	N/A
5	5	5	5	5	5	The excellent knowledge imparted to us by the Project Management Team	None. Everything is excellent.
1	3	3	3	3	3	in depth discussions on the applicability of each modules to the core process	
4	4	5	4	5	4	3 New learnings on the QMS	materials be given ahead of time so we study earlier and raised questions for clarifications
4	4	4	4	4	4	the QMS training course was well explained	Better time management; emphasis on more significant topics and less discussion on not so significant items and less unnecessary side comments
5	5	4	4	5	4	aa	
						The topics were extensively discussed.	None

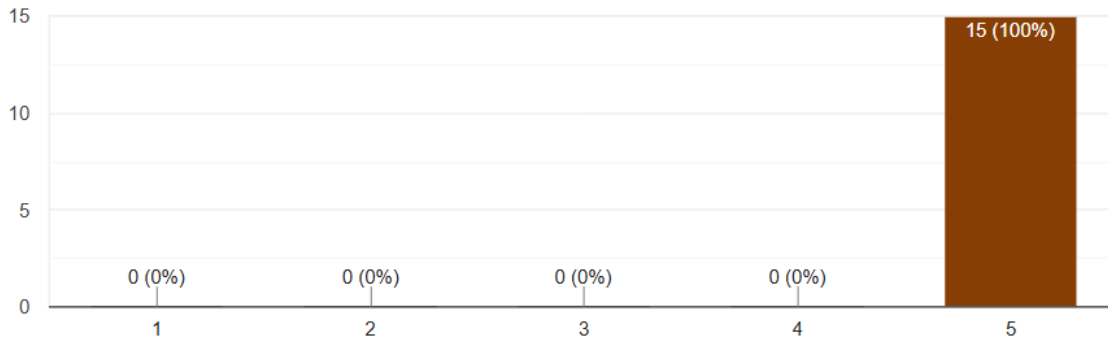
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Training Course on ISO 19001 Management Systems Audit

Course Objectives:

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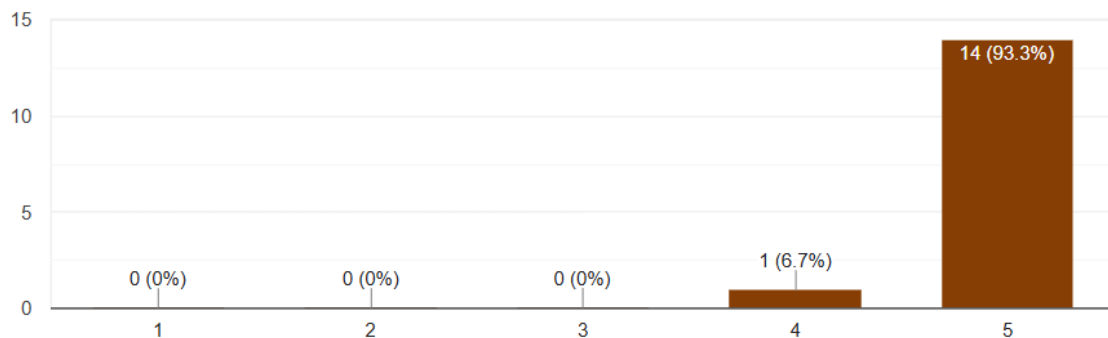
15 responses



Course Expectations:

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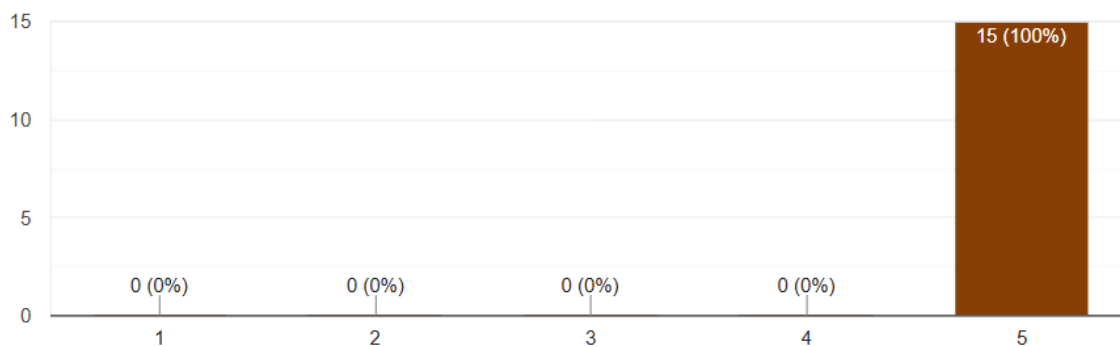
15 responses



Selection of topics

 [Copy chart](#)

15 responses





Name	Agency	Email address	Course Objectives:	Course Expectations:	Training Materials	Selection of topics	Usefulness of course
Rodel S. Nufiez	DOF	rnunez@dof.gov.ph	5	5	5	5	5
Llorimer C. Marquez	Department of Finance	lmarquez@finance.gov.ph	5	5	5	5	5
Marianne Angelica M. Nu	Department of Finance	mmnuque@dof.gov.ph	5	5	5	5	5
CHERRY KRIS C. MIPA	DOF	cmipa@dof.gov.ph	5	5	5	5	5
Rosemary G. Abelgas	Department of Finance	rabelgas@dof.gov.ph	5	5	5	5	5
Luja-in R. Pangcoga	Department of Finance	lpangcoga@dof.gov.ph	5	5	5	5	5
Richard G. Manzano	DOF	rmanzano@dof.gov.ph	5	5	4	5	5
LOLITA R. VERDADERO	DEPARTMENT OF FINANCE	lverdadero@dof.gov.ph	5	5	5	5	5
Gerald Allan Dellupac	Department of Finance	gdellupac@dof.gov.ph	5	5	5	5	5
Rhafael Larry Mauricio	Department of Finance	rmauricio@dof.gov.ph	5	5	5	5	5
Maria Liza R. Santos	DOF	msantos@dof.gov.ph	5	5	5	5	5
Arron R. Esteban	Department of Finance	aesteban@dof.gov.ph	5	5	5	5	5
Rhodora V. Reyes	Department of Finance	rreyes@dof.gov.ph	5	4	4	5	5
Marina Elenita S. Lizaso	Department of Finance	mlizaso@dof.gov.ph	5	5	5	5	5
May Rose Faner	DOF	mfaner@dof.gov.ph	5	5	5	5	5
			5	4.933333333	4.866666667	5	5

Sequencing of topics	Organization of course	Scheduling of activities	Length of course	Lectures/Discussions	Presentations	Exercises/Workshops	Appropriateness of instru	Training platform (Zoom)
5	5	5	5	5	5	5	5	5
5	5	5	5	5	5	5	5	5
5	5	5	5	5	5	5	5	5
5	5	5	5	5	5	5	5	5
5	5	5	5	5	5	5	5	5
5	5	5	5	5	5	5	5	5
5	5	5	5	5	5	5	5	5
5	5	4	4	5	4	4	4	5
5	5	5	5	5	5	5	5	3
5	5	5	5	5	5	5	5	5
4	4	4	5	5	4	4	4	5
5	5	5	5	5	5	5	5	5
5	5	5	5	5	5	4	5	4
4	5	4	4	5	4	5	5	4
5	5	5	5	5	5	5	5	5
5	5	4	3	5	5	5	5	5
4.866666667	4.933333333	4.733333333	4.733333333	5	4.8	4.8	4.866666667	4.733333333

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What did you find particularly rewarding/liked best about the course?	How can the delivery of the course be enhanced?
The workshop.	--
Being on the side of the auditor	More activity during the seminar
New techniques and strategy to audit.	To apply the learning and practices.
The conduct of simulation audit and the observations delivered by the observers is appreciated for future improvements for new auditors. Well done QMS team.	Enhanced the auditing techniques by providing useful guidelines and a well understanding on how to properly conduct the audit professionally and write an audit findings specifically for improvements in specifying a criteria which not to focus on ISO clauses.
Simulation Audit	More workshops in preparing Audit Checklist and Script
Discuss the outputs made per team in every activity	Learners may observe an actual audit to gain more knowledge
Simulation Audit	more workshops
The speakers, I liked how he was able to deliver all complicated areas of internal auditing of QMS, with the practical applications of what he discussed we are able to grasp the underlying principles and techniques about IQA. The PDCA method of auditing as a guide makes it simplified. It was indeed enjoyable having DAP as the professional guide in learning all about QMS and IQA topics.	I am satisfied with the delivery of the course. This concluded training is highly appreciated.
Learned a lot	longer days of training
The conduct of simulation audit	Be more realistic on time budgeting on the course
was given the opportunity to apply learnings through the actual mock audit	.
The internal audit knowledge that can be used for organizational and professional improvement.	More time and more exercises
learning new techniques in auditing as well as the proper audit criteria to be used	more workshops that will develop mastery in auditing
The simulated audit.	More hands on exercises
new knowledge on the conduct of audit	more detailed or series of discussion per topic

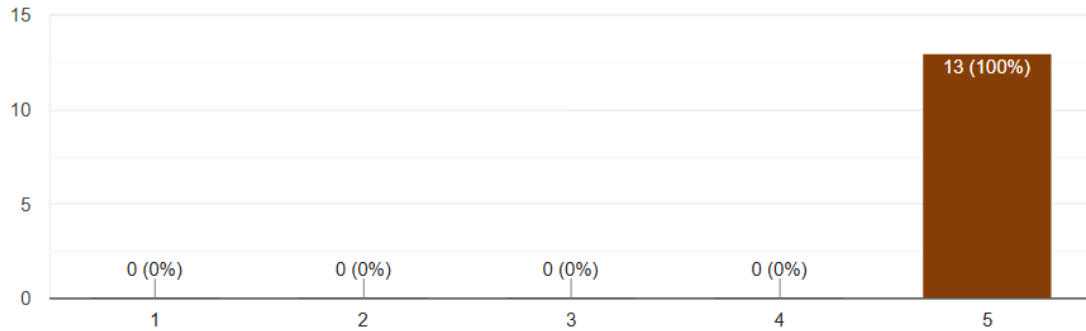
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Training Course on RCA and Solutions Formulation

Course Objectives:

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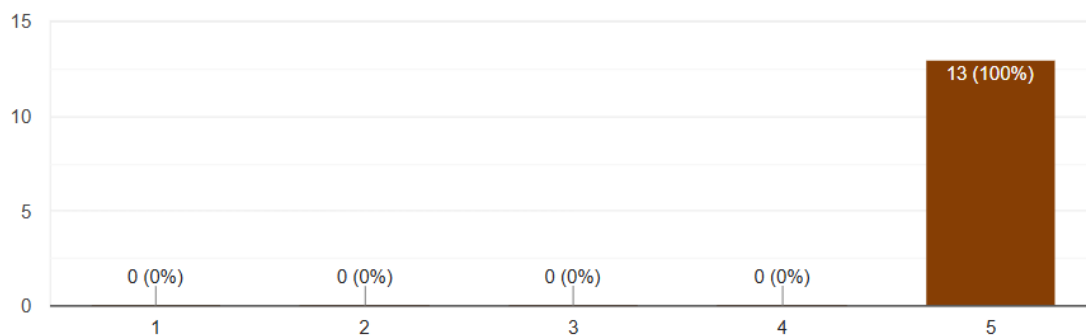
13 responses



Course Expectations:

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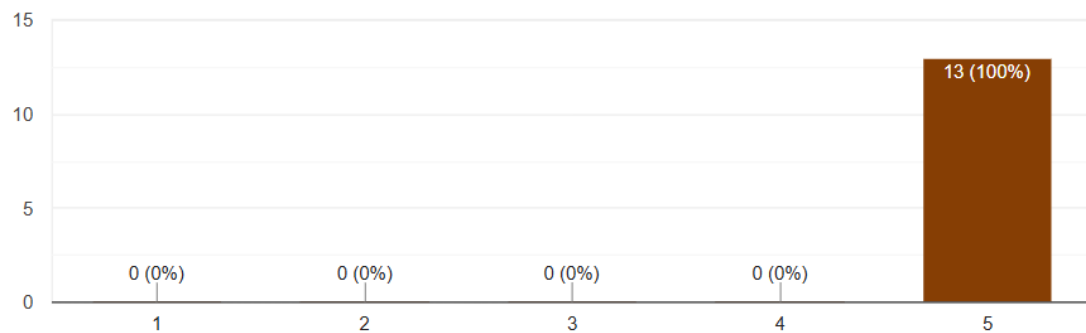
13 responses



Training Materials

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13 responses

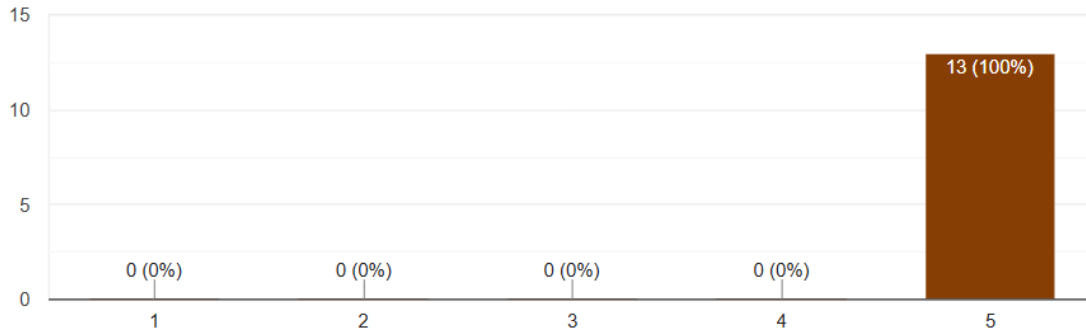


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Selection of topics

 Copy chart

13 responses



Name	Agency	Email address	Course Objectives:	Course Expectations:	Training Materials	Selection of topics	Usefulness of course
CHERRY KRIS C. MIPA	DOF	cmipa@dof.gov.ph	5	5	5	5	5
Luja-in R. Pangcoga	Department of Finance	lpangcoga@dof.gov.ph	5	5	5	5	5
Dhan Carlo V. Garcia	DOF	dgarcia@dof.gov.ph	5	5	5	5	5
Dhan Carlo V. Garcia	DOF	dgarcia@dof.gov.ph	5	5	5	5	5
Marina Elenita S. Lizaso	Department of Finance	mlizaso@dof.gov.ph	5	5	5	5	5
Rhodora V. Reyes	DOF	rreyes@dof.gov.ph	5	5	5	5	5
Johanna Nicole R. Nuna	Department of Finance	jnunag@finance.gov.ph	5	5	5	5	5
Dianne Jemme S. Encarnado	Department of Finance	dencartado@dof.gov.ph	5	5	5	5	5
Kristine Anne M. Valenzuela	DOF	kvalenzuela@dof.gov.ph	5	5	5	5	5
Vissan N. Reyes	Department of Finance	vnabor@dof.gov.ph	5	5	5	5	5
Kristine Anne S. Lurzano	DOF	klurzano@dof.gov.ph	5	5	5	5	5
Mark Joshua Julio	DOF	mjulio@dof.gov.ph	5	5	5	5	5
Angelica P. Garcia	Department of Finance	agarcia@dof.gov.ph	5	5	5	5	5
			5	5	5	5	5

Sequencing of topics	Organization of course activities	Scheduling of activities	Length of course	Lectures/Discussions	Presentations	Exercises/Workshops
5	5	5	5	5	5	5
5	5	5	5	5	5	5
5	5	5	5	5	4	5
5	5	5	5	5	5	5
5	5	5	5	5	5	5
5	5	5	5	5	5	5
5	5	5	5	5	5	5
5	5	5	5	5	5	5
5	5	5	5	4	5	5
5	5	5	3	3	5	5
5	5	5	5	4	5	5
5	5	5	5	5	5	5
5	5	5	5	5	5	5
5	5	5	5	5	5	5
5	5	5	4.846153846	4.692307692	4.923076923	5



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Appropriateness of instructional materials	Training platform (Zoom Video Communications, Inc.)	Other training applications used (to be specified)	Pre-training arrangements/coordination	Degree of learning acquired
5	5	5	5	5
5	5	5	5	5
5	5	5	5	5
5	5	5	5	5
5	5	5	5	5
5	4	3	4	4
5	5	5	5	5
5	5	5	5	5
5	5	5	5	5
5	5	3	3	5
5	5	5	5	5
5	5	5	5	5
5	5	5	5	5
5	5	5	5	5
5	4.923076923	4.692307692	4.769230769	4.923076923

Expectations were adequately met	Actively involved in the learning process	What did you find particularly rewarding/liked best about the course?	How can the delivery of the course be enhanced?
5	5	Writing an NCs and RCAs using Fishbone properly	None so far
5	5	Interactive activities to fully understand the course	Microlearning
5	5	N/A	N/A
5	5	N/A	N/A
5	5	The workshops	More workshops
4	4	defining the problem of the actual NC obtained by	providing more exercises or workshops
5	5	I got to learn a lot of things while enjoying ang ha	N/A
5	5	Workshops	Additional workshops
5	5	The training course was very insightful to the QM	n/a
5	5	The way how to correct / properly fill-out the RCAI	N/A
5	5		Could have been three days, if permissible, to be a
5	5	The foods	N/A
5	5	-	-
4.923076923	4.923076923	4.927125506	

ONE-POINT LESSON

Project	Technical Assistance on the Expansion of the ISO 9001:2015-Certified Quality Management System (QMS) of the Department of Finance (DOF)
Prepared by	 Angela C. Vargas
Noted by	 Arnel D. Abanto
Center	Productivity and Development Center
Date Prepared:	25 March 2025
File number	

Subject/Activity: Project Implementation

Actual Date (if applicable): n.a.

What happened? (State the problem and what was done)	What should have been done? (Recommended corrective and preventive action)
During the course of the project, DOF management initially decided not to proceed with the requested scope expansion and opted not to conduct the readiness assessment. The project team convinced management to proceed with the readiness assessment within the current scope. However, DOF management still chose not to move forward with it, resulting in a reduced project price and a shift in the project's deliverables.	Corrective Action- The project team worked to convince DOF management to proceed with the readiness assessment within the existing scope. Despite this effort, management ultimately decided not to proceed, leading to adjustments in project pricing and deliverables. Hence, the corresponding agreement and payment was processed. Preventive Action- Future projects should implement a more structured decision-making process, including early stakeholder alignment and documented approvals for scope changes. Additionally, clear communication of the impact of scope reductions on project outcomes should be emphasized to prevent similar challenges.