development academy of the philippines
ISO 9001:2015 Certified
CIP/4045/03/03/579

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[2016] PROJECT ACCOMPLISHMENT REPORT

I. Project Information

Project Code	QCRAE
Project Title	Development of a Quality Management System Certifiable to ISO 9001:2015 for the Bureau of the Treasury
Project Start	January 1, 2016
Project End	March 30, 2017
Project Price	Php 7,267,932.00
Client Organization	Bureau of the Treasury

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II. Project Team

Project Manager	Lewina S. Tibe
Team Members	Aileen A. Ricohermoso
	John Christian C. Flaminiano
	Angela C. Vargas
	Leanne Kym Jane J. Lozañes
	Carolyn N. Caudilla
Supervising Fellow	Evangeline M. Macariola
Consultants/ Resource Persons	Elena Avedillo-Cruz, Antonio P. Santos, Delfin R. Jacob

III. Project Details

Project Description

Effective management and good governance are essential elements of quality, which can be easily achieved thru an effective Quality Management System (QMS). In line with the need for government agencies to improve quality in their operations and service delivery in the light of the Administration's thrust to adopt transformational leadership, the approved 2011-2016 Philippine Development Plan (PDP) cites enhancing and standardizing the quality of public service delivery to become consistent with the requirements of the International Organization for Standardization (ISO).

Certification to ISO 9001:2015 shall serve as a tool for the Bureau of the Treasury to achieve its vision to be the pro-active manager of public funds characterized by minimization of interest rate risks and hedging of financial risk. Hence, to continue their journey toward certification, a proposal entitled "Development of a Quality Management System Certifiable to ISO 9001:2015 for the Bureau of the Treasury" was submitted.

Project Objective

The project aimed to provide the necessary interventions to facilitate the establishment of ISO 9001:2015 QMS for the BTr.

Specifically, it:

1. Enhanced the understanding and appreciation of BTr officers and staff on the requirements and implementation of ISO 9001:2015 QMS;

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(Center)
[2016] PROJECT ACCOMPLISHMENT REPORT

2. Developed the capabilities of key officers and staff of BTr in preparing for and sustaining the ISO 9001 certification; and,
3. Prepared the documentation and implementation requirements for the certification of BTr's QMS and for maintaining and sustaining the established QMS.

Focus Area	Productivity for Economic Development
Project Type	Training and Consultancy
Project Beneficiary	Local Government
Regional Coverage	National Capital Region

IV. Project Accomplishments

Key Activities Implemented

1. Process Mapping Workshop – The DAP project team guided the Core Team in the preparation of a process map that illustrates the interfaces of the management, core and support processes on March 16, 2016 at Bayview Park Hotel. The workshop aimed to develop an in-depth understanding of the BTr's context as an organization considering its stakeholders. This also provided awareness to the members of the Core Team about the interface of the different processes and its impact when there is collaboration of work between these processes.

2. Writeshop on Quality Manual - The DAP Project Team provided guidance in drafting the Quality Manual, which BTr labelled as Treasury Quality Manual (TQM) on March 17-18, 2016 at Bayview Park Hotel. The workshop focused on ensuring that the TQM meets the requirements of the ISO 9001:2015 standards. BTr Core Team members were able to fully understand how crucial is the drafting and finalization of the Quality Manual and later decided to prioritize its approval.

3. Workshop on Risk Management Tools - A workshop on risk management, which is within the scope of the QMS, was conducted to develop the tools to be adopted for QMS. Resource Person for this workshop was Mr. John Christian Flaminiano, who shared his experience and knowledge on the subject. A lecture on risk management was conducted in the morning and workshop was done in the afternoon. Core Team members were able to formulate risk registry to be used by BTr.
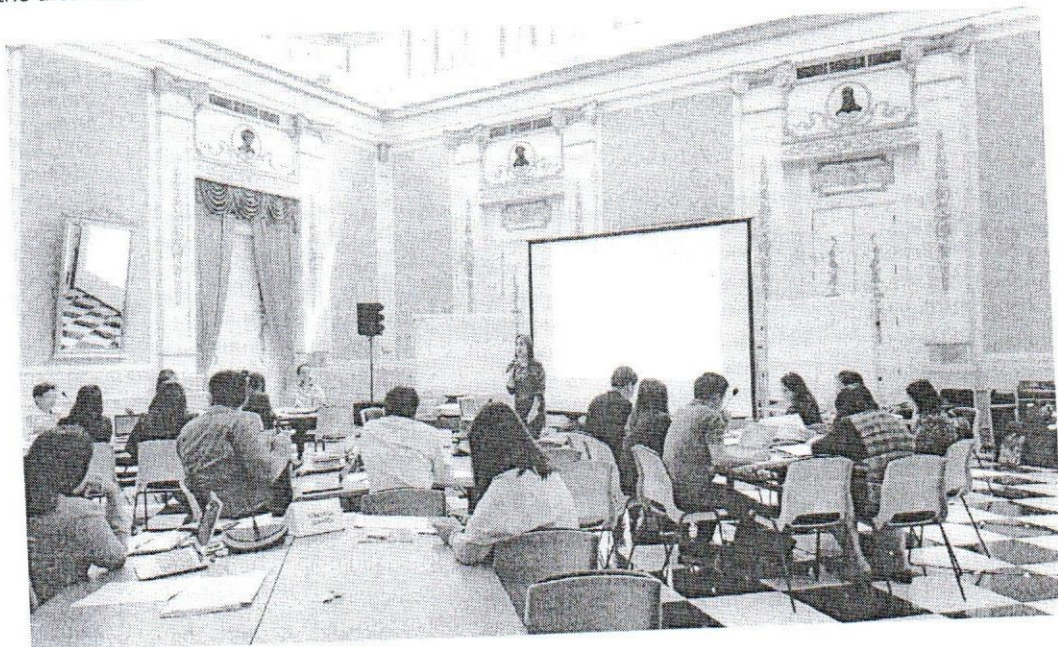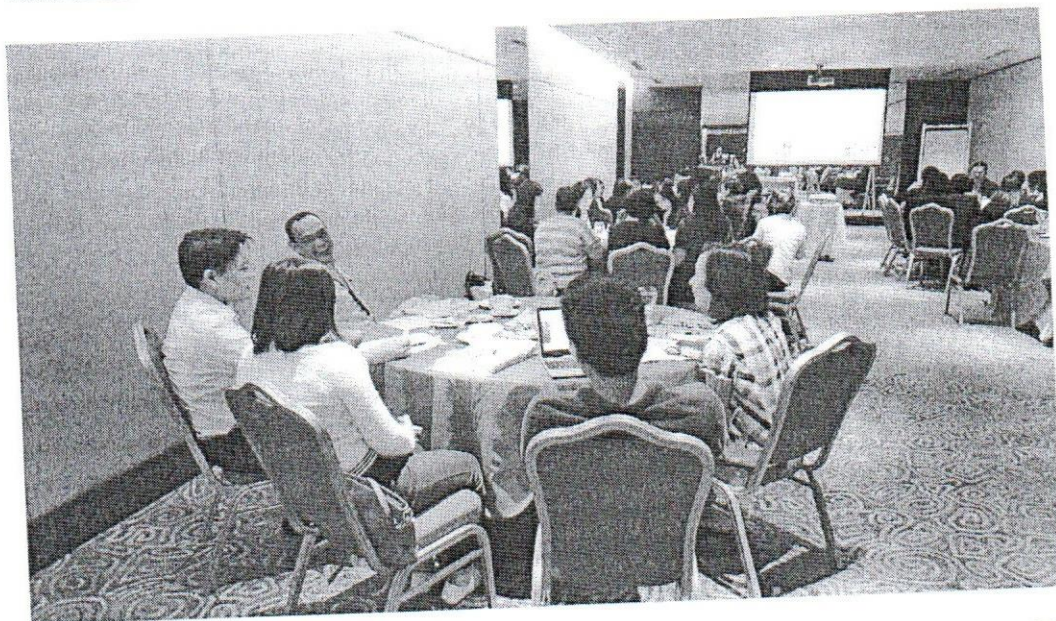
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(Center)
[2016] PROJECT ACCOMPLISHMENT REPORT

6. Workshop on Knowledge Management Tools – A workshop on knowledge management, which is within the scope of the QMS, was conducted to develop the tools to be adopted for BTr's QMS, on June 28-30, 2016 at BTr Marble Hall office in Ayuntamiento, Intramuros, Manila. Resource Person for KM was Ms. Elena Avedillo-Cruz, who conducted the lecture in the morning and workshop in the afternoon.

7. Workshop on ISO 9001 Quality Planning – The DAP Project Team guided the Core Team in establishing quality objectives and plans at the organizational and functional levels in preparation for ISO 9001 certification. The ISO 9001 Quality Planning served as a guide in the implementation of the quality policy of BTr. This was conducted on July 14-15, 2016 Waterfront Manila Pavilion Hotel & Casino in United Nations Avenue, Manila.

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(Center)
[2016] PROJECT ACCOMPLISHMENT REPORT

8. Review and Enhancement of Operational Controls and Procedures – A review of the existing controls and documentation of BTr's core and operational processes was conducted to introduce the needed improvements and changes, as necessary, in conforming to the minimum requirements of ISO 9001:2015. This was conducted on July 19-21, 2016 at BTr Cafeteria, Ayuntamiento, Intramuros, Manila.

9. Cascading for Batches 2, 3 and 4 – Workshop on Risk Management Tools, Control of Nonconformity, Knowledge Management Tools and Workshop on Performance Evaluation and Customer Satisfaction Tools were conducted for Batch 2, comprised of selected personnel of the pilot regional and provincial offices of BTr, which are Pampanga, Cebu and Davao, on July 26-29; January 23-28, 30 and February 4, 2016 for Batch 3; and, February 7-11, 13-14 and 20, 2016 for Batch 4, at BTr Cafeteria, Ayuntamiento, Intramuros, Manila. Batches 3 and 4 comprised of BTr personnel from the different regional and provincial offices, hand-picked by BTr. The same technical guidance provided to the Core Team was cascaded to Batches 2, 3 and 4, including the tools and forms and how it was used, which served as a guide in formulating their own.

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(Center)
[2016] PROJECT ACCOMPLISHMENT REPORT

10. Training Course on Internal Quality Audit - The DAP Project Team conducted training on IQA for the members of the Core Team and Batches 2, 3 and 4. Workshops on establishing the IQA Program was facilitated. The training included mock audit to guide and enhance the auditing skills of the participants. It enabled the participants to understand, interpret and audit ISO-QMS requirements, as well as, address audit findings. This was conducted on August 2-5 for Batch 2, 23-26 for Core Team, at DAP Conference Center in Tagaytay City. While Batch 3 had theirs on January 31-February 3 and Batch 4 on February 15-18, 2016 at Ramada Manila, Binondo, Manila.

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(Center)

[2016] PROJECT ACCOMPLISHMENT REPORT

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(Center)
[2016] PROJECT ACCOMPLISHMENT REPORT

11. Technical Guidance on QMS Implementation – The DAP Project Team provided technical guidance to the QMS Core Team on the implementation of the established QMS. The technical guidance sessions involved implementation checks to BTr Central Office, NCR, Pampanga, Cebu and Davao to determine how well they have applied the QMS. This was done on September 7-8 at the Central Office; 12-15 in Cebu and Davao; and, 27-28, 2016 in Pampanga.

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(Center)
[2016] PROJECT ACCOMPLISHMENT REPORT

CENTER FOR QUALITY AND COMPETITIVENESS
(Center)
[2016] PROJECT ACCOMPLISHMENT REPORT

12. Establishing the QMS Audit Programme – The DAP Project Team provided technical guidance on the first conduct of IQA and recommended corrective actions to address audit findings. This was conducted on August 30-31, 2016 at BTr Cafeteria, Ayuntamiento, Intramuros, Manila.

13. Launching of Treasury Quality Management System and BTr's Quality Policy Statement – The unveiling of BTr's Quality Policy statement was done on September 2, 2016 at Marble Hall, Ayuntamiento Building, Intramuros, Manila. It was attended by the Treasurer of the Philippines, Mr. Roberto B. Tan, deputy treasurers, core team members, staff and personnel of BTr, Vice President and Managing Director of PDC, Arnel D. Abanto and DAP President, Antonio D. Kalaw.
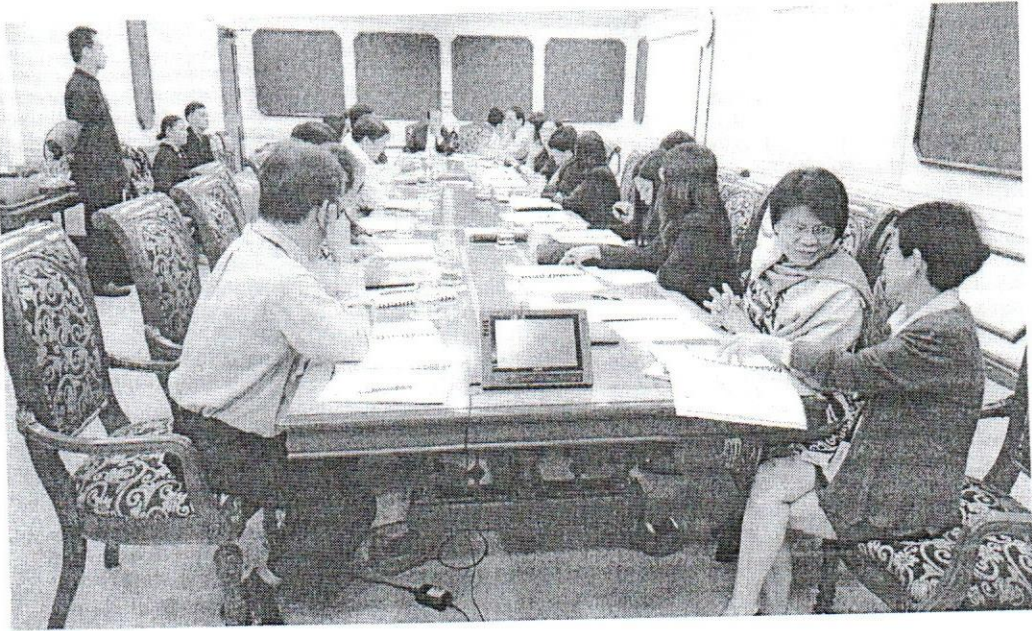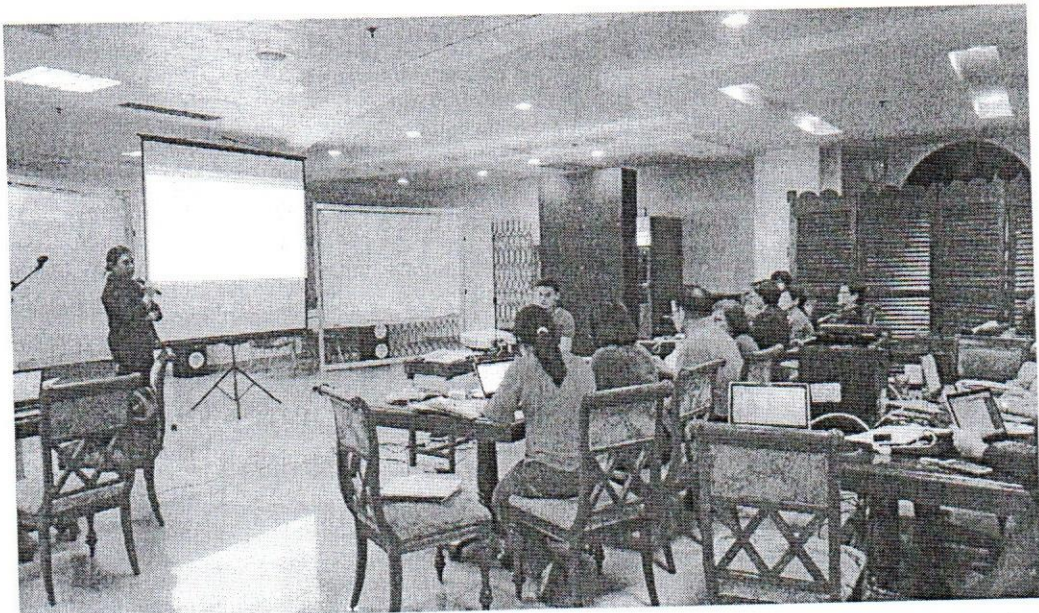
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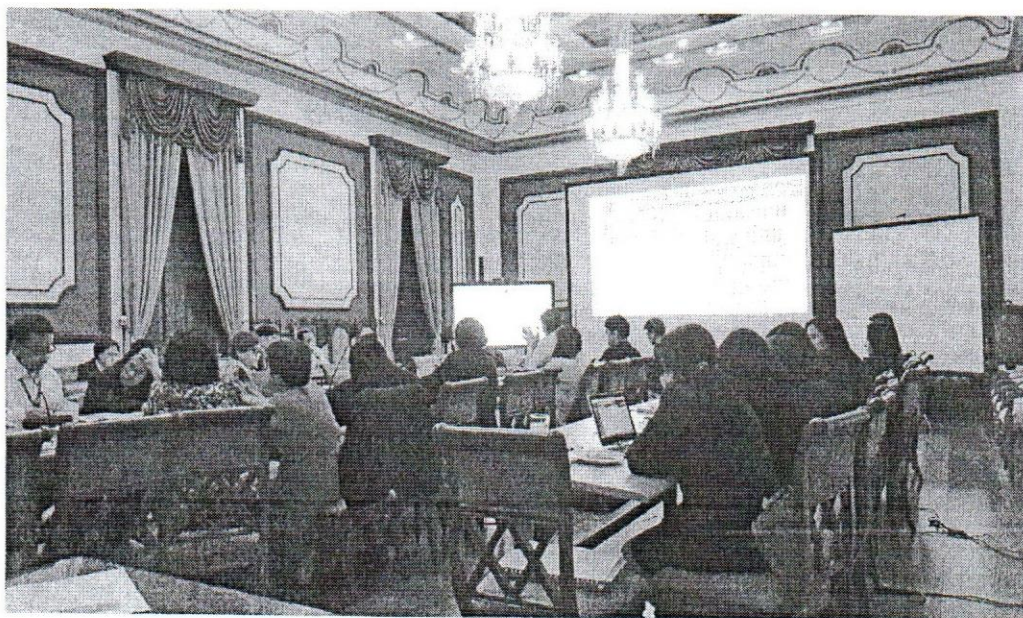[2016] PROJECT ACCOMPLISHMENT REPORT

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14. Technical Guidance on Internal Quality Audit – The DAP Project Team provided technical guidance to enhance the conduct of their first IQA. Core Team members were also guided how to draft and finalize audit itinerary, audit checklist and audit criteria. This was conducted on September 27, 2016 at the conference room of the Office of the Treasurer of the Philippines, Ayuntamiento and NCR conference room in Palacio del Gobernador Building, Intramuros, Manila.

15. Workshop on Management Review Inputs – The DAP Project Team provided technical guidance on how an MR is done and what agenda are to be included during its conduct. Management review template was provided to the members of the Core Team. This was done on October 13-14, 2016 at BTr Cafeteria, Ayuntamiento, Intramuros, Manila.

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(Center)
[2016] PROJECT ACCOMPLISHMENT REPORT

16. Technical Guidance on Management Review – The DAP Project Team provided technical guidance in facilitating the first Management Review meeting to evaluate the effectiveness of QMS. Feedback and recommendations to enhance the conduct of MR were also provided. This was conducted on October 24-25, 2016, at Sala De Sessiones, Ayuntamiento Building, Intramuros, Manila.

17. Readiness Assessment – The DAP Project Team conducted a final gap/readiness assessment of the established QMS and recommended necessary actions to eliminate gaps. There were 78 Conformities, 25 OFIs, and no NC findings conducted in Central Office, NCR Regional and District I office, Region III and Pampanga Provincial office, Region VII and Cebu North Provincial Office, and Region XI Davao Del Sur Provincial Office. They were rated as "Certainly Certifiable" against the requirements of ISO 9001:2015 standard, by the Assessor. The activity was conducted on November 8-11 and 14-15, 2016.
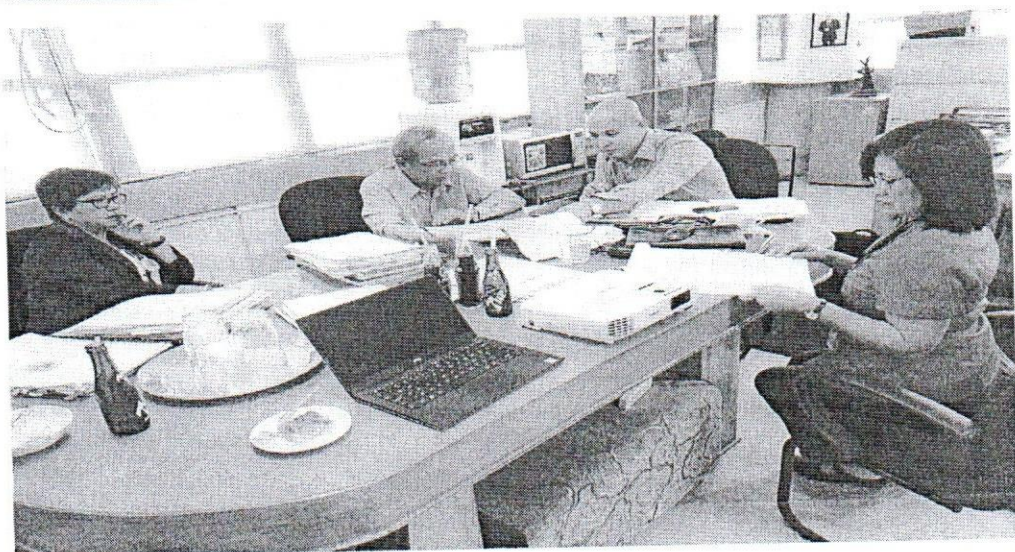
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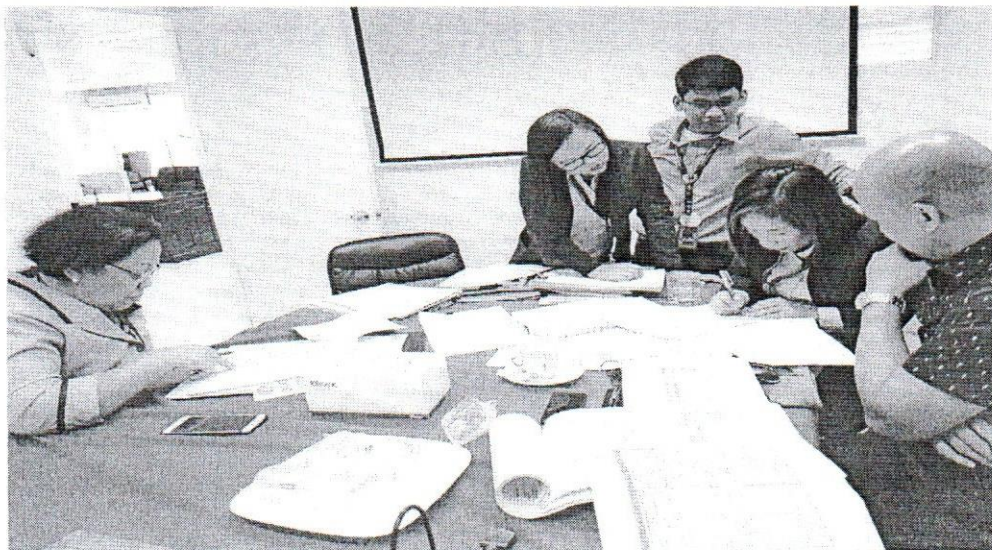(Center)
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[2016] PROJECT ACCOMPLISHMENT REPORT

Major Outputs	Core Team members were guided on how to draft their Treasury Quality Manual and other needed tools and forms which they used in the implementation of the installed QMS. They were provided with the necessary guidance and trainings to be able to effectively implement and sustain their certified ISO 9001:2015 QMS.
Project Impact	BTr was able to integrate QMS in their everyday work with ease and it made them productive as they continue with its implementation. With their ISO 9001:2015 recommendation for certification, it inspired them even more to move further with the formulation of new ideas to be applied for its continual improvement.
Lessons Learned	Having an open mind and receptive to new ideas kind of attitude helped in their quest towards certification to ISO 9001:2015 QMS. Sharing of ideas from the different participants of the pilot regions also contributed to the success of the project.

V. Attachments

- Summary of Evaluation for Course and Resource Person (for training program)
- Certificate of Project Closure (for all completed projects)

Prepared by:

Lewina S. Tibe
Project Manager

Noted / Approved by:

ARNEL D. ABANTO
Center Head

Notes:
1. Project details on Section I-III can be generated thru PMIS based on PMs Inputs.
2. Project Managers are required to accomplish Section IV & provide Section V to reflect results of project implementation
3. Project Managers can update/adjust the pre-filled sections(I-III) based on actual data