

## DETAILED PROPOSAL FORMAT

### A. BASIC INFORMATION

1. **Project Title**
2. **Proponent (s)**
3. **Implementing Agency**
  - 3.1 Lead Agency
    - Head of Agency
    - Name of Proponent(s)
    - Contact Details
  - 3.2. Collaborating Agency
4. **Project Duration**
5. **Project Site(s)**
  - 5.1 Province
  - 5.2 City/Municipality
  - 5.3 Barangay
  - 5.4 Geocode
6. **Total Budget Requirement**
  - 6.1. Requested Budget
  - 6.2. Agency Counterpart
  - 6.3. Other Sources
7. **R&D Agenda to be Addressed**
8. **Expected Technology to be generated**
9. **Description of Technology/Information**
10. **Potential Impact of the Technology/Information**
11. **Target Beneficiaries/Users**

### B. TECHNICAL DESCRIPTION

1. **Rationale**
2. **Objectives**

3. **Review of Literature**
4. **Methodology**
5. **Workplan Schedule**
6. **Budget Summary**
7. **Logical Framework**
8. **Sustainability Plan**
9. **Potential Intellectual Property**

**SUSTAINABILITY PLAN**

*(Discuss in detail plans to ensure sustainability of project upon project completion in terms of financial and organizational aspects.)*











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**WORKSHEET DETAILS FOR EQUIPMENT OUTLAY (EO)**

<b>Equipment Outlay (EO) – Minor Equipment Only</b>						
<b>Details of Equipment (Minor Equipment Only)</b>	<b>No. of Units</b>	<b>Price/ Unit</b>	<b>Total Year 1</b>	<b>Justification</b>	<b>Year 2</b>	<b>Total Outlay</b>



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### LOGICAL FRAMEWORK

**Project Title:** \_\_\_\_\_  
**Proponent** \_\_\_\_\_  
**s):** \_\_\_\_\_

**Agency:** \_\_\_\_\_  
**Budget Requested:** \_\_\_\_\_

Narrative Summary	Project Targets – Objectively Verifiable Indicators	Means of Verification	Assumptions
Goal:			
Purpose:			
Project Outputs:			
Activities:	Inputs:		



The Detailed Proposal contains the detailed information of a particular project to be implemented by the Research Institution/Agency.

Detailed proposal must be prepared using the format given and in accordance with the following guidelines:

#### **A. BASIC INFORMATION**

- |  |  |
|--|--|
| 1. Project Title                                   | Brief but clear official and distinctive name of the project that describes the main theme of the proposed study.  |
| 2. Proponent (s)                                   | Complete name of the project leader and designation including the agency where he belongs, office address, contact numbers and email address.  |
| 3. Implementing Agency                             | Lead agency (Research Center/ Institution/ Bureau/ College or University where the proponent belongs) and collaborating agency (s) (Persons/Researchers and/or their agencies that will be cooperating with the lead agency) implementing the project. |
| 4. Project Duration                                | Period that indicates proposed date of start and completion of the project.  |
| 5. Project Site                                    | Place or area covered by the project or where the project will be conducted.   |
| 6. Total Budget Requested                          | Financial requirement of the project in Philippine peso.   |
| Budget Requested                                   | The total budget requested from DA-BAR   |
| Agency Counterpart                                 | The contribution/share of the implementing agency in the conduct of the project  |
| Other Sources                                      | Other fund sources of the project, if any  |
| 7. R&D Agenda to be addressed                      | Researchable area to be addressed by the project based on BAR's RDEAP 2016-2022  |
| 8. Expected Technology/ Information                | Package of technology (POT) to be developed  |
| 9. Description of technology/information           | Brief description of the POT   |
| 10. Potential impact of the technology/information | Impact of the POT to the community   |
| 11. Target users/beneficiaries                     | End users of the POT   |

## B. TECHNICAL DESCRIPTION

1. Rationale Definition of research problem, scope and coverage, significance of the research project and the justification for its conduct. For Technology Commercialization proposals, include the technical viability or a brief description of the technology for commercialization.
2. Objectives General and specific aim of the project which must be consistent with the title.
3. Review of Literature Concepts and approaches gathered from recent literature which indicate gap in existing knowledge to help determine direction and focus of the proposed project and avoid possible duplication.
4. Methodology Indicates the project components (if applicable), and contains the details and procedure to be followed in conducting the research. This includes:
  1. Factors (variables) on the experiment or study.
  2. Treatments and lay-out.
  3. Experimental design, replications, characteristics of experimental units (sites, number, area, etc.)
  4. Statistical analysis
  5. Specific management of the experiment (this includes specific features about the management of the experiment that are not included in the treatments)
  6. Cultural practices (i.e. land preparation, pest control, weed control, fertilization, etc.)
5. Workplan Schedule Itemizes the detailed activities to be undertaken for the whole duration of the project (See *'How to Prepare a Workplan Schedule'* for details.)
6. Budget Summary Describes the personnel/staff and material resources needed by the project; provides information on human and non-human resource requirement of the project expressed in budgetary terms. It consists of four forms: Main Budget Summary, Worksheet Details for Personnel Services (PS), Maintenance and Other Operating Expenses (MOOE) and Equipment Outlay (EO). (See *'How to Prepare a Budget Summary'* for details.)

7. Logical Framework      Presents the main elements of the project, expressed in terms of objectives for each element and inputs required to achieve them (See '*How to Prepare a Logical Framework*' for details).
  
8. Sustainability Plan      Detailed plan focusing on the financial and organizational aspect of the project. Includes the production plan, financial plan and social return on investment (See '*How to Prepare a Sustainability Plan*' for details)
  
9. Potential Intellectual Property      Specifies the expected results from the project that are patentable such as new inventive steps that have commercial application.

## How to Prepare a Workplan Schedule

The Workplan Schedule or Activity Plan contains the details of the project activities as well as a detailed listing of sub-activities to be done to achieve the set objectives. Activities should be determined based on the objectives.

The Workplan Schedule shall be accomplished by the project leader, detailing the following:

<i>Objectives</i>	General and specific aim of the project
<i>Activities</i>	Describes the major activity and sub-activities to be conducted in order to attain the objectives set by the project. Action words are used to start the statements (e.g. Conduct training needs survey).
<i>Expected Results/Outputs</i>	Indicates the projected achievements/ milestones/ significant findings/specific product or services that will be generated upon completion of a particular activity
<i>Responsible Person (s)</i>	Refers to the project staff (e.g. project leader, lab technician) responsible for the specific activity.
<i>Resources Required</i>	Refers to the expertise, equipment, materials and other resources needed to do the various activities listed.
<i>Schedule of Activities</i>	These are the schedules sub-divided into months in a quarter, weeks in a month and so on, depending on the choice of time segments as affected by the project life span and duration of the activities. Use a straight bold line to run through the specific time segments covering the planned and end of a particular activity.
<i>Required Budget</i>	Total expenditure incurred in the conduct of the activity

**Source:** adopted from Talatala, G. 1997. *R&DM-D: Research Project Planning and Implementation Control*. UP Open University, Los Baños, pp.143-148.

## **How to Prepare a Budget Summary**

The budgetary requirement has four (4) general categories: Personal Services (PS), Maintenance and Other Operating Expenses (MOOE), Equipment Outlay (EO) and Administrative Cost. For DA-led (RFUs/ROs, Attached Agencies/Corporations and Bureaus) proposals, only the budget for MOOE is allowed for funding support.

### ***Personal Services (PS)***

The Personnel Services comprises the salary and wages of the research staff/s and the honoraria of the project leader and the study leaders. The budget for this category should constitute no more than 30 to 40% of the total amount of PS + MOOE.

Each project shall be handled by a project leader who shall oversee the management and implementation of the project. If in case the project has two or more studies, the project leader must handle one or more studies within his/her field of expertise and can involve a study leader as part of the project team. However, the study to be handled by the study leader should be clearly defined in the proposal. Other project personnel can be included depending on the need of the project.

### ***Maintenance and Other Operating Expenses (MOOE)***

The different items under MOOE include the following:

1. Traveling Expenses (02) – The allowed expenses include fares for the use of public utility transport, plane and boat; daily allowance and actual lodging/hotel bills. Indicate the number of travels to be made, number of persons involved, places to visit and kind of transport required.
2. Communication (03) – Indicate the items of expenditure such as mailing, telephone/fax/cellphone bills, etc.
3. Supplies and Materials (07) – Indicate the items such as office supplies, like paper, computer ink, etc., laboratory or experimental supplies/materials, gasoline and oil, and other related items. Equipment with a value of more than PhP 15, 000.00 should be placed under the EO item.
4. Other Services (29) – This includes the following:
  - Short-term service contracts
  - Resource person/Technical consultant fee
  - Wages for farm labor/Utility services
  - Printing services
  - Food catering/Rentals for facilities and venues for meetings, workshops and trainings (in relation to the project)

These services are understood to be for the implementation of the research project.

***Equipment Outlay (EO)***

The equipment to be purchased are only those which are essential and directly needed for the operation of the project. Only minor equipment is/are allowed. If in case, equipment to be used in the project is readily available in the implementing agency, this may be considered as the agency's counterpart. The total amount should not exceed a total of PhP 500,000.00.

## How to Prepare a Logical Framework

The logical framework is a project management tool for the preparation, monitoring and evaluation of projects. It is also used in analyzing the components of the project and the logical linkages between the means and ends.

Further instructions on how to fill-up a logical framework is provided below.

### **Narrative Summary**

Brief statements of the project's goal, purpose, outputs, activities and inputs.

- |            |  |
|------------|--|
| Goal       | <ul style="list-style-type: none"><li>• This is the ultimate objective of the program to which the project contributes.</li><li>• This is the last cell to be filled up in the Narrative Summary column.</li></ul>   |
| Purpose    | <ul style="list-style-type: none"><li>• The first cell to work on in the Narrative Summary column.</li><li>• Refers to the new conditions or qualities achieved when the target groups adopt or utilize the project outputs or what the project hopes the target groups will do with the project outputs.</li><li>• The core objective usually becomes the project purpose or sometimes, it is reformulated to make it more suitable as a project purpose. However, if it is stated too broadly that it cannot focus on a particular target group(s), the core objective is elevated and used as a project goal.</li></ul> |
| Outputs    | <ul style="list-style-type: none"><li>• The results of the listed activities of the project after implementation</li><li>• Guide question: <i>"What is the minimum set of results or goods and services the project has to produce and offer to the target group (s) for the project to achieve its goal?"</i></li><li>• Each output is numbered for quick and easy reference in relation to its respective sets of activities. A short-term project usually has three to five outputs but not less than three.</li></ul>  |
| Activities | <ul style="list-style-type: none"><li>• Measures or tasks carried out by the project to obtain the outputs.</li><li>• Numbered with reference to the outputs.</li></ul>  |

### **Assumptions**

Risks and uncertainties beyond the control or direct influence of the project and should be formulated as positive statements like Objectives (Goal, Purpose or Outputs). These are specific statements to achieve specific conditions, which in turn will help the next higher objective.

- Not all cells in the Assumptions Column are filled up, some are left blank especially when a particular candidate assumption has been transferred to or made an integral part of the whole project strategy.
- Not all external factors, which are apparently connected to the project, are put in the Assumptions Column. Frame conditions such as season and climate, soil physical attributes or national policies are not considered as sources of risks to the project.

### ***Objectively Verifiable Indicators (OVI)***

Signs or data to be used in determining whether a particular objective has been achieved through the performance of a certain set of tasks and activities. It gives the level of successor performance at different points in time.

- Must measure what is relevant in an objective.
- Must be related closely enough with what needs to be measured, that one can be confident that the project was a decisive factor in obtaining the observable results.
- Must be specified in terms of quantity, quality, and time (QQT).
- Must be independent

### ***Means of Verification (MOV)***

Indicate how to acquire evidence to measure whether or not the indicators have been met. This also pinpoints where to find the proof that will provide data or information required for each indicator.

- If the MOV for a particular OVI cannot be found or established, the OVI has to be changed because it loses its usefulness as a proof of success.
- In some cases, one document used as MOV for a particular OVI can also be used to verify another indicator.
- MOVs are project documents, reports. Documents and reports of other related agencies and organizations can also be used.

### ***Inputs***

Inputs are the resources needed to fuel the activities.

- It is usually expressed in terms of financial, human, and non-human resources (e.g. equipment).



## How to Prepare a Sustainability Plan

The sustainability plan details plans focusing on financial, organizational and socio-economic aspect to ensure sustainability of the project upon project completion. At the minimum, the project should be able to address the following:

1. Is there an organization who will take charge of the operation of the project?
  - What trainings will be provided to the members of the organization to prepare them for handling the operation once the project is completed?
  - How will the proponent establish support and ownership for the project in the organization?
2. Will the organization be sustainable even after project completion?
  - How will the organization carry out project activities once the project is completed?
  - Where will money for activities come from once the project is completed?
  - Can the project continuously operate even without outside funding support?
3. What mechanisms will be established to ensure that the project will achieve its objective? Is there an evaluation plan to be developed?
4. How will the success of the project be documented and disseminated to the stakeholders?
5. What criteria will be used to measure socio-economic and environmental returns from the R&D grant provided?