

University of the Philippines Diliman

Policy and Implementing Guidelines for Administrative Employee Learning and Development

I. POLICY DECLARATION

A. HUMAN RESOURCE DEVELOPMENT POLICY

The development and retention of a competent and efficient workforce in the public service is a primary concern of the national government and to pursue this, the Civil Service Commission (CSC) has laid down the policy of continuing the career and personnel development of government employees at all levels.

(The Civil Service Law and Rules, (Book V of Executive Order 292 and Its Omnibus Rules, as Amended)

Cognizant of the importance of a competent, efficient, and effective human resource complement in the pursuit and fulfillment of its mandate as the National University, the University of the Philippines has firmly put in place its policy framework for the promotion of human resource development for all personnel (Faculty, Research, Extension and Professional Staff (REPS) and administrative personnel).

B. EQUAL EMPLOYMENT OPPORTUNITY POLICY

Anchored on the principle of equal employment opportunity, UPD's human resource development policy framework, programs, and activities are formulated, designed, and provided to ensure EQUAL ACCESS in its availment regardless of age, religion, sex and sexual orientation, gender, ethnicity, differential abilities, etc. extension of its continuing institutional support for staff development, and differential abilities.

II. DEFINITION OF TERMS

A. ADMINISTRATIVE PERSONNEL – non-teaching staff providing necessary managerial, clerical, secretarial, or other administrative support services for effective operations of the University.

B. FACULTY OR REPS ADMINISTRATORS - faculty members or REPS with administrative positions or functions.

C. QUALIFIED PERSONNEL – are those who meet the conditions and requirements for the availment of administrative development fund (ADF) and other related requests for professional and career development related to their administrative function and/or aligned with their career path.

- D. ADMINISTRATIVE DEVELOPMENT FUND (ADF)** – approved University Funding support for the learning and development of administrative staff.
- E. HUMAN RESOURCE DEVELOPMENT** – integrated use of training, organization, and career development efforts to improve individual, group, and organizational effectiveness through enhancement of key competencies that enable individuals in organizations to perform current and future jobs through planned learning activities. (source: www.boundless.com).
- F. HUMAN RESOURCE DEVELOPMENT COMMITTEE (HRDC)** – a committee that reviews, evaluates, and recommends requests for attendance/participation to staff development activities (MLT-19-052, 28 February 2019) and provides guidance to the HRDO training section on the in-house training plan and implementation.
- G. IN-HOUSE LEARNING AND DEVELOPMENT PROGRAMS** - programs and interventions developed, organized, and /or initiated by Diliman HRDO, and UP Diliman units for administrative personnel development.

It includes UP recognized organization administered training/seminar/workshops that will address the learning and development requirements of the units aligned with the Civil service Commission and the University directions for the Administrative Employee Learning and Development program.

- H. NON-TRAINING LEARNING AND DEVELOPMENT INTERVENTIONS** - refers to development intervention: e.g., Coaching and Mentoring, Job Rotation and Benchmarking, and other related activities; aimed at improving the acquired knowledge, skills, and attitudes; and provide opportunities to enhance potential skills sets of employees.
- I. LOCAL FELLOWSHIPS** - approved local learning and development interventions within the Philippines.
- J. FOREIGN FELLOWSHIPS** - approved foreign learning and development interventions taking place outside the Philippines.
- K. FORMAL EDUCATION** – the pursuit for completion of an academic degree and including comprehensive examination.
- L. NON-FORMAL EDUCATION** - attendance to non-degree programs e.g., vocational/technical, certificate, and short courses.
- M. TRAINING** – refers to formal and non-formal training courses and interventions such as coaching, mentoring, job rotation, seminars, workshops, and others that are part of

the employee's Individual Development Plan/Career Development Plan. (Sec. 61, CSC 2017 Omnibus Rules on Appointments and Other Human Resource Actions, p. 51). Implementation of training courses utilize all types of methods including use of online platforms.

N. STUDY LEAVE – a time-off from work with pay of qualified administrative officials and employees for the purpose of the study and/or review for the comprehensive examination and professional licensure examinations.

O. NON-TEACHING STAFF DEVELOPMENT PROGRAM - Non-Teaching Staff Fellowship (NTSF) and Study Leave Programs are formal education support programs for administrative and REPS¹ personnel to include support for tuition and other school fees; thesis and dissertation grants (1020th Meeting of the Board of Regents, 25 April 1989 as amended in 1120th Meeting of the BOR, 27 May 1998; and 1181st Meeting of the BOR, 15 April 2004, BOR 1065th meeting, 23 May 1993, BOR 1120th meeting, 27 May 1998/1123rd meeting, 27 August 1998).

III. ABOUT HRDC DUTIES AND FUNCTIONS

A. COMPOSITION

The composition of each Human Resource Development Committee is as follows:

UP Diliman Administration Offices	
Chairperson (Ex-Officio)	The Vice Chancellor for Administration or Authorized Representative
Vice Chair (Ex-Officio)	Director, UP Diliman Human Resources Development Office
Members	<p>One (1) regular representative from the First Level of rank-and-file career employees, selected by the duly accredited employee's association (i.e., negotiating union)</p> <p>One (1) regular representative from the Second Level of rank-and-file career employees, selected by the duly accredited employee's association (i.e., negotiating union)</p> <p>One (1) additional member representing the administration, selected through appointment</p>

¹ Applications for REPS are handled by the REPS Personnel Fellowship Committee (RPFC) under the Office of the Vice Chancellor for Research and Development (OVCRD).

B. POWERS AND FUNCTIONS

Assists the Chancellor in the implementation of approved policies, rules, standards of general guidelines pertaining to human resource development through the following:

1. Administration of the Administrative Development Fund (ADF)
2. Development of guidelines for the selection of nominees to training and scholarship programs in accordance with existing civil service policies and standards.
3. Formulation, review and evaluation of staff development policies, programs and activities including foreign fellowships funded from the ADF.
4. Review and evaluate a prepared list of competency-based learning and development (L&D) courses/interventions to administrative staff based on the identified L&D needs. The list of courses shall be updated every six (6) months.
5. Review, evaluate and monitor implementation of guidelines on the management of learning service providers.
6. Endorse or evaluate employee applications or requests for financial support for fellowships, as well as other human resource development activities (e.g., attendance in seminars, workshops, conferences, completion of short-term course) Subsequently, the requests for financial support previously submitted to the Administrative Development Fund (ADF) Committee shall also be handled by the HRDC.
7. Conduct the screening of qualified employees from the list of prospective nominees relevant to the training course/scholarship under consideration.
8. Study and provide recommendations on the availment of invitations and offers for participation in training or study programs, both local and foreign.
9. Review and evaluation of in-house training programs and design.
10. Publish or post in conspicuous places the scholarship opportunities at least a month before the date of screening for such grants.
11. Approved the most qualified nominees for training or study programs, for the Chancellor.
12. Conduct a continuing monitoring of scholars/grantees sent to various L&D programs both foreign and local and
13. Submit quarterly accomplishment to the Chancellor/Director/President), cc: OVPA.
14. While screening and evaluation of requests for attendance/ participation and corresponding funding is lodged with the Human Resource Development Committee (HRDC).²

C. MEETINGS

1. Regular Meeting: Every 2nd and 4th Friday of the month
2. Special Meeting: Whenever necessary

² [NGY 19-67 - Constitution of HRDC \(2019\), pp.1-3](#)

D. TERM OF OFFICE

Members shall be appointed by the Chancellor for a term of three (3) years and the First and Second level of rank-and-file career employees shall be selected by the duly accredited employees of association.

IV. IMPLEMENTING GUIDELINES

A. ADF FUND ADMINISTRATION

The administration of the ADF is under the Office of the Vice Chancellor for Administration (OVCA) with the Human Resource Development Committee (HRDC) serving as advisory and recommendatory committee for the management of ADF.

B. ADF UTILIZATION BY TYPE, DOCUMENT REQUIREMENTS, PROCEDURES, AND REPORTING REQUIREMENT

ADF covers funding for local and international fellowships. Existing ADF allocation is 70% for attendance/participation in local fellowship and 30% for attendance/participation in foreign fellowship. HRDC, at the start of the year, shall determine the allocation of ADF funds per unit for the fiscal year depending on the number of administrative personnel of the unit. However, the percentage will be adjusted or redistributed as needed.

1. **Local and International Conferences, Training Courses, Seminars, Workshops, and benchmarking activities participation in/and/or attendance -** Funding may cover registration fees, transportation costs, and other authorized fees, and daily travel expenses, and in the case of foreign fellowship, daily subsistence allowance. All amounts are subject to review, every three years in accordance with the University and government rules.

1.1. Eligibility Requirements:

- Administrative personnel with part-time and full-time permanent appointments, except those with probationary status.
- Newly hired UP Contractual employees and Administrative personnel with temporary status can avail of the ADF only after six (6) months up to two (2) months prior to the end of appointment. Re-appointed UP Contractual employees and Administrative personnel with temporary status can avail of the ADF until two (2) months prior to the end of appointment.

- Priority on fund availment is given to permanent administrative personnel.
- All qualified administrative personnel may avail of the ADF but excluding those who are compulsorily retiring within six (6) months in view of the return service requirement.
- All permanent and UP Contractual administrative

1.2. Per request but not to exceed the set rate as approved by the Chancellor, which is within University and Government mandated rules.

1.3. **Registration Fee** (For local please refer to the NBC No. 563, 22 April 2016 or its latest issued rates)³

1.4. Foreign Travel

1.4.1. Airfare

1.4.1.1. Actual cost of economy airfare or actual cost of economy rate not exceeding the ceiling amount.

1.4.2. Pre-departure expenses

1.4.2.1. Pre-departure expenses (e.g., terminal fees, taxi fare, passport processing, immunization and medical laboratory fees, photographs, portage, and other related expenses) not exceeding PhP 3,500.

1.4.3. Daily Subsistence Allowance (DSA)

1.4.3.1. Based on the Provisions in EO 77, s. 2019

1.4.3.2. Maximum DSA for Participation

Amount in Peso	Destinations
25,000.00	for Southeast Asia (excluding Singapore)

³ NBC 563-Guidelines on Participation of Govt Officials and Emp. (2016), p.2. <https://www.dbm.gov.ph/wp-content/uploads/Issuances/2016/National%20Budget%20Circular/NBC%20No%20563.pdf>

35,000.00	for Oceania (Australia, New Zealand, Papua New Guinea, Pacific Islands excluding Hawaii), Singapore, Mainland China, Hong Kong, Macau, Taiwan, Mongolia, Korea, South Asia (Afghanistan, Bangladesh, Bhutan, India, Maldives, Nepal, Pakistan, Sri Lanka), Middle East and Japan
45,000.00	Europe, Russia, Turkey, Africa, the Americas

1.4.3.3. Maximum DSA for Oral /Poster presentation⁴

Amount in Peso	Destinations
50,000.00	for Southeast Asia (excluding Singapore)
70,000.00	for Oceania (Australia, New Zealand, Papua New Guinea, Pacific Islands excluding Hawaii), Singapore, Mainland China, Hong Kong, Macau, Taiwan, Mongolia, Korea, South Asia (Afghanistan, Bangladesh, Bhutan, India, Maldives, Nepal, Pakistan, Sri Lanka), Middle East and Japan
85,000.00	Europe, Russia, Turkey, Africa, the Americas

1.5. Local Travel

1.5.1. Airfare

1.5.1.1. Per request but not to exceed 30,000.00, subject to actual expenses upon liquidation, for oral and paper presentations – (source RPFC proposed manual 2019).

1.5.1.2. Per request but not to exceed 25,000.00, subject to actual expenses upon liquidation, for participation as Convenor/Moderator/Facilitator or Attendance in

⁴ Source: RPFC proposed Manual, 2019

Conferences (non-presenter), Seminars, Workshops, Training Courses, etc. – (source RPFM proposed manual 2019).

- 1.5.1.3. Actual cost of economy airfare or actual cost of economy rate not exceeding the ceiling amount.

1.5.2. Daily Travel Expense (DTE)

Per Diem/Day in PhP	Destinations
1,500.00	Region I, II, III, V, VIII, IX, XII, XIII, ARMM;
1,800.00	CAR, Region VI, VII, X, XI
2,200.00	NCR, Region IV-A (CALABARZON) and IV-B (MIMAROPA)

- 1.5.2.1. Terminal fees, parking fees, road tolls, etc. to and from the destination or place of assignment, actual cost of taxi fares to and from airport/ seaport terminals (per EO No. 77, 15 March 2019)⁵
- 1.5.2.2. Provisions in EO 77, s. 2019 against double payment, or regarding cases wherein allowable travel expenses are partially or fully provided by other funders, shall be strictly followed.⁶

1.6. Document Requirements

- 1.6.1. Letter of request/application indicating the justification for the request with respect to the relevance of the present work and career plans; and endorsed by the Head of Unit and endorsed by the Unit HRDC.
- 1.6.2. Copy of the Individual Performance Commitment Review (IPCR) containing the duties and responsibilities.
- 1.6.3. Copy of seminar invitations/ notice of acceptance /announcement from the organizing institutions indicating the objectives, course outline, itemized budget, and other relevant information.

⁵ Malacañang Palace E.O. No. 77 (2019), p.5.
<https://www.officialgazette.gov.ph/downloads/2019/03mar/20190315-EO-77-RRD.pdf>

⁶ Malacañang Palace E.O. No. 77 (2019), p.5.
<https://www.officialgazette.gov.ph/downloads/2019/03mar/20190315-EO-77-RRD.pdf>

- 1.6.4. For International Fellowship, Accomplished surety contract for return service obligation for special detail for a period of at least thirty days.
- 1.6.5. Paper / Poster Presentations (local and foreign)
 - 1.6.5.1. Letter indicating contribution of the paper in the applicant's field of endeavor, addressed to the Chancellor, through channels, endorsed by the immediate supervisor, unit / office head, and Dean / Director.
 - 1.6.5.2. Letter of invitation / notice of acceptance of paper / poster
 - 1.6.5.3. Copy of program from the organizing committee / institution (in English translation)
 - 1.6.5.4. Hard copy of accepted abstract
 - 1.6.5.5. Itemized budget for travel, including financial counterpart of the organizers, if any

1.7. Reporting Requirements

- 1.7.1. Attendance at Conference/ Seminar/ Workshop/ Training Course/ Etc.

Submission of certificate of attendance or participation and other related documents to Diliman Accounting Office, as part of the cash advance liquidation.

2. In-house training

- 2.1. HRDO shall develop a competency-based learning and development program for administrative personnel, faculty administrators, newly hired employees including non-up, management and supervisory skills training for mid-career administrative personnel, and about to retire employees.
- 2.2. HRDO shall submit a plan for employee's learning and development, and innovative programs and interventions for the succeeding year on or before the last official working day of the current year for approval of the HRDC.
- 2.3. The learning and development programs and interventions shall be delivered through self-paced and facilitated strategies, updated, and categorized by the HRDO in accordance with the direction of the Civil Service Commission and the University of the Philippines.

- 2.3.1. Self-paced is an instructional design and delivery of training programs through self-guided and asynchronous learning that can be completed within set period in accordance with individual performance commitment setting.
 - 2.3.2. Facilitated training is an approach for assisted and synchronous learning through interacting in real-time with resource speakers and co-participants delivered through any of the following methodologies: traditional face to face, online platforms, hybrid, and other modes.
- 2.4. The HRDO shall ensure that the following learning and development programs are updated, and shall be conducted every year for UP Diliman employees:
- 2.4.1. Mandatory Programs: Required programs for employees under the law.
 - 2.4.2. Technical Skills Training: Programs aim to enhance abilities or knowledge used to perform practical tasks.
 - 2.4.3. Essential Soft Skills Training: Programs aim to enhance personal attributes at characteristics to interact effectively and harmoniously with other people, and to accomplish work.
- 2.5. The HRDO shall ensure management of Learning Service Providers in accordance with the approved guidelines. The performance of LSPs shall be evaluated upon completion of the L&D activity and will be reported to HRDC during the annual review and planning workshop. Those who obtained a Very Satisfactory rating shall be retained in the resource pool.
- 2.6. For purposes of transparency training section will also provide the result of evaluation to accredited LSP, upon review and action of the HRDC.
- 2.7. In house training annual budget is subject to Chancellor's approval upon review and endorsement of the HRDC. The in-house training budget is, but not limited, to the 50% allocation for local fellowship, and the full allocation for foreign fellowship charged against the Administrative Fund Allocation.
- 2.8. Reporting Requirements: HRDO shall submit semestral/ bi-annual accomplishment learning and development programs and interventions report, for monitoring and auditing purposes.

3. For unit-initiated and recognized training

- 3.1. Unit initiated training refers to technical and specialized programs developed and conducted by UP Diliman units for their employees.
- 3.2. Recognized training is a program reputed by the HRDC. It refers to technical and specialized programs conducted by UP Diliman units and organizations within the facility of the University.
- 3.3. Funding is limited only to payment for fees of speakers, lecturers, facilitators, resource persons and course development, subject to UP Diliman Accounting Office policies. Proposals should be submitted for approval.
- 3.4. Unit Initiated and Recognized programs must provide a 50% discount on the program and registration fee to all UP Diliman personnel recommended by their units. The remaining costs may be covered by the HRDC charged against the ADF.

4. Document Requirements for Request for Funding

4.1. Unit Initiated Training

- 4.1.1. Letter of request from the Unit Head, addressed to the Chancellor through channels, indicating the relevance of the training to the unit's operation and contribution to productivity and efficiency.
- 4.1.2. List of attendees
- 4.1.3. Training proposal with budgetary requirements

4.2. Recognized Training

- 4.2.1. Letter of request for funding indicating relevance of participation to the unit's mandate and the applicant's professional development, addressed to the Chancellor through channels, and endorsed by the immediate supervisor, and unit/office head or dean/director.
- 4.2.2. Accomplished Administrative Development Fund (ADF) application form.
- 4.2.3. Copy of performance target for the period covering duration of the training period.
- 4.2.4. Letter of invitation or announcement indicating title of the conference/seminar/workshop/training course, venue, training duration, sponsoring agency, and course/program description.
- 4.2.5. Copy of program.

- 4.2.6. Itemized budget for travel including financial counterpart of the organizers (if applicable)

5. Reporting

- Participants with an approved request must submit a completion report (re-entry plan) within 30 calendar days after the training and are enjoined to cascade the learnings to colleagues within their office/unit.

6. Non-Training L&D Interventions

- 6.1. All college/office HRDC through the Unit Head shall submit reports on non-training learning and development interventions conducted annually using the prescribed reporting form.

C. NON-TEACHING STAFF FELLOWSHIP ELIGIBILITY AND DOCUMENT REQUIREMENTS, PROCEDURES, AND REPORTING REQUIREMENT

1. **Formal Education** – Funding may cover tuition fees and other authorized school fees, book and semestral / term allowance, thesis / dissertation aid. Graduates can avail of one-time incentive refer to the PRAISE Manual.

1.1. Eligibility

- 1.1.1. permanent full-time personnel
- 1.1.2. with at least five (5) years of continuous employment in the University. (including the years of service rendered as Contract of Service personnel)
- 1.1.3. with at least a Very Satisfactory performance ratings for the last two (2) rating periods
- 1.1.4. undergraduate degree must have at least 75 academic units to credit
- 1.1.5. With not more than 50 years of age. ⁷
- 1.1.6. No pending case (for DLO and CSC confirmation)
- 1.1.7. Undergraduate fellowship should have at least 75⁸ academic units to credit.
- 1.1.8. Performance Rating must be at least (Very) Satisfactory performance for the last two rating periods immediately preceding the application.

⁷ Non-Teaching Staff Development Program (1998), p.1

⁸ Amendment from the Minutes of the 1255th Meeting of the BOR (2010), p. 1

1.2. Reporting Requirements

- 1.2.1. certified true copy of grades,
- 1.2.2. progress reports (for on-going study) within 30 days from end of the semester and report for duty within 1 calendar month for study leave
- 1.2.3. results of comprehensive/qualifying/candidacy exam (if applicable) within 30 days upon release of results and/or
- 1.2.4. certified copy of diploma of the degree obtained and report for duty within 60 days.
- 1.2.5. Grantee must pass all subjects enrolled in. Otherwise, the fellowship will be forfeited.

2. **Non-formal education** - Funding that may cover applicable fees, allowance, and other authorized fees.

2.1. Eligibility

- 2.1.1. permanent full-time personnel
- 2.1.2. with at least five (5) years of continuous **employment in the University. (including the years of service rendered as Contract of Service personnel)**
- 2.1.3. with at least a Very Satisfactory performance ratings for the last two (2) rating periods

2.2. Reporting Requirements

- 2.2.1. progress reports (for on-going study), and/or certified copy of certificate of completion/diploma and report for duty within 1 calendar month for study leave

3. **Requirements**

3.1. Duration

- 3.1.1. At least 1 year for vocational
- 3.1.2. 2 years for bachelor's degree/ Master's no Degree/Doctorate Degree

3.2. Qualifying Exam

- 3.2.1. Waiver of qualifying exam for the undergraduate level
- 3.2.2. Qualifying exam for the graduate level for ranking purposes only
- 3.2.3. The panel can request for additional screening in cases of prioritization due to limited availability of funds.

3.3. Percentage of staff qualified to apply.

- 3.3.1. Based on available slots: (Undergraduate, 20; Graduate (MS; MA and PhD 45); and Vocational, 35)
- 3.3.2. Total slot is 100 but allocation may be redistributed as needed. (subject for review after 3 years)

- 3.4. Provision of substitute: The Unit shall not hire a substitute for the grantee. The unit shall make necessary arrangements (e.g., graduate assistant, etc.) to ensure support for the employee on study leave and services will not be hampered.
- 3.5. Academic Performance-Must pass all subjects enrolled in, if with failing marks, automatic forfeiture of fellowship.
- 3.6. Certification from the unit head that the appointment will be renewed is necessary in case that the proposed seminar schedule is beyond the current appointment period, during the time of application.

4. Privileges

- 4.1. Free tuition and other school fees
- 4.2. Thesis/dissertation aid (please refer to the latest issued rates)
 - 4.2.1. Masters – P7,500.00 to P 15,000.00
 - 4.2.2. Doctoral – P15,000.00 to P 50,000.00
- 4.3. Semestral allowance (fellowship)
 - 4.3.1. Graduate – P2,500 per semester
 - 4.3.2. Undergraduate – P2,000 per semester
 - 4.3.3. Vocational – P1,500/sem.⁹

5. Prohibition

The grantee shall not engage in any other occupation or practice of profession inside or outside the University during the entirety of the grant.

Non-compliance with the rules and requirements may result in forfeiture of approved fellowship, subject to committee evaluation and application of University and government rules.

6. Documentary Requirements

- 6.1. Original Application
 - 6.1.1. Letter request for study leave endorsed by the head of unit or office/unit HRDC.
 - 6.1.2. Performance Rating (last 2 rating periods prior to the application)
 - 6.1.3. Certification from the unit head that will reflect the ff:
 - 6.1.3.1. That there is no provision for substitute for the grantee and that the unit shall make necessary arrangement to ensure support for the employees
 - 6.1.3.2. The potential of the candidate to undertake further studies.

⁹ Non-Teaching Staff Development Program (1998), p.2

6.1.3.3. The need of the unit and/or the relevance of the course to the job.

6.1.4. Duly accomplished study leave contract and corresponding suretyship agreement.

6.1.5. University Clearance (for 30 days or more)

6.1.6. Copy of acceptance/admission from school/university and academic calendar for the current year.

6.1.7. Certified copy of grades at the end of each semester or summer.

6.1.8. Certification of earned units.

6.1.9. Certification of no pending administrative case

6.1.10. Waiver of age requirements (for 50 yrs. old and above)

6.2. Renewal of Application

6.2.1. Letter request for renewal study leave endorsed by the head of unit or office/unit HRDC.

6.2.2. Duly accomplished progress report form

6.2.3. Certified copy of grades at the end of each semester or summer.

6.2.4. Certification of no pending administrative case

6.3. Thesis/ Dissertation Aid

6.3.1. Letter of request for funding indicating relevance of the thesis/ dissertation topic to the unit's mandate and the applicant's professional development, addressed to the Chancellor through channels, endorsed by the immediate supervisor, unit/ office head and dean/ director.

6.3.2. Accomplished application form

6.3.3. Certification of performance ratings (during the last two (2) consecutive rating periods) issued by HRDO.

6.3.4. Copy of study plan.

6.3.5. Certification of approval of thesis/ dissertation proposal

7. Reporting Requirements

7.1. Support for Tuition and Other School Fees

7.1.1. Administrative personnel who avail of the NTSF must submit to HRDO a copy of grades and progress report after each semester. Extension/ renewal of funding support for the fellowship requires good standing performance, i.e., without any dropped subjects, incomplete grades and/ or failing marks. Failure in not more than 25% of total units enrolled in

shall mean forfeiture of tuition fee assistance but the grantee may continue his/her study leave with pay.¹⁰

7.1.2. After the degree is obtained, the administrative personnel must submit to the HRDC through HRDO a certified copy of the diploma and a post-fellowship report indicating plans to operationalize the learnings to strengthen the programs of the unit.

7.1.3. Non-submission of required copy of grades and progress report or proof diploma or graduation, may result in pending approval of related requests and other privileges.

7.2. Thesis/Dissertation Aid

7.2.1. Support of the University should be acknowledged in the thesis/ dissertation. The following format may be used to acknowledge the support of the University:

7.2.1.1. The author acknowledges the University of the Philippines Diliman for funding support through the Administrative Development Fund – Thesis/ Dissertation Aid.

7.2.1.2. The grantee should seek advice regarding IP protection policies of the University in accordance with the Revised IP Policy of the University of the Philippines System (3 June 2011) through the OVCA.

7.2.1.3. Should the results of the thesis/ dissertation be published or publicly presented or exhibited, the University shall be acknowledged as the source of the grant.

D. STUDY LEAVE TYPES, ELIGIBILITY AND DOCUMENT REQUIREMENTS, PROCEDURES, AND REPORTING REQUIREMENT

To continuously strengthen and upgrade the academic qualifications of the administrative personnel to improve their competencies for effective and efficient delivery of services. Administrative personnel shall be given liberal opportunities to develop themselves professionally.

Pursuant to CSC MC No. 21, Officials and employees excluding those in the teaching profession who are covered by different provisions of law, may apply for study leave subject to the following conditions:

1. The study leave is a time-off from work not exceeding six (6) months with pay for qualified officials and employees to help them prepare for their bar or board examinations or complete their master's degree. For completion of master's degree, the study leave shall not exceed four (4) months.

¹⁰ Non-Teaching Staff Development Program (1998), p.4

2. The leave shall be covered by a contract between the agency head or authorized representative and the employees concerned. No extension shall be allowed if the officials or employees avail of the maximum period of leave allowed herein. If they need more time to complete their studies, they may file a leave of absence chargeable against their vacation leave credits.¹¹

Per 1255th BOR Meeting dated 27 May 2010, the Policy on Study Leave with Pay for Non-teaching personnel, specifically on the duration of study were amended, as indicated in table below:

Amendment to the Policy on Study Leave with Pay for Non-teaching personnel

Duration of Study		
Degree program Enrolled in	FROM	TO
Bachelor	2 years	2 years
Master	2 years	2.5 years (30 months)
PhD	2 years	-up to 4 years (48 months) after a master's degree or its equivalent has been earned - up to 5 years (60 months) for straight PhD program

1. Study Leave Types

- 1.1. **Full time** - refers to full time-off from work with pay or without pay of qualified administrative officials and employees for the purpose of the study and/or review for the comprehensive examination and professional licensure examinations.
- 1.2. **Half day** - a half day off from work with pay or without pay of qualified administrative officials and employees for the purpose of the study and/or review for the comprehensive examination and professional licensure examinations.

2. Eligibility

- 2.1. Have a bachelor's degree that requires the passing of the bar or a board licensure examination for the practice of profession.

¹¹ CSC MC No. 21 (2004), p.1.

<http://www.csc.gov.ph/phocadownload/userupload/itduser/mc21s2004.pdf>

- 2.2. Have a profession or field of study to be pursued that is relevant to the agency's mandate, or to the duties and responsibilities of the concerned official or employee and in consideration of the career development of the employee, as determined by the agency head.
- 2.3. Have rendered at least two (2) years of service with at least very satisfactory performance for the last two (2) rating periods immediately preceding the application.
- 2.4. Have no pending administrative and/or criminal charges.
- 2.5. Not have any current foreign or local scholarship grant.
- 2.6. Have fulfilled the service obligation of any previous training/scholarship/study leave grant; and
- 2.7. Have a permanent appointment. However, as the purpose of granting a study leave is to develop critical mass of competent and efficient employees which will redound to the improvement of the agency's delivery or public services, employee with coterminous appointment may be allowed to avail of the study leave if they:
 - 2.7.1. Meet the requirements under items 1.1 to 1.6.
 - 2.7.2. Would be able to fulfill the required service obligation; and
 - 2.7.3. Are not related to the head of agency or to any member of a collegial body or board, in case of constitutional offices and similar agencies, within the 4th degree of affinity or consanguinity.¹²

3. **Requirements**

- 3.1. Grant shall be tenable for at most two (2) years for the bachelor/vocational studies, at most three (3) years for a master's degree, and at most five (5) years for a Ph.D. degree, provided grantee passes all enrolled courses in any semester or term, otherwise his/her privilege maybe curtailed; Provided further that a grantee may be recalled to regular duty to the exigency of the service.¹³
- 3.2. There shall be no provision for a substitute for the grantee. The head of the unit shall make the necessary arrangements to ensure that the operations of the unit are not hampered or jeopardized. A

¹² CSC MC No. 21 (2004), p.2.

<http://www.csc.gov.ph/phocadownload/userupload/itduser/mc21s2004.pdf>

¹³ 1065th Meeting_Rules on the Grant of SLWP to REPS and Adm. Personnel (1993), p.3

certification to this effect by the unit head concerned shall be attached to the application for study leave.

- 3.3.** The selection of grantees shall consider among other things, the potential of the candidate to undertake further studies, the need of the unit and the relevance of the course to the job. The nominee shall be endorsed by the head of Unit, Department Chairman and the Dean and the corresponding Unit HRDC and shall be recommended for approval by the UP Diliman HRDC and approved by the Chancellor thru the Vice Chancellor for Administration.
- 3.4.** The grantee shall be required to enroll in at least 9 units for a BS course, the equivalent of 9 units for vocational course, and at least six (6) units for graduate studies.
- 3.5.** % of staff qualified to apply-No limit but for units performing vital functions like PGH and other health services, police force, etc., exigency of the service should be taken into consideration.
- 3.6.** Academic Performance
 - 3.6.1.** Must pass all subjects enrolled in
 - 3.6.2.** For failure in not more than 25% of total units enrolled in – forfeiture of tuition fee assistance but may continue SLWP.
 - 3.6.3.** For failure in more than 25% of total units enrolled in – forfeiture of SLWP.

4. Privileges

- 4.1.** The grantee shall enjoy half-day study leave with full pay.
- 4.2.** This program offers no financial assistance other than the full salary of the grantee.
- 4.3.** Notwithstanding that the grantee renders half-day service, for purposes of the grant of privileges given to all regular employees such as the 13th month pay, clothing allowance, leave privileges, etc. the grantee shall be considered as if he/she renders full time service, except that during the entirety of the grant, the grantee may not be entitled to any overtime pay.¹⁴
- 4.4.** Tuition waiver of up to 12 units for undergraduate and up to 9 units for graduate if enrolled in the University of the Philippines.
- 4.5.** With tuition assistance of up to 9 units if enrolled outside the University of the Philippines for undergraduate and graduate levels. Should not exceed the UP rate for equivalent course.
- 4.6.** If no equivalent course the number of units should be multiplied with the prevailing rate per unit.
- 4.7.** Thesis/dissertation aid
 - 4.7.1.** Masters – P7,500.00 to P 15,000.00
 - 4.7.2.** Doctoral – P15,000.00 to P 50,000.00

¹⁴ 1065th Meeting_Rules on the Grant of SLWP to REPS and Adm. Personnel (1993), p.4

5. **Prohibition**

The grantee shall not engage in any other occupation or practice of profession inside or outside the University during the entirety of the grant.

6. **Miscellaneous**

The University reserves the right to revoke the grant should the grantee violate rules of the grant or other rules of the University which may so warrant such revocation. Further, the grant may be revoked if it is determined that the actual course being pursued by the grantee is not going to serve the interest of the unit of the grantee or that of the University as a whole.¹⁵

7. **Reporting Requirements**

7.1. While not enrolled (e.g., during a summer period) the grantee shall render the usual full-time service.

7.2. The beneficiaries of the study leave shall inform their respective agencies in writing, through the personnel office, of their failure to take bar/board examination or to complete their master's degree for which they were granted the study leave. They shall also refund to the agency all the salaries and benefits received during the study leave. Further, for causes within their control, they shall be warned that a repeat of the same would bar them from future availment of the study leave and training/scholarship grant whether foreign or local. (Item IV of CSC MC No. 21, s.2004, Amendment to Section 68 of CSC MC No. 14, s. 1999 relative to the Guidelines on Study Leave).¹⁶

7.3. The beneficiaries of the study leave for purposes of taking the comprehensive and bar/board examination shall submit results to the committee, within 30 days after the release of the exam results. While the beneficiaries of the study leave/fellowship/NTSF for purposes of completing a degree shall submit a copy of proof of completion.

7.4. Non-compliance on the submission requirements shall be subjected to conditions on contractual obligations, and other applicable University, CSC and COA auditing rules. Also, may result in pending approval of succeeding or related requests.

¹⁵ 1065th Meeting_Rules on the Grant of SLWP to REPS and Adm. Personnel (1993), p.4

¹⁶ CSC MC No. 21 (2004), p.2.

<http://www.csc.gov.ph/phocadownload/userupload/itduser/mc21s2004.pdf>

7.5. Report for duty (upon return/termination/completion of study leave)

8. **Documentary Requirements**

8.1. Study Leave with Pay (1065th BOR Meeting 26 May 1993)

8.1.1. Letter of request/application indicating the justification for the request with respect to the relevance of the present work and career plans; and endorsed by the Head of Unit, Department Chairman and the Dean and the corresponding Unit HRMPSB (former APC) and shall be confirmed by the UP Diliman HR Development Committee and approved by the Chancellor thru the Vice Chancellor for Administration in the case of administrative personnel.

8.1.2. Certificate of actual enrollment every semester or summer that he/she is enrolled and a certified copy of grades at the end of each semester or summer.

8.1.3. The grantee shall sign a contract with the University to render a return service obligation, based on the prescribed rules.

8.2. Half-day Study Leave

Requirements to avail of the half day study leave:

8.2.1. Submission of class schedule

8.2.2. Unit head endorsement of approved academic activities during semestral breaks

8.2.3. If non submission of required documents (**please refer to the section of requirements**) it will be charged to their vacation leave

E. PROCEDURES

1. Applicant/Unit Level action

1.1. Attendance at Conference/ Seminar/ Workshop/ Training Course/ Etc.

1.1.1. Requests with complete supporting documents shall be submitted to the HRDC Secretariat at HRDO at least one (1) month before the schedule of the activity and four (4) days before the meeting of the committee. Lacking documents must be submitted by the personnel within three (3) working days.

1.2. For Unit-initiated Trainings

1.2.1. Applications/ requests with complete supporting documents must be submitted to HRDO.

1.3. UPD-organized Trainings

1.3.1. Requests with complete supporting documents shall be submitted to the HRDO at least one (1) month before the schedule of the activity.

Note: All Requests submitted less than the required lead time must be accompanied by a strong justification for late submission endorsed by the Unit Head and subject to consideration of the Committee.

1.4. Fellowship

- 1.4.1. Applications/ requests with complete supporting documents must be submitted to HRDO.
- 1.4.2. For renewal, if no failing grades, HRDO will inform HRDC then HRDO to process request for renewal.
2. HRDO checks and verifies submitted documents.
3. HRDO prepares a matrix for agenda to the HRDC.
4. HRDC reviews and evaluates.
5. HRDC approves/ disapproves requests.
6. HRDC does not approve requests via referendum and reimbursement of requests was not encouraged by the committee.
7. Release of Funds

The unit shall prepare the disbursement voucher/liquidation report, obligation request and supporting documents as follows:

- 7.1. Cash Advance** for Attendance to Conference/ Seminar/ Workshop/ Training Course/ Etc.
 - 7.1.1. Photocopy of approved application form with unit head justification (proposal of the secretariat)
 - 7.1.2. Travel order*
 - 7.1.3. Proposed itinerary of travel, endorsed by the immediate supervisor and approved by the unit head.
 - 7.1.4. Photocopy of travel authority (in case travel authority is not yet available, submit a copy of application for authority to travel)
**
 - 7.1.5. Copy of UNDP DSA rate used **
- 7.2. Liquidation of Cash Advance/ Reimbursement for Attendance to Conference/ Seminar/ Workshop/ Training Course/ Etc.¹⁷
 - 7.2.1. Photocopy of approved application (proposal of the secretariat)
 - 7.2.2. Two (2) copies of accomplished Official Travel Report (1 soft copy for HRDO, 1 hard copy for accounting office) (proposal of the secretariat for reporting in Malacañang)

¹⁷ Prescribing the Revised Guidelines and Documentary Requirements for Common Government Transactions (2012), pp. 3-4.
https://www.coa.gov.ph/phocadownloadpap/userupload/Issuances/Circulars/Circ2012/COA_C2012-001.pdf

- 7.2.3. Photocopy of certificate of participation/attendance/appearance
- 7.2.4. Certificate of travel completed*
- 7.2.5. Photocopy of travel order*
- 7.2.6. Official receipts of payments*
- 7.2.7. Photocopy of travel authority**
- 7.2.8. Actual itinerary of travel, endorsed by the immediate supervisor and approved by the unit head.
- 7.2.9. Copy of UNDP DSA rate used**

*Additional requirements for local travel

**Additional requirements for travel abroad

**Sec. 26. Documentary Requirements. The documentary requirements for cash advance for travel as provided under 1.1.4 of COA Circular No. 2012-001 dated June 14, 2012, amended by COA Circular No. 2013-001 dated January 10, 2013.

- 7.3. All required documents must be submitted to the HRDO, signed by the unit head/s. The HRDO will transmit the documents to the Budget Office. Incomplete documents, however, will be returned to the applicant/ grantee unprocessed.
- 7.4. The ADF is subject to the usual accounting and auditing rules and regulations.
- 7.5. Unit-initiated Trainings
 - 7.5.1. Voucher prepared by the unit for processing of the payment of honoraria, which shall be signed by the Unit Head and submitted to the HRDO.
 - 7.5.2. Copy of approval of request.
 - 7.5.3. Copy of program.
 - 7.5.4. Copy of contract/ conforme signed by the Unit Head and the resource person(s)
- 7.6. UPD-organized Trainings
 - 7.6.1. Secure Chancellor's approval to the endorsed Learning and Development for the year.
 - 7.6.2. Forward the approval to Diliman Budget Office for clearance
 - 7.6.3. Prepare related disbursement vouchers, with complete documents and submit to fiscal related offices for processing.

7.6.4. Issue payments to Resource Speakers and logistic support requirements

F. OBLIGATIONS

1. Non-Teaching Staff Fellowship/ Study Leave

1.1. Return Service Requirement¹⁸

1.1.1. Study Leave

- 1.1.1.1. Administrative personnel on local study leave with pay shall render one (1) year of service for every one (1) year of leave with pay or a fraction thereof.
- 1.1.1.2. Administrative personnel on local study leave without pay shall render one (1/2) year of service for every one (1) year of leave with pay or a fraction thereof.
- 1.1.1.3. Administrative personnel on foreign study leave with pay/fellowships shall render two (2) year of service for every one (1) year of leave with pay or a fraction thereof.
- 1.1.1.4. Administrative personnel on foreign study leave without pay shall render one (1) year of service for every one (1) year of leave with pay or a fraction thereof.

Study Leave	Type	Return Service requirement	Fraction of Return Service Requirements for SL/SD with pay
Abroad	With pay	(1:2)	<ul style="list-style-type: none"> • More than six (6) months = 2 years • Less than six (6) months but not less than two (2) months = 1 year • Less than two (2) months = Six (6) months
Abroad	Without pay	(1:1)	
Local	With pay	(1:1)	
Local	Without pay	(1:1/2)	

Prior to 21 August 1989, RSR for SLWP (Abroad) is 1:3
 21 August 1989 to present, RSR for SLWP (Abroad) is 1:2



1.1.2. Fellowship

¹⁸ Different from CSC Memo Circular for Return Service

1.1.2.1. Administrative personnel on local fellowship with pay shall render one (1) year of service for every one (1) year of fellowship with pay or a fraction thereof.

1.1.2.2. Administrative personnel on foreign fellowship with pay shall render two (2) years of service for every one (1) year of fellowship with pay or a fraction thereof.

1.1.3. The service obligation to the agency for full-day study leave availment shall be as follows:¹⁹

Period of Grant	Service Obligation
One (1) month	Six (6) months
Two (2) to three (3) months	One (1) year
More than three (3) months to six (6) months	Two (2) years

Should the official or employee fail to render in full the service obligation referred to in the contract on account of voluntary resignation, optional retirement, expiration of term of appointment for coterminous employees, separation from the service through one's own fault, or other causes within one's control, the official or employee shall refund the gross amount of salary, allowances and other benefits received while on study leave proportionate to the balance of the service obligation required based on the following

formula: $R = \frac{(SOR - SOS)}{SOR} \times TCR$

Where :

- R = Refund
- TCR = Total Compensation Received
(gross salary, allowances and other benefits received while on study leave)
- SOS = Service Obligation Served
- SOR = Service Obligation Required

¹⁹ CSC MC No. 21 (2004), p.2.

<http://www.csc.gov.ph/phocadownload/userupload/itduser/mc21s2004.pdf>

The service obligation to the agency for full-day study leave availment shall be as follows:²⁰

Period of Grant	Service Obligation
One (1) month	Six (6) months
Two (2) to three (3) months	One (1) year
More than three (3) months to six (6) months	Two (2) years

1.1.4. The service obligation to the agency for half-day study leave availment shall be as follows:²¹

Period of Grant	Service Obligation
One (1) month	Three (3) months
Two (2) to three (3) months	Six (6) months
More than three (3) months to six (6) months	One (1) year

2. To maximize the benefits of attendance to a conference/ training/ workshop/ seminar within a unit, ADF grantees are strongly encouraged to share their new knowledge gained to their co-employees and committees where they belong, if applicable. The unit shall prepare the certificates indicating the number of training hours credited to each staff who participated in the echo seminar as certified and signed by the unit head, which can be accredited as training attended for the period.

3. In the spirit of transparency and in recognition of the Union as partner in the capacity building of the administrative personnel, the University shall inform the Union, through the Human Resources Development Office (HRDO), of all its career development programs for the non-academic rank-and-file employees. The award of training, study, and scholarship grants, both local

²⁰ CSC MC No. 21 (2004), p.2

<http://www.csc.gov.ph/phocadownload/userupload/itduser/mc21s2004.pdf>

²¹ CSC MC No. 21 (2004), p.2.

<http://www.csc.gov.ph/phocadownload/userupload/itduser/mc21s2004.pdf>

and foreign, shall be governed by relevant rules, as implemented by the Human Resource Development Committee (HRDC). (Section 4, Article VI of UP-AUPWU CNA, effective 27 April 2015 to 26 April 2020).

G. APPEALS

1. The Unit / Diliman HRDC shall decide on appeals/requests for reconsideration relative to the applications or requests for financial support for fellowships, as well as other human resource development activities (e.g., attendance in seminars, workshops, conferences, completion of short-term course) in their respective jurisdiction.
2. Any employee who is dissatisfied with the outcome or result of the evaluation by the HRDC or who has personal knowledge why an employee should not be granted the application or request shall:
 - a. File a written protest with the appropriate HRDC within five (5) working days from the date of receipt of the final action from the Committee. The Committee shall decide on the matter within five (5) working days from receipt of the protest.

The Appeal/Protest shall have the following contents:

- i. The full name and office/contact information of the protestant (aggrieved party) and/or the protestee (applicant or requestor); and
 - ii. The facts constituting the grounds for the appeal/protest or requests for consideration.
 - b. In the event of an adverse decision by the Committee, the employee or the protestor may appeal in writing to the Chancellor, through the UPD HRDC, within five (5) working days from the receipt of the decision. The Office of the Chancellor shall decide the aforesaid request within five (5) days from receipt thereof. The decision of the Chancellor shall be final.
3. An appeal and/or a protest may be withdrawn by the protestant anytime as a matter of right. The withdrawal of the appeal/ protest shall terminate the protest case.
 4. Appeals filed beyond the prescribed period shall no longer be entertained.

V. POLICY REVIEW AND UPDATING PERIOD AND OTHER DISCLOSURE

The policy review and updating of implementing rules and guidelines shall be conducted every three years to ensure that all administrative employees learning, and development are relevant.

VI. COMMITMENT

I hereby commit to implement and abide by the provisions of this UPD-Policy and Implementing Guidelines for Administrative Employee Learning and Development



Fidel R. Nemenzo

Chancellor

University of the Philippines, Diliman

23 September 2021

Date


CSC Action:

I have evaluated the herein UPD-Policy and Implementing Guidelines for Administrative Employee Learning and Development and found it to be in accordance with the provision of CSC MC _____, s. and may now be implemented.


CSC Regional Director
(Signature over Printed Name)

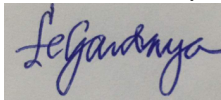
(Date)


Respectfully submitted by the Members of the
Human Resource Development Committee (HRDC)
16 April 2021


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(AUPW Union Representative)


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ANNEX A: SAMPLE APPROVED LEARNING AND DEVELOPMENT PROGRAMS AND INTERVENTIONS

**2021 HUMAN RESOURCE DEVELOPMENT PROGRAMS AND INTERVENTIONS
Calendar of Activities**

Program	Theme/ Category	Method	Participants	Target Date	Resource Person
1. Training Needs Assessment and Competency Requirement Development		Survey, FGD and interview	All UP Diliman Admin personnel and REPS	April – July 2021	College of Engineering - Department of Industrial Engineering and Operations Research Ateneo Center for Organization Research and Development
2. Establishment of 2022-2026 Year Human Resource Learning and Development Plan		Interview, FGDs, workshop and consultations	HRDBD-Training Section, HRDC, AUPWU, selected unit-HRDC members	July – October 2021	National College of Public Administration and Governance School of Labor and Industrial Relations
3. Online Programs for Empowerment in the New Normal for UP Employees (OPEN UP) 2.0					
a. Orientation for New Employees of UP Diliman (ONE UP) 2021	Mandatory Training	Self – Paced	New UP Diliman Admin personnel and REPS of	May 3, 2021	N/A
b. Pre-Retirement Orientation for UP Diliman Employees (PROUD) 2021	Orientation	Self – Paced	UP Diliman employees retiring in 2021	May 3, 2021	N/A
c. Gender Sensitivity Training	Mandatory	Facilitated	All UP Diliman Admin personnel and REPS	May 13-14, 2021	Diliman Gender Office
d. Mental Health Support Intervention	Essential Soft Skills	Facilitated	All UP Diliman Employees	May 21-22 and October 7-8, 2021 <i>Registration: May 3-14 and September 20-30</i>	UP Diliman Psychosocial Service
e. Seminar on Occupational Safety and Health	Mandatory Training	Self – Paced	All UP Diliman Admin personnel and REPS	May 3, 2021	Instructional materials will be consulted with University Health Service and Occupational Safety and Health Center
		Facilitated	Unit AOs and Health Officers	June 14 and 21, 2021 <i>Registration: June 1-11</i>	UP Diliman COVID Response Team and UHS
f. Data Privacy Seminar	Mandatory Training	Self – Paced	All UP Diliman Employees	May 3, 2021	Instructional materials will be consulted with Data Protection Office
		Facilitated	Unit AOs and Data Privacy Officers	July 16 and 30, 2021 <i>Registration: July 1 - 12</i>	Data Protection Office



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4. Leading the Excellence in Value Line Managers (Supervisory level employees) of UP Diliman (LEVEL UP 2.0)	Essential Soft Skills and Technical Skills	Hybrid	UP Diliman Admin personnel and REPS with supervisory functions	August 9, 16, 23 and 30, 2021 <i>Registration: July 1-17</i>	Civil Service Commission – UP Diliman Field Office National Engineering Center, HR Planning and Research Division Mr. Jonathan Yabut
5. Skills Training and Enhancement Program (STEP UP) 2.0: Productivity Tools and Online Collaboration Applications	Technical Skills	Hybrid	Unit AOs	September 10, 17, 24 and 28, 2021 <i>Registration: August 2-16</i>	University Computer Center Information Technology Development Center
6. Consultative Dialogue on Administrative Policies, Documentary Requirements and Processes 2021	Orientation	Hybrid	Unit Heads and AOs	November 12 and 26, 2021 <i>Registration: November 3-11</i>	Office of the Vice Chancellor for Administration Human Resource Development Office



ANNEX B: LEARNING AND DEVELOPMENT GUIDELINES

RATIONALE

Section 30, Chapter V of the The Revised Administrative Code of 1987¹ states that *“The development and retention of a competent and efficient work force in the public service is a primary concern of government. It shall be the policy of the government that a continuing program of career and personnel development be established for all government employees at all levels. An integrated national plan for career and personnel development shall serve as the basis for all career and personnel development activities in the government.”*

The Civil Service Commission suggests that government offices shall allocate a budget for human resource interventions and must include development programs for all levels and categories of government employees. This is also aligned with the 2017-2023 Strategic Plan² of the University, which aims to *“upgrade the technical, managerial, and leadership skills of academic and non-academic personnel of the University”*. This entails the following activities:

1. Institution of targeted career development courses and mentoring programs on academic and administrative leadership and management competency;
2. Establishment of campus-based professional development centers;
3. Coordination with national and institutional agencies for partnerships focused on skills enhancement for staff and faculty administrators;
4. Strengthening of programs that encourage administrative staff and REPS to pursue master's/doctoral degrees; and
5. Expansion of faculty, REPS, and administrative staff development funds

Meanwhile, many offices encountered challenges in the operationalization of their mandates while facing the risks brought by the pandemic and the changes in policies and directions set to address the current need of support to operation. Some of the challenges encountered are: managing technology and human resources, the seamless integration of data, systems, procedures and services, and the volume of transaction, which affected the productivity and quality of results performed by line managers. With these challenges, employees are more eager to participate in solid learning and development programs that can help them overcome such difficulties in their workplace.

On a global scale, the COVID-19 pandemic has brought immense pressure on several organizations, particularly on upskilling their workforce. While emerging workplace trends such as work from home and flexible working hours have been put in place as temporary measures, it is expected that such work setup will become part of the new normal. Transitioning to the new normal will undoubtedly require new skills and attitudes, and training employees will likely play a major role to achieve this goal.

¹ http://www.csc.gov.ph/phocadownload/GovtIssuances/eo_292.pdf

² <https://up.edu.ph/strategic-plan/>



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In fact, almost 80% of leaders across the world agree that capability building is extremely important for their organization's long-term development plans³. Likewise, 92% of those who belong to organizational leadership participate in informal learning programs, while 54% have been enrolled in self-paced learning programs. These numbers show that training programs are increasingly seen as a major investment by organizations, and that employees are equally willing to participate in such initiatives as they prepare for the realities of the new normal.

While the pandemic has accelerated several workplace trends to be adapted in the daily operations of organizations, research by McKinsey Global Institute in 2018 also suggests that several disruptions in the workplace have already taken place due to increased automation and use of artificial intelligence. While the need for manual and basic cognitive skills will decline in the future, high-level skills such as technological, social and emotional, and higher cognitive skills will be expected from employees in the years to come.

In consideration with the government policies, the University's strategic plan, the effect of pandemic in daily operations, and the disruptions caused by increased automation at work, the Human Resource Development Office (HRDO) is laying out its learning and development plan that aims to address the necessary competencies needed by employees to succeed in the workplace.

SELECTION OF NOMINEE/S TO LEARNING AND DEVELOPMENT INTERVENTIONS/SCHOLARSHIPS

In support to the individual personnel development which is an integral part of learning and development, each functional unit shall be responsible for ensuring the relevance adequacy of L&D programs and activities for its respective personnel.

- I. All units are encouraged to conduct L&D activities to ensure organizational effectiveness and efficiency.

II. Information Dissemination

All employees of the University shall be notified by the HRDO of the invitational training for the submission of respective Nominee(s) to the HRDO with endorsement from the unit HRDC. The internal screening is encouraged ensuring equal opportunity principle (EOP) in selection of nominees.

III. Requirements

In addition to the requirement prescribed under existing policies, the following requirements are hereby adopted for purposes of evaluation:

1. Priority shall be given to nominees to career service Permanent, Contractual and Casual appointments.
2. A nominee must have served for at least two (2) years in the agency.

³ <https://www.mckinsey.com/business-functions/mckinsey-accelerate/our-insights/rethink-capabilities-to-emerge-stronger-from-covid-19>



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3. The nominee's present duties and responsibilities must be relevant to the specific L&D activity.
4. A nominee who has availed of learning intervention/training must accomplish Learner's Action Plan (LAP) to be forwarded to HRDO and Learner's Application Form (LAppForm) to the Unit Head and a copy to be furnished to HRDC.
5. A nominee must have no pending administrative charges against him/her
6. A nominee must meet the requirements specified in the program

IV. To ensure that appropriate and effective L&D intervention (training, workshop and other form of L&D intervention) is provided to each personnel, the following guidelines shall be considered:

- Individual Performance Commitment Form Rating, Individual Development Plan and Competency-Based Assessment of personnel per unit;
- Learning Action Plan for employee;
- Coaching and Mentoring Journal;
- Employee's potential for advancement;
- Employee's career development needs;
- Ability of employee to teach others in learned skills after completion of training;
- Employee's own interest in and efforts to improve his/her work (self-development);
- Workload/schedule;
- Degree to which employee meets stated criteria for attending a course/training whenever specified whether initiated by the office or by external agencies; and
- Availability of funds

V. Procedure for the Evaluation of Nominees

1. Upon receipt of the nominees, the Training Section shall do the following:
 - i. Validate employee's information from the forms
 - ii. Create a database of qualified applicants for the selection of participants by the HRDC
 - iii. Prepare a comparative data on all the nominees for the HRDC to determine whether or not they meet qualifications prescribed for the invitational training or to which they have been nominated underspecified requirements hereof.
2. The HRDC shall select participants guided by equitable distribution of slots.
3. The following Evaluation criteria shall be used by the HRDC in determining the most qualified nominee:

Criteria	Weight
Job relevance	20%
Performance rating last rating period	20%
Potential (relevance to development)	20%



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Timeliness	10%
Completeness of submission	10%
Recommendation/Prioritization of the Unit HRDC	10%
Communication Skills	10%
<i>Total</i>	100%

4. The Training Section shall immediately notify the chosen nominee(s) endorsed by UPD HRDC. The other nominees shall also be notified of the results of the screening process.

VI. Participants

1. The Unit HRDC shall endorse to the UPD HRDC a participant to a training activity. A nomination form shall be used for this purpose. For the Unit Head, however, the higher level authority's approval shall have to be sought first.
2. No employee shall be allowed to participate in any training activity without the official endorsement of his/her unit HRDC
3. Any nominee who is not included in the Endorsement for the training activity shall not be considered.
4. A nominee who cannot attend the training activity for one reason or another must inform the HRDC his/her intention to decline ten (10) days before schedule of the activity by filling out a notice of withdrawal form. The nominee must state in the form the reason for withdrawal.

VII. Effectivity

These guidelines shall take effect immediately.

IMPLEMENTATION OF L&D INTERVENTION

In order to ensure that continuous provision of effective and efficient learning and development programs and interventions are implemented to all UP Diliman administrative personnel and REPS, the following guidelines are hereby issued:

I. Implementation Proper

- Pre-assessment shall be performed to gauge the participant's knowledge on the subject matter.
 - i. The training facilitator shall prepare a set of questions to be answered by the participants at the start of the training, which will assess the participant's level of knowledge regarding the subject matter.
 - ii. The trainers shall immediately summarize and interpret the answers given.
 - iii. The result obtained shall be the basis of determining whether or not there is a need for adjustment in the training program.



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- At least two trainers must be present in every implementation proper of a training activity
 - i. The trainers shall facilitate the training activity.
 - ii. They shall assist in the workshops and shall serve as overall coordinators.
 - iii. They shall see to it that all participants are present in all training days and shall scrupulously and inconspicuously monitor the activities of both the speakers and participants for documentation and evaluation purposes.
 - iv. Furthermore, the trainers shall be responsible for the issuance of certificates to the participants.
 - An Action Plan shall be required from the participants after the training proper. It shall contain strategies or steps that utilizes what has been learned from the training activity.
 - Immediately after the training, a post-test shall be conducted to assess if the training objectives were met.
 - It shall be compared with the pre-test results to measure if improvements were achieved.
 - The issuance of certificates shall be centralized at HRDO for proper documentation. Certificate of Completion/Participation and Appearance shall be awarded/given to a participant or learner who has met the following:
 - i. Accomplished the online registration;
 - ii. Attended and participated in at least 90% of the session hours;
 - iii. Submitted the required outputs; and
 - iv. Completely submitted the end of the program evaluation
 - The L&D implementer shall ensure accurate recording of attendance and list of submitted outputs as certified by the concerned training staff.
 - All certificates of completion/participation issued shall be attested by the Chief of the HRDBD or their authorized signatories in their absence.
 - A unique certificate code is indicated in every certificate of completion/participation issued to every participant who completed a Learning and Development Activity/Program .
- II. Upon report to duty, the participants must submit LAP within one week after the last day of the training. For a seminar whose duration exceeds one week, the participants must submit their recommendations to respective offices that are adaptable in their area of responsibility and consequently start implementing the learning/output in the workplace.
- III. Other monitoring mechanisms, such as coaching and the like, shall be done to determine the effectiveness of the training to the Participants. These monitoring mechanisms may include progress reports and follow-up activities.
- IV. Cost-effective methods for employee learning & development will be employed.
- Job Orientation discussing the actual duties and responsibilities for the new employees or transferees shall be facilitated by Unit AOs as a necessity prior to the performance of his/her job.
 - The Job Rotation Program (JRP) will be established in the University as a means of developing and enhancing the potential of employees by exposing them to the



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other work functions of the University. For this purpose, the movement of employees under JRP may either be from one division to another. The duration of the JRP shall be within the period prescribed by the Head of Unit but shall not exceed twelve (12) months. The program covers employees who have demonstrated professional qualities and leadership or managerial acumen to enrich and enhance their skills and knowledge.

- On-The-Job training program may also be adopted by the unit as a means of developing the performance of its employees and fast tracking of operations.
 - i. Coaching on the job from superior/senior colleague
 - ii. Knowledge sharing and learning session
 - iii. Job shadowing
 - iv. Interventions (e.g. counselling, team building)
 - v. Other Developmental Activities

V. Sanctions

- An employee who has been granted with training opportunity but failed to attend shall be prohibited to participate in any seminar, workshop or training activity within the six (6) months period. In addition, any expenses incurred due to non-attendance will be borne by the employee.
- Penalties shall be imposed by the Training Section upon approval of the HRDC to all employees that shall violate the policies stated herein.

VI. Records Maintenance and Management

The following records shall be maintained by the HRDO:

- List of trainings/development interventions attended per employee
- List of participants per training/development intervention conducted containing a breakdown of female and male learners and participants and their levels of positions;
- List of programs facilitated/conducted; and
- L&D Activity Completion Report to be submitted 10 working days after the conduct of the activity to include in the following order:
 - i. Executive Summary (abstract of the training/template)
 - ii. Activity proposal
 - iii. Office memorandum
 - iv. Activity plan/Instructional Design
 - v. Facilitator's session guide
 - vi. Letter of invitation/Correspondence
 - vii. MOA/Contract/TOR/Confirmation Letter form the resource person
 - viii. Profile of the resource person
 - ix. Result of online evaluation
 - x. Summary of resource person's rating
 - xi. Learning action plan
 - xii. Pre and Post evaluation results analysis
 - xiii. Attendance sheets



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- xiv. Financial report (obligated/billing amount)
- xv. Pictorials (1 page with 5 photos highlighting the activity)
- xvi. E-copies of the learning materials/presentations
- xvii. Sample certificate of participation/recognition

VII. Effectivity

These guidelines shall take effect immediately.

MANAGEMENT OF LEARNING SERVICE PROVIDERS

Pursuant to Memorandum Circular No. 24, s. 2016 (Program to Institutionalize Meritocracy and Excellence in Human Resource Management (PRIME-HRM) Enhanced Maturity Level Indicators, the UP Diliman Human Resource Development Committee adopts the following guidelines in managing the learning service providers for the interest of service of the Learning and Development Program:

I. Objectives

The purpose of these guidelines is to identify, monitor, and evaluate Learning Service Providers through implementation of LSP management system which covers accreditation, management, and evaluation of efficient and effective L&D services of LDPs. A regular review and improvement mechanisms shall be established based on M&E results and feedback from learners and managers/ supervisors to ensure optimum contribution in achieving L&D results.

II. Scope

These guidelines shall be implemented in relation to Learning and Development of administrative personnel, but not limited to the faculty administrators, newly hired and about to retire employees in UP Diliman.

III. Criteria

To ensure the quality of intervention for Learning and Development, the qualifications in the identification, screening, selection and accreditation of Learning Service Providers whether individual resource person, speakers, trainers and facilitators, and groups/institutions within or outside the University may be rated and selected in any two of the following areas:

1. For Individual Trainor, Resource Speakers, Facilitators, organizations engagement

QUALIFICATION AREA	DETAILS	SCORING
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<i>(for identification, screening and selection)</i>			
Education/ Expertise	<ul style="list-style-type: none"> Background or area of specialization with at least a Master's degree 	3.0	Bachelor's degree
		4.0	Master's Degree
		5.0	Phd Degree
Experience	<ul style="list-style-type: none"> With at least 10 years of experience or proven record that can substantiate any claims to the experience or skill and preferably with documented outcomes. Proof of certification or accreditation to claimed experience or expertise can be considered in lieu of 10 years' experience. 	3.0	Below 10 years experience
		4.0	11 – 15 years experience
		5.0	More than 15 years of experience with submitted outcome
Integrity and Credibility	<ul style="list-style-type: none"> No legal or pending case or any critical incidents that might otherwise tarnish or put to question the LSP credibility, ethical behavior, or intellectual integrity. 	5.0	Credible with intellectual and moral integrity

Basis of ranking and selection will be computed from the average scoring results of the qualification area. Highest ranking will be selected and presented by the HRDBD Training Section to the HRDC for reporting purposes.

2. For accreditation

ACCREDITATION AREA	DETAILS	SCORING	
Education	<ul style="list-style-type: none"> Background or area of specialization with at least Master's degree 	3.0	Bachelor's degree
		4.0	Master's Degree
		5.0	Phd Degree



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Experience	<ul style="list-style-type: none"> With at least 10 years of experience or proven record that can substantiate any claims to the experience or skill and preferably with documented outcomes. Proof of certification or accreditation to claimed experience or expertise can be considered in lieu of 10 years' experience. 	3.0	Below 10 years experience
		4.0	11 – 15 years experience
		5.0	More than 15 years of experience with submitted outcome
Integrity and Credibility	<ul style="list-style-type: none"> No legal or pending case or any critical incidents that might otherwise tarnish or put to question the LSP credibility, ethical behavior, or intellectual integrity. 	5.0	Credible with intellectual and moral integrity
Established Partnership	<ul style="list-style-type: none"> With at least 3 continuous services as LSP and with very satisfactory rating from 100% of participants who attended the L&D activity. 	5.0	3 years partnership and 100% very satisfactory rating

Basis of accreditation will be computed from the average scoring results of the qualification area. Highest ranking will be selected and presented by the HRDBD Training Section to the HRDC as accredited LSP, for reporting purposes.

The HRDBD Training Section will regularly submit a report to the UPD HRDC through the HRDO director for the updated lists of accredited LSP's with result of performance based on M&E results and feedback from learners and managers/ supervisors to ensure optimum contribution in achieving L&D results.

The HRDBD Training Section will submit and update the competency requirements of needed expertise based on the approved L&D activity or training program.

IV. Honorarium



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Internal and external learning service providers may be given honoraria based on the approved program of activities and line-item budget, subject to University, COA and DBM existing rules and regulations.

V. L&D Resource Pool and Automated Data Management

An L&D Resource Pool shall be established, screened, and evaluated by the HR Development and Benefits Division through the Training Section every year, for recommending approval of the HRDC upon endorsement of the HRDO.

All Certified Trainers or Learning Service Providers shall be part of the L&D resource pool, with gender balance among the members shall be maintained, if applicable.

A database of L&D resource pool will be established and utilized for fast tracking of available and applicable LSP.

All interested individual, groups or institutions may register for accreditations to UPD L&D Resource as partners through the designated website, following the listed guide:

1. What is needed to create an LSP Accreditation Account?

a. For individual

The first step in requesting to become LSP of UP Diliman is to register for an account with LSP ACCREDITATION, a Learning and Development Management assistance program of the UP Diliman HRDC, in partnership with the Human Resource Development Office and HR Development and Benefits Division through the Training Section.

Before the applicant for LSP sign up for an account, he/she must have a digital copy of the following ready:

- Curriculum Vitae indicating the expertise and experience with documented outcome
- A valid government IDs e.g. passport, GSIS/SSS UMID, drivers license, and voters ID are accepted;
- A recent photo. This will be used for the LSP QR Learning Accreditation (QRLA). QR Coded Learning Accreditation dashboard is a unique account of LSP that contains personal information, photo, and learning courses conducted in different periods. This will be used for the future administration of training using the different methods, with paperless registration. This will be discussed and explained in separate guidelines.

b. For group/institutions

- Business permit/accreditations indicating the purpose, expertise and experience of business;



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- A valid training certifications and accreditations, indicating expertise or areas of specialization.
 - A recent company logo. This will be used on the LSP QR Learning Accreditation (QRLA). QR Coded Learning Accreditation dashboard is a unique account of LSP that contains personal information, photo, and learning courses conducted in different periods. This will be used for the future administration of training using the different methods, with paperless registration. This will be discussed and explained in separate guidelines.
2. How to register for the QRLA Account
 1. Visit the UPD LSP ACCREDITATION Account (official website to be determined).
 2. Fill out the registration form (basic personal information for purposes of signup of password using the official email account).
 3. Complete the account details.
 4. Upload valid photo for individual; valid logo for group/institutions
 5. Accept the terms and review information in relation to data privacy and consent agreement. CONFIRM to accept the terms.
 6. Check email for verification using the sent link to the provided email address. Redirected to UPD LSP ACCREDITATION welcome home/website.

VI. Monitoring and Evaluation

The performance of LSPs shall be evaluated upon completion of the L&D activity and will be reported to HRDC during annual review and planning workshop. Those who obtained a Very Satisfactory rating shall be retained in the resource pool.

For purposes of transparency, the Training Section will also provide the result of evaluation to accredited LSP, upon review and action of the HRDC.

VII. Effectivity

These guidelines shall take effect immediately.

EVALUATION OF L&D INTERVENTION

In order to ensure that continuous provision of effective and efficient learning and development programs and interventions are provided to all UP Diliman administrative personnel and REPS, the following guidelines are hereby issued:

I. Pre-Test

All learning and development programs and interventions shall begin with a pre-test to determine the basic knowledge and preparedness of participants to the training. Questions shall include all topics to be covered in the programs and interventions.



II. Conduct of Learning and Development Programs and Interventions

Learning and Development Programs and Interventions shall be conducted in a manner that shall be easily understood by participants. The trainer shall set the tone by discussing the learning objectives and the skills/knowledge expected acquired by the participants at the end of the training.

III. Post-Test

Immediately after the conduct of the learning and development program, a post-test shall be administered to measure the effectiveness and usefulness of the program. The same questions used during the pre-test shall be used.

IV. Evaluation

The pre- and post-tests shall be tallied separately and thereafter compared to check whether there was an improvement or regression after the conduct of the learning and development intervention.

An improved result will be considered as an initial step that the learning and development intervention is effective and will be further evaluated with the demonstration by the participants of their learning.

On the other hand, a regression shall be treated as an area for improvement and shall result in the conduct of a root-cause analysis in order to check weaknesses or gaps in the delivery of the learning and development intervention. Such analysis may include interviews or focus group discussion with the participants.

After which, measures shall be undertaken in order to ensure that such regression will not occur.

V. Coverage

All in-house training programs including those with outsourced speakers are required to comply with these guidelines. Concerned program managers must furnish the Development and Benefits Division a copy of a summary report on the results of the pre- and post-tests conducted two weeks after the completion of the activity.

VI. Effectivity

These guidelines shall take effect immediately.



INTERNAL GUIDELINES IN THE EVALUATION OF LEARNING AND DEVELOPMENT INTERVENTION

Pursuant to Memorandum Circular No. 24, s. 2016 (Program to Institutionalize Meritocracy and Excellence in Human Resource Management (PRIME-HRM) Enhanced Maturity Level Indicators, the UP Diliman Human Resource Development Committee adopts the following guidelines to ensure that employees are provided with appropriate opportunities for specialized trainings to enable them to function more effectively and be kept abreast with recent developments in specific areas affecting their jobs and career:

I. OBJECTIVES

The purpose of these guidelines is to properly assess/evaluate the specialized training programs/short-term courses and provide procedures in the availability and processing of specialized training programs/short-term courses as well as the post training responsibilities of the participant.

II. SCOPE

These guidelines contained herein refer to locally offered non-academic specialized training and short – term courses that do not lead to an academic degree. These include seminars, symposia, conference and conventions, with specific topics/themes being conducted by government agencies (GAs), non-government organizations (NGOs), the academe, UPD units and other recognized training institutions.

Specialized training can be availed of by permanent, contractual, casual employees. However, Non-UP contractuels' shall be allowed to trainings conducted in-house or external training offered for free.

III. IMPLEMENTING MECHANISM

1. The HRDO - Training Section (TS) shall provide, through timely dissemination and circulation, necessary information on available non-academic specialized trainings and short-term courses being offered by Gas, NGOs, the academe, UPD units and human resources development training institutions relevant to job enhancement/enrichment, career development and the achievement of the University's mandate.
2. Creation and invitation to specialized trainings/short-term courses received from the above mentioned sources or forwarded by the different offices of the University shall be reviewed and evaluated by the TS in terms of:
 - a. Course/training cost;
 - b. Relevance of the course/training to the organizational needs of the University and the specific needs of the different units;
 - c. Relevance to the University's thrust and directions for the year;
 - d. Duration of the course/training;
 - e. Training needs of professionals for renewal of licenses (for professions requiring continuing education);
 - f. Curriculum and course content in relation to the career pathing program;



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- g. Officers' training agenda for the year; and
 - h. Existing issuance and guidelines issued by the Office of the Chancellor and oversight agencies related to training.
 3. Based on the assessment of the training program the TS shall:
 - a. Forward the assessment to the HRDC for their endorsement
 - b. For created specialized training, send letter of endorsement to the unit **(Form 1)**
 - c. For invitation to specialized trainings, immediately disseminate information relative to the program to the appropriate bureaus/services/offices
 - d. Send letter of regrets to the UPD unit or the inviting organization **(Form 2)**
 4. In disseminating information on the program to the appropriate units, the TS shall be guided by the mandate, functions and training needs of the unit/employees based on the:
 - a. List of employees recommended for the training submitted by the different units;
 - b. Individual Development Plans of employees
 - c. Training needs/competencies inventory survey; and
 - d. The University's training agenda
 5. Recommendation/nomination of the Unit HRDC and the application form for the specialized training/short-term course shall be submitted to the TS for validation if the candidate(s) meet the criteria/requirements of the training/course. **(Form 3)**
 6. The TS shall prepare the recommendation to the HRDC for approval.
 7. Within one week upon return from the specialized training, the employee shall submit a Post-Training Report **(Form 4)** to the Head of Unit, copy furnished the TS.
 - a. The TS may require recipient of specialized training to undertake re-echo sessions and shall monitor the implementation of re-entry plan
 - b. The TS shall establish and maintain a databank of all employees who availed of local non-academic specialized trainings and other short-term courses

IV. SOURCE OF FUND

Funding shall be sourced from the Administrative Development Fund

V. EFFECTIVITY

These guidelines shall take effect immediately.

REFERENCE

Office Order No. 42, Series of 2018, Internal Guidelines on identifying Learning Service Providers, National Wages and Productivity Commission.



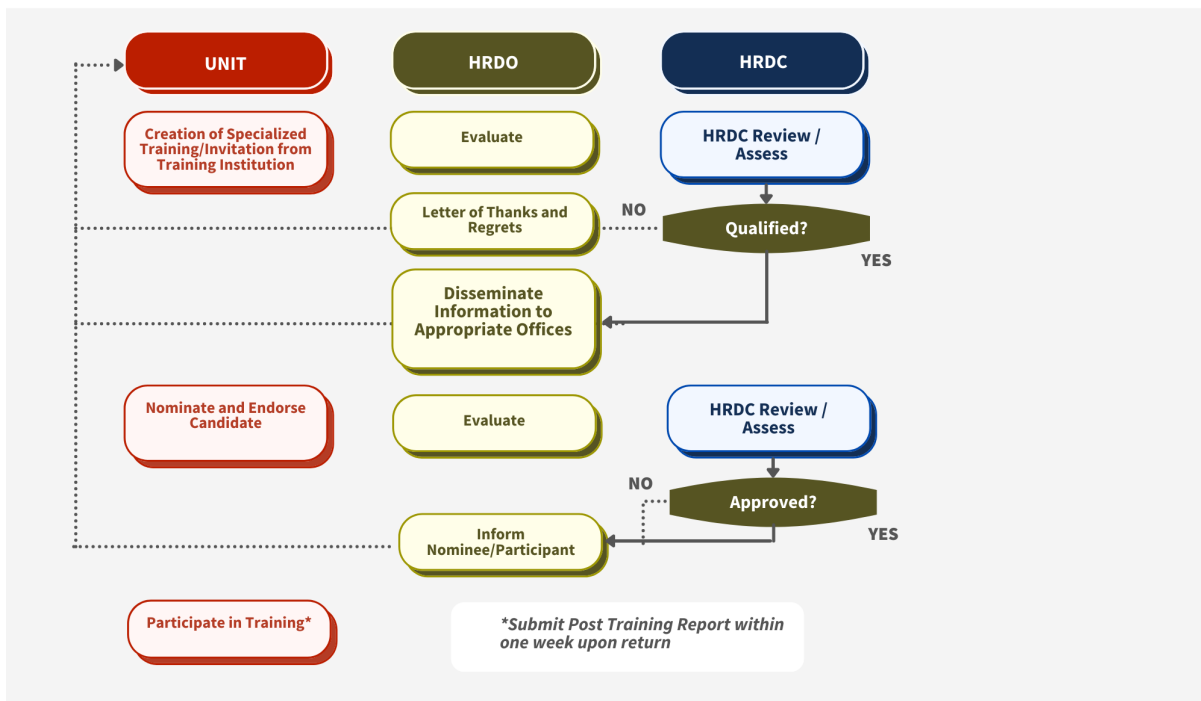
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SPECIALIZED TRAININGS

GENERAL PROCESS FLOW





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FORM 1

FOR :
FROM : **HRDO**
SUBJECT : **SPECIALIZED TRAINING ON** _____

The Human Resource Development Office received an invitation from (Training Agency/Institution) _____ to its training on _____ to be held on _____ at _____.

The program (brief description)

Registration fee in the amount of Php _____ per participant may be charged against the training funds of the nominating office/administrative development fund, subject to COA accounting and auditing rules.

We would appreciate receiving your recommendations and the duly accomplished application form on or before _____ to facilitate processing.



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FORM 2

Dear Sir/Madam:

This is to acknowledge receipt of your letter of invitation to (title of training program). We regret that we cannot send any of our staff to your programs at this time due to the economic measures that the University must comply with and/or the availability of a similar in-house training program scheduled this year.

We hope to avail of your training programs in the future.

Thank you.

Very truly yours,

(VCA)



POST TRAINING REPORT

(FOR NON-ACADEMIC SPECIALIZED TRAINING AND OTHER COURSES)

Name : _____

Position : _____ Office/Division/Unit : _____

Conference/Training/Seminar Title : _____

Training Institution : _____

Date : _____ Venue : _____

- I. Please evaluate the conference/training/seminar you have attended in the following areas:
 - a. Program/Course Content:
 - i. Importance of the course in relation to the overall thrust of UPD. Who would best benefit from this training in the future?
 - ii. Relevance of this training to your present work.
 - b. Venue (appropriateness for learning)
 - c. Schedule
 - d. Training Methodology
 - e. Training Staff
 - f. Resource Person/s
 - g. Funding
- II. Problems Encountered
- III. Recommendations

Include suggestions and comments on the training attended, course module, lectures, accommodations. Response to issues and problems to part II.

- IV. Re-Entry Plan
 - a. How will the technology gained be transferred/applied to UPD?
 - b. Plan to include list of activities/budget to be undertaken by the office within a year