

**Memorandum Circular**

No. 02

Series of 2006

**SUBJECT : Guidelines on Foreign Scholarships, Training Grants and Related Travels Abroad**

**I. RATIONALE**

Foreign scholarships/ trainings and attendance to seminars and conferences are part of the career development program of the Department for the employees' professional and personal growth. Participation in foreign scholarships/ trainings enables the employees to network with their counterparts abroad and be updated with global trends. Through scholarships and training programs, additional skills, knowledge, and competencies are acquired by employees. With foreign training/ scholarships, the objective of the Department to improve its human resources ultimately leads to the accomplishment of its mission, vision, goals and objectives.

For an equitable distribution of foreign scholarships and travel opportunities for all employees in the Department, the processes and procedures that will guide the Personnel Development Committee (PDC) are hereby established.

**II. OBJECTIVES**

1. To provide foreign scholarships/trainings to qualified and deserving staff for their professional and career development, competency enhancement and efficiency in the delivery of services for the achievement of the Department's objectives;
2. To establish a system that adheres to the principles, policies and procedures in the selection of employees for availment of foreign scholarship and training opportunities;
3. To improve/ expand career opportunities for DSWD staff; and
4. To develop and retain high quality staff in the Department.

**III. LEGAL BASES**

- ❖ Executive Order No. 129 dated May 6, 1968 entitled "Providing Rules and Regulations Governing Official Travel Abroad of Officials and Employees of the Government, Both

National and Local, Including Government-Owned or Controlled Corporations, and Prescribing Rates of Allowances and Other Expenses Therefore.”

- ❖ Executive Order No. 367 dated August 21, 1989 which further amend E. O. no. 129 dated May 6, 1968, as amended by E. O. No. 421, dated November 26, 1973
- ❖ Executive Order No. 248 dated May 29, 1995 prescribing rules and regulations and New Rates of Allowances for Official Local and Foreign Travels of Government Personnel
- ❖ Executive Order No. 248-A dated August 14, 1995 amending E. O. No 248
- ❖ Executive Order No. 298 dated March 23, 2004 amending further E. O. No. 248 as amended by E. O. No. 248-A
- ❖ Executive Order No. 459 dated September 1, 2005 entitled “Streamlining the Procedure in the Disposition of Request of Government Officials and Employees for Authority to Travel Abroad”
- ❖ The Implementing Rules of Book V Executive Order 292 provides that every department or agency shall establish a continuing program for career and personnel development for all agency personnel at all levels. Human resource development opportunities and activities shall be provided which shall include training and scholarship grants, both foreign and local.
- ❖ M. C. No. 23 s. 2003 entitled “adoption of the DSWD Organizational Competencies”
- ❖ M. C. No. 6 s. 2004 entitled “adoption of the DSWD Leadership Competencies”
- ❖ S. O. No. 460 s. 2004 providing for the Terms of Reference of the Career Pathing Program and Designating career coaches and counselors.

#### IV. COVERAGE

This Circular covers scholarship and training grants abroad which include undergraduate, master’s and doctorate degrees, diploma courses, short courses, workshops, fora/symposia, study tour and seminars on specialized courses; secondments and international social service and internship; and other training program opportunities of similar nature.

#### V. DEFINITION OF TERMS

1. **Competency** – is the knowledge, skills, abilities, attitude, and standards to succeed in a particular job.

2. **Country report** – a report or paper which the grantee/scholar prepares and presents during the training. The report provides a situationer of the country and other relevant data that will be required by the inviting organization abroad.
3. **Foreign scholarship** – any training, seminar, or academic/educational opportunity awarded to the employee by an educational institution or organization and to be held in a foreign country.
4. **Generic course** – training program or course with a general or broad field or theme e.g. public administration, governance, public policy, etc.
5. **Grantee/Scholar** – an employee who was granted scholarship/ training.
6. **Human resource** – people employed by an organization.
7. **Human resource development** – organized learning experiences provided by employers within the specified period of time to bring about the possibility of performance improvement and personal growth.
8. **Internship** – a program wherein an employee is on a placement or residency training.
9. **Pool of potential candidates** – list of employees participating in the Department's Career Pathing Program and employees recommended by the Head of Office for possible scholarship.
10. **Re-entry plan** – plan of action to apply learnings from the scholarship to the work of the employee.
11. **Secondment** – exchange programs of the Department with associate countries and/or social welfare posting to foreign countries for the purpose of assistance to Overseas Filipino Workers (OFW) in countries abroad.
12. **Service obligation** – the period of time that the grantee must serve upon completion of scholarship program.
13. **Scholarship** – academic/educational opportunities or trainings awarded to the employee by an educational institution or organization.
14. **Study tour** – any learning or training that is done using the methodology of going out on the vicinity of the study or visiting a place/s and observing a case study setting.
15. **Training** – activities designed to change or enhance the competencies of an individual; learning that is provided to improve performance on the job.

## VI. GUIDING PRINCIPLES AND POLICIES

1. The Department shall ensure the equitable distribution of foreign scholarship opportunities for all employees of the Department.
2. Foreign scholarships/trainings shall be granted to qualified and deserving employees as a means of enhancing functional/technical, interpersonal and personal competencies consistent with the career development program of the Department.
3. Transparency and objectivity shall be observed in the processes and procedures on foreign scholarships/trainings. There shall be no discrimination in the selection of candidates on account of age, gender, civil status, disability, religion, ethnicity or political affiliation unless specifically indicated in the training course or by the sponsoring agency.
4. In identifying nominee/s, the pool of potential candidates shall always be checked/tapped to facilitate:
  - a. thorough and wide selection processes for scholarship/ training
  - b. the development of career path for each official/ employee
  - c. the development of training programs relevant to the Department's thrust and training agenda
5. The grantee is obliged to ensure return of investment of agency or the Philippine government, by way of compliance with the service obligation or through refund of predetermined amount in case of failure to complete the service obligation.
6. All officials and employees who availed of foreign scholarships and other related travels abroad shall submit, within 60 days upon completion of the program, a travel report and action/ re-entry plan using the prescribed forms. They shall also be required to share their knowledge and experiences in their respective regions/offices in sessions specifically arranged for the purpose. The Department shall provide support to the grantee in the conduct of such activity and in the implementation of his/her action/ re-entry plan. Failure to comply, the grantee shall refund to his/her office the amount provided by the government and/or the sponsor. Likewise, he/she shall be automatically disqualified for availment of trainings and travel abroad until he/she has submitted the required travel report, action/re-entry plan and completely complied with his/her service contract.
7. Monitoring of the implementation of the action/ re-entry plan shall be carefully observed by the employee's supervisor and the Head of Office, to ensure that knowledge, skills and technologies gained from the travel are shared.
8. Foreign scholarship invitations directly sent to employees of the Department or direct solicitations of employees for foreign scholarships/trainings will no longer pass through

the PDC. However, regularity and consistency in the principles, policies and rules from the Terms of Reference of the Personnel Development Committee and all scholarship guidelines must be observed. The employee or official must be cleared with all scholarship requirements stated under Part VIII. The employee must be endorsed for application to foreign scholarships/trainings by his/her Director for staff below director level or Coach-Monitor for Director and Assistant Secretary, and has to request for approval from the Secretary for attendance to training on official time and for funding, if this can be allowed.

## VII. PROCESSES AND PROCEDURES

To promote transparency and smooth flow in the selection process, the PDC and the PDC Secretariat must observe the following processes and procedures EXCEPT in cases where there is no material and sufficient time to adhere to the regular process:

1. Upon receipt of invitation from the NEDA Special Committee on Scholarships or from international agencies/organizations, the Office of the Secretary shall refer the same to the Undersecretary for General Administration and Support Services (GASS) who shall thereafter forward the said invitation directly to HRMDS-CPDD for the initial draft of the invitation and thereafter, for final assessment of the PDC Chair to:
  - a. Determine the relevance of the invitation to the organizational needs of the Department and the career development plan of its employees.
  - b. Ascertain the funding provision for the grant and other requirements.

Invitations that are not coursed through the Office of the Secretary shall be immediately acted upon referral to the PDC.

2. After verification and assessment of the invitation (which must be acted upon within the day of receipt), the same shall be disseminated and posted in conspicuous places within the Department e.g. bulletin boards indicating the criteria and requirements for availment / qualification (Central Office/Regional Office).
3. A memorandum shall likewise be issued to the heads of the major office clusters (Office of the Secretary/ Undersecretaries/ Assistant Secretaries/ Bureaus/ Services/ Regional Directors) to disseminate the invitation and the qualification requirements.
4. The PDC Secretariat shall prepare a list of qualified candidates based on the duly endorsed nominations. Other candidates can also be drawn from the pool of potential employees for training in the Central/Field Offices upon proper consultation with and subject to the approval of the office or unit concerned.

5. For invitations received two (2) weeks before the deadline of submission of nominee/s, the invitation will no longer be disseminated. The PDC Secretariat shall check from the pool of potential candidates for scholarships/trainings, database of employees with career plans and qualified previous PDC applicants that were put on active file.
6. The PDC shall convene and deliberate on the nominations following certain sets of criteria that shall be developed and agreed upon by the PDC and in accordance with the requirements of the inviting organization/sponsoring agency, such as:
  - a. Qualifying criteria as a minimum requirement to eliminate outrightly the non-qualifying candidates.
  - b. All things being equal, another set of evaluation criteria may have to be developed to ensure that the best among the qualified candidates is nominated by the agency.
  - c. Personal interview and/or written examination/test as deemed necessary, particularly for foreign academic scholarship.
7. Convening the PDC:
  - a. Three (3) PDC members must be present during the deliberation.
  - b. When the Chairperson is not present in the meeting, the Vice-chairperson shall act as the presiding officer.
  - c. When the Chairperson and Vice-chairperson are not present during the meeting, the meeting will not push through. Selection of nominee/s shall be made through a referendum.
  - d. When a PDC member is a nominee/applicant, he/she must inhibit himself/herself from the deliberation. His/Her alternate must attend the deliberation instead.
8. Referendum shall only take place when:
  - a. There is a lone candidate to the program;
  - b. The PDC cannot convene due to lack of quorum;
  - c. The deadline for submission of nominee/s is too tight and there is not enough time for the PDC to conduct deliberations.

The PDC Secretariat shall prepare notice of referendum and resolution which shall state:

- a. why no PDC meeting took place, (e. g. due to the non-availability or conflicting schedules of most PDC members for the scheduled deliberation);
- b. the deadline of the submission of documentary requirements and the endorsement of the nominee to NEDA or the inviting organization;
- c. that the criteria set were followed to obtain the best and deserving nominee/s for the training program.

The PDC Members shall give comments and the PDC shall make the final declaration of who will be the recommendee or nominee to the scholarship, to be approved by the Secretary.

9. The results of the deliberation/resolution shall be submitted by the PDC to the Secretary or his/her duly designated official for approval. For urgent resolutions, the Undersecretary for GASSG may sign "by the authority of the Secretary".
10. Thereafter the Secretariat shall prepare endorsement letter to the inviting organization, to be signed by the Undersecretary-In-Charge of the General Administration and Support Services Group (GASSG).
11. The Secretariat shall inform the candidates, thru the head of office, on the results of the deliberation.
12. The Secretariat shall assist the nominee/s in the preparation of the requirements of the inviting organization/sponsoring agency.
13. Upon confirmation by the inviting organization/sponsoring agency, the Secretariat shall inform the nominee/s of his/her acceptance to the program.
14. The grantee for foreign scholarship / training shall be given a pre-departure briefing on the procedure for securing travel documents, entitlements, responsibilities and obligations and other relevant information.
15. The grantee shall sign a contract with the Department stipulating his/her obligation and the conditions of the grant. The PDC through the PDC Secretariat shall ensure that the compliance to the contract is regularly monitored.
16. Upon return of the grantee from scholarship/training, he/she must submit a travel report reflecting/containing among others his/her learning and plans of action, including identification of areas that need to be pursued by the Department to make the learning useful and meaningful. In addition, action/ re-entry plans for trainings, masteral thesis for Masters Program and other pertinent research papers must be submitted.

The concerned central and regional office shall provide the technical and logistical support to the grantee in the implementation of his/her action/ re-entry plans.

17. The PDC through the PDC Secretariat shall coordinate with concerned units in the monitoring of the progress/implementation of action/ re-entry of grantee, provide technical assistance and counseling service, as maybe necessary, to ensure that recommendations are carried out.

## **VIII. QUALIFICATION REQUIREMENTS**

Interested applicants to foreign scholarships must meet the following minimum qualification requirements:

1. Eligibility - must meet the requirement of the inviting organization or sponsor
2. Work experience – must have rendered at least two (2) years work experience in the Department and holds a permanent position; and must meet the requirements of the inviting organization or sponsor. Regular employees who do not meet the 2-year residency on permanent appointment may be considered provided there are no applicants.
3. Educational Attainment – must meet the requirements of the inviting organization or sponsor
4. Must have at least Very Satisfactory in performance rating for the last 2 rating periods
5. Must have no pending local or foreign scholarship application
6. Must have no pending administrative or criminal case
7. Must have rendered the required service obligation from previous local or foreign scholarship grants
8. Must have submitted travel report and action/ re-entry plan, if applicable, from previous scholarship/training

## **IX. APPLICATION TO FOREIGN SCHOLARSHIPS AND GROUNDS FOR DISQUALIFICATIONS**

1. Interested applicant/s must meet the qualification requirements. Interested and qualified applicant/s shall be nominated by the head of office/ director for staff below director level or his/her coach-monitor for Director and Assistant Secretary and shall submit the following basic documents to the PDC Secretariat on or before the specified deadline:
  - a. Endorsement/ recommendation letter with justification from the Head of Office, for application below director level, and the Coach-Monitor or Cluster Undersecretary for Directors and Assistant Secretaries;
  - b. Completely filled out Application Form and Civil Service PDS Form 212
  - c. Medical Certificate
  - d. Certificate of No Pending Administrative or Criminal Charge



- e. Certification that the scholarship/training is related with the career development plan of the employee and in case he/she would be chosen for the program, staff complement would be identified and work targets will not be negatively affected while attending the program
  - f. Regional PDC Resolution (for FOs only)
  - g. Travel Report from Previous Scholarship/Training that have not been submitted
  - h. Re-entry plan for previous training attended or feedback report for graduate program completed
2. The following will be grounds for disqualification of applicants in the initial screening:
- a. Failure to meet the minimum qualification requirements provided under Part VIII
  - b. Incomplete documents
  - c. Late submission of application. Late application or a whole-day extension shall only be considered if and when there are no applicants yet.

## **X. CRITERIA FOR FOREIGN SCHOLARSHIP**

1. The following criteria shall be used in assessing the qualifications of candidates for foreign scholarship/training:
- a. Relevance of the program to the unit's mandate = 30 points
  - b. Relevance of the program to the function = 40 points
    - b.1 Relevance to the position = (20 points)
    - b. 2 Relevance to the current actual duties = (10 points)
    - b. 3. Relevance to career development = (10 points)
  - c. Actual years of service in the Department = 15 points:
    - 10 and up = 15 points
    - 6- less than 10 years = 10 points
    - 2- less than 6 years = 5 points
  - d. Training abroad = 15 points:
    - Frequency:
      - No travel = 15 points
      - 1 travel = 4 points
      - 2-3 travel = 3 points
      - 4-5 travel = 2 points
      - 6 and above = 1 point



- Duration:
    - Less than 2 weeks = 5 points
    - 2 weeks – 1 month = 4 points
    - More than 1 month - 6 months = 3 points
    - More than 6 months – 1 year = 2 points
    - More than 1 year = 1 point
  
  - Time lapse:
    - More than 10 years = 5 points
    - 8 – 10 years = 4 points
    - 5 –less than 8 years = 3 points
    - 2 – less than 5 years = 2 points
    - 1-less than 2 years = 1 point
    - Less than 1 year = 0 point
2. Due to limited foreign trainings and capability development opportunities abroad, only one (1) nominee per office will be accepted by the PDC for an equitable distribution across the offices of the Department's employees' population. The Head of Office has to assess the potential and competencies of the staff and decide who he/she would endorse to the PDC.
  3. The Committee shall identify the units in the Department based on the Key Result Area (KRA), and the positions and functions with which the program is relevant or more contributory for organizational and human resource development, and assign breakdown of points for the criteria: a) Relevance of the Program to the Unit's Mandates and b) Relevance of the Program to the Function.
  4. A generic course or training program (e. g. public administration, governance, etc.) will be opened to all employees.

## XI. SERVICE OBLIGATION

After completion of the foreign scholarship, training or grant the official or employee concerned shall serve the Department under the compulsory service obligation prescribed as follows:

Duration of Foreign Scholarship, Training or Grant	Service Obligation
For every year or fraction thereof not less than 6 months	2 years
A fraction of a year less than 6 months but not less than 2 months	1 year

A fraction of a year less than 2 months	6 months
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The service obligation shall not apply in the following travels:

1. Attendance to high-level or ministerial meetings;
2. Compliance with an essential international commitment where the participation of the Department is extremely necessary or indispensable; and
3. Invitation for speaking engagement where the official or employee is recognized an expert on the subject matter.

## XII. EFFECTIVITY

This Circular shall take effect 15 days upon signing and supersede, amend or modify Memorandum Circular No. 25, series of 2003 and other pertinent provisions of Department orders, issuance and circulars inconsistent therewith.

Copies of this Circular shall be disseminated to all the bureaus, services and offices at the Central Office and Field Offices.

Issued in Quezon City, this 15th day of February, 2006.

*Luwalhati F. Pablo*  
**LUWALHATI F. PABLO**  
OIC Secretary

*by [signature]*  
*[initials]*