



Administrative Order
No. 18
Series of 2019

GENERAL POLICY IN IDENTIFYING AND SELECTING LEARNING SERVICE PROVIDERS

I. RATIONALE

The Department of Social Welfare and Development (DSWD) strongly supports the professional development of its officials and employees by providing various learning and development interventions (LDIs) needed to effectively perform their current position/job, as well as prepare them for future roles in the organization.

For the past years, it may be noted that majority of the LDIs provided to officials and employees were in the form of trainings, which are either externally sourced-out or are conducted in-house by the proponent Office/Bureau/Service (OBS) in the Department. Although OBS are guided by the general policy that procurement of learning service providers (LSPs) shall follow the existing rules/regulations and procedures on procurement, however, there is still a need for the Department to come-up with customized standards and tools that will be used by all OBS, for purposes of uniformity and sound decision making.

II. LEGAL BASES

- Rule VII of the Omnibus Rules Implementing Book V of Executive Order No. 292 and other pertinent Civil Service Laws provides the policies on career and personnel development in government. That:

“Every official and employee of the government is an asset or resource to be valued, developed and utilized in the delivery of basic services to the public. Hence, the development and retention of a highly competent and professional workforce in the public service shall be the main concern of every department or agency;”

- CSC MC No. 28, s 1990 Reiterating Certain Policies in the Conduct of Government Training and Development Program
- Republic Act No. 9184 entitled Government Procurement Reform Act dated January 10, 2003, as well as its 2016 Revised Implementing Rules and Regulations
- National Budget Circular No. 2007-1 entitled Guidelines on the Grant of Honoraria to Lecturers, Coordinators and Facilitators in Seminars, Training Programs, and Other Similar Activities

- CSC MC 24 s 2016 Program to Institutionalize Meritocracy and Excellence in Human Resource Management (PRIME-HRM) Enhanced Maturity Level Indicators

III. OBJECTIVES

This guidelines aims to establish the minimum standards to be used in the identification and selection of LSPs, as well as to ensure the quality of the Learning and Development (L&D) activities provided.

IV. COVERAGE

This guidelines shall be used in the identification and selection of LSPs (an individual, group of individuals, or unit/institution/organization within or outside DSWD), who will act as part of the L&D Management Team either as a resource speaker/person, facilitator, lecturer, coordinator, and others, for the conduct of learning development interventions.

Moreover, this shall also be used in the identification and selection of LSPs for learning and development interventions sponsored by donor agencies/organizations (i.e DFAT, World Bank, etc.), unless stipulated in the partnering agreement that the donor's requirements and standards shall be followed.

V. DEFINITION OF TERMS

Coordinator – is any person who acts as lead person in the conduct of seminars, training programs, and other similar activities. He/She directs, supervises and/or participated in the organization, coordination, and conduct of such activities; develops training designs, modules and curricula of identified courses in response to training needs; may serve as lecturer, resource person, or facilitator.¹

Facilitator – is any person who is a subject matter in neutrally managing group processes and dynamics sessions such that he/she intervenes for greater group understanding, thus enabling the participants to full participation, to mutual understanding, and to shared responsibilities in the achievement of group objectives and/or in making quality decisions.²

Honorarium – is a form of compensation given as a token of appreciation or reward for gratuitous services on account of one's broad and superior knowledge or expertise in a specific field for which, going by custom, tradition or propriety, no fixed price is set³

¹ National Budget Circular 2007-1

² Ibid

³ Ibid

Learning and Development (L&D) - is broadly defined as a set of interventions for the personal, career and professional development of DSWD officials and employees that intend to improve individual and organizational performance.

Learning Service Providers (LSPs) – refer to an individual, a group of individuals, a unit or an institution/organization within or outside of DSWD who provide interventions and initiatives that aim to capacitate DSWD officials and employees through direct provision of L&D and/or facilitation

Learning and Development Resource Pool – refers to the databank/database of recognized and accredited learning service providers in various fields or areas of expertise.

Lecturer – is any person who uses lecture as an instructional method in seminars, workshops, conferences, symposia, training programs and other similar activities.⁴

Resource Speaker/Person – is any person who, by virtue of his/her expertise in a specific subject area, serves as speaker in seminars, conferences, symposia, training programs and similar activities.

VI. STANDARDS

A. Criteria

The following general criteria shall be considered in selecting individual or group/institution as resource persons, speakers, trainers, coordinators, and facilitators:

AREA	DETAILS
Education/Expertise	Background or area of specialization (i.e. Doctoral degree, Master's Degree or a Certification on subject/area of specialization)
Experience	Proven record that can substantiate any claims to the experience or skill and preferably with documented outcomes (i.e. number of credible relevant work experience, service record/portfolio)
Suitability/Aptness	Fitness for the task or role and sustainability (i.e. is willing to devote the time required for the preparation and actual conduct of the learning and development activity; is willing to provide coaching and support for participants or proponent OBS beyond activity sessions; evaluation results of previous LDI engagements;

⁴ Ibid

Integrity	Absence of critical incidents that might otherwise tarnish or put to question the person's credibility, character, ethical behavior or intellectual integrity as a learning service provider (i.e. recommendation or commendation from previous clients; is credible and respected in the area/field of specialization)
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If gender expertise is required in the L&D intervention, the same has to be included in the Terms of Reference or letter of conforme as a prerequisite for selection of learning service providers.

The qualifications of the LSPs shall be evaluated using the attached form (Annex A). The proponent OBS shall not be precluded from setting additional criteria as deemed needed and shall provide the corresponding indicators and rating system.

Only those that attained an average adjectival rating of Very Satisfactory shall be included in the short list of qualified LSPs, or in the case of a lone provider, shall be awarded with the engagement.

B. Honorarium

Payment of honorarium of the LSPs, whether as individual or group/organization, or as a local or foreign entity, shall be governed by existing national government rules and regulations, and shall be approved by the designated approving authority of the Department, in accordance with the existing DSWD Manual of Delineation and Delegation of Authority.

Likewise, internal staff or official who acts as learning service provider may be given honoraria subject to the Department of Budget and Management (DBM) and Commission on Audit (COA) existing rules and regulations on the matter.

C. Learning and Development Resource Pool

A Learning and Development Resource Pool shall be established and reviewed every year by the Human Resource Management and Development Service (HRMDS) for Central Office or its counterpart in the Field Offices.

All recognized and accredited Learning Service Providers by the Civil Service Commission (CSC) and the Career Executive Service Board (CESB) based on the latest issued certified list, as well as those certified as DSWD core group of specialists and employees accredited as Gender and Development (GAD) Resource Pool Members by the Philippine Commission on Women, shall be part of the Learning and Development Resource Pool of the Department.

Further, the Department shall engage other external local and international learning service providers towards interactive learning and sharing, and generally, a gender balance among the members of the DSWD resource pool shall be maintained, as far as practicable.

D. Evaluation

After the actual conduct of the activity, the performance of the LSP shall be evaluated by the proponent OBS using the attached form (Annex B). Those who obtained an equivalent over-all adjectival rating of Very Satisfactory shall be retained in the L&D resource pool and may qualify for other LDI engagements in the future.

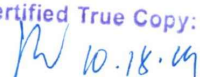
VII. EFFECTIVITY AND REPEALING CLAUSE

This Order shall take effect immediately and shall continue to be in force and effect until revoked. Previous order, issuance or circulars inconsistent herewith are deemed amended, superseded, or revoked accordingly.

Copies of this Order shall be disseminated to all the Bureaus, Services and Offices at the Central Office and Field Offices.

Issued in Quezon City, this 18th day of October, 2019.


ROLANDO JOSELITO D. BAUTISTA
Secretary
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Certified True Copy:

MYRNA H. REYES
OIC-Division Chief
Records and Archives Mgt. Division

ANNEX A

SELECTION MATRIX FOR LEARNING SERVICE PROVIDER

Learning Service Provider: _____

Title of Activity: _____

Proponent Office/Bureau/Service: _____

RATING SCALE	ADJECTIVAL RATING
5	Outstanding
4	Very Satisfactory
3	Satisfactory
2	Unsatisfactory
1	Poor

Instruction: Proponent Office should set the criteria, corresponding weight allocation that will total to 100%, and the rating system to adopt, prior to evaluating the Learning Service Provider (LSP).

Rating Guide. Generally, a rating of 3 is given for meeting the minimum requirement, while additional points are earned for going above the minimum requirement. The LSP shall be considered disqualified, if the minimum requirement is not met. The "Score" per criteria is computed by multiplying the rating given and the weight allotted. Then, add up all the scores to get the Total Score and its Equivalent Adjectival Rating.

CRITERIA	RATING SYSTEM	RATING	SCORE
<p>1. Education/Expertise (Weight allocation: ____%) (Background or Area of Specialization)</p> <p>Minimum requirement: _____</p> <ul style="list-style-type: none"> • Doctorate Degree • Masteral Degree or Diploma or equivalent Industry Certification (i.e. ICT) on required area of expertise • Baccalaureate Degree or equivalent certification on area of expertise • Does not meet the minimum requirement <p><u>Note:</u> The equivalent rating system per bullet may be adjusted based on the minimum requirement set.</p>	<p>5</p> <p>4</p> <p>3</p> <p>disqualified</p>		
<p>2. Experience (Weight allocation: ____%) (Proven record that can substantiate any claims to the experience or skill and preferably with documented outputs)</p> <p>Minimum requirement: _____</p> <ul style="list-style-type: none"> • Exceeds the minimum required number of years of work experience by 50% • Exceeds the minimum required number of years of work experience by 25% • Meets the minimum required number of years of work experience • Does not meet the minimum requirement <p><u>Note:</u> The equivalent rating system per bullet may be adjusted based on the minimum requirement set.</p>	<p>5</p> <p>4</p> <p>3</p> <p>disqualified</p>		

<p>3. Suitability/Aptness (Weight allocation: _____%) (Fitness for the task or role and sustainability)</p> <ul style="list-style-type: none"> • High level of understanding of DSWD context and is flexible to adjust or customize program designs/delivery to the needs of the participants/Department 5 • Average level of understanding of DSWD context and flexible to adjust or customize program designs/delivery to the needs of the participants/Department 3 • Low level of understanding of DSWD and is not flexible to adjust or customize program designs/delivery to the needs of the participants/Department 1 <p>Other set of indicators, if applicable</p> <ul style="list-style-type: none"> • Average "Outstanding" Evaluation Results of LSP's engagements (past 3 yrs) 5 • Average "Very Satisfactory" Evaluation Results of LSP's engagements (past 3 years) 4 • Average "Satisfactory" Evaluation Results of LSP's engagements (past 3 yrs) 3 • With Unsatisfactory/Poor Evaluation Results of LSP's engagement (past 3 yrs) 1 <p><u>Note:</u> Should the 2 sets of indicators be used, the average rating shall be computed first, before multiplying it to the assigned weight allocation.</p>			
<p>4. Integrity (Weight allocation: _____%) (Absence of critical incidents that might otherwise tarnish or put to question the person's credibility, character, ethical behavior or intellectual integrity as a learning service provider)</p> <ul style="list-style-type: none"> • With commendation or recommendation or positive feedback from previous clients; is credible or respected in the area of expertise 5 • No unfavorable feedback on LSPs credibility, character, ethical behavior or intellectual integrity 3 • With unfavorable feedback on LSPs credibility, character, ethical behavior or intellectual integrity 1 			
<p>5. Others, as deemed needed (Weight allocation: _____%) For example: For firms/company/institutions as LSP</p> <ul style="list-style-type: none"> • Have access to a pool of qualified consultants, coaches, mentors and/or trainers whose field of expertise and expertise are within the required specialization 5 • With complete legal documents to operate and with financial stability 3 			
<p>TOTAL SCORE:</p>			
<p>EQUIVALENT ADJECTIVAL RATING:</p>			

Rated by:

Noted by:

Name and Signature of Rater

Name and Signature of Head of Office

Position Title:

Position Title:

Date:

Date:

POST-EVALUATION MATRIX FOR LEARNING SERVICE PROVIDER

Learning Service Provider: _____

Title of Activity and Date: _____

Proponent Office/Bureau/Service: _____

Instruction: Using the Rating Scale of 1-5, kindly place an **X** mark on the column that represents your rating score per indicator.

To determine the score per criteria, multiply the rating given and the weight allotted. Then add up all the products to arrive at the total score and its equivalent adjectival rating.

CRITERIA	RATING				
	5 Outstanding	4 Very Satisfactory	3 Satisfactory	2 Unsatisfactory	1 Poor
1. Delivery of Outputs (Weight Allocation: _____)					
Ability to deliver the expected outputs per agreed timeline as stipulated in the Terms of Reference or Conformance Letter					
a. Demonstrates strong knowledge of subject matter					
b. Gives appropriate evidence and resources					
c. Encourages participants to ask questions					
d. Engages participants in a learning experience					
e. Submits outputs on time					
2. Working Relationship (Weight Allocation: _____)					
Ability to establish rapport and build good working relationship with proponent OBS, other members of the training team, and participants during the entire duration of the engagement					
a. Demonstrates establishing rapport with the proponent OBS/training team					
b. Demonstrates establishing rapport with the participants					
c. Provides feedback to the proponent OBS/training team					
d. Provides feedback to the participants					
e. Models respectful attitude towards all					
3. Responsiveness to needs of participants (Weight Allocation: _____)					
Flexibility and/or ability to make necessary adjustments to respond to the needs of participants to ensure effective conduct of the activity					
a. Assesses participants' skills and learning needs					
b. Uses variety of teaching methods					
c. Open to suggestions from proponent or participants					

CRITERIA	RATING				
	5 Outstanding	4 Very Satisfactory	3 Satisfactory	2 Unsatisfactory	1 Poor
4. Over-all evaluation rating from participants (Weight Allocation: _____)					
Over-all feedback or evaluation rating gathered from the post-evaluation tool administered to the participants at the end of the conduct of the activity					
5. Others (Weight Allocation: _____) As deemed needed					
TOTAL SCORE:					
EQUIVALENT ADJECTIVAL RATING:					

Rated by:

Noted by:

Name and Signature of Rater
Position Title:

Name and Signature of Head of Office
Position Title:

Date: _____

Date: _____