



Republic of the Philippines  
**Department of Education**

03 DEC 2013

DepEd ORDER  
No. 53, s. 2013

**APPROVAL AND IMPLEMENTATION OF THE 2013  
DEPED RATIONALIZATION PROGRAM**

To Undersecretaries  
Assistant Secretaries  
Bureau Directors  
Directors of Services, Centers and Heads of Units  
Regional Directors  
Schools Division Superintendents  
Directors of Bureaus, Services, Centers and Heads of Units  
All Others Concerned

1. In October 2004, Executive Order 366 (EO) *Directing A Strategic Review of the Operations and Organizations of the Executive Branch and Providing Options and Incentives for Government Employees Who May Be Affected by the Rationalization of the Functions and Agencies of the Executive Branch* directed a strategic review of the operations and organizations of the Executive Branch.
2. The initiative aimed to: (a) focus government efforts and resources on its vital/core services; and (b) improve the quality and efficiency of government services delivery by eliminating/minimizing overlaps and duplication, and improving agency performance through the rationalization of service delivery and support systems, and organization structure and staffing (Section 2, EO 366).
3. In December 2011, the Department of Education (DepEd) embarked on the review and revision of its Rationalization Plan (RP) in light of long term reforms needed in the education sector notwithstanding fast-changing demands of the local and global environment. This Department opted to submit the Rationalization Plan in two phases:
  - a. **Phase I** includes the mandate, functions and proposed organizational structure for the agency. It also shows the indicative staffing and costing for the proposed structure vis-à-vis the 2005 level.
  - b. **Phase II** includes the placement of employees into the new staffing pattern and the names and positions of employees which will be affected by the rationalization effort of the organization.
4. The scope of the DepEd Rationalization efforts covers the following:
  - a. All Central Office Units;
  - b. Sixteen (16) Regional Offices excluding DepEd ARMM;
  - c. Schools Division Offices – Proper (206 as of 30 June 2013); and
  - d. Personnel whose services are chargeable to specific objects of expenditures in the GAA Personnel Services, that is, casual and contractual employees.

All employees at the school level and DepEd ARMM offices are excluded in the DepEd Rationalization Program.

5. DepEd's RP Phase I was submitted in February 2013. This was crafted by the DepEd Change Management Team (CMT) whose members represent the various DepEd levels, positions, functions and disciplines. In crafting the plan, the CMT followed a process that was consultative, participative, and transparent. Their recommendations are consistent with time-proven principles in the field of management and organization development.

6. On **November 15, 2013**, the DepEd RP Phase I was approved by the Department of Budget and Management (DBM). The DepEd is **given a maximum of four (4) months** from the date of approval to place the employees and positions in the new staffing pattern (SP). The basis of the placement of employees to comparable positions will be merit and performance.

7. In addition, the general provisions of the approval are as follows:

7.1. The employees whose items will be affected by the rationalization shall have the following options:

- a. **Remain in government service** through converting their respective item/s from regular to Co-Terminus with the Incumbent (CTI) status, either in DepEd including schools or other agencies
- b. **Avail of retirement/separation with the applicable incentives.**

**Employees who will be affected by the DepEd Rationalization efforts shall be given up to two months from the date of approval or January 15, 2014 to submit their preferred option to their respective heads of offices.**

7.2. Casual/Contractual items in the agency will be abolished pursuant to the rationalization efforts. In view of this, the services of personnel hired on a casual/contractual basis in the DepEd should not go beyond one (1) month after the approval of the agency's RP. **Thus, all contracts of casual and contractual personnel shall end on December 15, 2013.**

Affected Casual/Contractual Personnel, if qualified, are entitled to avail of the retirement/separation package under the Program within one month upon approval of the DepEd RP.

7.3. The Notice of Organization, Staffing and Compensation Action (NOSCA) that reflects the specific positions in the approved SP would be issued later by DBM upon submission by DepEd of the specific positions as placed therein.

**Upon the release of the NOSCA from DBM, DepEd can fill up the open and newly created positions through the regular selection process. All personnel, whether affected or not, may apply for the open positions, provided they meet the requirements of the applied position.**

8. The National Change Management Team (CMT), reconstituted through DepEd Memorandum No. 271 s. 2011, shall manage the implementation of the approved Rationalization Plan. The central, region and schools division offices shall also reconstitute and activate their field CMT to manage the implementation of the RP at their respective levels.

9. The undersecretaries and assistant secretaries, together with the directors at the central and regional levels and schools division superintendents (SDSs), shall be meeting their respective employees from **December 2 to 13, 2013** to communicate the approved plan.

10. Enclosed is the **Implementing Guidelines for the DepEd RP** to ensure smooth transition of the organization and the timely submission of the outputs required by DBM.

11. Immediate dissemination of and compliance with this Order is directed.

  
**BR. ARMIN A. LUISTRO FSC**  
Secretary

Encl.:  
As stated

Reference:  
DepEd Memorandum: (No. 271, s. 2011); 224, s. 2011; 451 and 469, s. 2004

To be indicated in the Perpetual Index  
under the following subjects:

BUREAUS & OFFICES  
EMPLOYEES  
OFFICIALS  
POLICY  
QUALIFICATIONS  
RATIONALIZATION  
RETIREMENT  
RULES & REGULATIONS

Made: Approval of Bar Plan  
1072 December 1, 2013

## DEPED RATIONALIZATION PROGRAM

### STEP BY STEP PROCESS

*For the Heads of Offices in the Central, Region and Schools Division Levels*

#### PREPARATORY WORK:

**1. Obtain a copy of all materials and resources from the CMT Secretariat**

- |                                                          |                                           |
|----------------------------------------------------------|-------------------------------------------|
| a. DepED Order on the RP and the Implementing Guidelines | e. RP-approved Functions                  |
| b. EO 305 + IRR                                          | f. RP-approved Staffing Pattern           |
| c. FAQs from PIA (Sept 2011)                             | g. Planilla database                      |
| d. RP-approved Structures                                | h. Retirement Tool (MS Excel)             |
|                                                          | i. Letter Template for Affected Personnel |

**2. Reconcile Data and Records of all Employees**

**a. Personnel Unit / Section / Division**

- Prepare a master list of the updated official records of employees with the following data:
  - creditable years of service (with GEIS premium payments)
  - length of government service (for the computation of incentives)
  - actual salary of employees as of Dec 31 2011 (for the computation of incentives)
  - computation for the OFFICIAL AGE of each employee (specifically for the fraction of the year)
- Update the planilla as of November 30, 2013

**3. Establish the Sub-Change Management Team (CMT) at CO and per RO and SDO (see section IV.A.1 on Implementation Arrangements):**

- a. include help desk members and database managers as part of the Sub-CMT
- b. Train the Help Desk and Database Managers

#### COMMUNICATE TO PERSONNEL:

**4. Schedule a Management Meeting (for CO and RO levels only).**

- a. Undersecretary or Assistant Secretary with the respective Directors and Chiefs
- b. RO with the ARD, SDSs and ASDSs (with the U.Sec or A.Sec assigned to the region if available)

**5. Orient all Personnel in the Office about the DepED RP:**

- a. Background
- b. Implications of the RP to the Planilla ITEMs
- c. Implications of the RP to the Personnel
- d. OPTIONS of Affected Personnel
- e. Presence and Role of Help Desks

**6. Direct the Database manager/s to update Planilla Database (baseline) to have an accurate list of affected and unaffected personnel based on the approved staffing pattern**

**7. Individual letters for the affected personnel shall be prepared by the respective CO CMT Secretariat, and the Personnel Officer at the RO and SDO with the signatories as follows:**

- a. Central Office units – Undersecretary or Assistant Secretary supervising the office/unit
- b. Regional Office – Regional Director
- c. Schools Division Office – Schools Division Superintendent

8. **Have one-on-one dialogues** with each of the affected personnel to:
  - a. Inform him/her of the options + details and implications of each option (*Refer to Section VI: Actions and Options*);
  - b. Critical dates in decision making (*Refer to Section IV.B Implementation Schedule*);
  - c. Give out the letter outlining the available options (with corresponding reply form)

The USec/ASec/Director/RO/SDS should have the following data when holding the one-on-ones:

- a. available comparable positions as possible placements for the affected employee within the office
  - b. estimated retirement/separation package that the affected employee will receive if ever they choose to retire/be separated from government service
9. Helpdesks at each level should be visible and active especially during the 'thinking time' of employees.
  10. **Heads of Offices, together with the HelpDesk, may schedule small group discussions** to further clarify information on the RF implementation and options for affected personnel
  11. **Heads of Offices shall conduct other employee assistance programs** to aid employees in decision-making i.e. placement options outside of DepED, investment level road seminars, eligibility and equivalency concerns, etc.

#### **PLACEMENT OF PERSONNEL:**

12. Follow the Placement Process provided in *Section V and Attachment 4: Mechanism for the Placement of Affected Personnel*
13. Database Team has to update the plantilla database as a result of the placement process and the decisions of employees to either retire or be on OII status.
  - a. Aside from managing the RO plantilla database, the RO database manager/s should regularly monitor the SDO Database Team during the placement process to check the status of items and possible available placements for other affected personnel from the nearby schools divisions
14. The respective sub-CMTs shall address appeals and complaints raised at their level. The sub-CMTs should document all appeals and their resolutions and submit these to the CMT Secretariat.

#### **CONSOLIDATE and SUBMIT**

15. Database Team will prepare the 'Comparative Matrix of Existing and New staffing Pattern'
16. SDO to submit to RO; and CO units to submit to CMT Secretariat
17. RO will validate and check the SDO outputs for accuracy
18. RO shall submit the 'Region-wide Comparative Matrix' to the CMT Secretariat
19. CMT Secretariat will consolidate outputs for the review and approval of the Secretary
20. CMT Secretariat shall submit documentary requirements to DBM.

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## **INTRODUCTION**

In October 2004, the President of the Philippines through the issuance of Executive Order 366 (EO 366) *Directing A Strategic Review of the Operations and Organizations of the Executive Branch and Providing Options and Incentives for Government Employees Who May Be Affected by the Rationalization of the Functions and Agencies of the Executive Branch* directed a strategic review of the operations and organizations of the Executive Branch. The initiative aimed to: a) focus government efforts and resources on its vital core services; and b) improve the quality and efficiency of government services delivery by eliminating/minimizing overlaps and duplication, and improving agency performance through the rationalization of service delivery and support systems and organization structure and staffing (Section 2, EO 366).

In December 2011, the Department of Education (DepEd) embarked on the review and revision of its Rationalization Plan (RP) in light of long-term reforms needed in the education sector notwithstanding fast-changing demands of the local and global environment. Thus, upon request of the DepEd Executive Committee (ExoCom), Department of Budget and Management (DBM) returned the 2006 Rationalization Plan to give the new management team of the Department more time to thoroughly review the functions, the organizational structure and the staffing complement. In the said response, DBM reminded DepEd that the plan should be: a) based on the core functions of the department, b) the resulting staffing pattern after rationalization should have the same or lower number of positions as compared to the filled items at the start of the rationalization effort in 2005, and c) it should not exceed the Personnel Services (PS) level of the department at the start of the rationalization effort in the foreseeable year. The DBM also required the identification of names of employees who will be affected in the implementation of the new structure.

The department opted to submit the Rationalization Plan in two phases. Phase I includes the mandate, functions and proposed organizational structure for the agency. It also shows the indicative staffing and costing for the proposed structure vis-à-vis the 2005 level. Phase II includes the placement of employees in the new staffing pattern and the names and positions of employees that will be affected by the rationalization effort of the organization. This approach was taken to lessen the duplication of effort and avoid undue worry on the part of the employees who might or might not be affected based on DBM approval of the new structure and staffing pattern. Moreover, before employees can be assigned to their new offices in the proposed organizational structure, members of management and the employees themselves have to be prepared and guided to go through a personal and organizational change process.

DepEd's Rationalization Plan- Phase I was submitted last February 2013, DepEd. This was crafted by the DepEd Change Management Team (CMT) whose members represent the various DepEd levels, positions, functions and disciplines. In crafting the plan, the CMT followed a process that was consultative, participative, and transparent. Their recommendations are consistent with time-proven principles in the field of management and organization development.

On 15 November 2013, DBM approved DepEd's Rationalization Plan- Phase I. The order includes the evaluation of the proposed structure and staffing complement, and DBM's actions on DepEd's proposals resulting to the approved rationalized structure and staffing pattern of all levels of the organization. The order concluded with the requirement to submit the comparative matrix of existing positions and the rationalized staffing pattern within four (4) months after the date of approval (*Attachment 1: DBM's Approval Letter*).

In this context, this Implementing Guideline is being issued to ensure the smooth transition of the organization and the timely submission of the outputs required by DBM.

## **I. OBJECTIVES OF THE IMPLEMENTING GUIDELINES**

This issuance aims to guide all key DepEd Managers and Change Management Teams in effectively leading the implementation of the plan to make a smooth and seamless transition to the new functions and structure of DepEd while ensuring that all employees are provided the assistance to make an informed decision on their job actions. Specific objectives are as follows:

- a. Clarify the purpose and scope of the Rationalization Program

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- b. Define the roles of involved offices and inter mechanisms (e.g. CMT and Help desks);
- c. Ensure the timely accomplishment of the DEM mandated Comparative Matrix of Existing and Rationalized Staffing Pattern by:
  - Identifying the actions on current personnel items resulting from the Rationalized Staffing Pattern;
  - Defining the **options available** to personnel to help them make career decisions;
  - Providing the mechanisms for the placement of personnel and in the resolution of **appeals**;
  - Clarifying specific rules applicable to special personnel situations;
- d. Describe the mechanisms available to assist employees in this phase of the organizational transition.

This guideline is also being issued to ensure observance of transparency and accountability in the implementation of the Rationalization Program.

## **II. SCOPE OF THE RATIONALIZATION PROGRAM**

The rationalization of the DepED, as approved by the DEM excludes the structure and staffing pattern of the following:

- a. School level;
- b. Schools Division Offices approved after 30 June 2013;
- c. DepED-ARMM offices and schools;
- d. Attached agencies.

## **III. GUIDING PRINCIPLES**

In the implementation of the rationalization plan, any action taken should always be within the bounds of EO 366, RA 6656 and CSC Rules and should be guided by directives of the Secretary and the Change Management Team. Such actions must also manifest the values of the department and be aligned to time-tested principles for effective management of change. The following is a summary of basic principles to guide implementation:

- a. **Clarity of Vision and Unity in Action.** The process of designing the organizational structure of DepED for the Rationalization Plan was conducted in a participative and transparent manner and the resulting structure is based on the mandate of DepED, its strategic directions, and the required functions of each DepED level (RA 6656). Clear understanding of the rationale for the structure and reason for the change is required of all implementers of the plan. When all implementers understand the vision in the same manner and in the same clarity, there would be unity of action.
- b. **Rationality and Objectivity: "Think DepED".** Similar to the structure, all the positions therein were all based on the functions. Rationalized positions are positions in the original plan that which are with enhanced functions, or are abolished or reduced in number in the Rationalized Staffing Pattern. Reason for abolition or reduction is based on the necessity of the function and position in the organization and not related to the personal performance of the job holder.
- c. **Individual Choice** - Holders of rationalized positions are considered "affected" employees but are not automatically separated from government service. They can:
  - apply for retirement/separation and avail of the incentive provided for by the program;
  - convert the regular status to Co-Term plus with the incumbent (CTI) status.

Permanent employees, who opt to remain in government service but are not placed within the department, may stay as part of the CSC/CPS pool for placement in other government agencies, or within the DepED on a "for-terminus with the incumbent" status in an assignment to be determined by DepED.



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- d. **Management Prerogative** – At the end of the day, the head of office is responsible and accountable for the results or accomplishment of the office targets. In the placement process, the teams responsible for conducting the placement of affected personnel shall have a recommendation prepared for the appointing authority at each level. The Secretary, with the ex-Officio, shall approve the final placement results considering the needs of the office for each position and the performance of all those who opted to apply for the position.
- e. **Engaging People:** Superiors shall approach the task of informing the organization in a personalized manner and take time to dialogue with affected employees to discuss options. Each DepED personnel, both affected and unaffected shall receive a letter from the Head of Office as regards status of their terms or positions 'personally'. Superiors shall ensure that those affected shall be allowed to discuss with guidance. "Those who may have loss in life shall have more in assistance and care".
- f. **Principle of Caring for and Enabling the People: "Maka-tao" and "No one left behind".** DepED shall take care of its people in the whole process of implementing the Rationalization program. DepED will organize 'Help Desks' in all DepED levels to help explain especially to those affected, the rationale of the Rationalization Plan, the options available for their fate, and the consequences of each option. DepED shall partner with entities to organize live food and employment option to employees who choose to retire or leave government service but are looking for continuous sources of income.

As per EO 366, a team shall include a capacity building program for all DepED employees, considering that annual assignments in the CO and RO have changes. DepED shall try to ensure that all those affected, but want to stay in government service and possess or are willing to acquire the competencies and qualifications required by the offices or units in the approved RP shall have a place in the organization. Employees shall be given orientation and guidance on their new or revised functions at the start of the Transition stage. They shall also be provided with orientation and training to enhance their competencies to perform their new tasks and responsibilities.

- g. **Matching people to jobs.** It is critical to put the "right person for the right job" and to give "the right job to the right person". This process may take time. To effectively manage the change and ensure "job fit", the process for the placement of personnel shall be done in stages, utilizing the appropriate processes and tools and abiding by existing rules of the CSC, DSM and the CES Board. This is also in consonance with RA 6656 s. 19(b) "An Act to Protect the Security of Tenure of Civil Service Officers and Employees in the Implementation of the Government Reorganization".

#### **IV. IMPLEMENTATION ARRANGEMENTS**

##### **A. IMPLEMENTING TEAMS**

As provided by EO 366, the key unit responsible and accountable for the Rationalization Program is the Change Management Team (CMT) as established by the Department. The critical functions of the CMT relevant to these are to: (1) Oversee the actual implementation of the Rationalization Plan; and (2) Mitigate the impact of the rationalization effort. Hence, the implementation arrangements discussed below are mainly based on this structure. In addition, CMT - Help Desks are to be established at each level, to assist employees through the decision-making process as requisite to transition.

The following table provides a summary of responsibilities and composition of the sub-teams involved in the implementation of the Rationalization Program:

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**GENERAL RESPONSIBILITIES AND COMPOSITION**

**1. DepED Change Management Team (CMT) – National level**

**Composition:** The DepED CMT (National CMT) is composed of the DepED Executive Committee (ExeCom), Bureau, Service Centers and Regional Directors (selected Schools Division Superintendents (SDS) and Assistant Schools Division Superintendents (ASDS) and Representatives from the DepED National Employees Union and other associations. (See Attachment 2 for the List of CMT members and Help Desk)

**Responsibilities:**

- Oversee the actual implementation of the Rationalization Plan
- Mitigate the impact of the rationalization effort, and
- Coordinate and consolidate the processes and outputs of the sub-change management teams

**Specific responsibilities of the ExeCom as part of the CMT:**

- Provide the overall directions and policies for the implementation of the Rationalization Program
- Act as champions for the development of implementation Guidelines for the entire Department following the EO 366 and other pertinent government rules and guidelines
- Steer the change and information/communication processes
- Ensure the submission to DDM of the required outputs relevant to the Rationalization Program (i.e. Consolidated Matrix of Existing and Approved Staffing Pattern)
- Provide support to the Department Secretary on decisions and policies relevant to the RP

**2. Sub-CMTs at each level: Central Office and Field CMTs**

**Composition:** The Sub-CMT for the **Central Office** shall be the CMT Discussion Group 1 (CMT-DG-1) that handled the design of the Rationalization Plan for the CO during Phase 1. In the event that the members of the CMT-DG-1 are unavailable due to the responsibility of overseeing the implementation of the plan in their respective regions/offices/division, then, the CO CMT shall be (at the minimum), composed of: the Undersecretaries, the Assistant Secretaries, the Central Office Directors, the Chief of Personnel Division, the Chief of Management Division, and an official representative of the DepED National Employees' Union.

A Sub-CMT for each **Regional Office** is composed of the Regional Director, the Assistant Regional Director, the Chiefs of Divisions, the Regional Information Officer, the Human Resource Management Officer (HRMO), the Planning Officer, and an official representative of the DepED National Employees' Union Regional Chapter.

A Sub-CMT for each **Schools Division Office** is composed of the Schools Division Superintendent (SDS), the Assistant SDS, the Head of Personnel Unit, a representative from the Educational Supervisors, the Schools Division Information Officer, and the official representative of the DepED National Employees' Union Division Chapter.

*Note: EO 366, HR Rule IV, Sec 7 stipulates that in the absence of an accredited union, the rank and file employees shall elect from among their ranks their representative to the CMT through an assembly organized for the purpose.*

**Responsibilities:**

- Support management in the implementation of the RP, which includes the communication of appropriate information; monitoring the application of the policies and guidelines; participate in the mitigation/resolution of change management issues and personnel appeals; and participate in the presentation and discussion of placement recommendations
- Provide the ExeCom with feedback and recommendations that are necessary to resolve issues or improve the implementation processes
- Ensure the proper application of the policies, guidelines and processes relevant to placement under the RP

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- Develop and implement other employee assistance mechanisms based on the needs of the constituents and in collaboration with relevant government agencies and organizations

### **3. CMT Secretariat**

**Composition:** The CMT Secretariat is composed of personnel from EDP TAF, Personnel Division, Employee Welfare and Benefits Division and Management Division (See Attachment 2 for the list of members).

**Responsibilities:**

- Assist the CMT in planning, implementing and providing technical coordination of all activities relevant to the Rationalization Program
- Assist the CMT in preparing the needed inputs, documents, and reports required for the submission of the Rationalization Plan
- Consolidate and analyze data and workshop results to aid the CMT and Executive in decision-making
- Ensure the integrity and confidentiality of data and information regarding RP status and operations
- Provide administrative support services to the CMT such as but not limited to clerical, logistical, documentation, and workshop management services

### **Help Desks (HD): Central (National); Regional; and Schools Division**

**Composition:** The Central Office Help Desk shall be composed of two sub teams that will handle queries and clarifications regarding a) options for affected employees; and b) retirement benefits and incentives

The Central Office Help Desk shall also serve as the National Help Desk that will assist the various teams at the field level. The oversight for the operation of this team will be provided by the Assistant Secretary in Planning and Development as well as the Assistant Secretary for Programs and Projects.

The **Regional Office Help Desk** shall be composed of selected individuals assigned by the Regional Director. As preference, these individuals are those holding retained positions in the rationalized structure.

The **Schools Division Office Help Desk** shall be composed of selected individuals assigned by the Schools Division Superintendent. As preference, these individuals are those holding retained positions in the rationalized structure.

**Responsibilities:**

- Assist the CO and the RO and Schools Division CMTs in helping employees understand the content and process of the RP implementation and respond to their concerns
- Provide assistance to employees in relation to:
  - Clarifying information on EO 366 and RP guidelines
  - Clarifying required Qualification Standards (QS) per position
  - Computation for Retirement/Separation Benefits
  - Understanding the Options available for Affected personnel
  - Determining possibilities for placement
- In collaboration with the CMT Secretariat, assist in the placement of affected personnel who opted to continue government service outside DepEd.
- National Help Desk shall also assist all the Regional and Schools Division Help Desks

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**B. IMPLEMENTATION SCHEDULE**

As stipulated in the letter of DBM regarding approval of the Rationalization Plan, the Department is given four (4) months to implement the Rationalization Plan upon its approval. This implies the observance of critical implementation dates specified in the table below. Attachment 3 provides a complete listing of implementation activities covering the 4 months to further ensure that the deadlines are met.

Critical Dates	Activities
15 Nov. 2013	Approval Date
15 Dec. 2013	<b>End of contracts of non-permanent employees whose contracts are funded through GAA-PS</b>
27 Nov. – 13 Dec. 2013	Announcement of Approval in a forum (per office and/or organizational level)
09-10 Dec. 2013	Notification and issuance of 'letter' to 3rd Level Personnel
11-12 Dec. 2013	Notification and Issuance of 'letter' to CO affected personnel
11-13 Dec. 2013	Notification and Issuance of 'letter' to RO and SDO affected personnel
13 Dec. 2013	Submission of the Reply form of Affected 3rd Level Personnel
19 Dec. 2013	Submission of the Reply form for prospective Regional/SDO Division Chiefs
15 Jan. 2014	Last day of the submission of reply forms for 1st and 2nd level positions (a. levels)
15 Jan. 2014	<b>Official Effective Date of Retirement / Separation of Employees that are retiring under EO 386</b>
16-20 Dec. 2013	Conduct of Placement Process for affected 3rd Level Personnel
23 Dec. – 8 Jan. 2014	Placement Process for prospective Regional/SDO Division Chiefs
10 Jan. – 14 Feb. 2014	Conduct of Placement Process for all affected 1st and 2nd level positions, including presentation of placement recommendations to the respective CMT of each office
14 Feb. 2014	<b>Submission to DBM of the List of Retirees and Request for Funding of Incentives</b>
03 Jan. 2014	Posting of the results of the placement to 3rd level positions
10 Jan. 2014	Posting of the results of the placement to Regional Chief Positions
10 Jan. 2014	Posting of the results of the placement to SDO Chief Positions
17 Feb. 2014	Posting of the results of the placement of affected personnel
21 Feb. 2014	<ul style="list-style-type: none"> <li>▪ SDOs' submission of the Comparative Matrix of Existing and Approved Staffing Pattern – to the Regional office</li> <li>▪ Bureaus/Centers/Services/Academy submission to CG Personnel Division</li> </ul>
27 Feb. 2014	ROs' submission of the Comparative Matrix of Existing and Approved Staffing Pattern – to the CG CMI Secretariat
7 Mar. 2014	Submission of report to the ExecDir
14 Mar. 2014	Submission of Report to DBM

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**C. COMMUNICATION**

The following communication channels and assistance are provided to ensure consistency and accuracy in dissemination of information:

**1. Communication Avenues**

Various approaches shall be utilized to ensure that employees are informed and have access to accurate and complete information on the Rationalization Program. Communication approaches may be through seminars, forum in the office, small group discussions, and one-on-one dialogues.

**2. Communications Instruments**

- 2.a. **DepED Order.** The approval of the Rationalization Plan and guidelines for its implementation shall be issued and disseminated immediately to formally document the announcement of DBM's approval and prepare the organization for its implementation.
- 2.b. **Individual letters to the affected personnel.** A personalized letter shall be given to each affected employee signed by the head of office at each level and will be handed to the employee during the individual discussion between the personnel and his/her head of office. The letter shall communicate the:
  - Effect of the rationalized staffing pattern to the position item;
  - Options for the affected personnel; and
  - Available assistance to be provided.
- 2.c. **Pamphlets and Information Sheets.** Information, education and communication (IEC) materials highlighting critical matters regarding the rationalization program and addressing to "frequently asked questions" (FAQ) shall be prepared and distributed by DepED's Communications unit in coordination with the OMT secretariat as reference for management and staff.

**3. Employee Assistance: Help Desks**

As mentioned earlier, a 'Help Desk' shall be organized and activated as soon as the Rationalization Plan of DepED is approved by DBM. It shall operate for six months or until such time as the Secretary deactivates it. The Help Desk shall be operated by a main team from Central Office who shall coordinate with the Help Desks of each region. The following parameters are to be followed regarding Help Desks:

- 3.a. Queries and clarifications regarding the implementation of the rationalization program can be coursed through the Help desk of each office.
- 3.b. Issues and concerns that are left unanswered shall be raised directly to the Help Desk at the Central Office by a designated member of the Help Desk at the field level. This is to ensure that clarifications or queries are properly organized to expedite responses to be provided. A dedicated email address will be used for this purpose to ensure proper documentation of the correspondence.
- 3.c. Queries or clarifications raised through the Help Desk are expected to be answered immediately or at least within 24 hours for those raised to the Central Office Help Desk.

**V. GUIDELINES ON ACTIONS ON PLANTILLA ITEMS AND OPTIONS OF PERSONNEL**

The rationalization of the structure entails certain actions to be taken on existing plantilla items, and those are as follows: **Retain** (in the same corresponding new office), **Abolish** (position item is no longer reflected in the RSP), and **Transfer** (to another office). As a consequence, incumbent personnel holding plantilla items shall be categorized as:

- o **Unaffected personnel.** This is the status of a position holder of an item that is retained in the rationalized staffing pattern (RSP). Hence, all personnel with this status shall remain in their current positions.

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- o **Affected personnel.** All personnel deemed affected are those whose plantilla item is abolished (no longer reflected in the RSP) or considered "merged" (quantity of current position items is reduced based on the requirement of the new structure). As a general rule, all plantilla items shall be accounted for in their "mother units" for the purpose of identifying the affected personnel.

In this context, the DepEd is directed to undergo a placement of personnel to transition the organization to the new structure. A mechanism shall be established for this purpose where the placement of personnel to comparable positions shall be based on merit and performance. The following provisions shall govern the placement process:

1. Personnel should express their intent to remain in DepEd to ensure of their willingness to undergo the process of **placement** in a comparable position within the same or another organizational unit within DepEd.
2. The instrument that the affected personnel can use to express whether intent to be placed in a comparable position is the reply form that is attached to the letter he/she shall receive from management, informing him/her of the status of the higher item in the SP and the options available under EO 366.
3. A comparable position is one with the same or not more than three (3) salary grades higher than the current position title of the same job group, provided that the employee meets the requirements of the job (i.e. qualification standards; technical competencies; and psychosocial attributes and workplace attitudes).
4. The placement process and criteria to guide the heads of offices in placing affected personnel into comparable positions within DepEd are listed under **Attachment 4: Guidelines for the Placement of Affected Personnel**.
5. Placement recommendations at each level shall be discussed with the concerned personnel, after which, these shall be presented to the respective OMT for feedback before submission to the Secretary for approval as final authority.
6. As authorized and designated by the Secretary, the Undersecretary or Assistant Secretary shall be accountable for the conduct of the placement process in offices of the Central Level that belongs to the organizational strand assigned to them. For the field offices, the authority is delegated to the Regional Director for placing personnel in the new positions in the Regional office and to the Schools Division Superintendent for those in the Schools Division Office.

In the event that placement is not feasible, EO 366 provides the following options for affected personnel:

- **Remain in government service** through converting their respective items from regular to Co-Terminus with the Incumbent (CTI) status, either in DepEd (including schools) or other agencies.
- **Avail of retirement/separation with the applicable incentives.**

Specific provisions are as follows:

**A. Convert the regular status to "Co-terminus with the Incumbent" status**

A.1. Affected Personnel who choose to remain in government service however cannot be placed in the RSP have the option to convert their regular status to **Co-terminus with the Incumbent (CTI)**.

A.2. CTI Status has the following conditions, as provided in EO 366 Section 9 and IRR Section 13:

A.2.a. The employee shall not suffer any diminution in pay, except for certain allowances that used to be given corresponding in the performance of specific functions which would no longer form part of their new functions. This means that the reassigned personnel will hold their position and rank level with full rights to benefits and mandatory allowances (bonus, cost of living allowance, loyalty pay, clothing allowance) but not those allowed in their previous position by virtue of their functions e.g. RATA.

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- A.2.b. Funds for the continued payment of their salaries shall be transferred to the recipient office.
  - A.2.c. The position shall be abolished only upon vacancy due to appointment to another position, retirement, separation or transfer to another agency, at which time the funds corresponding to the vacant position shall revert back to the General Fund.
  - A.2.d. If the employee later objects to the new assignment, she shall be deemed separated/retired but without the EO 335 incentives;
  - A.2.e. The affected personnel shall express his/her preferences of assignment. However, final decision shall be given by the appropriate appointing authority based on where the personnel can provide services needed by the recipient office.
  - A.2.f. Reassigned personnel are expected to perform the functions and responsibilities of their new assignments.
- A.3. C. in DepED Central, Regional or Schools Division Levels
- A.3.a. Affected personnel on CTI status may be reassigned to the Central, Regional or Schools Division levels except for those personnel holding medical or allied medical positions (Medical Officer, Dentist, Nurse, Nutritionist/Dietitian, and Dental Aide) who can only be reassigned to DepED-supervised priority schools.
  - A.3.b. Affected Personnel who choose to take CTI status may be reassigned to the same office or to another office/unit in another level of the organization where their services are needed.
  - A.3.c. Placement for these employees may only commence after the placement of personnel in the recipient office has been completed.
- A.4. CTI in DepED Schools
- A.4.a. Affected personnel on a CTI status may transfer to DepED schools where their services are needed.
  - A.4.b. As stipulated in the RP approval letter from DBM, affected personnel holding Medical and allied-medical positions (Medical Officer, Dentist, Nurse, Nutritionist/Dietitian, and Dental Aide) may only choose the CTI option if they shall be reassigned to the priority schools to cater to the needs of the school children. In the exigency of the service, they may also be recalled by their supervisors to provide health-related services to other schools or cluster of schools near to where they are reassigned.
  - A.4.c. Affected personnel shall express their preferences of schools to be assigned. However, the decision shall be given by the appropriate appointing authority based on where the personnel can provide services needed by the schools.
  - A.4.d. The transfer to the DepED Schools shall go through the process of the Civil Service Commission (CSC) and official transfer order shall be given only by CSC. DepED shall facilitate the initial transfer process by notifying employees and school assignments.
- A.5. CTI in Other Executive Agencies
- A.5.a. Affected Personnel shall also have the option to join other agencies in the executive branch. He/she shall be endorsed by DepED in the CSC for inclusion in the pool of government employees to be placed in other government agencies.
  - A.5.b. Once the CSC finds a match, the affected employee shall transfer to the recipient agency bringing his/her permit with him/her and its existence is conformous with the incumbent. If the employee later objects to or does not accept the assignment, he/she shall be deemed separated or retired with the appropriate benefits but without the incentive under EO 335.

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B.3.c. The placement procedure of CSC is stipulated in Section 15 of EO 366 .RR. Attachment 5 provides the Process for transferring personnel to the CSC Pool or to a CTI Status.

**B. Retirement / Separation from Government Service**

B.1. Affected personnel also have the option to retire or be separated from government service availing of the regular retirement or separation benefits plus the applicable incentives under EO 368.

B.2. Affected Personnel have two (2) months from the date of RP approval to signify their intention to avail of the retirement/separation package.

B.3. The Agency Personnel Officer shall immediately provide the names and records of all affected personnel to the Government Service Insurance System (GSIS) to enable the latter to reconcile its records with the Agency.

**B.4. Retirement/Separation Benefits:**

B.4.a. No affected employee who opt for retirement/separation shall receive less than an aggregate of 7.5 Million Pesos (P50,000,000) as either retirement/separation gratuity benefit from both the National Government and the GSIS.

B.4.b. Affected personnel who opt to retire/be separated shall, in addition to the applicable benefits be entitled to the following:

- Refund of Pag-IBIG Contributions.
- Commutation of Unused Vacation and Sick Leave Credits.

B.4.c. The table below shows the factor for computing incentive under the rationalization program (based on the EO 77 s.2012 – Amending EO 637 s.2007 on the Basis of the Computation of the Incentives of Personnel Affected by the Implementation of the Rationalization Program under EO No. 368 (s.2004):

YEARS OF SERVICE *	INCENTIVE FACTOR	COMPUTATION
20 and below	0.5	▪ ½ month of the basic salary as of December 31, 2011 for every year of government service and a fraction thereof
21-30	0.75	▪ ¾ month of the basic salary as of December 31, 2011 for every year of government service and a fraction thereof, computed starting from the 1 <sup>st</sup> year
31 and above	1	▪ 1 month of the basic salary as of December 31, 2011 for every year of government service and a fraction thereof, computed starting from the 1 <sup>st</sup> year

\* Note: Only the government service up to age 59 and a fraction thereof shall be counted

B.4.d. The EO 368 incentive would be given on a one-time basis, and shall be paid by the national government (DBM) based on actual years of government service as reflected in the Employee Service Record duly certified by the authorized official in the DO,RO, and SDO.

B.4.e. Government services which are to be included in computing actual years of government service includes:

- Casual status – includes those funded by the GAA under a lump sum appropriation for Emergency Laborer
- Temporary status – are those funded under the GAA-PS and duly attested/approved by the CSC
  - a. Temporary services of teachers, related teaching and non-teaching employees whether intermittent or continuous;
  - b. Contractual status / including ad-hoc/term status of non-permanent employees



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- b. Permanent (regular) status, whether intermittent or continuous, including those served in other government agencies and while on approved leave of absence (e.g. vacation, sick, study, or scholarship or study grant); and
  - c. Provisional status of teachers including as substitutes, whether intermittent or continuous
- R.4.f. According to EO 366 Section 15, Government personnel who voluntarily retired/separated as a result of the rationalization efforts of the Department/Agency concerned shall not be appointed or hired in any agency of the Executive Branch, including in COCs/OGPs, except in educational institutions and hospitals, within a period of five (5) years. Reemployment in any Branch of Government shall be considered as new entry to the civil service.
- R.4.g. Provision of consultancy services by government personnel who voluntarily retired/separated as a result of the rationalization shall be governed by Section 7 of RA 6713 or the Code of Conduct and Ethical Standards for Public Officials and Employees dated 20 February 1989 (Section 17, Policy on Rehiring of Retired/ Separated Personnel).

#### **VI. GUIDELINES ON NON-PERMANENT EMPLOYEES**

- A. Non-permanent employees are those employed by DepED either as casual or contractual status. DBM Circular Letter No. 2013-5 dated 22 July 2013 states that "all contracts to be terminated one month after RP approval".
- B. Casual and contractual personnel are included in the Rationalization Plan. Therefore, if qualified, considering the other requirements like age and years of service, they are entitled to avail of the retirement benefit or package within 1 month upon approval of the RP.

#### **VII. GUIDELINES ON APPEALS**

In accordance to EO 366 IRR Rule IX, an appeals mechanism shall be set up and managed by the respective GMT at each level. It shall address the issues and concerns raised by personnel affected by the Rationalization Program.

##### **A. Scope of Appeals**

- A.1. In cases when an affected personnel is not in agreement with the action taken regarding his/her employment, the employee may submit an appeal to the Head of Office through the GMT.
- A.2. The following are possible causes of complaints and appeals:
  - a.2.a. Non- notification of the affected personnel
  - a.2.b. Deviation from Sections 3 and 4 of RA 6713 on the order of placement and of dismissal of affected personnel
  - a.2.c. Actions implemented that are not included in the approved Plan
  - a.2.d. Violations of provisions of the Implementing Rules and Regulations of EO 366
- A.3. The following are **non-appealable matters**:
  - a.3.a. The declaration of what functions are to be abolished or merged as a result of the consultations between the management and the union or rank and file representative in the change management team;
  - a.3.b. The positions in the approved staffing pattern

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- a.3 c. For those who opted to remain in government service in DepED, their deployment or reassignment; and
- a.3 d. For those who opted to remain in government service via the CSC pool, their placement in another agency.

**B. Process for making Appeals**

Based on the E.O. 366, filing of Appeal shall undergo the following process:

- b.1. Employee may file complaint with their respective sub-CMT within five (5) working days from receipt of notification that position is deleted.
- b.2. Field CMT shall respond and issue the resolution to the employee within five (5) working days. Resolution shall be signed by the Head of the CMT of the corresponding DepED office level.
- b.3. The employee may further file an appeal with the Secretary, as Chair of the National CMT within five (5) working days from the receipt of the resolution from the Field CMT.
- b.4. Department/Agency Head to render decision within fifteen (15) working days from receipt of appeal.
- b.5. Affected personnel may further appeal to the CSC the decision of the Agency Head within 10 working days from receipt of decision from the Head of Agency.
- b.6. Unsettled issues must be documented and monitored by the Department CMT.
- b.7. The CSC shall have to render decision within 30 working days from filing of appeal. Its decision shall be final and executory.





REPUBLIC OF THE PHILIPPINES  
DEPARTMENT OF BUDGET AND MANAGEMENT  
MALACANANG, MANILA

NOV 15 2013

**HON. ARMIN A. LUISTRO**  
*Secretary*  
Department of Education (DepEd)  
DepEd Complex, Meralco Avenue  
Pasig City

Attention: **Undersecretary Rizalino D. Rivera**  
*Chairperson, Change Management Team*

Sir:

We are pleased to inform you of the approval of the Rationalization Plan (RP) of the DepEd which was submitted to this Department pursuant to Executive Order (EO) No. 366 dated 04 October 2004.

The highlights of the Plan, the evaluation/findings of this Department, as well as the approved organizational structure and staffing pattern (SP) are shown in **Attachments A to D**.

Please note that the DepEd is given a **maximum of four (4) months** from this approval to place its existing positions in the aforesaid SP. The Notice of Organization, Staffing and Compensation Action that reflects the specific positions in the approved SP would be issued later by this Department upon submission by the agency of the specific positions as placed therein.

Personnel in positions that could no longer be accommodated in said SP have the option to: (a) retire with the applicable incentives; (b) be placed to other agencies needing additional personnel, to be handled by the Civil Service Commission (CSC); or (c) their respective positions would be converted from regular to **coterminus with the incumbent (CTI)** status, i.e., to be abolished once vacated, except those personnel occupying medical/allied medical items who have to be transferred only to DepEd-supervised priority schools to cater to the needs of the school children, if they will not opt to retire/be separated. Notwithstanding this arrangement, in the exigency of the service, the medical/allied medical personnel concerned could be required by their supervisors to provide health-related services to other schools near to where they are reassigned.

Despite the **four (4)-month** period to submit the placement of positions in the approved RP, please note that **Section 17 of the Implementing Rules and Regulations of EO 366** provides that the incentive is **available only within two (2) months** from this approval. Thus, to facilitate the identification of affected personnel, we suggest that the DepEd issue a memorandum informing all regular personnel of the available options and once affected, choose any one of the three.

Said memorandum should also clarify that employees who could not be placed in the SP but will later opt to retire shall be **deemed retired within the two (2)-month period from the approval of the DepEd RP**.

The services that they have rendered beyond said period until the submission of their names to the Department of Budget and Management (DBM) shall no longer be credited in the computation of their incentives and terminal leave benefits. However, their salaries for the services they have rendered shall be paid by the agency, subject to existing budgeting, accounting and auditing rules and regulations.

May we also note that per existing policy casual/contractual items in the agency are abolished pursuant to its rationalization efforts. In view of this, the services of personnel hired on a casual/contractual basis in the DepEd should not go beyond **one (1) month** after the approval of the agency's RP, consistent with *DBM Circular Letter (CL) No. 2013-5<sup>1</sup>* dated 22 July 2013. Affected casual/contractual personnel, if qualified, are entitled to avail of the retirement/separation package under the Program within one (1) month upon approval of the DepEd RP.


The DBM would process the incentives of the regular/casual/contractual personnel upon submission of said documents.

Those holding CTI items are no longer entitled to the incentives under the Program if they would opt to retire/be separated after the two-month period.

May we request that the DepEd facilitate the immediate submission to the CSC of the list of priority agencies for reassignment of the affected personnel who opted to be placed to other agencies needing additional personnel.

For your guidance, herewith are *DBM CJ 2006-10* dated 26 June 2006 on the processing of retirement/separation/unemployment benefits by the Government Service Insurance System, *DBM Budget Circular No. 2013-1* dated 12 April 2013 on the documentary requirements and procedures in the processing by the DBM of retirement benefits of government employees, and *CSC Resolution No. 080058* dated 11 January 2006 containing the guidelines on the placement of affected personnel.

Very truly yours,

  
**FLORENCIO B. ABAD**  
Secretary

cc: **Chairman Francisco T. Duque III**  
Civil Service Commission

<sup>1</sup> Guidelines on the Filing of Positions and the Hiring of Personnel for Agencies Whose RP is Yet to be Approved by the DBM, Those Whose RP was Withdrawn, Returned Without Action or Not Submitted Within the Deadline, and Those with Approved RP

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**ATTACHMENT 2**

**LIST OF MEMBERS OF THE NATIONAL CHANGE MANAGEMENT TEAM**

**A. DepED Change Management Teams (CMT)**

NAME	DESIGNATION
1. Br. Amín A. Luisar FSC	DepEd Secretary
2. Mario A. Derizulto	USEC, Partnerships and External Linkages
3. Alberto I. Muyot	USEC, Legal & Legislative Affairs
4. Dina S. Orante	USEC, Programs & Projects
5. Rizalino B. Riebra	USEC, Regional Operations
6. Francisco M. Varela	USEC, Finance & Administration
7. Lorna D. Dño	Asst. Secretary for Programs & Projects C/C BA, B
8. Reynado Antonio D. Lagasa	Asst. Secretary/Chief of Staff
9. Jesus J.R. Meroe	Asst. Secretary for Planning
10. Amando C. Ruiz	Asst. Secretary for Finance & Admin.
11. Tonista M.C. Limali Esc	Asst. Secretary for Legal & Legislative Affairs
12. Robert M. Agustin	Director, Administrative Service
13. Jocelyn B. Andaya	C/C-Director, BEE
14. Rosario D. de Leon	OIC-Director, EOPITAF
15. Marilyn D. Dimasano	Director, BEE
16. Ruth L. Fuentes	OIC Director, MEAP
17. Rogelio J. Morales	Director, Technical Services
18. Ella G. Narponguit	Director, Health & Nutrition Center
19. Amador Patrick R. Saarnal	Director, Communications Unit
20. Beatriz G. Toron	Director, IHO Secretariat
21. Teresita M. Velasco	Regional Director, RO
22. Lourdes G. Anguluan	Regional Director, RO II
23. Isabella M. Borjes	Regional Director, RO I
24. Diosdado M. San Antonio	C/C-Regional Director, RO IV A
25. Sinfonosa A. Guirares	Regional Director, RO V B
26. Ramon Field C. Abcede	C/C-Regional Director, RO V
27. John Arnold S. Sierra	OIC-Regional Director, RO VI
28. Carmelita T. Dulangan	OIC-Regional Director, RO VII
29. Luisa R. Yoo	Regional Director, RO VII
30. Corazon P. Brown	OIC-Regional Director, RO IX
31. Ingrid G. Racoma	OIC-Regional Director, RO X
32. Gloria B. Bengac	Regional Director, RO XI
33. Alan G. Fabreza	OIC-Regional Director, RO XII
34. Dion D. Donato	Regional Director, CAR
35. Alberto T. Escobarde, Jr.	OIC Regional Director, CARAGA
36. Luz S. Almeca	Regional Director, NCR
37. Arturo Bayocot	EDS, Pagadian City
38. Josilyn Solana	C/C SDB, Tanao City
39. Sonia de Leon	Chief, HRWD; C/C-Personnel Div
40. Louisa Roberto	Chief, Management Division
41. Domingo R. Alidor	President, DepED National Employees Union
42. Francisca Cruz	Officer, DepED National Employees Union

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NAME	DESIGNATION
43. Johnny Basawag	Officer, DepED National Employees Union
44. Amador Enriquez	President, National Association of Public Secondary School Heads Inc. (NAPSSH)
45. Restituto Lomerla	Officer, Phil. Assoc. of Educ. Supervisors (PAES) Region 7
46. Sherwin J. Manarquit	President, Public Elementary School Principals' Association (PESPA)
47. Benjamin Mascariña	President, Public Schools District Supervisors Association
48. Eugene Penales	President, National Association of Chiefs and Asst. Chiefs of Elementary Education (NACACEE)
49. George Renante	Officer, Phil. Assoc. of School Superintendents (PASS)
50. Fidel Salasagcol	President, DepED CO Employees Union
51. Romeo Alip	President, Phil. Assoc. of School Superintendents (PASS)

**B. Directory of National Help Desk Members**

National Help Desk Members		Contact Number	E-mail Address
<b>Oversight</b>			
1. Jesus L. R. Mateo	Asst. Secretary, Planning and Development	633-72067 0917-5377799	jcs.l.mateo@deped.gov.ph
2. Lorna D. Dero	Asst. Secretary, Programs and Projects	633-3703 0947-9927338	lmaadnc@deped.gov.ph
<b>On Retirement Package</b>			
1. Leonila "Gelly" Jacon	Office of Undersecretary for Regional Operations	631-2578 0977-000-2617	gelly.jacon@yahoo.com
2. Eugenia "Geny" Mendocza	Office of Undersecretary for Regional Operations	633-7203 0932-547-1529	geny.mendocza@yahoo.com
3. Leonardo "Leard" Guidew	Office of Assistant Secretary for HRMS	633-0667 0927-458-7114	leonardoguidew@yahoo.com
4. Winder "Wicky" Abalar	Personnel Division, HRDS	633-6632 0927-375-3268	bjgwic@yafce.com
<b>On Employee Options</b>			
1. Roger Masapo	OPS-440	633-7216 0917-5011-1170	rogermasapo@deped.gov.ph
2. Francis dela Cruz	Legislative Liaison Unit	633-0887 0927-455-7114	francislcn@yafce.com
3. Juan Araojo	FNC	0917-5237552	araojoj62@gmail.com

**C. CMT Secretariat**

CMT Secretariat	Position Title
<b>Oversight</b>	
1. Rosario D. de Leon	Director, LUPPIAF
<b>Technical Support</b>	

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1. Noelle Ria Marie Roa	BI-SRA Program Specialist, Office of Usec for Regional Operations
2. Leonila Josen	HR Consultant, Office of Usec for Regional Operations
<b>Members:</b>	
1. Joel O. Mendoza	Admin. Officer II, Management Div.
2. Florentino Barte	Admin. Officer V, Management Div.
3. Ma. Fatima Angeles	Admin. Officer II, Personnel Div.
4. Billy Vega	Admin. Officer IV, Employee Welfare And Benefits Div.
5. Edgardo N. Palacol	PDO IV, EDPITAF
6. Sonia T. Sobremisana	Admin. Aide VI, EDPITAF
7. Cecilia G. Tiamson	Admin. Officer IV, EDPITAF
8. Evangelina Puno	Admin. Officer II, EDPITAF
9. Nicva Y. de Jesus	COS, EDPITAF
10. Jojet Gabriel	COS, EDPITAF



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**ATTACHMENT 3  
DETAILED IMPLEMENTATION ACTIVITIES**

**A. Timetable for Communicating the Approval and Notifying Employees**

Date	Implementation Activities	Expected Output	
15 Nov. 2013	Approval Date	Preparatory activities	
18-22 Nov. 2013	Orientation to key and middle-level managers		
25 Nov. – 10 Dec. 2013	Orient and install Help Desks at all levels Training of designated Regional teams for a better management vis-à-vis the Rationalized Staffing Pattern issued by DDM		
<b>STAGE 1: Communicating to Employees</b>			
<b>Announcement of Approval</b>			
27-28 Nov. 2013	<ul style="list-style-type: none"> <li>▪ CMT Meeting (includes all key managers) on the Implementation Guidelines and Timetable</li> </ul>	<ul style="list-style-type: none"> <li>▪ Understanding of the approved Rationalized Structure and Staffing Pattern</li> <li>▪ Clear set of Outputs and Deadlines</li> </ul>	
2-6 Dec. 2013	<ul style="list-style-type: none"> <li>▪ The DepED Secretary announces the RP approval through the issuance of a DepED memo and accompanying implementation Guidance</li> <li>▪ Undersecretaries/Assistant Secretaries to discuss approval and guidelines with the CO/CD Directors and Division Chiefs</li> <li>▪ Regional Directors to discuss to their respective SCSs the approval and guidelines <i>(maybe accompanied by an Undersecretary/Assistant Secretary)</i></li> <li>▪ <b>Notice to personnel holding casual/contractual items regarding the termination of contract (one month after approval)</b></li> </ul>		
4-11 Dec. 2013	<ul style="list-style-type: none"> <li>▪ Under Assistant Secretaries/ CO Directors to announce to their respective office personnel the approval and guidelines</li> <li>▪ Notification and issuance of "letter" to 3<sup>rd</sup> Level Personnel</li> <li>▪ Regional Directors to announce to their respective Regional personnel the approval and guidelines</li> <li>▪ SCSs to announce to their respective SDO personnel the approval and guidelines</li> </ul>		
10-11 Dec. 2013	<ul style="list-style-type: none"> <li>▪ <b>Notifying Each Affected Employee (and Issuance of Letter)</b></li> <li>▪ Individual discussion of Under/Assistant Secretaries/ CO Director with their respective affected employees regarding the options available to Affected Employee</li> </ul>		<p>All Employees are informed of their respective status in the new Structure; and if applicable, the appropriate options afforded</p>
11-13 Dec. 2013	<ul style="list-style-type: none"> <li>▪ Individual discussion of Regional Directors with their respective affected employees the options available</li> <li>▪ Individual discussion of SCSs with their respective affected employees the options available</li> </ul>		
15 Dec. 2013	End of contracts of non-permanent employees whose contracts are funded through GAA-PS		



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**B. Timetable for the Placement for 3rd Level Employees**

Date	Implementation Activities	Expected Output
16 Dec. 2013	<b>Submission of the Reply form of Affected 3rd Level Personnel</b>	
16-17 Dec. 2013	Consolidation of data for Affected 3rd Level Personnel and submission of data to the ExecCom	3rd level employees: • Assignments in the rationalized structure • Retiring / Be separated
16-20 Dec. 2013	Conduct of Placement Process for affected 3rd Level Personnel	
26 Dec. 2013	<b>Submission of placement recommendation of 3rd Level personnel of to the Secretary and Approval</b>	
3 Jan. 2014	Posting of the results of the placement to 3rd level positions	

**C. Timetable for the Placement of Regional Division Chiefs and SDO Division Chiefs**

Date	Implementation Activities	Expected Output
19 Dec. 2013	<b>Submission of the Reply form for prospective Regional/SDO Division Chiefs</b>	
20 Dec. 2013	Consolidation of data for prospective Regional/SDO Division Chiefs Submission of consolidated list to the Regional Director / SDO	Regional and SDO Division Chiefs • Assignments in the rationalized structure • Retiring / Be separated
23-30 Dec. 2013	Placement Process for prospective Regional/SDO Division Chiefs	
2-3 Jan. 2014	Discussion of placement results for Regional Division Chief positions with concerned Under/Assistant Secretary	
6-8 Jan. 2014	Discussion of placement results for SDO Division Chief positions with respective Regional Director	
10 Jan. 2014	Posting of the results of the placement to Regional Chief Positions	
10 Jan. 2014	Posting of the results of the placement to SDO Chief Positions	
<b>15 Jan. 2014</b>	<b>Official Effective Date of Retirement / Separation of Employees that are retiring under EO 366</b>	

**D. Timetable for the Placement for 1st and 2nd Level Employees (all levels)**

Date	Implementation Activities	Expected Output
19 Dec. 2013	*Thinking Time* allotted for Affected 1st and 2nd Level personnel	List of personnel for: a) Placement, b) Retiring/Be separated, c) CH status
15 Jan. 2014	Correction and consolidation of reply forms	
15 Jan. 2014	Last day of the submission of reply forms for 1st and 2nd level positions (all levels)	
12-15 Jan. 2014	Correction of reply forms	
<b>15 Jan. 2014</b>	<b>Official Effective Date of Retirement / Separation of Employees that are retiring under EO 366</b>	
16 Jan. - 14 Feb. 2014	Conduct of Placement Process for affected 1st and 2nd Level Positions including presentation of placement recommendations to the respective CMI at each office	List of personnel that are: a) Placed in the RSP b) Retiring/Be separated (under 2) c) CH status (under 2)
14 Feb. 2014	<b>Submission to DBM of the List of Retirees and Request for Funding of Incentives</b>	
17 Feb. 2014	Posting of the results of the placement of affected personnel	

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***Timetable for the Preparation of Report to DBM***

<b>Date</b>	<b>Implementation Activities</b>	<b>Expected Output</b>
17-20 Feb. 2014	Preparation of the Comparative Matrix of Existing Positions and Rationalized Staffing Pattern	Comparative Matrix of Existing Positions and Rationalized Staffing Pattern per region and 1 for the central office
21 Feb. 2014	<ul style="list-style-type: none"> <li>▪ SDOs' submission of the Comparative Matrix of Existing and Approved Staffing Pattern – to the Regional office</li> <li>▪ Div./Cen./Ser./Academy submission to CO Personnel Division</li> </ul>	
21-23 Feb. 2014	Region's review, checking and compilation of the Comparative Matrix of Existing and Approved Staffing Pattern	
27 Feb. 2014	ROs' submission of the Comparative Matrix of Existing and Approved Staffing Pattern – to the CO OMT Secretary	
28 Feb. – 4 Mar. 2014	CO OMT Secretary's review, checking and compilation of the Comparative Matrix of Existing and Approved Staffing Pattern	
5-6 Mar. 2014	OMT Secretary's packaging of report to DBM	
7 Mar. 2014	Submission of report to the ExeCom	
10-12 Mar. 2014	ExeCom's review of the output	
13 Mar. 2014	Finalization of outputs and other documentary requirements	
14 Mar. 2014	Submission of Report to DBM	

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**ATTACHMENT 4**

**MECHANISM FOR THE PLACEMENT OF AFFECTED PERSONNEL**

**MECHANISM FOR THE PLACEMENT OF AFFECTED PERSONNEL**

DepEd is directed to undergo a placement of personnel to transition the organization to the new structure. A mechanism shall be established for this purpose where the placement of personnel to comparable positions shall be based on merit and performance.

**A. Placement Mechanisms**

The following puts in place a mechanism to place individuals in positions that meet their qualifications, capabilities, and work preference to ensure that the requirements of the task and the organization are fulfilled.

**a.1. Placement Authority**

The ultimate, sole and final authority in placing personnel into positions in the Rationalized Staffing Pattern, rests on the Secretary, who will approve all placement actions of personnel and submit such to the DBM.

As such, the Executive Committee shall be accountable for the placement of third level officials in the Department and thus will have a direct hand in the placement process.

The Secretary has designated and authorized the Undersecretaries and Assistant Secretaries to be accountable for the placement of all other personnel in offices at the Central Level under the organizational strand assigned to them. For the field offices, the authority is delegated to the Regional Director for placing personnel in their new positions in the Regional office and to the Schools Division Superintendent for those in the Schools Division Office.

The table below summarizes the officers accountable for the placement of affected personnel.

	Positions to be filled-up by placement	Accountable Officials	Output
Part 1: Rating of Affected Personnel	<b>Central Office:</b> Directors Division Chiefs Office Staff of the Under / Assistant Secretary 1 <sup>st</sup> and 2 <sup>nd</sup> level positions at the Central Office	UnderSecretary / Assistant Secretary – in-charge of the organizational strand for which the particular office belongs  UnderSecretary / Assistant Secretary – in-charge of the organizational strand for which the particular office belongs with recommendations from Director/Chief of office	Placement recommendations to be presented to the CO GMT for comments
	<b>Region Level</b> Regional Chiefs positions  1 <sup>st</sup> and 2 <sup>nd</sup> level positions at the Regions	<ul style="list-style-type: none"> <li>▪ Assistant Regional Director</li> <li>▪ Subsector SDB</li> <li>▪ Assistant Regional Director</li> <li>▪ Appropriate Chief/Head of the Division in the new structure</li> </ul>	Placement recommendations to be presented to the RO GMT for comments
	<b>Schools Division Level</b> Schools Division Chiefs  2 <sup>nd</sup> and 1 <sup>st</sup> level positions at the Schools Division	<ul style="list-style-type: none"> <li>▪ ASDS</li> <li>▪ President of PESMANAPSH</li> <li>▪ ASOS (in the absence of an ASDS, the SDB in consultation with Regional Director, shall assign a senior officer)</li> <li>▪ Appropriate Chief/Head of the Division in the new structure</li> </ul>	Placement recommendations to be presented to the SDO GMT for comments

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Phases	Positions to be filled-up by placement	Accountable Officials	Output
Part 2: Decisions on the Recommendations	All placement recommendations for CO	DepED Secretary	Final placement of current affected permanent employees to be submitted to DBM
	All placement recommendations for RO	Regional Director in consultation with the Undersecretary/Assistant Secretary – in-charge of the Region	Final placement of current affected permanent employees to be submitted to DBM
	All placement recommendations for SDO	SDO in consultation with the Regional Director	Final placement of current affected permanent employees to be submitted to DBM

**a.2. Criteria for placement**

Placement of personnel to comparable positions shall be based by the following criteria:

REFERENCE DOCUMENTS	CRITERIA	VALUE																																																															
<ul style="list-style-type: none"> <li>Updated Personal Data Sheet (PDS);</li> <li>Service records</li> <li>CSC QS 2007</li> </ul>	<p><b>1. Relevance of academic preparation and / or recent trainings</b></p> <p><i>Descriptor: The candidate meets all the QS required of the comparable position, he / she had RELEVANT trainings that will positively influence his/her performance of the functions in the comparable position</i></p>	<b>15</b>																																																															
<ul style="list-style-type: none"> <li>Record of work experiences as indicated in the PDS</li> <li>Records of other assignments / designation (may have been concurrently performed with the regular position)</li> <li>Submitted curriculum vitae if required by management)</li> <li>If available, the job design provides the list of required skills and key result areas</li> <li>Records of any complaints or disciplinary actions</li> <li>Submitted curriculum vitae (if required)</li> <li>If available, the job design provides the list of required skills and key result areas</li> </ul>	<p><b>2. Technical Competence required by the functions</b></p> <p><i>Descriptor: The candidate meets all the knowledge and skills required of the comparable position. The purpose of the rating is to determine the extent that the candidate will be able to perform the functions of the job because he/she has the appropriate aptitude and competence for it. This is pegged by any of the following:</i></p> <ul style="list-style-type: none"> <li><b>20 points</b> : Previous / current job experiences indicating that the candidate understands the functions of the job and has the required technical skills to perform well</li> <li><b>20 points</b> : Relevant outputs developed by the candidate him/herself</li> <li><b>15 points</b> : Any other relevant meritorious accomplishments</li> </ul>	<b>55</b>																																																															
	<p><b>3. Psychosocial Attributes and personality traits</b></p> <p><i>Descriptor: The candidate meets the basic workplace attitudes and the traits required in the performance of the job. To rate the candidate, please be guided by the distribution of points per type of position being rated:</i></p> <table border="1"> <thead> <tr> <th rowspan="2">Criteria</th> <th colspan="3">Distribution of points per position level</th> </tr> <tr> <th>3<sup>rd</sup> level</th> <th>2<sup>nd</sup> level</th> <th>1<sup>st</sup> level</th> </tr> </thead> <tbody> <tr> <td><i>Honesty and integrity</i></td> <td align="center">4</td> <td align="center">4</td> <td align="center">5</td> </tr> <tr> <td><i>High Motivation</i></td> <td align="center">3</td> <td align="center">3</td> <td align="center">3</td> </tr> <tr> <td><i>Potential:</i></td> <td></td> <td></td> <td></td> </tr> <tr> <td>    ▪ Communication Skills</td> <td align="center">2</td> <td align="center">2</td> <td align="center">2</td> </tr> <tr> <td>    ▪ Ability to present ideas</td> <td align="center">4</td> <td align="center">3</td> <td align="center">1</td> </tr> <tr> <td>    ▪ Assertiveness</td> <td align="center">1</td> <td align="center">2</td> <td align="center">5</td> </tr> <tr> <td>    ▪ Judgment</td> <td align="center">3</td> <td align="center">2</td> <td align="center">2</td> </tr> <tr> <td>    ▪ Leadership ability</td> <td align="center">3</td> <td align="center">2</td> <td align="center">1</td> </tr> <tr> <td><i>Psychosocial attributes:</i></td> <td></td> <td></td> <td></td> </tr> <tr> <td>    ▪ Human Relations</td> <td align="center">2</td> <td align="center">3</td> <td align="center">3</td> </tr> <tr> <td>    ▪ Decisiveness</td> <td align="center">2</td> <td align="center">2</td> <td align="center">2</td> </tr> <tr> <td>    ▪ Stress tolerance</td> <td align="center">2</td> <td align="center">2</td> <td align="center">2</td> </tr> <tr> <td><i>Work Standards</i></td> <td align="center">2</td> <td align="center">3</td> <td align="center">3</td> </tr> <tr> <td><i>Self Management &amp; Personal Effectiveness</i></td> <td align="center">2</td> <td align="center">2</td> <td align="center">NA</td> </tr> </tbody> </table>	Criteria	Distribution of points per position level			3 <sup>rd</sup> level	2 <sup>nd</sup> level	1 <sup>st</sup> level	<i>Honesty and integrity</i>	4	4	5	<i>High Motivation</i>	3	3	3	<i>Potential:</i>				▪ Communication Skills	2	2	2	▪ Ability to present ideas	4	3	1	▪ Assertiveness	1	2	5	▪ Judgment	3	2	2	▪ Leadership ability	3	2	1	<i>Psychosocial attributes:</i>				▪ Human Relations	2	3	3	▪ Decisiveness	2	2	2	▪ Stress tolerance	2	2	2	<i>Work Standards</i>	2	3	3	<i>Self Management &amp; Personal Effectiveness</i>	2	2	NA	<b>30</b>
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**a.3. Placement Processes**

**Pre-Placement Steps:** For both the Central Office and the Field Offices, the Heads of offices shall follow these steps:

- a. Each affected employee will have a discussion with his/her head of office regarding the status of his/her rank in the SP and the options available under EO 300. He/she is expected to express his/her intent to be placed in a comparable position using the reply form that is attached to the letter, including the office of interest.
- b. Based on the reply forms submitted by affected personnel, the CMT Secretariat in-charge of the office database on actions per position shall prepare:
  - i) the table of "Actions on Items and Personnel"; and
  - ii) list of placement candidate per position.

Both documents shall be submitted to the Placement team for review.

- c. The Personnel office / section of each office shall prepare the pertinent documents regarding candidates and ensure that these are ready for the placement team.
- d. Placement team shall review actions on items and list of candidates.
- e. Each member of the placement team shall rate each candidate against criteria set.
- f. A consolidation of rating per criteria shall be done to determine the final rating of the candidate per criteria. The team shall add the scores per criteria to obtain the final / overall rating of the candidate.
- g. Candidates are then ranked based on the final / overall rating given by the placement team.
- h. Placement recommendations at each level shall be discussed with the concerned personnel, after which, these shall be presented to the respective CMT or Sub-CMT for feedback.
- i. The Placement team and their respective Sub-CMT shall convene to discuss the rank list and recommendation to the Head of Office / appointing authority. The recommendation to be made by the placement team and CMT is a "ranking" of all rated candidates per position.
- j. Submit the final recommendation to the appointing authority.
- k. Appointing authority will review the placement recommendations, discuss with the higher-level official (refer to the table of accountable officials – Section A.1, Placement Authority) to arrive at a decision.

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**ATTACHMENT 5**

**PROCESS FOR TRANSFERRING PERSONNEL TO THE CSC POOL OR TO A CTI STATUS**

**PROCESS FOR TRANSFERRING PERSONNEL TO THE CSC POOL**

The placement procedure for transferring personnel to the CSC Pool per Section 13 of EO 368 (RR) is as follows:

- a. For employees who opt to remain in government service yet cannot be accommodated in DepEd, the DMF shall submit his/her name to the DBM and CSC, specifying the action and indicating the three (3) priority agencies for reassignment. In case an employee would want to be reassigned to an area outside of his/her present province/region of assignment, the preferred area of assignment shall also be indicated.
- b. The affected personnel shall notify the personnel officer of the decision indicating the order of priority of the three (3) agencies for reassignment and the preferred province or region of assignment.
- c. The CSC shall then match the position, qualifications and skills of the affected personnel with the needs of the agencies he/she had identified as priority agencies for reassignment within a period of two (2) months.
- d. In case no match can be found in the priority agencies for reassignment, the CSC shall then look for a match in other agencies within the present province/region of assignment of the affected employee, unless another area of reassignment has been requested.
- e. If an employee is not placed within the two-month period, he/she shall transfer to the CSC and remain therein until a match can be found. The DBM shall likewise transfer his/her personal services budget to the CSC.
- f. After satisfying the requirements of National Government agencies, the CSC may explore the possibility of reassigning affected personnel to local schools and hospitals.
- g. There shall be no diminution in the salary of the placed personnel. They shall have full rights to all the benefits which may be available to other government employees, including Collective Negotiation Agreement (CNA) incentives. In case there is a difference between the benefits enjoyed by employees in the mother and in the recipient agency of the placed personnel, he/she shall enjoy the larger benefits for a period of one (1) year. However, placed personnel shall no longer be entitled to certain allowances such as those that are given corresponding to the performance of specific functions which would no longer form part of their new functions.
- h. The placed personnel shall enjoy security of tenure in the agency where they have been reassigned in accordance with civil service rules and regulations. The position of the placed personnel in the recipient agency shall be co-terminus with the incumbent. i.e., the item shall be abolished only upon vacancy due to appointment to a position in the absorbing agency, transfer to another government agency, LGU or private firm, retirement or separation, at which time the funds corresponding to the vacated position shall revert back to the General Fund.
- i. After one year, if the employee later objects to or does not accept the assignment, s/he shall be deemed separated or retired with the appropriate separation/retirement benefits but without the EO 368 benefits. The placement is also declared unappealable (Sec. 21 EO 368 (RR)).

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**PROCESS FOR TRANSFERRING PERSONNEL TO A CO-TERMINUS WITH THE Incumbent (CTI) STATUS**

Co-terminus to incumbent option is available to regular employees who do not remain in government service.

**1. Establishing Need for CTI Positions within DepED**

- a. The Central Office, each region, and each schools division shall determine the need for additional manpower to perform tasks within their own levels.
- b. Schools Division Offices shall identify schools requiring additional manpower specifically for non-teaching tasks.
- c. These identified needs shall be submitted to their respective CMTs as basis for placement of CTIs in the Central Region, Schools Divisions and Schools.

**2. Assigning Employees with Co-Terminus to Incumbent (CTI) Positions within DepED**

- a. An affected employee who chooses to remain in government service will first be offered a comparable position by management. In cases where the employee is unable to fill a comparable position, he/she may opt for a CTI status within DepED. The employee will have to express his/her interest on the specific tasks / job that had been identified by the office he/she intends to be assigned.
- b. The head of office shall review the additional HR needs of all offices and the prospective CTI candidates to these offices determine a match based on job fitness.
- c. Based on the review, the employee may be assigned within DepED to do a job within his/her organizational unit, another organizational unit, another DepED level, another schools division or region, or in a school, depending on the need of the organization bringing his/her position term with his/her on a Co-Terminus with the incumbent (CTI) arrangement. The expressed interest of the employee shall be reviewed.
- d. Names of employees given CTI status and assigned to schools shall be submitted to the DepED CMT who shall submit their names to the CSC.

**3. Assigning Employees with Co-Terminus to Incumbent (CTI) Positions to other Agencies.**

- a. An affected employee who chooses to remain in government service under a CTI status in another agency shall should express his interest in the reply form provided by management.
- b. The CMT Secretariat shall consolidate all names and shall prepare the necessary documentary requirements for endorsement to the CSC.
- c. The head of office shall submit to CSC the names of these employees for processing.