

TESDA CIRCULAR

SUBJECT: TESDA Retirement Plan Guidelines including the Conduct of "Salamat- Mabuhay" Program in Honor of Retiring TESDA Officials and Employees		Page 1 of 8 page/s Number <u>024</u> , Series of 2022
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I. REFERENCES

1. Memorandum No. 740, series of 2021 on the Amended Guidelines on the Payment/Processing of Retirement Benefits of TESDA Employees;
2. CSC Resolution No. 1301977 dated 28 August 2013 on the Enhanced Guidelines on CSC "Salamat-Mabuhay Program";
3. CSC Memorandum Circular No. 7, series of 1998 on the Adoption of "SALAMAT-PAALAM" Program in honor of retiring officials and employees in the Civil Service;
4. TESDA Circular No.074, series of 2019 with subject: Revised TESDA-Program on Awards and Incentives for Service Excellence (TESDA-PRAISE);
5. GSIS Memorandum Circular No. 005, series of 2018 on the Reissuance of GSIS Memorandum No. 003, series 2015 (Memorandum Circular-Reminder to Agencies on Securing Clearance from the GSIS for Separating Employees before payment of Terminal Leave); and
6. Memorandum No. 361, series of 2018 on the Implementation of Pre-Retirement Program for TESDA officials and employees.

II. RATIONALE

The CSC Omnibus Rules Implementing Book V of Executive Order No. 292 and Other Pertinent Civil Service Laws, particularly Section 7, Rule VIII (Career and Personnel Department) which prescribes that agencies shall establish a continuing program for the development of its personnel, including the Pre-Retirement Program, intended to familiarize would-be retirees on the government retirement plans and benefits as well as available business opportunities or other productive options/pursuits.

In relation with the Civil Service Commission's thrust of humanizing the bureaucracy, the CSC in Resolution No. 98-0474 dated 05 March, 1998 enjoins all heads of departments and agencies to adopt the "SALAMAT-PAALAM" Program in recognition of the contributions of the retiring officials and employees in their respective offices. Similarly, CSC promulgated the Resolution No. 1301977 on 28 August 2013, wherein the Commission resolved to adopt the enhanced guidelines in the implementation of "Salamat-Mabuhay" Program. Offices/agencies shall likewise, ensure that the retirees are issued their retirement benefits under the "Maginahawang Pagreretiro Program" during the Ceremony or on the date of their retirement. CSC

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further encouraged each agency to develop its own mechanics of the program subject to existing rules and regulations.

In recognition of the loyalty and dedication to duty of its retiring employee/s, it is imperative for TESDA to prepare, assist and guide them, as holistically as possible, to live an active life upon separation from the service.

III. OBJECTIVES

The Retirement Plan is hereby established to prepare TESDA retirees for a productive life after rendering so many years of efficient and dedicated service to the Republic of the Philippines and for the Filipino people.

IV. SCOPE

This Retirement Plan covers all officials and regular employees who have been employed in TESDA for ten (10) years, whether consecutive or aggregate, prior to their optional or compulsory retirement shall be covered by the program.

V. PROGRAM AND ACTIVITIES UNDER THE PLAN

TESDA Retirement Plan shall include the programs and activities indicated below, which may be conducted separately or in conjunction with each other and subject to the availability of funds and/or resource persons and shall comply with the existing government accounting and auditing rules and regulations.

NO.	PROGRAM/ACTIVITIES	SCHEDULE	RESPONSIBLE PERSON/OFFICE
1	Posting of List of Compulsory Retirees	January of every year	Employee Welfare Benefit (EWB) Section, Human Resource Management Division (HRMD)
2	Conduct of Pre-Retirement Program	Once every Semester	TESDA Development Institute (TDI), HRMD
3	Filing of Application for Retirement	<ul style="list-style-type: none"> ● At least one hundred twenty (120) days prior to the actual retirement date (Sec. 9 of CSC Memorandum Circular No. 07, series of 2013) 	Concerned Retiree.



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4	Acquisition and Submission of Complete Documentary Requirements/Clearance s for claims/benefits	<ul style="list-style-type: none"> ● Not later than one hundred (100) days prior to the actual intended date of retirement (<i>Sec. 9 of CSC Memorandum Circular No. 07, series of 2013</i>) 	Concerned Retiree
5	Attendance to any TVET Program (for Entrepreneurial option) offered	<ul style="list-style-type: none"> ● As soon as DG's acceptance or approval of the application of retirement 	Concerned Retiree
6	Availment of Non-Duty Status (as applicable)	<ul style="list-style-type: none"> ● One month prior to the effectivity date of retirement to process necessary documentary requirements 	Supervisor and concerned Retirees
7	Processing of Payment of Terminal Leave and/other claims/benefits	<ul style="list-style-type: none"> ● Upon submission of complete requirements (within a period of thirty (30) days from the actual retirement date, provided that clearance has been issued by GSIS pursuant to GSIS Memorandum Circular No. 005, series of 2018) 	HRMD
8	Conferment of Plaque of Service Recognition Awards	<ul style="list-style-type: none"> ● During Flag Raising Ceremony (every last Monday of the month) 	EWB, HRMD
9	"Salamat-Mabuhay" Program (Option: Simple Program, Surprise AVP, Food to share, Bouquet of Flowers/Token/Gift)	<ul style="list-style-type: none"> ● On the birthday or last day of service of retiree/s 	Supervisor & Division Head

VI. GUIDELINES

To operationalize this Plan, the following guidelines are hereby prescribed:

1. Programs and activities shall be acted upon by the responsible person/office/s following the specified schedule;

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2. The responsible person/office/s may request assistance from or coordinate with other office/s and/or agencies for the successful undertaking of the program/activities;
3. Optional retirees shall request for tentative computation of their retirement pension and loan details prior to submission of request for retirement which may aide them in making final decision relative to application for retirement.
4. Officials and employees who applied for optional retirement shall execute an Affidavit of Irrevocable Undertaking to Avail of Optional Retirement as part of the requirements;
5. The Director/Head of Office concerned shall assign an understudy wherein the retiree shall turn-over his/her pending work one month before the effectivity of the retirement. In the absence of an understudy, the pending works of a retiree shall be turned-over to the concerned Division Chief/Immediate Supervisor.
6. The Turn-Over Report shall be submitted to the HRMD/FASD/Administrative Unit. The report shall not only be limited to the proceedings of the activity but must also include the following:
 - a. List of pending works;
 - b. List of office equipment;
 - c. List and contact information of partners, and stakeholders;
 - d. Work files, documents, and other information relevant in the performance of his/her duties and responsibilities.

The Division Chief/Director/Head of Office/Unit concerned shall ensure that officials and employees who applied for retirement shall execute proper turn-over of all pending work to the understudy who will take charge upon relinquishment of duties;

7. The Division Chief/Director/Administrator concerned shall ensure that officials and employees who applied for retirement must also be cleared of all money/property accountability as well as Service Obligation from his/her previous scholarship/training availed before the disbursement of his/her last salary and all accumulated benefits;
8. The retiree/s may opt to avail the "*Non-Duty Status*", provided that all of his/her pending task/s is/are turned over to his/her co-employee/understudy. This takes effect one month prior to the effectivity



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date of retirement. This is to give the retiree/s ample time to prepare for his/her future endeavor;

Employees on the Non-Duty Status remain in service but are relieved of their duties and responsibilities as they process their documents ahead of their retirement date.

9. The Regional Office concerned shall request for the issuance of a TESDA Order from the Director General, through HRMD-AS, for the designation of an Officer-in-Charge (OIC) or an official in Acting capacity one (1) month prior to the retirement of the incumbent Regional/Provincial/District Director, or TTI Administrator. The one (1) month period is intended for the following activities to ensure a continuous and smooth transition;
 - a. proper turnover of pending works, office, commitments, periodic reports, target, and other matters relevant to the performance of the duties and responsibilities of the designated OIC/Acting official; and
 - b. coaching and mentoring in managing and overseeing the implementation of office programs, projects, and activities.
10. Retiring Executive/Regional/Provincial/District Directors may request for a preferential post, six (6) months prior to the effectivity of his/her retirement, subject to the approval of the Director General.
11. The Non-Duty Status of the retiring officer shall give ample time for him/her to facilitate the documentary requirement for his/her retirement but he/she should be available for consultation by his/her successor.
12. The HRMD shall post the list of retirees for the year, every first week of January of each year in the RMIS and Bulletin Board as advance information to those who are retiring from the service;
13. Six (6) months prior to retirement (for compulsory retirees) or four (4) months prior to retirement (for optional retirees), the retiree/s shall coordinate with HRMD relative to retirement concerns;
14. The retiree shall file an application for retirement benefits using GSIS Form No. 06302017-RET (copy attached), unless otherwise revised, and other documents as required by TESDA and other agencies;
15. In addition to the preceding terms and conditions, the processing of retirement benefits, especially for those would-be retirees who have pending cases relating to graft and corruption in violation of RA 3019, shall further



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be based on GSIS Memorandum Circular No. 002, series of 2014 dated June 3, 2014;

16. Retirement benefits shall be released within (30) days from the actual retirement date of the concerned employee, provided that clearance has been issued by GSIS pursuant to GSIS Memorandum Circular No. 005, series of 2018);

17. CSC Resolution No. 1302242 states that: "The retiring employee shall execute a statement under oath declaring whether or not he/she has a pending case, as herein defined. In the event that he/she has a pending case, he/she shall disclose the nature and status of the same".

"The oath may be administered by a notary public or any administering officer of the employer-agency designated by the head of agency".

"The retiree shall use the form for Declaration of Pendency/Non-Pendency of Case" (Annex "A" of this Circular).

"Notwithstanding the foregoing and in connection with Item 8 of the Declaration of Pendency/Non-Pendency of Case, the Human Resource Management Office (HRMO) of concerned agencies shall submit names of retirees, to the Ombudsman and CSC for verification of pendency of case within one (1) month after the official or employee has submitted his/her written expression of intent to retire."

18. The retiree/s shall be provided with their preferred TVET program to help them prepare for entrepreneurial options after his/her retirement. Availment of a short-term TVET program of up to fifteen (15) days after retirement maybe granted after acceptance of his/her application for retirement.

19. The Pre-Retirement Program (PRP) shall form part of the Workforce Development Plan (WDP) to be conducted by TESDA Development Institute, bi-annually in coordination with concerned agencies;

20. Meanwhile, the HRMD Chief/FASD Chief/Regional HRMO in RO or his/her authorized representative shall conduct counseling/exit interview. In this phase, the HRMD shall, among others, surface the impressions, experiences, and knowledge of the retiring employee about TESDA and how these could be used to improve organizational policies and standard operating procedures. HRMD shall also encourage the expression of the needs and personal future plans of retiring employees to determine the appropriate HR intervention to address such need;



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21. TESDA adopts the CSC Resolution No. 130197 on Enhanced Guidelines CSC "Salamat-Mabuhay" Program promulgated on August 28, 2013 by conducting the TESDA Retirement Activity/Celebration. Only those who will be conferred with Service Recognition Awards are entitled to the program.
22. COROPOTI shall allocate an amount for the conduct of Salamat-Mabuhay Program to honor the retirees. The budget shall cover payment for the plaque, supplies, materials, miscellaneous expenses and snacks/meals. Expenses to be incurred shall be chargeable against Maintenance and Other Operating Expenses (MOOE) subject to the availability of funds and strict adherence to existing government accounting and auditing rules and regulations and Administrative and Financial Guidelines.

For uniformity, expenses should not exceed the following amounts:

- a. Plaque – PhP 1,500.00 per retiree
 - b. Snacks/meals – PhP 200.00 per head for a maximum of 25 participants including TESDA Officials per retiree
 - c. Supplies, materials and other miscellaneous expenses – PhP 7,000.00
23. The retirees whether under the compulsory or optional scheme who meet the following criteria shall be granted the Retiree's Incentive pursuant to the guidelines indicated in TESDA Circular No. 074, series of 2019, otherwise known as "TESDA-Program on Awards and Incentives for Service Excellence (TESDA-PRAISE):
 - a. Must have rendered at least ten (10) years of service with TESDA;
 - b. With suggestions, inventions, superior accomplishment and other personal efforts which resulted in monetary savings which shall not exceed 20% of the savings generated;
 - c. With Performance Rating of Very Satisfactory for two (2) consecutive years prior to retirement; and
 - d. Has not been charged with any administrative case within five (5) years preceding the year of retirement.
(The candidates for this award shall be duly endorsed by the Office Head and shall undergo screening and evaluation by the PRAISE Committee who shall issue a resolution to the effect.)

The qualified retiree shall be given the incentive in the indicated amount subject to the availability of funds and strict adherence to existing government accounting and auditing rules and regulations and Administrative and Financial Guidelines:




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- a. Php 25,000.00 – for employees retiring under the optional retirement scheme; and
 - b. Php 50,000.00 – for employees retiring under the compulsory retirement scheme.
24. This activity shall form part of the OPCR of AS/ROPOTI to ensure its funding requirements and effective and efficient implementation of the Retirement Plan. The allocation of funds shall be based on the list of retirees submitted by the HRMD annually.
25. Conferment of Service Recognition Award shall be done during the Flag Raising Ceremony. This will be awarded by the Director General to recognize the retiree's loyalty, dedication, and contributions to the agency, government, and to the people.
26. HRMD/FASD/Administrative Unit shall maintain a database of all retirees. The database must include their contact information; address, service records, and field of expertise.
27. As TESDA recognizes the expertise and proficiency of its retired officials and employees, they shall be included in the pool of Subject Matter Experts (SMEs) and Resource Persons who will be tapped in the provision of learning and development interventions for TESDA officials and employees, and consultancy for various TVET programs, and projects.
28. TESDA National and Regional Association of Concerned Employees (ACE) shall coordinate with the HRMD/FASD/Administrative Unit on the retirees who may opt to avail or be enrolled in the health care insurance. As such, retirees shall conform with the terms and conditions of the concerned/identified health care provider.

EFFECTIVITY CLAUSE

This Circular shall take effect immediately. Wide dissemination of this Circular is hereby enjoined.


SEC. ISIDRO S LAPEÑA, PhD., CSEE
Director General

