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## I. Scope of the Manual

The extent of this reference manual is described as follows:

- Objective
- Learning and Development
- Learning within the Company (In-House)
- Learning outside the Company
- Learning Program Abroad
- Student Trainee Program

## II. Objective

The objective of this Reference Manual is to:

- a. Provide a general guide on PNBGen Personnel Development programs
- b. Identify responsibilities and accountabilities relating to personnel development

## III. Learning and Development

### A. Philosophy

1. Learning and development activities shall be conducted for all levels of employees, taking into account their learning/training needs vis-a-vis the Company's corporate mission, objectives, strategies and values.
2. Learning and development shall be a shared responsibility among top management, middle management, supervisors, employees and training staff, viz:
  - a. Top Management: Provides the general organizational climate and support for learning and development.
  - b. Middle Management: Provides support for the learning and development of their staff by:
    - assessing the learning and developmental needs of their staff and communicating these to the Human Resource & General Services Division (HRGSD).
    - planning their subordinates' career paths

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- assisting in the post-learning/training performance evaluation of participants.
  - supporting subordinates' desire to apply acquired learning on the job through action plan implementation and related schemes.
- c. Company Employees: Adopt and maintain an attitude of openness/receptiveness to changes in behavior or in structure to facilitate desirable changes in work setting after the learning program.
  - d. HRGSD: Provides the technology and structure for implementing the learning and development system.
3. Participation in formal learning and development programs shall be equitably distributed among all divisions of the Company.
  4. All in-house and external learning programs should continually be conducted and/or coordinated by HRGSD.
  5. Learning and development programs should lead to the development of a pool of qualified and eligible replacements (promotables) that will ensure continuity of operations in all levels of the organization.
  6. Linkages between learning and performance evaluation, career pathing, systems and methods, organizational development, etc. should be maintained as the exigency of the service requires.

## B. Nature and Scope of Learning for PNBGen Employees

The nature and scope of learning shall cover the following:

1. Learning programs conducted by the Company for its employees starting from entry (i.e., hiring) up to retirement of employees (which include orientation/re-orientation, value development, employee development, supervisor/managerial development, re-training, technical/professional/specialized courses, pre-retirement seminars and other courses on urgent thrusts of the Company);
2. On-the-job learning of subordinates initiated by their supervisors;
3. Learning programs conducted by government offices/private institutions, as availed of by the Company;
4. Local scholarship grants sponsored by the Company itself and availed of by its employees;
5. Local scholarship grants sponsored by government offices/private institutions as availed of by the Company employees;

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6. Foreign-assisted scholarship programs availed of by the Company employees; and
7. Company-sponsored learning programs abroad granted to employees with high potential.

### **C. Basic Concepts, Principles and Objectives**

Human resource development efforts in the Company shall fulfill the following goals:

1. Enhance individual and organization effectiveness through:
  - a. improved job performance
  - b. increased productivity
  - c. positive work attitude and
  - d. smooth interpersonal relationship of employees
2. Maintain status of PNBGen in the insurance community
3. Sustain the Company's corporate social responsibility
4. Intensify research undertaking to support learning and development efforts
5. Provide career advancement opportunities to deserving and qualified employees of the Company

### **D. Norm of Conduct While Undergoing the Learning Program**

Employees while undergoing the learning program must behave themselves in a manner that enhances the prestige of the Company considering that they carry with them the name of the Company wherever they go.

### **E. Post-Learning Program Requirements**

1. All participants to learning and development programs are required to submit reports, including recommendations for the improvement of the service along their particular field, and to share whatever knowledge gained with their peers in the office.
2. Reference materials (e.g. books, supplies, hand-out, etc.) required during learning shall be turned over for official use of the Division and the HRGSD.

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3. Those who completed major learning programs are required to report on the status of the implementation of approved Action Plans. Action Plans are proposals to improve systems and procedures, including policy changes, submitted by participants of comprehensive and extensive programs.

## **F. Training Expenses**

1. All learning programs of the Company shall be administered by the HRGSD.
2. Approval of Learning Programs -

- a. In-House Learning Programs

All in-house learning programs shall be subject to the approval of approving authorities in accordance with the Manual on Signing Authority (MSA). Requests for approval shall be submitted by the Division/Group Head:

- proposed learning schedule
- title of Program with a brief description of each, and their participants
- detailed estimate of expenses for each course

- b. Out-of-House Learning Programs

- Participation/attendance in out-of-house programs shall be approved by the appropriate authorities as provided for under the MSA.
- Recommendations shall be submitted together with justifications or reasons for sending the recommendee to the program as well as the estimated investment to the HRGSD, which shall endorse the same to the approving authorities.
- Once approved, HRGSD shall provide the recommendee the notice of approval and keeps a file copy as reference in monitoring implementation and compliance with requirements.
- Travel arrangements as well as payment of fees and other pre-departure requirements shall be handled by the HRGSD.

3. Service Contract

- a. An employee who will be sent to attend a program shall be required to sign a Service Contract binding themselves to render service to the Company for a period of time based on the schedule below:

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(i) Out-of-House Programs

Cost of the Program	Service Contract (Period of service to be rendered to the Company)
Above P10,000 up to P25,000	Six (6) months
Above P25,000 up to P50,000	One (1) year
Above P50,000 up to P75,000	One and a half (1 ½) years
Above P75,000 up to P100,000	Two (2) years
Above P100,000 up to P200,000	Two and a half (2 ½) years
Above P200,000 up to P300,000	3 years
Above P300,000	4 years

(ii) In-House Programs

As a general policy, in-house programs will not be covered by a Service Contract except for developmental and specialized programs where participants shall be required to sign a Service Contract binding themselves to render service to the Company for a period based on the schedule in (i).

- b. Preparation of documents shall be the responsibility of the Human Resource & General Services Division.
- c. A copy of the Service Contract shall be included in the 201 file of the employee concerned.
- d. The contract to be signed shall be on a per program basis.
- e. The Service Contract shall commence at the end of the program unless specified. However, when sent to several programs, the period covered by each service contract shall not overlap i.e. each service contract shall commence from the completion of the service contract preceding the same.

To illustrate: An employee who completed a program, which costs P50,000 in June 2013 shall have a Service Contract of one (1) year from June 2013 to May 2014. In August 2013, he completed another program of P50,000 for which he shall serve another contract of one (1) year corresponding to the latter program, which shall commence in June 2014.

The Service Contract shall likewise cover the following areas:

- (i) Participants shall abide with all pertinent provisions of the employee handbook on decorum, professional conduct and ethics.
- (ii) Should a participant decide to resign voluntarily or be separated from the service prior to his completion of the post-training/learning service requirement, he shall

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be required to reimburse the expenses in full regardless of the number of months of post-training/learning service he has completed or served.

4. The following expenses shall be chargeable to the Professional and Technical Development budget:

- a. transportation expenses (plane, sea or bus fare) of participants from residence/point of debarkation to place of assignment plus other receipted expenses (terminal/toll fees, excess baggage for Company-owned materials up to a maximum of 10 kilos).
- b. per diem and travelling expenses of participants, in accordance with existing policies.
- c. seminar fee, in case of out-of-house learning program.
- d. other expenses for in-house learning program such as:
  - honorarium paid to lecturers/speakers
  - cost of food (meals/snacks) served during the seminar
  - cost of learning materials
  - rent of venue and facilities, if applicable
  - accommodation/lodging, in case of live-in seminar
  - If program is held outside Metro Manila - per diem and traveling expenses of trainers/training coordinators in accordance with existing policies
  - Expenses related to pre-screening of candidates for officership program such as cost of assessment exam, traveling cost incurred for background verification, credit checking, etc.
  - other reasonable learning program expenses, such as awards/plaques of appreciation.

5. Honorarium Paid to Lecturers/Speakers

- a. For external Resource Speakers/Lecturers - actual cost of professional fee plus applicable taxes;
- b. In-house Resource Speakers/Lecturers - All officers, except those from HRGSD who shall serve as resource speakers for in-house learning programs on weekends/non-working days shall be given a stipend, viz:

No. of Lecture Hours	Stipend
One and a half (1 ½) hours or less	P200 – P500
More than one and a half (1 ½) hours but less than four (4) hours	P500 – P1,000
More than four (4) hours but less than 6 hours	P800 – P1,500
At least six (6) hours	P1,200 – P2,000

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6. Cash Advances:

a. A participant shall be allowed to make a cash advance to cover cost of transportation/plane fare, per diem and other related travel expenses based on existing policies.

b. The cash advance shall be made upon the issuance of a Travel Order.

c. Availment of cash advance shall be subject to the following guidelines:

(i) Local Learning Programs -

- For short-term programs (i.e., duration not exceeding 15 calendar days), cash advances shall cover transportation to and from the program venue plus per diem for the duration of the program but not to exceed fifteen (15) calendar days.
- For long-term learning programs (more than 15 calendar days)
  - For in-house program, cash advances shall cover the cost of one-way transportation (from the participant's station/from residence/point of debarkation to the training venue) plus per diem not exceeding fifteen (15) calendar days.
  - For local out-of-house program, the cash advances shall cover two-way transportation cost and per diem for the duration or the program.

(ii) Foreign Learning Programs -

- The cash advances shall cover transportation cost, per diem and other travelling expenses for the duration of the program.

d. Pending settlement, cash advance shall be carried under Accounts Receivable of employee concerned. No cash advance shall be granted to employees with outstanding accounts receivables.

e. For out-of-house programs, fees may be paid in advance to avail of discounts offered. The payment shall be booked directly as Professional and Technical Development expenses.

f. Settlement of cash advances

(i) Local Learning Programs -

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Settlement of cash advances shall be effected as follows:

a) For short-term programs	Within five (5) calendar days after the participant returns from the program
b) for long-term programs	Within thirty (30) calendar days from start of the program
c) for out-of-house program	Within five (5) calendar days after the participant returns from the program

(ii) Foreign Learning Programs -

Settlement of cash advance shall be made within fifteen (15) calendar days after the participant returns from the program, to allow him to comply with all the requirements.

(iii) In case the participant fails to settle his cash advance within the required period, the amount advanced shall be made due and demandable, in which case his salaries and other benefits shall be applied to the settlement of said cash advance, until the same is fully paid.

Implementation of payroll deduction shall be the responsibility of the Human Resource & General Services Division based on the advice of Controllershship Division.

7. All training expenses shall be processed by the Human Resource & General Services Division. Payment/reimbursement of expenses shall be implemented only if the following are found in order:

- compliance with existing policies of the Company
- compliance with minimum documentation requirements of the Bureau of Internal Revenue
- expenses are within the approved budget and in accordance with the approval for the specific learning program.

8. Monitoring of learning expenses against budget shall be the responsibility of the Budget Section under Treasury Division.

- a. Expenses in excess of the approved budget shall not be allowed. Additional budget appropriation may be requested subject to the availability of funds, and for approval of designated authorities in accordance with the MSA.
- b. Implementation of each learning program shall be based strictly on the approved recommendation. Any change in the breakdown of expenses must be referred back to the designated approver based on MSA.

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9. Learning Materials

- a. The Company shall provide participants with the necessary learning materials.
- b. Learning materials and the contents of said materials are intellectual properties of the Company and/or of the respective training providers. Hence, in no case shall said materials be printed, re-printed, published/disseminated/distributed/reproduced/sold/used for school projects or research papers without the written approval from the HRGSD.
- c. Recording of lectures through any media without the written approval of the Company and the lecturer/trainer concerned is not allowed.
- d. Failure to comply shall subject the employee concerned to appropriate administrative and/or disciplinary sanctions in accordance with existing policies.

## IV. Learning within the Company (In-House)

### A. Basic Concepts, Principles and Objectives

The objectives of in-house learning for employees are to -

1. orient and coach employees;
2. prepare people for succession;
3. facilitate manpower deployment and placement;
4. upgrade skills in using new methods and machines;
5. enhance professional growth; and
6. improve interpersonal relationships.

### B. Eligibility

To qualify for participation in a learning program, an employee must

1. be recommended by the Department/Division/Group/Regional Head/ Branch Manager;
2. meet the minimum and special qualifications/requirements set for a particular program;
3. be a regular/permanent employee;
4. have a performance rating of at least "Good"; and
5. have no pending administrative case at the time of nomination.

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### C. Procedure for Participation

1. The HRGSD shall circularize the list of learning programs to be conducted and the number of runs for the year.
2. Once the schedule has been set, the HRGSD shall send the invitation for a specific program to Group Heads and their administrative offices for dissemination to Division/Department Heads in their respective Group.
3. While the Division/Group Head determines who among his subordinates should attend the program, an employee may likewise request attendance to a particular program by seeking permission from his immediate supervisor, subject to the confirmation/nomination of the Division/Group Head.
4. The Division/Group Head shall submit recommendation for approval of the President, which should be filed at least two (2) weeks before the start of the program.
5. If application/nomination is approved/disapproved, the HRGSD shall notify the Division/Group Head in writing of the action taken.

### D. Guidelines

1. A participant is considered excused/relieved from the performance of his duties for the duration of the program.
2. A participant must attend no less than eighty percent (80%) of the total learning hours to be qualified to receive a certification of completion.
3. Attendance of participants during the learning period shall be monitored by the HRGSD. The Attendance Report maintained at the designated training room shall serve as the official record of attendance during the learning period.
4. Participants shall be required to personally log their actual time-in and time-out in the Attendance Report. Undue delays in making the entries and/or tampering of actual time-in/time-out shall subject the participant to disciplinary and/or administrative sanctions in accordance with the existing Code of Conduct.
5. Planned vacation leave shall be temporarily suspended while the employee is attending a program.
6. Participants must wear the prescribed office attire (i.e. prescribed office uniform or appropriate office attire based on existing policies) while attending the sessions.
7. Recommended participants who would like to withdraw from the program should inform the HRGSD in writing at least ten (10) days prior to the start of the program to

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enable the HRGSD to consider other possible participants and/or make the necessary adjustments on reservations and arrangements made.

8. A participant who is attending a particular program and will not be able to attend a session should give at least three (3) days prior notice to the HRGSD. Should he fail to give said prior notice, he shall be charged for the cost of meals for the particular schedule.
9. The use of telephone during learning sessions is discouraged except for extremely urgent reasons. During sessions, the HRGSD coordinator shall receive the messages intended to the participant and the same shall be relayed during break periods.
10. Participants are expected to observe proper office decorum at all times.
11. At anytime during the program, a participant may be disqualified from the program in the event that he is found to have violated any of the provisions of the Company's policies, rules and regulations.

### **E. Privileges**

Participants shall be entitled to per diem/transportation allowance/free lodging accommodation in accordance with the Company's existing Policy on Official Travel Benefits.

## **V. Learning Outside the Company**

### **A. Basic Concepts, Principles and Objectives**

The Company may finance the participation/attendance of an employee in seminars, workshops, conferences and the like conducted by government and private institutions, provided the course content is directly applicable to the needs of the prospective trainee's job.

### **B. Eligibility**

To be eligible for participation in an out-of-house program, an employee must:

1. be a regular/permanent employee at the time of application and with no pending administrative charge;

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2. have a performance rating of at least “Good” for the immediate past rating period;
3. obtain the endorsement and approval by the appropriate authorities as provided for under the MSA; and
4. have not attended a similar learning program in the past. (As much as practicable, attendance in external programs should be equitably distributed).

### **C. Procedure for Participation**

1. While the Division/Group Head determines who among his subordinates should attend a particular program, an employee may likewise request attendance to a particular program by seeking permission from his immediate supervisor subject to the confirmation/nomination of the Division/Group Head.
2. The Division/Group Head shall submit recommendation for approval of the President, which should be filed at least two (2) weeks before the start of the program.
3. If application/nomination is approved/disapproved, the HRGSD shall notify the Division/Group Head in writing of the action taken.

### **D. Duration of Study**

1. Local out-of-house learning program should not exceed a period of three (3) months. Employee’s participation in programs in excess of this period shall require the approval of the President.
2. Actual learning time may take place during or after regular office hours or even on weekends, if necessary.

### **E. Privileges**

Participants shall be entitled to per diem/transportation allowance/free lodging accommodation in accordance with the Company’s existing Policy on Official Travel Benefits.

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## VI. Learning Program Abroad

### A. Nature and Scope of Learning Program

1. Learning programs abroad may be availed occasionally by the Company to update employees on the latest development in the field of economics, management, insurance and finance, computer education and other technical/specialized areas.
2. Participation/attendance in a learning program abroad may be due to an invitation from a financial/insurance institution or any specialized institution abroad or may be arranged through a PNBGen office or correspondent Company in the place of study,
3. Participation in a learning program abroad may take the form of observation study-tour and/or formal classroom instruction.
4. Participation/attendance in a learning program shall require the approval of the President.

(Note: An employee undertaking other programs not sponsored by the Company shall be subject to the study leave regulations).

### B. Eligibility

To qualify in the learning program abroad, the employee must:

1. be a regular/permanent employee of the Company for a period of not less than two (2) years;
2. be performing duties directly related to the field of learning/training or is being groomed for a particular assignment for which attendance in learning program abroad may be a pre-requisite;
3. have a performance rating of at least “Very Good” for the immediate past rating period. The privilege to undergo the learning program abroad should be given as a reward to highly productive employees;
4. be holding an officer position or one that is highly technical in nature; and
5. have no pending administrative charges.

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### C. Procedure for Participation

1. Candidates shall be recommended and approved by the appropriate authorities as provided for under the MSA.
2. The application and registration formalities on the learning and development must be arranged by the Company employee concerned with his Group or Division.
3. Participation in these programs shall take into account educational qualifications, learning programs attended, previous job held, current duties, capabilities and potentials of the candidate.
4. The trainee must meet the latest requirements set forth by the national government for citizens leaving the country.
5. The trainee shall sign a Service Contract in which he binds himself to render service to the Company in accordance with the following:

Cost of the Program (in Peso)	Service Contract
Above P10,000 up to P25,000	Six (6) months
Above P25,000 up to P50,000	One (1) year
Above P50,000 up to P75,000	One and a half (1 ½) years
Above P75,000 up to P100,000	Two (2) years
Above P100,000 up to P200,000	Two and a half (2 ½) years
Above P200,000 up to P300,000	3 years
Above P300,000	4 years

Failure to abide by the terms of the Service Contract shall require the trainee/scholar to reimburse the Company the full cost of the learning program regardless of the number of months of the required post training/learning he has completed or served.

6. The trainee shall submit a report to the President, copy furnished the HRGSD within one month after his arrival.

### D. Travel Requirements

1. Passport

The Company employee must secure his passport. He may be assisted by his travel agency.

2. Visa

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Depending on the rules of the country to be visited, the Company employee concerned must secure a visa. A letter request for visa addressed to the embassy/consulate must be secured from the HRGSD.

3. Plane Ticket and Other Travel Expenses

The HRGSD or the sponsoring Division will be charged for the training cost including the plane fare, visa fee/s and assistance and other related expenses.

The HRGSD shall be responsible for the payment of plane fare/s and other related travel expense authorized/approved for the Company employee, subject to submission of a copy of the Travel Order and photocopies of plane ticket.

4. Cash Advance

To defray travelling expenses abroad, a reasonable amount of cash advance in currency notes may be procured by the employee going abroad subject to the Company's existing guidelines as provided for under the MSA.

### E. Privileges

1. Per diem rate based on existing Company policies.
2. Clothing allowance for his travel in accordance with existing guidelines on official travel abroad.
3. Tuition fees, transportation and other incidental expenses such as cost of passport, visa, etc.

## VII. Student Trainee Program

### A. Basic Policy

The Company aims to make a difference in the lives of young people by improving their skills and providing them on-the-job training or internship in the Company to enhance their qualification and prepare them for employment in their chosen industry.

The Company reaches out to students from accredited universities and colleges by accepting their requests for office practice or on-the-job training as pre-requisite for said students' school graduation. Through this Student Trainee Program, students are given a grasp on how the corporate world operates; thus, helping them to widen their professional horizon.

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## B. Guidelines

1. Applications for office practice are endorsed by the Dean of the school through a letter addressed to the Division Head of Human Resource & General Services Division.
2. Applicants shall be required to submit the following:
  - a. Resume
  - b. Recommendation letter from school
  - c. Recommendation letter from the Branch (if to be assigned in the branch)
  - d. 2 pcs. 2" x 2" ID picture
  - e. 1 pc. 1" x 1" ID picture
  - f. Copy of grades for the last 2 semesters
3. Applicants shall be required to take the Company's written examinations to test their aptitude and basic knowledge. Applicants who fail to get the required passing rate in the exams may be allowed for a re-take in the next semester.
4. The HRGSD shall review, process and approve the applications for office practice for students from schools in Metro Manila based on the following criteria:
  - a. Does not have a failing mark in the past two (2) semesters (summer included if applicable)
  - b. Passed the Company's written examinations
  - c. Availability of departments/units in the Company that are willing to accept student trainees
5. For provincial branches, approval for office practice shall be the prerogative of the Branch Manager, subject to the standard requirements/policies of this Student Trainee Program.
6. The Company shall not provide compensation nor grant any form of allowance to student trainees.
7. The Company shall not be compelled to hire the student trainee after his office practice.
8. No employer-employee relationship shall exist between the Company and the student trainee during the period of office practice.
9. A student trainee shall not be given access to confidential matters. They shall not be allowed to entertain clients nor perform functions that are regular duties of Company employees. As a general rule, student trainees shall only assist Company employees on certain office work and in no case shall they be given personal errands or tasks.
10. Student trainees must neither be allowed to handle money nor they be given tasks with monetary accountabilities.

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11. Student trainees must wear any of the following acceptable office attire:
  - a. School uniform or OJT uniform --- If the school requires the student trainee to wear the school uniform or the prescribed On-the-job Training (OJT) uniform; or
  - b. Corporate attire --- for student trainees who are not required by the school to wear its school uniform.
12. The Student Trainee ID to be provided by the Talent and Organization Development Department-HRG must be worn by the student trainee at all times while inside the Company premises and work area.
13. The student trainee shall undergo an orientation seminar to be conducted by the TODD-HRG (or the provincial Branch Manager, as the case may be) prior to actual office practice.
14. Upon completion of their OJT stints, the student trainee shall be rated by his immediate supervisor and Division/Group Head. This will be forwarded to the TODD-HRG together with the trainee's daily attendance record.
15. The TODD-HRG will review and process and record the trainee's certificate of completion, making sure that hours are accounted for and that ratings are with their proper sign-offs.
16. Should the student trainee wish to discontinue his OJT stint with the Company without rendering the required number of hours, the TODD-HRG shall issue a letter addressed to the Dean of the trainee's school informing the number of hours that the trainee has completed.

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