KaagapayngKomunidadsaMaginhawangPamumuhay

SOCIAL HOUSING FINANCE CORPORATION

2020 TRAINING & DEVELOPMENT PLAN

Competency-Based and Mandatory Trainings

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3.0	Unit	Schedule	CORE COMPETENCIES	Page/s #
3.1	All Units	2nd Quarter	3.1 SHFC Values Orientation Workshop	13

4.0	Unit	Schedule	LEADERSHIP COMPETENCIES	Page/s #
4.1	All SHFC Leaders	2nd Quarter	4.1 Coaching and Mentoring	13

5.0	Unit	Schedule	MANDATORY	Page/s #
5.1	BAC/TWG	3rd Quarter	Seminar on RA 9184 "Government Procurement Act"	14
5.2	All Units	3rd Quarter	Money Counterfeit Detection and Signature Verification Seminar	14
5.3	All Units	2nd Quarter	Conduct of 5S	14
5.4	All Units	Continuous	Continuing Professional Development for Licensed Professionals	14
5.5	All Units	4th Quarter	Data Privacy Act Seminar	15

	Competencies/Trainings	Total
1	Technical Trainings*	7
2	Organizational Trainings	2
3	Core Trainings	1
4	Leadership Training	1
5	Mandatory Trainings*	5
	TOTAL NO. OF TRAININGS FOR 2020	**15**

Due to the pandemic which caused Enhanced Community Quarantine for 2 months (March-May), Human Resources Development Division re-designed the 2020 Training Development Plan based on the programs needed to be prioritized which will equip SHFC employees to adapt to the new normal. Moreover, TDP 2020 focuses on the Continuous Learning Education of SHFC employees which are deemed necessary. HRDD still aims to address competency gaps by including programs which were not covered in the TDP 2019 and were based in the competency assessment conducted (January-February 2017) using SHFC's Competency-Based System (CBS) Manual. HRDD includes use of alternative mix of training interventions as suggested in the Competency Assessment Report by the HR Consultant submitted in February 2017. The following are the training interventions to be used:

	Training Intervention	Description
1	Classroom Training	In-house Training: A classroom-type of intervention that tackles a more specific course according to the needs of the organization carried out by either an internal speaker or an outsourced training provider. The content of the training is tailor-fit to the objectives of the program and usually consists of participants not lower than 20 employees. External Training: A classroom-type of intervention that requires an employee to attend public seminars to gain a new or outside perspective on the latest trends and topics related to their jobs. External Training is also an option when the target number of participants does not meet the minimum classroom size requirement of an in-house training.
2	Continuing Education	Is a type of intervention for professionals with Continuing Professional Development mandated by law. The intervention is designed to upgrade and/or update participant's skills and to enhance their understanding, application and interpretation in their chosen profession.
3	Experiential Learning	An intervention for employees in instances such as assumption of a higher position, designation to another job role, lateral transfer, job rotation, among others. Experiential Learning is a 180-degree evaluation which captures the immediate superior's rating and self-assessment of the employee to evaluate if the required skills and competencies are developed through actual performance of the job.

4	Coaching/Mentoring	These are interventions which would focus in long term development. The learning would be more experience-based and evolves as the protégé reaches the set goals and learns new behavior. Effects would be on performance improvement in a specific skills area through direct extrinsic feedback and intrinsic observation that would increase awareness.
5	Online or Distance Learning	These are online learning and development interventions / training courses which are delivered remotely. Participants can complete coursework requirements through online classes.

This Training Development Plan (TDP) is based on the results of the competency assessment conducted in January – February 2017, and is aligned with SHFC's Competency-Based System. The TDP contains the list of priority trainings based on the competency gaps needed to be addressed, and in consideration of the training requirements of the Corporation in anticipation of the approved Table of Organization / Reorganization. Further, the Competency Evaluation Forms submitted for the trainings conducted in 2019 has likewise been used as a TNA tool and/or benchmark to determine the current competency baseline. However, modifications have been made giving priority to programs which are significant in the new normal environment. The 2020 plan consists of schedules per quarter, target participants, methodologies and logistical requirements.

TECHNICAL TRAININGS				
Title	**Competency**	**Target Pax**	**Schedule**	**Description**
1.1 **Loan and Mortgage Management Course (LMMC)**	TC12 Loan and Mortgage Review	Operations Group personnel	2nd Quarter of 2020	This program is designed to hone participant skills in evaluating loan and mortgage documents to determine its authenticity, validity and acceptability based on the existing laws and organizational guidelines and policies for loan approval up to the release of loan proceed to the landowners. Topics include: • Loan and Mortgage Evaluation • Legal Research on Mortgage Evaluation • Monitoring of Compliances to Loan and Mortgage Findings
1.2 **Risk and Compliance Management Course (RCMC)**	TC9 Risk and Compliance Management	Legal, Compliance, PPER and Internal Audit personnel	2nd Quarter of 2020	This program is designed to educate participants on the policies and procedures, and to manage risk and compliance issues of the organization. They are expected to be able to identify, ,measure, monitor and evaluate risk and compliance issues while developing corresponding risk management and compliance framework to minimize the potential adverse effects of such risks and compliance issues to the organization. Topics include: • Risk Management concepts and applications • Policies and procedures to manage risk and compliance issues • Evaluating the organization's compliance with the law (e.g., Manual on Corporate Governance, Anti-Money Laundering Manual and other pertinent law) • Conduct of risk and compliance assessment activities • Preparing the Evaluation Report

1.3				This program is designed to update participant's knowledge on provision of legal advice and appropriate legal remedies/ actions necessary to assist the different offices/units and how to conduct conciliation/ arbitration concerning legal issues/problems. They will also be given effective techniques to increase their legal research skills and legal counseling skills. Topics include:

Legal Updates for Legal Officers	TC7 Legal Services	All Lawyers	Continuous	A. Legal Research
				  1. Policies and Procedures for Efficient Legal Research & Background Investigation
				  2. Analysis of research data, such as statutes, decisions, and legal articles, codes and documents using Supreme Court web site
				B. Management of Cases
				  1. Handling and monitoring of all SHFC's litigation cases and policies and procedures in the management of the case
				  2. Examination of documents/ evidences to determine advisability of defending or prosecuting lawsuits
				  3. Strategies needed in the speedy disposition of administrative cases
				C. Legal Counseling
				  1. Legal counseling in the SHFC Setting
				  2. Preparation of Legal Opinions and Advice
				  3. Implementation of Legal Opinions
				D. Investigation and Disposition of Administrative Complaints
				  1. Due process of law, policies and procedures during administrative hearings
				  2. Observance of basic rights of employees and management in the conduct of administrative hearings
				  3. Proper documentation/evidences during the conduct of hearing of administrative cases
				  4. Interlocutory Orders and rulings issued during the conduct of administrative hearing
				  • Rendering of Decisions based on examination of evidences

1.4 **Paralegal Training**	TC7 Legal Services	All personnel performing paralegal functions	2nd Quarter of 2020	The Paralegal Training consists of core and fundamental legal knowledge, which focuses on the better understanding and appreciation of laws, administrative rules and regulations, legal procedures and judicial cases, including the practical application of technical skills and best practices in legal research and methodology and legal writing and advocacy as these impact on and affect the operations and delivery of public service by SHFC. It covers three major study areas: I. Legal Fundamentals II. Skills Training III. Practical Applications
1.5 **Technical Advisory Course (TAC)**	TC13 Technical Advisory and TC14 Technical Services	Operations Group personnel	3rd Quarter of 2020	This program is designed to help participants assist and capacitate the partner stakeholders in complying with financing requirements and with project-readiness. It shall also help them address project issues and concerns based on existing policies and guidelines to facilitate and expedite the processing of the Community Associations' loan applications. Furthermore, they shall be able to perform site inspection and appraisal using the approved appraisal methodologies. Topics include: • Technical Advisory • Technical Site Inspection and Appraisal • Technical Evaluation and Project Monitoring

1.6	TC32 Financial Management	FCD personnel	3rdQuarter of 2020	This program is designed to upgrade participant's skills in accounting SHFC's financial transactions and interpreting results through various reports and analysis. It also aims to enhance their understanding, application and interpretation of tax laws and regulations applicable to the SHFC. Topics include: • Review of General Accounting Principles • Applicable laws and regulations • Financial Report Preparation • Gathering financial information • Developing financial reports for financial analysis • Accounts Payables • Recording, verifying and summarizing accounts payables transactions and events in accordance with generally accepted accounting principles in Payables • Taxation • Applicable tax laws and regulations to recurring transactions and procedures • preparation of tax records, tax returns • Assessing impact of the company's tax exposure
General Accounting & Taxation Program (GATP)				
1. 7	TC 35. Program Development	All Middle Management Officers	4th Quarter	This program will help SHFC to develop a 6-year strategic framework and plan in compliance with PCW's MC 2018-04 and to serve as its anchor to the annual GAD Plans for 2020-2025. The main objectives of this program are the following: • Familiarize with PCW Memorandum Circular 2018-04 or the Guidelines in the Development of Gender and Development Agenda • Identify strategic directions for the institution regarding the implementation of GAD initiatives • Develop a framework that will serve as a guiding document of the institution in effectively mainstreaming gender in its systems, mechanisms, and structures • Develop a long-term work plan detailing the implementation of the
GADvision 2025: Setting SHFC's Strategic Framework and Multi-Year Work Plans towards GEWE (Gender Equality and Women				

Empowerment)				strategic directives
				• Develop an institutional monitoring and evaluation mechanism for the proposed GAD agenda.

ORGANIZATIONAL TRAININGS				
Title	**Competency**	**Target Pax**	**Schedule**	**Description**

2.1
 	
Innovative Problem Solving and Decision Making Workshop (IPSDM)
	OC4
	Problem Solving and Decision Making
		All personnel	2nd Quarter of 2020	This program is designed to presents situations requiring the participants to analyze a given problem, come up with various alternative solutions to a problem, and arrive at a decision. It allows them to simplify the steps in handling problems and making decisions to enable the managers/supervisors and staff work more effectively. The importance of strategic thinking in problem solving and decision making process will also be emphasized in this course. Topics included:
				➢ Innovate with CARE (Creating, Advancing, Refining, and Executing as well as Facilitating)
				   • Situation Appraisal
				   • Identify Concern and Set Priority
				   • Plan Next Steps and Involvement
				➢ Problem Analysis
				   • Problem Identification
				   • Causes of the Problem
				➢ Decision Analysis
				   • Decision Objective
				   • Selection Criteria
				   • Creative Thinking Approach

				• Cost Benefit Analysis • Best Balanced Choice ➢ Potential Problem Analysis • Identifying Risks • Planning Preventive Actions Planning Contingent Actions

2.2
 	
Records and Information Management
	OC5
	Records Administration
		Records Officers and personnel who are in-charge in efficient management of records	2nd Quarter of 2020	This program is designed to educate participants on the prescribed system of records management and operations in the SHFC as well as the importance of maintaining the fidelity of records, proper protection, disposal and archiving of records. Also, in support of the QMS Certification for ISO 9001:2015, this seminar intends to ensure that all employees will understand the need to maintain the level of workplace organization through the principles and practice of 5S. Topics included:
				
				1. Backgrounder on the Life-Cycle of a Record
				2. SHFC Prescribed System of Classification of Records
				    a. Sorting of Records
				    b. Distinction between personal letters and official letters
				    c. Records Management and Operations System
				3. Roles, Duties and Responsibilities of Records Officers
				    a. Role as protectors of important/vital/ classified/confidential records/ documents of SHFC
				    b. Role in presenting legal documents in courts
				4. The ideal layout of a records office
				5. Retention period of each classified record
				6. Proper procedures in disposing/ archiving records or documents

CORE TRAININGS

Title	Competency	Target Pax	Schedule	Description

3.1
 	
SHFC Values Orientation Workshop (SVOW)
	CC1 Commitment to Credible Public Service	All personnel	4th Quarter of 2019	The program is designed to help participants clarify their personal values in order to align them with SHFC's core values and goals. It also aims to promote self-awareness of strengths and areas that need improvement in relation to their present position and the organization's goals. It could contribute to the personnel's appreciation of their own role in the organization and develop a positive outlook towards their job. Topics included:
				
				• SHFC Ideology: vision, mission, values, quality, policy, strategic intent
				• SHFC Values
				  - What They Are
				  - What They Are Not
				  - Illustrative Examples on How to Live Values on the Job
				• War Stories, Vignettes on How the Officers Lived the SHFC Values
				• Personal Vision & Mission Statements
				• Personal Values System
				• Action Planning to Reconcile and Live Personal & SHFC Values

LEADERSHIP TRAININGS

Title	Competency	Target Pax	Schedule	Description
4.1 **Coaching, Counseling and Mentoring**	LC 2. Managing Performance and Coaching for Results	SHFC Leaders	2nd Quarter of 2020	The participants will learn the similarities and differences between the three skills Practice the core skills of coaching, counseling and mentoring, and get feedback on your performance, and explore the role of a mentor and identify the skills and knowledge required.

MANDATORY TRAININGS			
Title	**Target Pax**	**Schedule**	**Description**
5.1 **Seminar on RA 9184 "Government Procurement Act"**	Bids and Awards Committee and Technical Working Group members (all end-users – for awareness)	3rd Quarter of 2020	This program is designed to make the participants be aware and understand the processes in the Procurement of goods, consulting services, contracting for infrastructure projects and lease of goods and real estate. Government procurement is, at present, governed by Republic Act. No. 9184, "An Act Providing for the Modernization, Standardization and Regulation of the Procurement Activities of the Government and for Other Purposes", enacted on December 18, 2002 and its Implementing Rules and Regulations.
5.2 **Money Counterfeit Detection and Signature Verification Seminar**	All cashiering personnel and account officers	3rd Quarter of 2020	Money Counterfeit Detection Seminar aims to develop the knowledge, skills and abilities of the target audience on how to recognize illegally created security documents or the fraudulent use of genuine security documents. Signature Verification Seminar aims to validate the identity of an individual. It is often used to compare signatures and check authenticity of the affixed signatures of the documents. It will help to identify fraud in the process of authentication of documents.
5.3 **Conduct of 5S**	All units	2nd Quarter of 2020	In support of the QMS Certification for ISO 9001:2015, this seminar intends to ensure that all employees will understand the need to maintain the level of workplace organization through the principles and practice of 5S.
5.4 **Continuing Professional Development for Licensed Professionals**	Accountants, Appraiser and Civil Engineer	Continuous	This program is designed to upgrade and/or update participant's skills in appraisal, accountancy and in engineering for SHFC's project development transactions and interpreting through various reports and analysis. It also aims to enhance their understanding, application and interpretation of new systems and approaches applicable to the SHFC.

5.5 Data Privacy Act Seminar	All Units	4thQarter	This course provides data privacy professionals with the knowledge to devise and implement policies and practices required by the Data Privacy Act (DPA) and support their organization's compliance efforts cost effectively, efficiently and productively.

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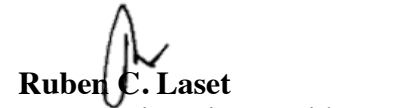Technical Staff VII

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