




# Training

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Human Resources Management Division

**Issued**

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## I. GENERAL EMPLOYEE TRAINING


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### POLICY


1. The Company shall provide an organizational climate which promotes the continuing personal development of its employees in terms of the knowledge, skill, and attitude areas which support organizational goals and objectives.
2. Training shall aim to help employees acquire and develop the knowledge, skills, and attitudes necessary to do their work and to prepare them for future responsibilities.

### REGULATIONS

1. The decision to allow employee participation in training programs shall depend upon the training need identified. Determining the training needs shall be a collaborative effort among employees, line supervisors and managers, the Technical Training team, and the Human Resources Management Division (HRMD).
2. Each department/division/unit head shall allot an annual training budget for his staff, as part of his own unit's goals, objectives, and plans. The head is responsible for monitoring the expenses, and ensuring that they are allocated accordingly to the various cost centers. The budget should be in line with the employees' training plans.
3. Training programs attended by employees beyond the office hours or on weekends shall not be considered as overtime work. However, those sent to attend training programs beyond office hours may have their transportation and other related expenses reimbursed. Meals may be reimbursed (based on the General HR Policies and Procedures) given that the training provider did not serve snacks and/or meals during the course of the training.
4. Employees may be sent to internal or external training programs upon recommendation and approval of their superiors, subject to budget allocation. As a general rule, only regular employees may be sent to training courses. Exceptions shall be decided upon by the HRMD based on the endorsement and justification given by the Heads of such employees and with the approval of the division head.
5. Training programs shall include, but are not limited to, classroom training, online training courses, and other development programs.
6. Employee training and development shall be the responsibility of:
  - a. Employee - The primary source of development must come from the employee. Employees are encouraged to devote time for their continued self-development.

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- b. Division/Department/Unit Head - Each head has the responsibility of determining and addressing the development needs of his staff. Employees shall be given the assistance to develop and harness their knowledge, skills and attitudes to the optimum through:
      - b.1. an immediate job orientation;
      - b.2. a regular and sound appraisal and feedback of performance, and periodic counseling;
      - b.3. providing on-the-job, or actual training as well as other opportunities for self-development;
      - b.4. giving of information regarding work objectives and progress toward its achievement; and
      - b.5. informing pertinent level of management, the Technical Training team or the HRMD about training needs that cannot be addressed within his resources.
    - c. Technical Training team - The development, implementation and evaluation of technical training activities and programs (including Agency Training) shall be initiated by the designated technical training team, and in collaboration with the HRMD, as may be required.
    - d. Human Resources Management Division (HRMD) - The HRMD shall provide assistance to Management in the selection, development, implementation and evaluation of appropriate management or behavioral training activities and programs that are relevant to and in support of the organization's goals and objectives. It shall also take charge of monitoring and documenting training and development initiatives consistent with the mandate and requirements of MAPFRE's HR Corporate Directorate.
7. The following are the phases of training:
  - a. Training Needs Analysis - This shall pertain to the continuing process of identifying gaps between the present level of employee knowledge, skills and attitudes, and the level required of the job. The methods range from simple observation of behavior and job performance, to structured interviews/questionnaires or analysis of corporate objectives.
  - b. Training Design - Based on the training needs analysis, the structure of the corresponding training program to be administered will be formulated, considering the objectives, learning content, tasks required, method of training, expected outcome, and training resources to be utilized.
  - c. Program Implementation - The actual training program shall be conducted based on the training design made.

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- d. Program Evaluation - Training programs shall be assessed afterwards to determine its effectiveness in meeting the objectives set, and to identify possible inadequacies of such for further improvement. The evaluation shall be based on the perception of the trainees, and the superiors concerned, as well as performance on the job. A follow-up training may be organized to serve as an update on the training conducted in order to ensure optimum application to actual work situation.
8. New hires will be given an orientation on basic Company information such as its history, policies and procedures, the current organizational structure, the Employee Code of Conduct, and its employee programs. The orientation will be handled by the HRMD and coordinated with the participants and their respective heads.
9. Training roadmaps and performance appraisal developmental plans will be used as reference or guide in what training alternatives to prescribe for employees. A training roadmap of a job shows the ideal technical and non-technical skills, knowledge and training needed in the career progress of a function.
 

It is the responsibility of the heads to make sure that the developmental plans of his staff are aligned with the training roadmap. They shall also be responsible for coordinating with the HRMD and the technical training team regarding the training plans.
10. The HRMD is responsible for maintaining the training roadmaps for employees. The Technical Training team shall coordinate with the HRMD and the division/department/unit heads for the updating of the roadmaps to ensure that any developments are properly documented and cascaded to employees.
11. An employee who is new on the job may be given the on-the-job training (OJT) as directed by his immediate superior, for a definite period of time. The objectives of the OJT shall be knowledge acquisition and skill development or enhancement in the actual job situation. This is done after the job has been clearly defined.
 

A close monitoring of the employee-trainee shall be undertaken by the immediate superior concerned. The progress of the OJT shall be documented during the entire time of observation. The results of the OJT shall provide information to the immediate head of the employee on the readiness of the latter to do a certain job on a regular basis.
12. Any participant who resigns from the Company shall automatically be considered “dropped” from the training program upon submission of his resignation letter.

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## II. INTERNAL (IN-HOUSE) TRAINING PROGRAMS

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### REGULATIONS


1. Internal training programs shall address development needs that are more general in nature and which exist widely across the organization. It will cover a range of training activities given by the Company such as formal job-improvement training, personal relations improvement, technical and supervisory or management training and development.
2. It shall cater to the identified training needs common or specific to a target group of employees, which cannot be dealt with on the job.
3. Employee-participants who have completed at least 80% attendance and have passed the corresponding examination/s, if any, shall be awarded certificates of attendance or completion.

### PROCEDURES


1. Based on the analysis of training needs identified, the division/department/unit head concerned shall coordinate with the Human Resources Management Division (HRMD) or the technical training team (for technical programs) in coming up with the appropriate action or training plan.
2. The training design shall be a collaborative work of the technical training team (for technical programs) and the HRMD (for non-technical programs), and the heads requesting training.
3. The completed training design shall be reviewed by the technical training team and HRMD for decision. Programs that are not within budget or would entail substantial cost shall subject to the President's approval.
4. The technical training team shall facilitate the arrangements on the resource speakers to be invited, schedule of sessions, materials preparation, program implementation and evaluation for technical programs.

The HRMD shall perform the same functions for non-technical programs, but will be in charge of collaborating with the heads and participants of technical programs.

5. Evaluation of the effectiveness of the training conducted shall be initiated by the technical training team (technical programs) and the HRMD (non-technical programs) by obtaining participants' feedback. Inputs from department/unit heads of participants may also be utilized to supplement or substantiate feedback received.

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6. Employees who attend training programs are required to forward their training information to HRMD for documentation, and will qualify for the training rewards program managed by HRMD.
7. Employees who are enrolled to online training programs or courses are required to complete the module before the given deadline. Those who fail to complete the course for unjustifiable reasons shall be considered “dropped” from the course and shoulder the equivalent cost of his enrollment.

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### III. EXTERNAL TRAINING PROGRAMS


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#### REGULATIONS

1. External courses shall be utilized when the Company has no comparable resources to provide the specific training required, and when the number of trainees is small to warrant the setting up of an internal or in-house program.
2. Upon separation from the Company, all materials obtained from Company-sponsored training courses shall be forwarded to the Human Resources Management Division (HRMD) for safekeeping. These shall be part of the clearance from the HRMD.

#### PROCEDURES

1. A recommendation for training program attendance may be initiated by the department/unit head based on the training needs identified.
2. The department/unit head will then coordinate with the HRMD regarding scheduled public seminar offerings of training institutions and the training budget of the department. He shall then decide on the recommendation to send the staff concerned to the training program.
3. The HRMD shall inform the employee-participant/s about the seminar. It will coordinate with the training institution for seminar registrations and prepare the requirements.
4. The participants may be asked to prepare a report about their learning within one week after the training and submit the same to their superiors, copy of which shall be furnished to the HRMD.
5. Participants shall be expected to impart to other employees what they learned from the course.

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## IV. EXAMINATION COURSES

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### POLICY

Employees who shall be attending examination courses are required to take the scheduled tests and are expected to attain at least the passing mark in order to get a Certificate of Completion.


### REGULATIONS

1. Participants who shall fail to pass exam courses (such as, but not limited to, the Basic Non-life Insurance Course or Insurance Basics Course) will have to re-take and pass the same course at his own expense. Passing such course may be a pre-requisite to taking any other Company-sponsored exam directly related to the course he failed e.g., Advanced Non-life, Basic Motor Insurance.
2. A participant who places "first" in class for external training examination shall be given a cash gift equivalent to the cost of the course.

Those who initially fail the course and thus required to re-take it are disqualified from receiving any cash gift equivalent, regardless if they place first in their class.

3. Cheating in any examination, quiz, or group work shall be considered an act of dishonesty and shall subject the employee to the appropriate disciplinary action in accordance with the Code of Conduct.



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## V. TRAINING AGREEMENT

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### POLICY

1. Employees are expected to practice their learning from the training in their line of work as well as for their professional development. The cost of the training programs attended by the employees is considered as investment on the part of the Company.
2. Regular employees who are enrolled to a training program amounting to at least PhP 30,000.00 will be bound to enter into a one-year training agreement in consideration of the amount spent by the Company for the program.
3. Should the employee leave the employment with or is terminated for a just cause by the Company before the end of the one-year period, the employee will pay the Company the actual amount of investment for the training program.

### REGULATIONS

1. The employee shall agree to remain in the employ of the Company for a fixed period of one year which will be counted from the first day of training in consideration of the training program granted.
2. The employee shall attend the training program diligently and shall follow all regulations that will be enforced by the training provider and those imposed by the Company from time to time.
3. The employee shall be liable to pay the Company upon demand the actual cost of the training program in the event of the following circumstances where the employee:
  - a. Fails to perform satisfactorily or is guilty of neglect or indifference in studying the program
  - b. Resigns from the Company and/or abandons the training program before completion without written consent of the Company
  - c. Fails or refuses to report for work or resigns from the Company upon completing the training program
  - d. Breaches any terms and conditions set out in the Training Agreement and/or conditions of his employment
  - e. Resigns or abandons the service of the Company during the one-year period
4. The actual cost to be paid pertains to the direct cost of enrollment to the local training program which excludes billable expenses (i.e, costs which are incurred in relation to the training program such as travel, living, and meal expenses).

An employee who is enrolled to a foreign training program shall be bound to enter into a training agreement where the cost to be considered will include that of the program,


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plane fare, *per diem* or daily allowance, hotel charges, and other travel accommodations pertaining to his participation in the training program.

5. The employee shall not be involved in any activity that shall jeopardize or bring disrepute to the reputation of the Company.
6. The employee shall not at any time or in any manner, either directly or indirectly, divulge, disclose or communicate to any person, natural or juridical, in any manner whatsoever any information concerning any matters affecting or relating to the business of the Company or its clients and partners. This includes, but is not limited to techniques, technology, and other systems, without regard to whether or not such matters will be deemed confidential, material or important.

The obligation of confidentiality based on the training agreement will subsist even after the cessation of the employee's employment.

7. Those cases which were not directly addressed in this policy shall be forwarded to HRMD for proper action.

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## VI. REINFORCED EDUCATIONAL ASSISTANCE PROGRAM


### POLICY

1. The Company supports the acquisition of additional knowledge and skills of its employees for their personal and professional development and the betterment of their career in the organization.
2. Regular employees with at least three (3) years of continuous service are qualified for an educational assistance should they pursue a post-graduate course (such as Masters, Doctoral or Advanced Studies) directly related to their job.

### QUALIFICATIONS

1. The employee must be employed in the Company at the time of course completion to be eligible for reimbursement. Should he resign from the Company within one year from the date of the recent tuition fee reimbursement, he shall automatically be suspended from the program and will be required to pay the Company the full amount of the last tuition fee reimbursed.
2. The eligible employee's performance rating must at least be 'Very Satisfactory' for the last two (2) years prior to the post graduate education and throughout the duration of this program.
3. The Company will utilize as benchmark the grade scales of the top three (3) Philippine universities (as seen in Table 1.1 below) to determine qualification for reimbursement and shall consider the grade point average of the employee for the semester.

University	Quantitative Grade Required
<b>100% REFUND</b>	
Ateneo de Manila University (AdMU)	84+
De La Salle University (DLSU)	85+
University of the Philippines (UP)	82+
<b>85% REFUND (satisfactory performance)</b>	
AdMU	80-83
DLSU	80-84
UP	76-81
<b>70% REFUND (fair performance)</b>	
AdMU	72-79
DLSU	70-79
UP	75

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4. No employee should have a failing grade for the semester in order to qualify for the tuition fee reimbursement under this program.
5. The employee will take up the course on a part-time but continuous basis as he works full time for the Company.

## COURSE REQUIREMENTS

1. A course or degree program must provide for the professional development of the employee, and bear a relationship to the employee's current or anticipated future duties within the Company.
2. Courses may be taken at reputable and acknowledged schools of higher learning (e.g. UP, DLSU, AdMU, University of Asia and the Pacific, Asian Institute of Management) or other institutions recognized to be specializing in the courses.
3. The employee should attach to the request the program description from the school.
4. The HRMD may require from the employee a copy of his final paper or dissertation and transcript of records upon completion of the program.

## REGULATIONS

1. An eligible employee interested in seeking educational assistance must formally notify his immediate head through writing. He must also state his career goals and plans in line with the education he would want to pursue.
2. The immediate head shall evaluate the request and endorse the request up to the level of division head with his recommendations.
3. The Division Head shall decide on the request, taking in consideration the approved budget for the educational assistance. This shall be charged against the local training budget of the division/department/unit of the employee concerned. The decision shall be forwarded to the Human Resources Management Division (HRMD) for proper action, coursed through the employee's department/unit head.
4. If the employee is seeking for an advanced study or a program that is not directly related to his job or career in the organization, the request will be forwarded to the HRMD for further evaluation and action.

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## PROCEDURES

1. The Program shall cover reimbursement for tuition fees up to a maximum of PhP 50,000.00 per semester. This program, however, does not include payments for the following:
  - a. Books, supplies, and equipment
  - b. Meals, lodging, or transportation
  - c. Tools or supplies which may be kept after completing the course of instruction
  - d. Units involving sports, games, or hobbies unless, they are required for completion of the degree program
2. An eligible employee must submit the following to HRMD for processing of reimbursement:
  - a. Original copy of the grade report from the educational institution that shows the employee has met the grade requirements.
  - b. Original copy of Official Receipt/s from the educational institution
  - c. Copy of the certified class schedule of the employee
  - d. Written endorsement from the immediate head and approval of the division head regarding the tuition fee reimbursement

## MODIFICATION, SUSPENSION, OR TERMINATION OF PROGRAM

This program may be modified, suspended, or terminated due to budgetary constraints or other reasons, as determined by HRMD.