



Republic of the Philippines
DEPARTMENT OF FINANCE
BUREAU OF LOCAL GOVERNMENT FINANCE
8th Floor EDPC Building, BSP Complex, Roxas Boulevard, 1004 Manila
www.blgf.gov.ph | central@blgf.gov.ph | +63 2 527 2780 / 527 2790

025.2019

BLGF MEMORANDUM CIRCULAR NO.

OCT 03 2019

TO : All BLGF Central and Regional Officials and Employees; All Provincial, City and Municipal Treasury Offices; and Others Concerned

SUBJECT : Guidelines on the Evaluation and Processing of Appointments of Local Treasurers and Assistant Local Treasurers

This Memorandum Circular is issued to inform all concerned of the herein attached **Department Personnel Order (DPO) No. 477.2019**, dated 04 Jun 2019, issued by the Secretary of Finance, on the **Guidelines on the Evaluation and Processing of Appointments of Local Treasurers and Assistant Local Treasurers**, thereby prescribing the streamlined documentary requirements and evaluation criteria, integrating the Standardized Examination and Assessment for Local Treasury Service (SEAL) Program, under Department Order No. 053.2016, dated 20 Oct 2016, and setting the two-level screening process for evaluation by BLGF Regional Offices (ROs) and Central Office (CO).

In line with Section 7¹ of the said DPO and pursuant to the BLGF Quality Policy, the following supplementary guidelines are hereby issued for compliance by all concerned, consistent with all applicable civil service rules and regulations:

1. **Publication and Posting of Vacancy.** Per Item Nos. 3.2 and 3.3 of DPO No. 477.2019, the publication and posting of the vacant position of Local Treasurer (LT) or Assistant Local Treasurer (ALT), in accordance with RA No. 7041, as amended, for at least fifteen (15) calendar days, shall first be complied with. The filling up of the vacant position shall be made after fifteen (15) calendar days from its publication, but shall not exceed nine (9) months from the date of publication. Such notice of vacancy shall strictly contain the qualification standards, as provided under Sections 470 and 471 of Republic Act (RA) No. 7160 or the Local Government Code (LGC) of 1991, and shall be posted in at least three (3) conspicuous places within the concerned LGU, and shall be reported to the Civil Service Commission (CSC).
2. **Prescribed Documentary Requirements.** The basic documentary requirements for processing the appointments of LT and ALT are provided in **Annex A**, for First Level Process (Initial Screening), and **Annex B**, for Second Level Process (Final Deliberation). The sample letter of recommendation of the local chief executive (LCE) is provided under **Annex C** hereof. The LGU, through its Human Resource Management Officer, shall:
 - a. Require each recommendee to submit all documentary requirements listed in **Item A of Annex A** and ensure the completeness of information;
 - b. Prepare the documentary requirements in **Item B of Annex A**; and

¹ 6. **RESPONSIBILITY OF THE BLGF.** The BLGF Executive Director shall be authorized to issue guidelines or circulars relative to and consistent with this Order to ensure streamlined implementation, due diligence, and continual improvement of service delivery standards, such as the prescribed documentary requirements for each level of HRMPST evaluations, checklists and templates, step-by-step procedures, certification of completeness and orderliness of required documents, and comparative evaluation matrices, among others. xxx

- c. Consolidate, label, tab and properly file in a docket or binder all documents enumerated in **Annex A**, together with the letter of recommendation of the LCE (*Annex C*) as cover.
3. **Requisites in the Submission of Letter of Recommendation of the LCE.** The letter of recommendation with supporting documents shall be submitted to the BLGF RO, through the Provincial Treasurer, in the case of municipalities and component cities, and to the BLGF CO Administrative Division, in the case of LGUs in the National Capital Region (NCR), for pre-evaluation and initial screening. If the recommendation is made by the LCE in Acting Capacity, compliance with Sec. 46 of RA No. 7160, or the LGC, shall be observed.
4. **Constitution of the BLGF HRMPSB.** The BLGF Regional HRMPSB of each BLGF RO shall be chaired by the concerned BLGF Regional Director, and composed of ranking Bureau personnel. The concerned Provincial Treasurer or his/her duly authorized ranking alternate shall serve as *ex officio* member thereof in screening local treasury appointments in component cities and municipalities, per Item Nos. 3.7 and 3.8 of DPO 477.2019. The BLGF Central HRMPSB shall be chaired by the BLGF Executive Director, and composed of ranking Bureau personnel, per Item Nos. 3.7 and 3.8 of DPO 477.2019.
5. **First Level (Initial Screening) Process.** The concerned BLGF Action Officer shall pre-evaluate the LGU's compliance with the documentary requirements and provide immediate feedback. In case the documents submitted are found incomplete or deficient, the LGU shall be properly notified using the form prescribed in **Annex D** hereof. The evaluation of the documents shall be certified as to completeness and orderliness, per **Annex E** hereof, and submitted to the BLGF Regional and Central HRMPSBs for deliberations.
- The BLGF HRMPSB shall deliberate and rank the recommendees for LT and/or ALT position/s. It shall comparatively evaluate all recommendees using **Annex F** hereof. Interview of recommendees by the BLGF Regional Director or Executive Director, as the case may be, shall be required to further evaluate the candidates' capacity for the position, and the corresponding points shall be included in the evaluation sheet. The results of each deliberation shall be formalized through a Board Resolution, and supported by duly signed summary of ratings, including all the First Level documentary requirements and the accomplished compliance certification, to be submitted to the BLGF Central HRMPSB.
6. **Second Level (Final Deliberation) Process.** The BLGF Central HRMPSB shall conduct the corresponding Second Level process for the final deliberation of all recommendees. The BLGF CO Administrative Division shall communicate the results to the BLGF RO to inform the concerned recommendee of the submission of the documentary requirements specified in **Annex B** hereof. Upon completion of all the required documents, the BLGF Central HRMPSB Chairperson shall endorse the proposed appointment papers to the Secretary of Finance, through the Undersecretary of Revenue Operations Group (ROG), for final action, together with the certification as provided in **Annex F** hereof. As part of due diligence, the BLGF Office of the Executive Director, the ROG Office of the Undersecretary, and/or the DOF Office of the Secretary may require additional information or clarification whenever warranted.
7. **Return Without Action Policy.** All recommendations or documents received by the BLGF RO or CO that are not compliant with the requirements shall be given up to thirty (30) days upon issuance of notification to complete the same. If after

the lapse of the said period the requirements remain to be completed, the entire set of documents shall be immediately and formally returned without action to the concerned LCE. In cases of individual applications received by the BLGF, the same shall be immediately referred to the concerned LCE for appropriate action.

8. **Issuance of Appointment Papers.** All appointments signed and issued by the Secretary of Finance shall be subject for attestation by the CSC. The same are not covered by Section 18 Rule VI of the ORAOHRA, which requires the concurrence of the majority of all the members of the local Sanggunian to approve such appointments, inasmuch as the appointing authority is the Secretary of Finance.

As per Item No. 3.11 of DPO No. 477.2019, a certified true copy of the appointment shall be issued to the appointee, through the BLGF, copy furnished the LCE, in order that said appointee can immediately take his/her oath of office and assume the duties of the position. In cases where the nature of the appointment issued involves promotion or transfer from another agency or LGU to another, the appointee shall seek an Authority to Transfer from the head of the agency where he/she is employed prior to assumption, which shall be submitted to the BLGF CO. Upon receipt of the copy of appointment, the appointed LT or ALT shall submit to the CSC Field Office, through the BLGF CO Admin Division, the following:

- a. Duly acknowledged, signed and dated Appointment Paper;
- b. Copy of the Oath of Office; and
- c. Clearance Form (CSC Form No. 7).

9. **Administrative Costs.** All administrative costs related to the conduct of screening and deliberations by the BLGF ROs and CO shall be chargeable to the concerned BLGF office funds only. No fees, of whatever nature, shall be collected for the processing of appointments from the LGU or individual recommendees.

10. **Effectivity.** This Memorandum Circular shall take effect immediately and all proposed appointments pending at the BLGF RO level shall be evaluated in accordance with the herein guidelines. All BLGF Regional Directors are enjoined to strictly comply with the herein rules, and to immediately and widely disseminate the same to all concerned under their respective jurisdictions.

All concerned shall be guided accordingly.



NIÑO RAYMOND B. ALVINA

Executive Director

17163



Attachments

Annex A	<i>First Level Basic Documentary Requirements for Appointment of LTs and ALTs</i>
Annex B	<i>Second Level Documentary Requirements for Appointment of LTs and ALTs</i>
Annex C	<i>Sample Letter of Recommendation of Local Chief Executive</i>
Annex D	<i>Notification of Deficiency in Documentary Requirements</i>
Annex E	<i>First Level Compliance Evaluation of Requirements for Appointment</i>
Annex F	<i>Second Level Compliance Evaluation of Requirements for Appointment</i>
Annex G	<i>Comparative Evaluation Sheet</i>

ANNEX A

First Level Basic Documentary Requirements for Appointment of Local Treasurers and Assistant Local Treasurers

Document	Remarks
A. Requirements from the Individual Recommenddees	
1. Personal Data Sheet (PDS) - CSC Form No. 212, with the following:	3 Originals*
1.1 Service Record	3 Originals
1.2 Work Experience Sheet	3 Originals
1.3 Previous Office Order of Designation as Treasurer/Assistant Treasurer, if any	1 Certified Copy each
1.4 Sworn Certificate of Employment (for private work experience)	1 Photocopy
1.4 Latest Approved Appointment (if applicable)	1 Certified Copy
1.5 Certificate of Residency ¹	1 Original
2. Certificate/s of Eligibility	1 Authenticated Copy for each applicable eligibility
2.1 Civil Service Commission for CSP and/or BCLTE	
2.2 Professional Regulation Commission (PRC)	
2.3 Bar	
3. Relevant Training Certificates ²	1 Certified Copy each
4. Performance Evaluation for the last two (2) rating periods ³	1 Certified Copy each
B. LGU Requirements	
1. Recommendation Letter of Local Chief Executive, with the following:	1 Original*
1.1 Sworn Statement of Non-Prohibited Relationship ⁴	1 Original*
1.2 Certification of Availability of Funds ⁵	1 Original
1.3 Approved Plantilla Schedule for the current year	1 Certified Copy
1.4 Publication of Vacancy (not beyond 3 months old) and Posting, with Qualification Standards ⁶	1 Original
1.6 Certificate of SPMS Compliance	1 Certified Copy
1.7 If applicable, provide justification/certification for:	1 Original for each applicable case or include in the recommendation letter
a. Quantum Leap in Salary Grade	
b. Dearth of Applicants/Inclusion of Applicants from Other LGUs	
c. Non-inclusion of Next-in-Rank Employees	
1.8 Government Issued ID with Photo and Signature of LCE	1 Certified Copy

Additional Requirement for Assistant Local Treasurer Certificate of Compliance with Sec. 325 of Republic Act No. 7160⁷

* Original document signed by hand

¹ Certificate issued by the concerned Barangay Chairman and stating the candidate's good moral character

² Maximum of 120 hours for the last 5 years for PT/CT; and 40 hours for the last 5 years for MT

³ Reckoned from the date of recommendation of the LCE

⁴ Certificate must state that the nominee is not within the 4th degree of affinity or consanguinity of the LCE

⁵ Certificate issued by the concerned Local Accountant or Budget Officer stating the authorized salary rate, salary grade and item number of the position

⁶ The Qualifications Standards to be published and posted must follow Sec. 470 and 471 of Republic Act No. 7160

⁷ Signed by hand by the LCE and Local Accountant stating that the filling up of the position complies with Sec. 325a of the LGC

ANNEX B

Second Level Basic Documentary Requirements for Appointment of Local Treasurers and Assistant Local Treasurers

Document	Remarks
1. Transcript of Records (except for recommendees who are already regularly appointed Local Treasurer/Assistant Local Treasurer)	1 Authenticated Copy for each academic degree
2. Latest Sworn Statement of Assets, Liabilities, and Net Worth (SALN)	1 Original
3. Medical Certificate - Latest CSC Form No. 211	1 Original
4. Valid Clearances and Certificate/s of No Pending Case (if with pending case/s, provide Case Summary/ies):	
4.1 National Bureau of Investigation (NBI)	1 Original
4.2 Civil Service Commission (CSC)	1 Original
4.3 Ombudsman	1 Original
4.4 BLGF (only for recommendees who are already appointed LT/ALT)	1 Original
4.5 LGU or NGA (only for recommendees who are appointed government personnel)	1 Original
4. Marriage Certificate (for married female only)	1 Certified Copy
5. Acceptance of Lower Salary (if applicable)	1 Original

ANNEX C

Sample Letter of Recommendation of Local Chief Executive

Date

NIÑO RAYMOND B. ALVINA

Executive Director

Bureau of Local Government Finance

Manila

Thru: **[NAME OF REGIONAL DIRECTOR]**

Regional Director, BLGF Regional Office No. _____

Dear **Executive Director ALVINA:**

In the exigencies of the service and in view of the vacancy of the **[Provincial/City/Municipal Treasurer/Assistant Treasurer]** of this **[Province/City/Municipality]**, I am recommending the following personnel for the Bureau's evaluation from which the Secretary of Finance shall appoint, in accordance with Republic Act No. 7160 and DOF Department Personnel Order No. 477.2019, to wit:

Name	Position, Official Station	Remarks/Brief Summary of Qualifications
1.		
2.		
3.		
<i>add rows if there are additional recommendees</i>		

Please find enclosed herein the following supporting documents for your perusal:

1. Personal Data Sheet and other supporting documents of the above recommendees;
2. Sworn Statement of Non-Prohibited Relationship with the above recommendees;
3. LGU Certification of Availability of Funds;
4. Approved Plantilla Schedule of the LGU for the current year;
4. Publication of Vacancy and Posting;
5. Certificate of SPMS Compliance from CSC;
6. Other justifications (if applicable); and
7. Government-issued ID with Photo and Signature of the undersigned.

Thank you.

Sincerely yours,

[Signature]

[NAME OF GOVERNOR/MAYOR]

[Position]



ANNEX D

NOTIFICATION OF DEFICIENCY IN DOCUMENTARY REQUIREMENTS

MAYOR/GOVERNOR _____
Province/City/Municipality of _____

Subject : **Notice of Deficiency of Requirements for Local Treasury Appointment**

Dear **Mayor/Governor** _____:

This has reference to the proposed appointment of Provincial/City/Municipal Treasurer/Assistant Treasurer of the Province/City/Municipality of _____, per your letter of recommendation dated _____, received by this Office on _____.

Please be informed that upon perusal of the documents submitted, the following deficiencies and observations have been found:

<i>Name of Recommendee:</i>	
Documentary Requirement from Individual	Remarks/Instruction
1.	
2.	
3.	
Documentary Requirement from LGU	Remarks/Instruction
1.	
2.	
3.	

In accordance with the policy of this Bureau, it is respectfully requested that the above-listed documents be fully accomplished and completely submitted within thirty (30) days from receipt of this notification. Otherwise, we will be constrained to return the entire set of documents for appointment without action.

Thank you.

Very truly yours,

Name and Signature of Regional Director



ANNEX E

COMPLIANCE EVALUATION OF REQUIREMENTS FOR APPOINTMENT

First Level Process: BLGF Regional Office No. _____

Name of LGU		Name of LCE	
Position		Salary Grade	PhP

Instructions: Please mark "C" if the requirement is fully complied, and "NA" if not applicable. This Certification must be submitted to the BLGF Central Office only when the 1st Level Requirements have been fully complied, and collated.

Document	Remarks	Evaluation		
		Name 1	Name 2	Name 3
A. Requirements from the Individual Recommendees				
1. PDS - CSC Form No. 212, with the following:	3 Originals			
1.1 Service Record	3 Originals			
1.2 Work Experience Sheet	3 Originals			
1.3 Previous Office Order of Designation as LT/ALT, if any	1 Certified Copy each			
1.4 Sworn Certificate of Employment (for private work experience)	1 Photocopy			
1.4 Latest Appointment (if applicable)	1 Certified Copy			
1.5 Certificate of Residency	1 Original			
2. Certificate/s of Eligibility	1 Authenticated Copy for each applicable eligibility			
2.1 CSC for CSP and/or BCLTE				
2.2 PRC/Bar				
3. Relevant Training Certificates	1 Certified Copy each			
4. Performance Evaluation (last two (2) rating periods)	1 Certified Copy each			

Document	Remarks	Evaluation
B. LGU Requirements		
1. Letter Recommendation of Local Chief Executive, w/ the following:	1 Original	
1.1 Sworn Statement of Non-Prohibited Relationship	1 Original	
1.2 Certification of Availability of Funds	1 Original	
1.3 Approved Plantilla Schedule (current year)	1 Certified Copy	
1.4 Publication of Vacancy (not > 3 months old) and Posting, w/ QS	1 Original	
1.6 Certificate of SPMS Compliance	1 Certified Copy	
1.7 Justification/certification (if applicable):	1 Original for each case or include in the letter	
a. Quantum Leap in Salary Grade		
b. Dearth of Applicants/Inclusion of Applicants from Other LGUs		
c. Non-inclusion of Next-in-Rank Employees		
1.8 Government-Issued ID with Photo and Signature of LCE	1 Certified Copy	
2. Certificate of Compliance with Sec. 325 of LGC (in the case of ALT)	1 Original	

This is to CERTIFY that the BLGF Regional HRMPSB has received and evaluated the documents for the appointment of _____ in the Province/City/Municipality of _____, finding said documents complete, in order, and in accordance with existing rules and regulations.

Issued by:

Noted by:

**Name and Signature
of BLGF Action Officer/Secretary**
Date: _____

**Name and Signature
of BLGF Regional Director**
Date: _____

ANNEX F

COMPLIANCE EVALUATION OF REQUIREMENTS FOR APPOINTMENT

Second Level Process: BLGF Central Office

Name of LGU		Name of LCE	
Position		Salary Grade	Php

Instructions: Please mark "C" if the requirement is fully complied, and "NA" if not applicable. This certification, together with the subject documents, shall be submitted to the BLGF Central HRMPSB.

Document	Remarks	Evaluation
1. Transcript of Records (except for recommendees who are already regularly appointed Local Treasurer/Assistant Local Treasurer)	1 Authenticated Copy for each academic degree	
2. Latest SALN	1 Original	
3. Medical Certificate (CSC Form No. 211)	1 Original	
4. Valid Clearances and Certificate/s of No Pending Case (if with pending case/s, provide Case Summary/ies):		
4.1 National Bureau of Investigation (NBI)	1 Original	
4.2 Civil Service Commission (CSC)	1 Original	
4.3 Ombudsman	1 Original	
4.4 BLGF (only for recommendees who are already appointed LT/ALT)	1 Original	
4.5 LGU or NGA (only for recommendees who are appointed government personnel)	1 Original	
4. Marriage Certificate (for married female only)	1 Certified Copy	
5. Acceptance of a Lower Salary (if applicable)	1 Original	

This is to CERTIFY that the BLGF Central HRMPSB has received and evaluated the documents for the appointment of _____ in the Province/City/Municipality of _____, found said documents complete, in order, and in accordance with existing rules and regulations.

Issued by:

Noted by:

**Name and Signature
of BLGF Action Officer**
Date: _____

**Name and Signature
of BLGF Central HRMPSB Secretary**
Date: _____

BLGF Human Resource Merit Promotion and Selection Board (HRMPSB) for Local Treasury
ANNEX G - BLGF COMPARATIVE MATRIX OF EVALUATION - LOCAL TREASURY APPOINTMENT

NAME OF LGU	IC	POSITION TO BE FILLED	RECOMMENDING LCE	SALARY GRADE	ITEM NO.					
Name of Regular Incumbent										
Status of Regular Incumbent/Reason of Vacancy										
CRITERIA	Point	Score	NAME OF RECOMMENDEE NO. 1		NAME OF RECOMMENDEE NO. 2		NAME OF RECOMMENDEE NO. 3			
			Current Position & Office		Current Position & Office		Current Position & Office			
			Particulars	RO Score	CO Score	Particulars	RO Score	CO Score	Particulars	RO Score
1. Education from a recognized college or university a. Commerce, Public Administration or Law Degree b. Other College Degrees	15 10	15								
2. Experience in treasury or accounting service Provinces and Cities Municipalities a. 15 years or more b. 10 years to < 15 years c. over 5 years to < 10 years d. at least 5 years	20 18 16 14	20								
3. Applicable DOF Examination/Certification a. SEAL 3 Certification (ACLTE) b. SEAL 2 Certification (BCLTE) c. SEAL 1 Certification (BCLTE)	20 15 10	20								
4. Performance Rating in the last 2 rating periods a. Outstanding b. Very Satisfactory	10 8	10								
5. Relevant Training Provinces and Cities Municipalities a. Above 120 hours b. 120 hours minimum	10 8	10								
6. Rank/Salary Grade (SG) a. SG 24 and Above b. SG 18 to SG 23 c. SG 11 to SG 17 d. SG 10 and Below	5 4 3 2	5								
7. Previous Designation as Acting/OIC/ICO Local Treasurer or Acting/OIC/ICO ALT Non-LT/Non-ALT Regular LT/Regular ALT a. 3 years or more b. 2 years to < 3 years c. 1 year to < 2 years d. At least 6 months to < 1 year	9 7 5 3	9								
8. Other Additional Points 8.1 BarRA 1080 Passer/Professional License Holder* 8.2 Post Graduate Degree 8.3 Post Graduate Diploma/Certificate 8.4 Collegiate/Post Graduate Honors Awards	3 3 1 1	8								
9. Interview by the BLGF Executive Director or Regional Director	3	3								
Total	100									

Publication
Date Issued
Expiration Date

Prepared by: _____
Regional HRMPSB Secretary
Date Signed: _____

Recommending Approval: _____
Regional HRMPSB Chair
Date Signed: _____

CO Final Evaluation: _____
Central HRMPSB Secretary
Date Signed: _____

Confirmed per CO Deliberations
Central HRMPSB Chair
Date Signed: _____

Note: * Additional points apply only for every license not used as Eligibility Requirement and for every academic degree, diploma, certificate or awards, but not to exceed 8 points.

Handwritten signature