



FTAD-RM-2026-259

Republic of the Philippines  
**Department of Education**  
REGION IV-A CALABARZON

14 April 2026

**Regional Memorandum**  
No.259 s.2026

**CONSULTATIVE MEETING ON THE OPERATIONALIZATION  
OF DEPED REGION IV-A CALABARZON TECHNICAL  
ASSISTANCE (TA) MECHANISM, PROCESS,  
AND SYSTEM**

To: **Schools Division Superintendents**  
**Assistant Schools Division Superintendents**  
**Regional Functional Division Chiefs**

1. Pursuant to the shared governance framework in Republic Act No. 9155 (2001), this Office issues the enclosed Guidelines on the Operationalization of DepEd Region IV-A CALABARZON Technical Assistance (TA) Mechanism, Process, and System.
2. The Guidelines establish a needs-based, data-informed, time-bound, documented, and measurable TA system, and define the TA process from School to SDO to RO, covering intake, triage, diagnosis, planning, delivery, documentation, monitoring, and closure.
3. These Guidelines are meant to operationalize TA while observing statutory roles and proper lines of authority under RA 9155. TA must strengthen performance and accountability without displacing the functions of the Schools Division Superintendent, school heads, and other field officials.
4. All Schools Division Offices (SDOs) are directed to:
  - a. organize/strengthen the SDO Technical Assistance Team (CID/SGOD) as the first-line TA provider to schools;
  - b. adopt the standard forms/tools (annexes) and align workflows with the TA cycle and service timelines in the Guidelines; and
  - c. submit the Quarterly TA Summary Report to the Field Technical Assistance Division within the prescribed period for consolidation into the Regional TA Dashboard (Online Tracking and Analysis System OTAS).
5. The Members of the Regional Field Technical Assistance Teams (RFTATs), Assistant Schools Division Superintendents, SGOD and CID Chiefs, and the SBM Coordinator are requested to attend an online consultation meeting on April 22, 2026 at 2:00 p.m.



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6. All participants must register through <https://tinyurl.com/ConsultMtg> on or before April 22, 2026. The meeting link will be sent to the registered email address.
7. For inquiries or clarifications, please coordinate directly and without delay with Chief Michael Girard R. Alba, Field Technical Assistance Division, through [michael.alba@deped.gov.ph](mailto:michael.alba@deped.gov.ph) or 0917 888 2731.
8. Immediate dissemination and strict compliance are enjoined.

  
**CARLITO D. ROCAFORT**  
Director IV

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## **GUIDELINES ON THE OPERATIONALIZED TECHNICAL ASSISTANCE (TA) MECHANISM, PROCESS, AND SYSTEM OF DEPED REGION IV A CALABARZON**

### **I. Purpose**

Pursuant to the shared governance framework in basic education<sup>1</sup>, this Office—through the Field Technical Assistance Division—adopts a Technical Assistance (TA) Operations Mechanism, Process, and System to ensure that TA is needs-based, data-informed, time-bound, documented, measurable, and aligned with statutory functions under RA 9155.

### **II. Legal and Policy Bases**

1. Shared Governance and Field Office Responsiveness. RA 9155 institutionalizes shared governance across governance levels and expects field offices<sup>2</sup> to translate national policy into responsive programs and services.
2. Proper Lines of Authority; TA Must Not Displace Supervisory<sup>3</sup> Functions. Implementing mechanisms may “fill in the details” but cannot expand, extend, or contradict the enabling law; roles must follow RA 9155’s allocation of authority and supervision
3. School-Based Management (SBM)<sup>4</sup> and Decentralized Decision-Making. DepEd policy recognizes SBM as decentralizing decision-making to schools to improve learning outcomes through community participation<sup>5</sup>.

### **III. Definition of Technical Assistance (TA)**

For these Guidelines, Technical Assistance (TA) refers to targeted support provided by the RO and/or SDO to address a validated performance or implementation gap through coaching, mentoring, process clinics, modeling, quality assurance reviews, and provision of tools/templates. TA is not limited to training and must be tied to measurable outputs and verification.

### **IV. Scope and Coverage**

These Guidelines cover all TA provided:

By the Regional Office (RO) to Schools Division Offices (SDOs); and By SDOs to schools, including support on:

- a. curriculum implementation and learning delivery;
- b. assessment, learner progress monitoring, and intervention design;
- c. school improvement planning, governance, and SBM-related support; and
- d. administrative/operational support necessary to enable program implementation.

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<sup>1</sup> Republic Act No. 9155 (2001).

<sup>2</sup> PSDSA v. De Jesus (2006)

<sup>3</sup> PSDSA v. De Jesus (2006)

<sup>4</sup> DepEd Order No. 007, s. 2024

<sup>5</sup> (IRR of Republic Act No. 11661 (2022); IRR of Republic Act No. 11615 (2022))

## V. Guiding Principles

TA in Region IV-A shall be:

1. Demand-driven and evidence-based (supported by minimum data/observations).
2. Tiered from the School to SDO to RO, with escalation based on complexity/scale/risk.
3. Time-bound (service timelines and closure requirements).
4. Documented (TA case file with artifacts and outputs).
5. Measured (defined indicators and verification methods).
6. Consistent with shared governance and statutory functions—TA strengthens performance and accountability while respecting proper lines of authority under RA 9155<sup>6</sup>.

## VI. Roles and Responsibilities

### A. Regional Office (RO)

The RO shall:

- a. Maintain a Regional TA Pool (Regional Field Technical Assistance Teams RFTATs) and roster of subject-matter experts.
- b. Operate the TA intake, triage, assignment, and tracking system for RO-handled and RO-escalated cases.
- c. Provide TA primarily for systemic, cross-SDO, high-complexity, or high-risk concerns.
- d. Provide capability-building to SDO TA Teams (standards, tools, coaching protocols, QA).
- e. Ensure TA interventions remain consistent with statutory roles and do not displace division/school functions<sup>7</sup>.

### B. Schools Division Office (SDO)

The SDO shall:

- a. Establish/strengthen the SDO TA Team (CID/SGOD) as the first-line TA provider to schools.
- b. Receive and validate school requests and provide TA within division capacity.
- c. Escalate to the RO only cases that meet the escalation criteria in Section VIII.
- d. Ensure school-level implementation follow-through, monitoring, and closure.
- e. Maintain division-level TA records and submit quarterly reports required under Section XI.

### C. Schools

Schools shall:

- a. Submit TA requests with minimum supporting evidence and context.
- b. Participate in diagnosis and planning; implement agreed actions.

<sup>6</sup> Republic Act No. 9155 (2001); PSDSA v. De Jesus (2006).

<sup>7</sup> PSDSA v. De Jesus (2006)

- c. Submit required artifacts/data for monitoring and closure and sustain improvements after TA closure.

## VII. Standard TA Cycle

All TA engagements shall follow this standardized cycle. Each step has required outputs and decision points to ensure traceability, measurability, and timely closure.

### 1. Intake

Input: TA Request Form (RO-FTAD-F001)

Output: Acknowledgment + case number + initial completeness check

### 2. Triage

Action: Rate urgency/complexity/scale/risk using (RO-FTAD-F002)

Output: Triage decision (SDO-handled vs. RO-escalated) + assignment

### 3. Diagnosis

Action: Evidence review, site/virtual validation, root-cause analysis (RO-FTAD-F003)

Output: Diagnosis notes + validated problem statement + baseline indicators

### 4. TA Plan

Action: Agree on scope, deliverables, roles, schedule, indicators (RO-FTAD-F004)

Output: Signed/confirmed TA Plan + timeline + monitoring checkpoints

### 5. Delivery

Action: Implement TA modalities (RO-FTAD-F005)

Output: Session outputs, tools provided, agreed actions

### 6. Documentation

Action: Keep TA case file and session documentation (RO-FTAD-007) and (RO-FTAD-008)

Output: Complete case file with artifacts and evidence of delivery

### 7. Monitoring

Action: Check adoption and results using the monitoring checklist (RO-FTAD-F006)

Output: Monitoring notes, indicator updates, corrective actions if needed

### 8. Closure

Action: Validate completion vs. TA Plan indicators; identify next steps

Output: TA Completion/Report (RO-FTAD-F009) and Performance Contract (RO-FTAD-F010)

## VIII. Triage and Escalation Criteria

### A. Handled by SDO TA Team

- a. Cases are handled at the SDO level when they are:
- limited to a single school or small cluster;
  - low to medium complexity;
  - without region-wide policy implications; and
  - manageable within division resources and timelines.

### B. Escalated to RO Team

- b. Cases are elevated to the RO when they involve:
- cross-SDO or division-wide systemic issues;
  - high complexity requiring specialized expertise; or

- high-risk implementation issues with urgent timelines (e.g., compliance-critical, major disruptions).

### **IX. Required Forms / Tools (Annexes)**

For uniform implementation, the following standardized forms shall be adopted:

- RO-FTAD-F001 – TA Request Form (Annex A)
- RO-FTAD-F002 – Triage Matrix and Assignment Sheet/ Needs Assessment (Annex B)
- RO-FTAD-F003 – TA Diagnosis Guide (5 Whys Diagram) (Annex C)
- RO-FTAD-F004 – TA Plan Template (Annex D)
- RO-FTAD-F005 – Coaching/Clinic Documentation Template (Annex E)
- RO-FTAD-F006 – Monitoring Checklist (Annex F)
- RO-FTAD-F007 – Commitment to Change
- RO-FTAD-F008 – TA Feedback
- RO-FTAD-F009 – TA Completion/TA Report
- RO-FTAD-F010 – Closure Report/Performance Contract (Annex G)

### **X. Service Timelines**

Unless urgency/scale warrants adjustment (to be justified in the case file):

- Acknowledgment of request: within 2 working days
- Triage decision: within 5 working days
- TA Plan agreed: within 10 working days
- Initial TA session/touchpoint: within 15 working days
- Closure: within 30–90 days, depending on scope and indicators

### **XI. Reporting, Dashboard, and Continuous Improvement**

Each SDO shall submit a quarterly report covering TA volume, top issues, closure rate, results/indicator movement, good practices, and unresolved/escalated cases.

The RO shall consolidate submissions into a Regional TA Dashboard and present quarterly insights to guide planning, resource allocation, and capability-building priorities.

Recurring high-frequency issues shall trigger preventive actions (templates, advisories, coaching packages) and targeted capacity building, consistent with shared governance and field-office responsiveness under Republic Act No. 9155 (2001).

## PROCESS FLOW

