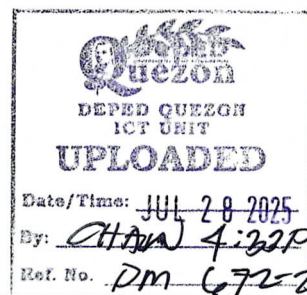




Republic of the Philippines
Department of Education
Region IV-A CALABARZON
SCHOOLS DIVISION OF QUEZON PROVINCE



21 July 2025

DIVISION MEMORANDUM
DM No. 672s. 2025

SECURING OF APPROPRIATE CLEARANCES AND TURN-OVER OF ACCOUNTABILITY

To: Assistant Schools Division Superintendents
Chiefs, CID and SGOD
Public Schools District Supervisors
Secondary School Heads
Elementary School Heads
All Concerned

1. Pursuant to **Republic Act No. 9155**, otherwise known as the **"Governance of Basic Education Act of 2001,"** which provides the legal framework for basic education governance, all personnel, particularly the School Heads, are mandated to ensure the orderly transfer of responsibilities and to secure the requisite clearances prior to reassignment or retirement. This procedure is essential to uphold operational continuity and safeguard the prudent management of school resources.
2. Accordingly, **all personnel**, whether teaching or non-teaching, and regardless of their assignment in schools or offices, are required to obtain the necessary clearances and complete the formal turnover of accountability before transferring to another assignment or officially retiring from service.
3. Attached herewith are the necessary templates and the action plan for your guidance.
4. Immediate dissemination and compliance to this Memorandum is earnestly desired.


ROMMEL C. BAUTISTA, CESO V
Schools Division Superintendent

SGORRA/07/21/2025

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TRANSFER OF ACCOUNTABILITY

This Transfer of Accountability is executed in compliance with the provisions of Republic Act No. 9155, also known as the Governance of Basic Education Act of 2001, and its implementing rules and regulations, which mandate the formal transfer of responsibility for school governance, management of resources, and accountability for school records, documents, and assets between the Outgoing School Head and the Incoming School Head.

I, _____, the Outgoing School Head of _____, holding the position of _____, hereby acknowledge that I have, on this day, _____, formally **transferred and turned over** to the Incoming School Head all pertinent school documents, records, and related materials, as specified in the **attached Annex**, in accordance with the general provisions of RA 9155, which mandates that school heads are responsible for ensuring the proper turnover of school records, documents, and assets as part of their duties in ensuring efficient school governance. I further certify that the school records and documents have been provided in a complete and accurate manner, and I shall continue to be accountable for the documents and records until such time as this transfer is formally acknowledged and accepted by the Incoming School Head.

Outgoing School Head: _____
Contact No.: _____

I, _____, the Incoming School Head of _____, holding the position of _____, hereby acknowledge that I have **received and accepted** all pertinent school documents, records, and related materials, as specified in the **attached Annex**, on this day, _____, in accordance with the general provisions of RA 9155, which entrusts the Incoming School Head with full responsibility for the management, safekeeping, and proper utilization of all school records and documents. By affixing my signature below, I formally accept responsibility for the documents and records pertaining to the school and affirm that I shall ensure their safekeeping, proper management, and proper turnover should I relinquish my position in the future.

Incoming School Head: _____
Contact No.: _____

Witness/es:

Public Schools District Supervisor

SGC Designated Co-Chairperson

SBM Division Coordinator

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SCHOOL RECORDS CHECKLIST

Annex

PARTICULARS	REMARKS
ALS FORM 5 (If the School Head is Managing an ALS Learner Center)	
ANECDOTAL RECORDS	
CRLA RESULT (Kinder to Grade 3)	
CURRICULUM CONCERNS	
DIPLOMA (UNCLAIMED)	
ECCD (KINDER)	
FORM 138 (SF 9) (UNCLAIMED)	
LEARNING MATERIALS	
PHYSICAL FITNESS TEST (MAPEH)	
READING OR NUMERACY PROGRAM	
ADOPT A SCHOOL PROJECT	
CLASSIFYING OF LEARNERS	
DEWORMING REPORT	
DPDS REPORT	
DRRM	
Earthquake Preparedness, RADaR, Etc.)	
ESIP (AIP.SRC.EBEIS)	
FEEDING REPORTS	
FORM 137(SF 10)	
GOVERNMENT ELEMENTARY SCHOOL PROFILE	
HNU	
Mapping, NSED, Unannounced Drills, Fire Safety Compliance, Family	
NSBI (NATIONAL SCHOOL BUILDING INVENTORY)	
NUTRITIONAL STATUS REPORT	
OTHER OKD PROGRAM (WINS, ARH, BDEP, MENTAL HEALTH) REPORTS	
PHYSICAL FACILITIES	
PHYSICAL FITNESS TEST (PRE-POST)	
SBFP/Self-Help Feeding Report	
SBM ACCOMPLISHMENTS (MOV` s)	
SCHOOL CONTINGENCY PLANS (Including Signed & Updated/Latest	
SCHOOL DRRM ACTION PLAN	
SCHOOL DRRM REPORTS (Student-Led School Watching and Hazard	
School DRRM Team and Signed Designation of School DRRM Coordinator)	

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PARTICULARS	REMARKS
SCHOOL FORMS (SF 1-SF 7)	
SCHOOL RECORDS	
SGC ACCOMPLISHMENTS (MOV's)	
SPG PROJECTS	
STATUS)	
STUDENT HEALTH RECORD (VACCINATION/DEWORMING/NUTRITIONAL	
TEST RESULT (NAT, NCAE, LAPG, TEPT-PST, PHIL. IRI AND FLAT, MFAT, NUMERACY)	
APP (Annual Procurement Plan) AND SUPPLEMENTAL if any	
APPOINTMENT PAPERS (ORIGINAL & LATEST)	
CANTEEN OPERATION REPORT	
CANTEEN REPORTS	
DCP PROJECT	
FINANCIAL RECORDS/STATEMENT FROM OTHER FUNDS	
FISCAL MANAGEMENT	
FORM 201	
INVENTORY OF SLMS AND TABLETS)	
IPCRF	
LAND TITLE/TAX DECLARATION	
Laptop/Wi-Fi	
LEAVE LEDGER CARDS	
LIQUIDATION REPORTS	
NOSA	
PASSBOOK (FEEDING/CANTEEN)	
PERFORMANCE INDICATORS	
PPE (Physical Plant & Equipment Inventory)	
PROJECTS FROM SEF	
PTA PROJECTS	
SALN	
SCHOOL PLANTILLA	
SCIENCE, MATH AND TVL EQUIPMENT INVENTORY	
SERVICE RECORDS	
STEP INCREMENT	
UPDATED PDS	

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Region IV-A

SCHOOLS DIVISION OF QUEZON PROVINCE

ACTION PLAN FOR THE STRICT IMPLEMENTATION OF THE CLEARANCE & TURN-OVER OF THE OUTGOING SCHOOL HEAD

FY 2025

BUDGET UNIT

I. Introduction

The role of a school head, as defined under Republic Act No. 9155 or the "Governance of Basic Education Act of 2001," encompasses both instructional leadership and administrative management. As the highest-ranking official in a school, the school head is entrusted with the overall performance of the school, including the prudent management of human, financial, and physical resources, as well as the accuracy and integrity of school records and reports.

Aligned with the Key Result Areas (KRAs) for school heads—particularly in School Leadership, Instructional Leadership, Human Resource and Financial Management, and School Management—this Action Plan addresses the recurring concerns raised by newly appointed and transferred school leaders. These concerns stem from incomplete or mishandled documentation, missing financial records, and a general lack of accountability due to the absence of a formal clearance and turn-over procedure for outgoing school heads.

In response, this Action Plan outlines a strict implementation process for the clearance and turn-over of outgoing school heads. A standardized template will be introduced and adopted to ensure uniformity, transparency, and accountability in documenting the handover of responsibilities. This template will serve as an official checklist and guide, covering essential areas such as school finances, property and equipment inventory, academic and administrative reports, learner records, and other critical documents.

By institutionalizing a formal and consistent turn-over mechanism, duly witnessed and verified by designated school and district officers, this initiative aims to ensure smooth leadership transitions, uphold accountability, and protect the integrity of school operations.

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II. General Objective/s

To implement a strict and standardized clearance and turn-over process for outgoing school heads through the use of an official template, in order to ensure accountability, continuity, and integrity in school operations—fully aligned with the mandates of RA 9155 and the Key Result Areas (KRAs) of school leadership and management.

III. Production

Areas of Concern	PPA's	Specific Objectives	Strategies	Time Frame	Budget and Its Source	Human Resources	Material Resources	Success Indicators	Risk
No proper turn-over and clearance process from the outgoing to the incoming school	Develop ment and Impleme ntation of Standar dized Turn-over and	To establish a uniform, accountabl e, and documente d process for outgoing school heads	- Create and disseminat e an official clearance and turn-over template	Q3	Not applicable	AO V, HRMO II, Records Officer, BO III, SGOD Chief, Representative from PESPA & NAPSSHI	Templates Checklists	- 100% of outgoing school heads complete clearance process using the standard template	- Resistance from outgoing school heads

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head	Clearance Process		- Conduct orientation and training for school heads and district supervisors		P569,600.00	AO V, HRMO II, Records Officer, School Heads, PSDS's	Training Templates	- At least 95% attendance of all targeted schools and district supervisors in scheduled orientation	Scheduling conflict that result in low attendance or partial participation
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IV. Evaluation

The implementation of the Clearance and Turn-Over Action Plan is designed to institutionalize accountability, transparency, and continuity in school leadership transitions, in accordance with the mandates of **RA 9155** and the **Key Result Areas (KRAs)** of school heads. Through the introduction of a **standardized clearance and turn-over template**, structured orientation programs, and enforced compliance protocols, this plan aims to address the long-standing issues of incomplete documents, unliquidated funds, and unrecorded school properties left by outgoing school heads.

Evaluation of the action plan will be based on both **quantitative and qualitative indicators** gathered during and after implementation. The following key areas will be used to assess its effectiveness:

1. **Compliance Rate**
 - o Percentage of outgoing school heads who completed the clearance process before official transfer or exit.
 - o Target: **95% compliance** across all schools in the division / district.
2. **Orientation and Capacity-Building Effectiveness**
 - o Attendance and participation levels of school heads and supervisors in orientation sessions.
 - o Improvement in knowledge and understanding as measured through feedback tools or post-training assessments.
 - o Target: **95% satisfaction rate** in training evaluations.

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3. Utilization of the Standard Template

- o Adoption and proper use of the official clearance and turn-over template across all schools.
- o Target: **100% usage** of the standardized template in all transitions.

4. Monitoring and Enforcement

- o Consistent application of sanctions for non-compliance.
- o Target: **All violations documented and acted upon** within a reasonable timeframe.

Prepared by:


CATHERINE A. PUREZA

Administrative Officer V/Budget Officer III

Approved by:


ROMMEL C. BAUTISTA, CESO V

Schools Division Superintendent

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