

<div><div>Name:</div><div>Designation:</div><div>For the period:</div><div>Reviewed By Team Leader:</div></div> <div>LUCKY LOUISE D. ABILLAR</div> <div>BRANCH OPERATIONS HEAD</div> <div>NOVEMBER 2022-DECEMBER2022</div> <div>JEROME C. DURAN</div>	Ratings Definition	
	5 - Exceptional	Performance is exceptional and at the highest
	4 - Exceeds Expectation	Successfully accomplished tasks or projects
	3 - Meets Expectation	Successfully accomplished tasks or projects on a
	2 - Below Expectation	Partially Accomplished the task or projects. Worked at tasks on an irregular or erratic basis.
Overall Rating: 4	1 - Not Acceptable	Unable to accomplish or complete the projects or tasks for the identified period of time &/or within performance standards.


The overall rating is a whole number as defined by the CitySavings 5-point rating scale. No rounding up shall be done.

A. Performance Goals – make up 95% of your Overall Rating						
Performance Goal	Weight	2022 Target Goal 3 - Meets Expectations	Above and Beyond Target Goal 4 - Exceeds Expectations/ 5 - Exceptional	Year-Assessment	Rating	Weighted Rating
REQUIRED	REQUIRED	REQUIRED	REQUIRED	TO BE POPULATED UPON GOAL COMPLETION		AUTOMATIC / DO NOT CHANGE
Achieve Operations TeleSales	2.5%	95% (Tele Sales vs. LR target) 2022 LR Target: 9 Billion	100% (Tele Sales vs. LR target) 105% (Tele Sales vs. LR target)	154.00%	5	0.13
Actual Opex vs. Budget per Branch	2.5%	Zero (0) Variance	5% Branch Opex Savings >10% Branch Opex savings	0.03	3	0.08
Achieve Tele Collection	2.5%	35% of endorsed accounts	45% of endorsed accounts > 50% of endorsed accounts	> 50% of endorsed accounts	5	0.13
Achieve Tele CI/BI	2.5%	35% of endorsed accounts	45% of endorsed accounts	3	3	0.08
Attain Very Satisfactory	5.0%	Audit Rating 85%	Audit Rating 90%	87.01%	3	0.15
No Unsafe and Unsound	5.0%	100% reconciliation of sensitive accounts and no	100% reconciliation of sensitive accounts and no	100.00%	5	0.25
No pending ROE	5.0%	100% Call Back process	100% Call Back process	100.00%	5	0.25
Attain Acceptable	5.0%	Acceptable Rating (81%-90%)	Strong (91%-95%)	95.40%	5	0.25
Attain Acceptable AMLA	5.0%	Acceptable Rating (81%-90%)	Strong (91%-95%)	92.53%	4	0.20
Manage risk incidents	5.0%	Maximum of 3 low risk open items	No outstanding open incidents	No outstanding open incidents	5	0.25
Manage risks in Risk	5.0%	Maximum of 1 high risk in Risk Heat Map	No high risk. Maximum 50% moderate risk in Risk	No high risk. No moderate risk.	5	0.25
Notify Client's with	6.25%	95% sending notice of KYC updating	> 95% sending notice of KYC updating	100.00%	5	0.31
Achieve Average TAT	6.25%	New Loan: 1 hr & 10 mins	New Loan: 1 hr	New Loan: 55 mins	5	0.31
Resolve customer	6.25%	95% resolved on time	>95% resolved on time	99.29%	4	0.25

Digitize customer	6.25%	N/A	N/A	100.00%	5	0.31
Achieve acceptable	10.0%	30% Good!	#ERROR!	83.34%	5	0.50
Achieve Acceptable	10.0%	70th Percentile (4.33)	75th Percentile (4.41)	4.26	2	0.20
Achieve LRM App	5.0%	90% registrations of total target	95% registrations of total target	85.76%	2	0.10
						0.00
						0.00
Total	95.0%	<-- MUST TOTAL 95%				3.99


B.
Development

Take your Capability Self Assessment for				[WRITE YOUR ASSESSMENT SCORE HERE]		
Developmental Goal	Weight	2022 Target Goal 3 - Meets Expectations	Above and Beyond Target Goal 4 - Exceeds Expectations/ 5 - Exceptional	Assessment and Actual Results	Rating	Weighted Rating
REQUIRED	REQUIRED	REQUIRED	REQUIRED	TO BE POPULATED UPON GOAL COMPLETION		AUTOMATIC / DO NOT CHANGE
Ensure Succession Planning	2.5%	With identified successors in each TL (in 2 years)	With identified successors in each TL (1 year) With identified successors in each TL (ready now)	With identified successors in each TL (ready now)	5	0.13
Achieve Capability Level Targets	2.5%	Core - 3 Chapter Domain - 3	Core - 4 Chapter Domain - 4 Chapter Lead - 5	6	5	0.13
						0.00
						0.00
Add: Merit as the Regional Recon Team						0.25
Total	5%	<-- MUST TOTAL 5%				0.50



JEROME C. DURAN

Regional Operations Head



LUCKY LOUISE ABILLAR

Branch Operations Head

COMPUTED RATING

4.49

Merit:

OVERALL RATING

4.49

