

Barangay San Francisco, Villaba, Leyte

Barangay Treasurer

Performance Evaluation Form

SECTION I: EMPLOYEE INFORMATION

Last Name: ARPON First Name: RENE

Job Position and/or Responsibilities: BRGY. TREASURER

Evaluator: AMELITA R. PELAYO (PUNONG BARANGAY)

Evaluation Period: From: 2022 - September TO: 2023 - September

Evaluation Type: ☒ Annual ☐ 3 Month ☐ 6 Month ☐ 9 Month

SECTION II: PERFORMANCE REVIEW

Review the nine (9) dimensions of performance. In each category, comment on the employee's accomplishments and challenges during the evaluation period. Indicate the level of performance achieved using the following scale

U = Unacceptable (0 Points)

NI = Needs Improvement (1 Point)

ME = Meets Expectations (2 Points)

EE = Exceeds Expectations (3 Points)

E = Exceptional (4 Points)

GENERAL WORK CHARACTERISTICS:

1) **Attendance & Punctuality.** Consider the number of absences, work arrival and departures, lunch periods and breaks, use of annual sick leave in accordance with City policy

U NI ME EE E
☐ ☐ ☐ ☐ ☒

Comments:

The employee reports on the specific time/hour schedules.

2) **Dependability.** Consider the extent to which the employee can be counted on to carry out instructions and responsibilities (and the degree of supervision necessary to complete work).

U NI ME EE E
☐ ☐ ☐ ☐ ☒

Comments:

The employee is responsible in complying the prescribed tasks.

3) **Professionalism.** Consider the extent to which the employee can be counted on to act, behave and dress in a professional manner.

U NI ME EE E
☐ ☐ ☐ ☐ ☒

Comments:

The employee shows desirable action and behavior.

4) Judgment, Leadership, Adaptability and Interpersonal Relations.

☐ U ☐ NI ☐ ME ☐ EE ☒ E

Comments:

He is capable to handle «showmanship» and integration.

5) Safety.

☐ U ☐ NI ☐ ME ☒ EE ☐ E

Comments:

Easy - approach skill is applied.

6) Interpersonal Style.

☐ U ☐ NI ☐ ME ☐ EE ☒ E

Comments:

The employee is cautious within the workplace or office.

7) Business Knowledge.

☐ U ☐ NI ☐ ME ☐ EE ☒ E

Comments:

The employee is competent on his job performance and demonstrate comprehensive knowledge to accomplish targets.

8) Technical Knowledge. Consider the extent of the employee's knowledge of the essential job functions as specified in the job description

☐ U ☐ NI ☐ ME ☐ EE ☒ E

Comments:

He has sufficient knowledge and skills on the work assigned.

9) Job Responsibilities.

☐ U ☐ NI ☐ ME ☐ EE ☒ E

Comments:

The employee is trustworthy and proficient on the overall activities relevant to his position and other concern that exemplifies good works.

SECTION III: GOALS/OBJECTIVES/SPECIAL ASSIGNMENTS

Where goals, objectives, projects, special assignments, etc. have been established, progress of these tasks should be evaluated. List and evaluate progress made on major pre-determined goals, objectives, projects, job duties and special assignments by marking the appropriate box. The "Comments" space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

1. Goal/Objective/Project/Major Job Duty/Special Assignment

☒ Accomplished or Satisfactory Progress

☐ Unsatisfactory Progress (See "Comments" Below)

Comments:

2. Goal/Objective/Project/Major Job Duty/Special Assignment

☒ Accomplished or Satisfactory Progress

☐ Unsatisfactory Progress (See "Comments" Below)

Comments:

3. Goal/Objective/Project/Major Job Duty/Special Assignment

☒ Accomplished or Satisfactory Progress

☐ Unsatisfactory Progress (See "Comments" Below)

Comments:

SECTION IV: OVERALL PERFORMANCE

Use this space to describe the overall performance rating. The overall rating should be a reflection of the general work characteristics and job responsibilities, tasks and steps.

U NI ME EE E
☐ ☐ ☐ ☐ ☒

SECTION V: EVALUATOR'S SIGNATURE

Evaluator's Name: AMELITA R. PELAYO

Date: Sept 30, 2023

Evaluator's Signature: 

SECTION VI: EMPLOYEE'S ACKNOWLEDGEMENT OF EVALUATION

☒ I have had an opportunity to read and discuss this performance review with the evaluator.

☒ This evaluation is acceptable to me.

☐ This evaluation is not acceptable to me and I am attaching my comments regarding this evaluation.

Employee's Signature: 

Date: September 30, 2023


APPENDIX 1: ESTABLISHMENT OF OBJECTIVES FOR THE COMING YEAR

With reference to the position responsibilities, list below the goals, objectives, projects or special assignments which should be continued and/or completed in the coming year. It is understood that these goals, objectives, etc. are subject to adjustment or change as situations and priorities change.

GOALS/OBJECTIVES/MAJOR DUTY/PROJECT/SPECIAL ASSIGNMENTS

1. Early Compliance of Orgy. Annual Budget
2. Accomplish collections and disbursements with substantial compliance on Accounting and auditing guidelines
3. Provide Accurate and transparent records of financial transactions.

Supervisor's Signature: Relajo Date: Sept. 30, 2023

Employee's Signature:  Date: September 30, 2023

Brgy. San Francisco, Villaba, Leyte

Barangay Treasurer

Performance Evaluation Form

Work Sheet

1. **Attendance & Punctuality.** Consider number of absences, work arrival and departures, lunch periods and breaks, use of annual sick leave in accordance with City policy.

	U	NI	ME	EE	E
1. Employee reports to work on a timely basis and stays on the job	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2. Employee schedules time off in advance and gives supervisor prompt notice of absence due to illness or other acceptable reasons	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3. Employee follows City policy for requesting and reporting use of leave	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4. Employee ensures work responsibilities are covered when absent or appnses supervisor of pending responsibilities or upcoming deadlines.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
5. Employee has acceptable attendance at meetings, and arrives on time for meetings and appointments.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Overall Rating for: Attendance & Punctuality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

2. **Dependability.** Consider the extent to which the employee can be counted on to carry out instructions and responsibilities (the degree of supervision necessary to complete work)

	U	NI	ME	EE	E
1. Employee can be counted on to perform work assignments and carry out instructions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2. Employee adequately monitors projects and exercises follow-through.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3. Employee adheres to time frames.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4. Employee responds appropriately to instructions and procedures.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
5. Employee has acceptable attendance at meetings, and arrives on time for meetings and appointments.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Overall Rating for: Dependability.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

3. **Professionalism.** Consider the extent to which the employee can be counted on to act, behave and dress in a professional manner.

	U	NI	ME	EE	E
1. Employee acts/behaves in a manner that reflects respect, courtesy and civility.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Employee establishes and maintains effective professional work relationships.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3. Employee attitude and appearance is appropriate for the position.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4. Employee appearance is always in good taste.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5. Employee's attitude is respectful and positive.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Overall Rating for: Professionalism.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

4. Judgment, Leadership, Adaptability and Interpersonal Relations.

Steps

U	NI	ME	EE	E
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

1. Employee evaluates situations and makes sound decisions, and uses reasoning to identify, solve and prevent problems

2. Employee exhibits willingness to comply with all reasonable requirements

3. Employee exhibits a good level of interpersonal skills and has a good working relationship with co-workers, subordinates, supervisors, customers and the general public

4. Employee works well with co-workers to get the job completed while being sensitive to the morale and satisfaction of those doing the work

5. Employee readily adjusts to changes

6. Employee readily accepts new assignments outside the scope of regular responsibilities

Overall Rating for Judgment, Leadership, Adaptability and Interpersonal Relations

5. Safety.

Steps

U	NI	ME	EE	E
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

1. Employee works in a safe manner, preventing accidents and injuries

2. Employee is knowledgeable of current safety standards and equipment necessary for proper completion of jobs or tasks

3. Employee conveys safety standards & equipment requirements to employees and co-workers and ensures proper compliance by them.

4. Employee successfully trains or re-trains employees on job safety

Overall Rating for Safety

6. Interpersonal Style.

1. Employee communicates clearly.

U	NI	ME	EE	E
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

2. Employee practices active listening

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
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3. Employee approaches disagreement constructively

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
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4. Employee shares information appropriately.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
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5. Employee is easy to approach and talk to

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
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Overall Rating for Interpersonal Style

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
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7. Business Knowledge.

1. Employee demonstrates understanding of the overall business.

U	NI	ME	EE	E
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

2. Employee demonstrates knowledge of relevant policies, practices, trends and issues.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
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Overall Rating for Business Knowledge

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
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Technical Knowledge. Consider the extent of the employee's knowledge of the essential job functions as specified in his job description.

	U	NI	ME	EE	E
1 Employee demonstrates the required functional and technical knowledge and skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2 Employee improves the way the job is performed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Overall Rating for: Technical Knowledge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Job Responsibilities.

	U	NI	ME	EE	E
1 Possesses and demonstrates complete knowledge of all accounting and financial records	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2 Possesses and demonstrates complete knowledge of and workings of City budget	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3 Possesses and demonstrates complete knowledge of the property tax roll and the tax collection process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4 Trains and cross-trains staff.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5 Accurately records minutes of meetings, records proceedings and authenticates public records	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
6 Accurately maintains records.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7 Possesses and demonstrates a complete knowledge of the voter registration system.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8 Has complete knowledge of election laws. Accurately prepares and coordinates elections	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9 Seeks out continuing education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Overall Rating for: Technical Knowledge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>