



AREA ACCOUNTANTS PERFORMANCE AGREEMENT AND REVIEW CY2022

Name (job holder): MENCHU SABANDO

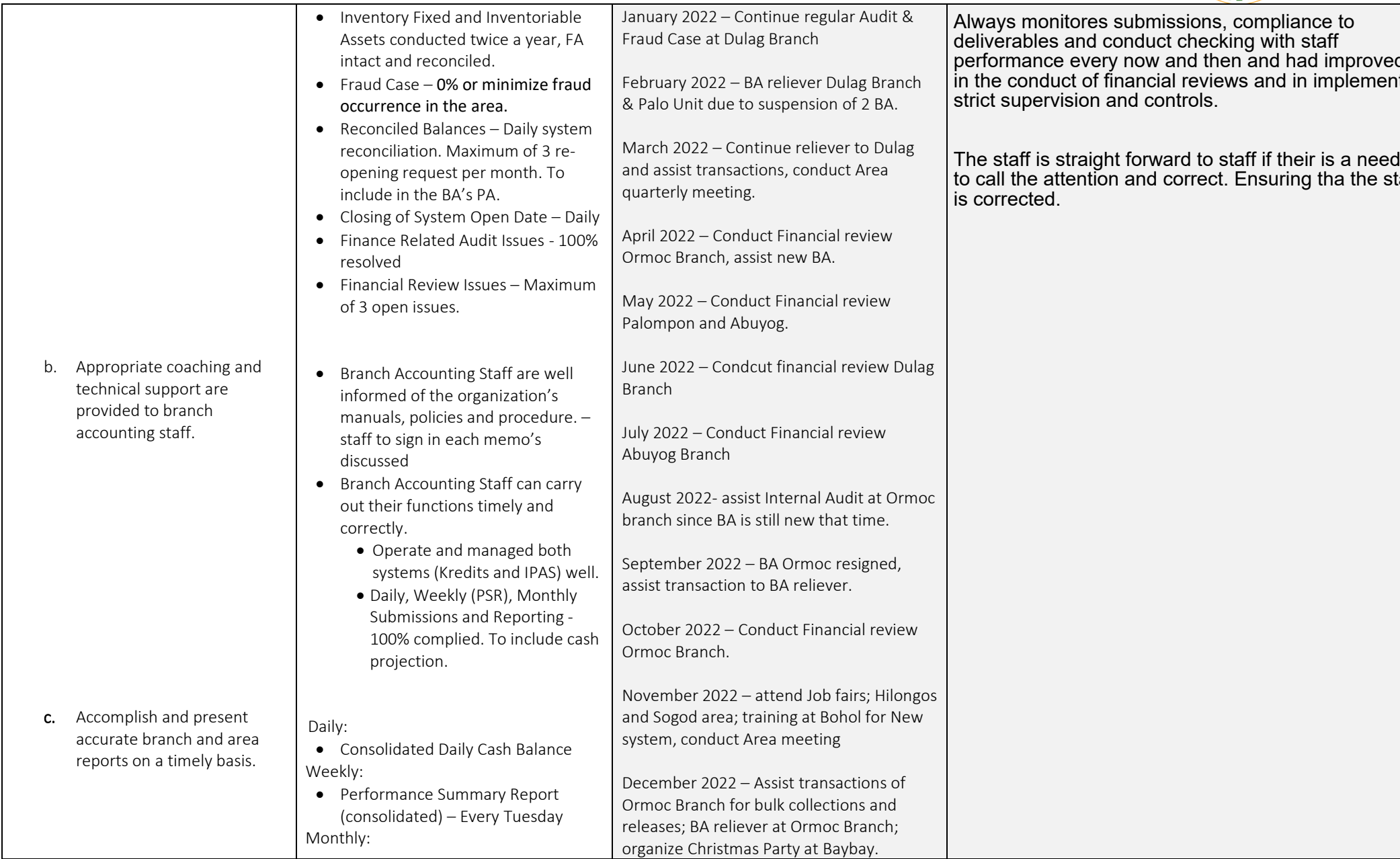
Role: AREA 5A AREA ACCOUNTANT

At CEVI we want every employee to have clarity about what they are meant to be doing; to be confident about how well they are doing; and to know what future they have.

Most of this will take place through regular, informal conversations - but having a simple, short record helps achieve this clarity and ensures that things are not forgotten. Clarify goals at the start of the year, and review regularly through the year. Discuss development, learning and support plans in support of these goals.

The start of the process – Clarity about what am I meant to be doing in my job

PERFORMANCE GOALS	KEY PERFORMANCE MEASURES	JOB HOLDER'S COMMENTS (fill out at the end of year review)	MANAGER'S COMMENTS (fill out at the end of year review)
1 ACCEPTABLE BEHAVIOR. Exhibit the organization's Core values for every transaction and encounter with internal and external parties are conducted with respect and professionalism.	<ul style="list-style-type: none"> • Believe and effectively practice the institution's mission and core values. • Good working relationship and attitude is established within CEVI staff. • Good relationship with internal and or external partners demonstrated by clear records or no complaints received either via IPH, email or audit reports. 	Able to established good working relationship within CEVI staff this year. Able to handle anger & pressure well.	Attitude of a leader was shown by the staff to the team. Always been respectfull, patient and do not hesitate to care and support the staff.
2 OPERATIONAL AND FINANCIAL EFFICIENCY. Achieve strong operational and financial performance. <ul style="list-style-type: none"> a. Achieved a strong control activities and implementation on internal control in the entire 	<ul style="list-style-type: none"> • Branch Visit and Financial Review are conducted as scheduled. • Regular area validation – min. of 1 cluster per quarter. 	Not consistently conduct Financial review due to circumstances, also not able to conduct area validation since there's still no regular meeting for the clusters.	ACHEIVED - considered as the most improved Area Accountant for this year! Had improved in the controls and in managing the branches.





<p>d. Monitor and ensures branches compliance on government statutory requirements and payables.</p> <p>e. Interact with internal and external auditors in completing audit requirements.</p>	<ul style="list-style-type: none"> • FS, Bank Recon and Portfolio Report – 6th of the ff. month • Monitoring and Checking Output (Before Reporting Deliverables) -5th of the month • Analysis and Reconciliation (After Reporting Deliverables) – 17th of the month • CBU Dormant Report – 10th of the month • PPI Reporting • Penalties - Zero • Violations - Zero • Audit Requirements 100% complied. 	<ul style="list-style-type: none"> - Able to consolidate Daily Cash. - Sent PSR weekly every Monday. - Able to send monthly report on time. - Able to send before reports deliverables on time. - Able to send CBU Dormant on time. - Able to review and correct to BAAs PPI errors. - Branches compliance on government statutory were monitored/ - Able to Interact Auditors, and comply audit requirements, most of my branches were acceptable audit rating except for Dulag branch. 	
<p>3 PEOPLE MANAGEMENT Ability to manage people within area covered exhibited by high retention rate and strong compliance measures.</p>	<ul style="list-style-type: none"> • 100% monthly meetings • % of staff annual turnover: _____ • 100% on time completion of staff performance evaluations 	<ul style="list-style-type: none"> - Able to conduct quarterly Meeting last March 2022 and November 2022. 	



	<ul style="list-style-type: none"> 100% completion of Annual Performance Reviews and PIP/IDP 		
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Ongoing through the year –how well I am doing

As you review your goals throughout the year (we recommend every quarter or more), use this page to record progress or achievement. Remember it is not just WHAT is achieved, but also HOW this was done (core values, behaviour, professional competencies what helps and hinders you in getting the job done)

GREEN- ACCEPTABLE

YELLOW- CAUTIONARY

RED- SIGNIFICANT RISK

JOB HOLDER'S COMMENTS	MANAGER'S COMMENTS	RATING (Green/Yellow/Red)
<p>1st Quarter. Date: <u>March 2022</u></p> <p>Achieved:</p> <p>January 2022</p> <p>Financial reports – January 07, 2022</p> <p>CBU Dormant January 12, 2022</p> <p>Admin Hearing Dulag Branch</p> <p>Branch Accountant reliever – Baybay Branch</p> <p>February 2022</p> <p>Financial reports – February 3, 2022</p> <p>CBU Dormant – February 03, 2022</p> <p>Before reports – February 09, 2022</p> <p>After reports – February 27, 2022</p> <p>Scanned Reports – March 01, 2022</p> <p>Branch Accountant Reliever – Palo Unit</p> <p>March 2022</p> <p>Financial report – March 03, 2022</p> <p>Dormant report – March 03, 2022</p> <p>Before reports – March 04, 2022</p>		Green



<p>After reports - March 15, 2022 Scanned Reports – March 17, 2022 Area 5A finance Meeting – March 10, 2022 Branch Accountant Reliever – Dulag Branch</p> <p>In this quarter I was not able to conduct Financial review due to Dulag Fraud Incident on process, finalizes fraud reports and Administrative Hearing, I've been also act as Branch Accountant in Baybay branch last January 2022 BA is resigning, for February and March 2022, 2 of the finance staff were suspended in connection of Fraud incident, so I've been a BA Reliever at Dulag and Palo.</p> <p>Not Achieved: January before & after reports deliverables. (Late billings and worksheet received due to typhoon Odette-HO no electricity and internet). Financial review Branch Visit Checklist</p>		
<p>2nd Quarter. Date: <u>June 2022</u> April 2022 Financial reports – April 02, 2022 Before reports – March 31, 2022 Dormant report – April 02, 2022 After reports – April 20, 2022 Signed FS – April 26, 2022 Financial review – Ormoc Branch</p> <p>May 2022 Before reports – May 01, 2022 Reports – May 03, 2022 CBU Dormant – May 04, 2022 After reports – May 16, 2022 Signed FS May 17, 2022 Financial review – Abuyog and Palompon Branch</p>		Green



<p>June 2022 Before reports – May 31, 2022 Reports – June 02, 2022 CBU Dormant – June 02, 2022 After reports – June 13, 2022 Signed FS – June 16, 2022 Financial review – Dulag Branch</p> <p>This quarter I was able to cope up slowly the AAs responsibilities especially financial reviews and Branch visit.</p>		
<p>3rd Quarter. Date: <u>September 2022</u> July 2022 Financial reports – July 03, 2022 Before reports – June 30, 2022 Dormant report – July 03, 2022 After reports – July 20, 2022 Signed FS – July 22, 2022 Financial review – Abuyog Branch</p> <p>August 2022 Before reports – July 31, 2022 Reports – August 02, 2022 CBU Dormant – August 02, 2022 After reports August 11, 2022 Signed FS August 30, 2022 BA Ormoc & Palo Unit resigning, at the same time on going Audit Ormoc</p> <p>September 2022 Before reports – September 06, 2022 Reports – September 03, 2022 CBU Dormant – September 04, 2022 After reports – September 19, 2022</p>		<p>Green</p>



<p>Signed FS – September 20, 2022 BA Ormoc resigned, assist BA reliever at Ormoc Branch.</p> <p>This quarter I was not able to focus Financial review since 2 of my staff rendered resignation, also Ormoc Internal Audit last August 2022, and AAs Meeting at Bohol.</p>		
<p>4th Quarter. Date: <u>December 2022</u> October 2022 Financial reports – October 03, 2022 Before reports – October 03, 2022 Dormant report – October 04, 2022 After reports – October 14, 2022 Signed FS – October 14, 2022 Financial review – Ormoc Branch</p> <p>November 2022 Before reports – November 02, 2022 Reports – November 03, 2022 CBU Dormant – November 04, 2022 After reports – November 21, 2022 Signed FS November 21, 2022 Musoni TOT Training</p> <p>December 2022 Before reports – December 01, 2022 Reports – December 02, 2022 CBU Dormant – December 03, 2022 Signed FS – January 03, 2022 Assist Ormoc transactions, Organize Leyte Branches Christmas party</p> <p>This quarter, was full of activities I was not able to complete Financial review for the past few months, from Prayer day, Job fair Hilongos and Sogod, conduct Area quarterly meeting, Musoni Training, organize whole leyte branches Christmas party, I've been also assisting Ormoc branch for their bulk transactions.</p>		<p>Green</p>



Personal Development - What is my future?

At Start of Year, Plan: What do I personally need to help me do my job well?		YEAR END REVIEW: was it available and was this achieved?
Personal (Learning &) Development		Well I can say, I able to achieved to manage my working time and Personal time, since I will not stress myself to negativity and try to relax my mind if I’m feeling stress. I’ve also maintained vitamins for my health.
This year I am looking forward for this following: Able to manage my Work time and Personal Time. Able to relax and can allocate time to Family. Able to handle stress and maintain good health.		
Manager Support (what help, resources, guidance and assistance does your manager need to make available to facilitate your working well this year)		- Trainings partially achieved, since we able to have trainings and meetings with AAs.
<ul style="list-style-type: none">- This year I am wanting for one on one with supervisor’s or any counselling to improve one’s personality.- Any training that can improve our personality towards handling people and leading them to be effective.- Activities that can improve and motivate individual’s life.- Activities that can give bonding time with co-workers not related to work for us to relax sometimes.		
Life Balance (what approach will you take this year to ensure work life balance and how will you know you achieved that?)		Achieved, I’ve already set priorities, Ive been also making to do lists every day that make my day easier.
<ul style="list-style-type: none">- No more Over time at work, to achieve this I must have Time Management and make to do Lists.- Set priorities and be time Conscious.- Make time to relax and enjoy with My Family and Friends.- More on reading books than staying longer time on social Media.		
What career next step do I aspire to?	What can I do to achieve this and who else needs to be involved?	Being an Area Accountant must be matured and good in making decisions, not all the time is smooth, but if you have determination and focused to your responsibilities you will able to achieve every goal you want every day.
This year I would just choose to be an effective and efficient Area Accountant on my Area, I want to improve everything and organize little things to make me productive.	Willingness and determination to do my responsibilities, With the support of My supervisor and co-workers, their	



	motivational and sincerity that can inspires me to go on with my life and with the help of Almighty God.	
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End of year summary

Job Holder's overall comments	Manager's overall comments	Functional/Matrix Manager's comments (if applicable)	2nd level Manager's comments
<p>Cy2022 was a better one, I can say that I've grown and learned from 2021 experiences, my 2021 stresses and depressions were my stepping stone on facing 2022, handling 4 branches with 2 units is not really easy to handle but a great experience especially in making decisions and travelling from one place to another, but despite of everything I've been through I am still grateful for waking up each day and able to love my life as I could, I've always put in my mind that everything is happen for a reason, since we just don't live once, we do always live every day so we must learn to be humble, love, and be contented. I can say that I am slowly being matured in decision makings, handle pressure and how to deal people with negative thoughts to you. Same last year we must be humble and calm in every storm came into your life, make every problems be the steps to achieve your goals and success in life.</p>	<p>I must say that she had improve a lot better this year! She was able to conquer her fears and anxiety over the concerns and the work of an area accountant that leads to a better performanve, leadership and outlook.</p> <p>She is very dedicated even when in times of sickness and health concerns, she is still managing the deliverables.</p> <p>Thank you for your hardwork, passion and commitment to cevi and to the accounting team in particular.</p> <p>Continue to be at your best and to motivate your staff. You are among the leaders that they admire with.</p>		
<p>Name MENCHU B. SABANDO</p>	<p>Name Estela Marie Miculob-Hubac</p>	<p>Name</p>	<p>Name</p>



Signature <i>M. Sandoval</i>	Signature <i>E. Guzman</i>	Signature	Signature
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Career Potential Rating	Definition	Please Tick
Too new to rate	Less than 6 months in post	
Develop at current level	Demonstrates depth and capabilities that reflect his/her expertise. May coach those less experienced and less knowledgeable. May be moved to other positions, but any moves in the next 3 years are likely to be at the same level of responsibility/grade.	
Promotable	Demonstrates capability for promotion to a role with greater scope, challenge and responsibility within three years.	
High Potential	Demonstrates the capability, ambition, mobility and willingness to progress 2 job grades in 1-3 years.	✓

Performance Rating	Definition	Please Tick
Too new to rate	Less than 3 months in post	
Improvement needed	Overall achievement did not meet the full expectations of the role this year. Performance may be improving but has not yet met full performance expectations (in terms of “what and/or how”). This performance level may be the result of a new or inexperienced employee still getting up to speed with the requirements of the job (typically in their first 6-12 months), or because performance in some or all aspects of the role need improvement.	
Valued Achievement	Good, successful, effective performance as expected for this role/grade – fulfilled all position requirements/objectives and sometimes generated results above those expected of the position (in terms of what and how). Attitude and behaviors reflected interest in improving and attaining higher level of outcomes for self and organization.	✓
Exceptional Achievement	Achieved extraordinary results that had a significant, positive impact on the team or organisation that far exceeded what is typical for this role/level. Was a role model for demonstrating World Vision’s Core Values to guide behaviour and decisions. Others were positively influenced by the professional and personal outcomes achieved.	