

PERSONNEL PERFORMANCE APPRAISAL (PPA)

Professional/Technical Job: ACCOUNT OFFICERRegion: VISAYAS 4Area: US/IE 4

Employee Name (Last Name, First Name, M.I.): _____

I. JOB OBJECTIVES					
METRICS	TARGET	ACTUAL	% ACCOM	Rating	PA. Pts
1. <u>Active Members w/ Loans</u>	460	415	90%	4	4
2. Productivity/Output (this target set once quarterly)	5	1	20%	1	1
3. Amount of Monthly Loan					
4. Number or Amount of Sales on Sales Products					
5. Sales Strategy Contributions	100%	93%	93%	4	4
6. Accomplishment of Learning Session (CoI)	55%	30%	55%	5	5
7. No. of errors with address/completed learning sessions	16	16	100%	5	5
8. 100% compliance on attending Learning Session	100%	100%	100%	5	5
Average Rating					3.9

II. JOB COMPETENCIES						
	5, Exceptional	4, Highly Effective	3, Proficient	2, Inconsistent	1, Unsatisfactory	N/A, Not Applicable
1. Quality of Work Exceeds the standards and the quantity of work	5 or more	3 or more	2 or more	1 or more	0 or more	0 or more
2. Problem Solving and Decision Making Considers ability to identify problems and generate alternative ways to solve them	95%	85%	75%	65%	55%	45%
3. Communication Skills Exceeds ability to communicate both oral and written form	5 or more	4 or more	3 or more	2 or more	1 or more	0 or more
4. Customer Service/Service Orientation Exceeds ability to serve customer and meet customer needs	5 or more	4 or more	3 or more	2 or more	1 or more	0 or more
5. Results Orientation Exceeds ability to set priorities and achieve goals	95%	85%	75%	65%	55%	45%
6. Compliance Exceeds compliance to company policies and procedures	100%	95%	90%	85%	80%	75%
Average Rating						4

III. PERSONAL ATTRIBUTES						
	5	4	3	2	1	N/A
1. Integrity Exceeds ability to maintain the highest level of integrity	95%	85%	75%	65%	55%	45%
2. Initiative Exceeds ability to take initiative and seek out new opportunities	95%	85%	75%	65%	55%	45%
3. Flexibility Exceeds ability to recognize and respond to unexpected events and requirements, willing to do what is necessary to get the desired results	95%	85%	75%	65%	55%	45%
4. Dependability Exceeds reliability in performing and completing work	95%	85%	75%	65%	55%	45%
5. Leadership Exceeds ability to influence people in a way that makes them want to follow, ability to rally support towards objectives of the organization	95%	85%	75%	65%	55%	45%
Average Rating						4.2

Legend: 5 = Exceptional, 4 = Highly Effective, 3 = Proficient, 2 = Inconsistent, 1 = Unsatisfactory, N/A = Not Applicable.

Notes: Cases would involve monetary loss or penalty either on the part of the institution or on the part of the receiver.

* Reference in rating for PPA and Audit

Score for Audit Rating Contribution	Weighted Score (out of 100)
Low Rating of 25 and above	25
Mid Rating of 30-34	30
High Rating of 35-39	35
Low Rating of 40-44	40

Lowest Rating	Weighted Score (out of 100)
25 and above	25
30 to 34	30
35 to 39	35
40 to 44	40

CARD MRI
PERSONNEL PERFORMANCE APPRAISAL
 Professional/Technical Job ACCOUNT OFFICER

Employee Name (Last, First, Middle Initial) <u>WILLIAM O. DEQUIN</u>		Name of Institution <u>CARD INC</u>	
Employee Grade <u>ACCOUNT OFFICER</u>		Supervisor Name (Last, First, Middle Initial) <u>ALBERTA, HENRO JOSE N.</u>	
Employee ID <u>10-25993</u>		Current Job Grade <u>6</u>	Tel <u>WPT MAGNET</u>
Evaluation Period <u>3/1/2019 - 12/31/2019</u>		Previous Assignment <u>TRACER</u>	Date Appointed <u>JAN. 2019</u>

RATING	DESCRIPTION	% ACHIEVEMENT OF TARGETS
5 - Outstanding	Performance is consistently superior and significantly exceeds position requirements.	80% and above
4 - Excellent	Performance frequently exceeds position requirements.	60-79%
3 - Good	Performance consistently meets position requirements.	40-59%
2 - Fair	Performance meets position requirements, but not all position requirements.	20-39%
1 - Unsatisfactory	Performance consistently fails to meet minimum position requirements; employee lacks skills required or fails to utilize necessary skills.	Below 20%
Not Rated	Employee has not been in position long enough to have demonstrated the essential elements of the position and be reviewed at a later agreed upon date.	Should meet or exceed 75% of all targets

CATEGORY	Current Assessment	Old Rating	New Rating
1. Job Knowledge	3.9	3.9	3.9
2. Job Competency	4	4	4
3. Quality of Work	4.2	4.2	4.2
Total	11.8	11.8	11.8

Note: Employees should get a minimum of 11.8 considered meeting the standards of the institution.

Qualitative Evaluation He is competitive and have the abilities in performing his duties but need encouragement.

Work and Development Plan for Improvement

To send in training in order to mold and equip with more knowledge as a preparation for future opportunities.

Comment of Person Being Evaluated (Optional: In case appraised employee has any comments regarding the performance evaluation, this section may be used.)
AS LONG AS I STAY IN THE INSTITUTION I WILL CONTINUE TO SUPPORT AND SHARE MY ABILITIES TO MAKE HIS VISION AND MISSIONS POSSIBLE.

Recommended by

HENRO JOSE N. ALBERTA

Appointed by

ALBERTA, HENRO JOSE N. 1/14/25

Name and Signature of Recommending Authority

WILLIAM O. DEQUIN

Name & Signature of Staff being evaluated, Date

REMARKS ON PERSONNEL ACTION (Please check appropriate box)

Recommendation and Approval (for Probationary Staff)

- ☐ Promoted to regular position effective _____
- ☐ Promoted to regular position effective _____
- ☐ Promoted to regular position effective _____

☒ Transfer assignment from current branch/office UNASAWN to new office HINUNGAN effective 3/1/25

PERSONNEL ACTION RECOMMENDATION PER RESULT OF PERFORMANCE ASSESSMENT

Recommendation and Approval (for Regular Staff)

- ☐ Subject employee qualifies to receive equivalent salary increase effective _____
- ☐ Subject employee does not qualify for equivalent salary increase as a result of performance assessment above
- ☐ Employee is however encouraged to improve performance (in case of Staff Admin. Case or SAC record or below PPA rating)
- ☐ Employee is however encouraged to continue achieving more while retaining position or be ready for any possible future career movement
- ☐ Other Action/Recommendation (State effective date, as applicable): _____

APPROVED BY:

JEREMIE JOY A. CRIVIA

RO-016

(Name of NO Officer/Equivalent Authority)

(Position)

Altag

Next level Authority