

Community Economic Ventures, Inc. (CEVI)  
**PERFORMANCE EVALUATION FORM FOR NON-SUPERVISORY POSITIONS**

Revised August 2015

This performance evaluation form is applicable to Non-Supervisory Staff under Developmental / Probationary period.

NAME OF STAFF: **Nenia Fe Pening** POSITION: **BAA** BRANCH/DEPT: **Acctg.** EMP. STATUS: **Probi** APPOINTMENT DATE: **March 1, 2023**

Rating for Productivity Assessment:

1=Poor (almost never)

2=Fair (some achieved)

3=Good (all targets achieved)

4=Very Good (all targets achieved, some exceeds)



5=Outstanding (all targets achieved and exceeded)

I. Productivity Assessment (60%)	Actual Performance (Achieved? Yes/No)					
	Month 1 March 2023	Month 2 April 2023	Month 3 May 2023	Month 4 June 2023	Month 5 July 2023	Overall (Yes/No)
Accurate & complete data encoding & timely loan processing (Kredits).	It was very challenging and exciting for me since it was the very first time I perform my duties. I encountered lot of errors instead of edit loans for the certain client I made another loan. With regards to loan processing, there's no delays.	This month, I encountered minimal errors but my typing skills are not yet fast. I have an errors on the client's personal details like their ID number. In loan processing it takes time to complete especially if the clients are new member. Loan processing had no delays.	This month, I only edit some details that were encoded by the EDO's since they are the one who encode and create loans. I edit personal details of the clients like birthdate and birth place. Moreover, loan processing had no delays.	For this month, I changed and edit the amount of their tasaka and CBU since it has a reverse entry. I also reviewed the amount of the loan application since it doesn't match the amount indicated in the loan application form. There were errors on the loan cards for yaman and educational loan but I changed right away.	No concern were encountered. Complete encoding of clients' data and loan processing are on time and loan cards were properly attached in the client's loan forms before the disbursement time.	Yes
Adequate compliance to cashiering functions and cash handling of the branch.	Collections are deposited in BPI every day. No collections were remained in the vault. All cash in are recorded and are placed in the vault. Some minimal expenses are also recorded in the PCF and replenished if necessary. Otherwise, excess cash are disbursed to clients during CBU withdrawal but, within that day the cash are returned.	In everyday, collections are deposited in BPI. No collections were remained in the vault. All cash in are recorded and are placed in the vault. Re-count the cash before disbursement.	In everyday, collections are deposited in BPI. No collections were remained in the vault. All cash in are recorded and are placed in the vault. Moreover, re-count the cash before disbursement and before cash deposit. I properly handle the cash.	In everyday, collections are deposited in BPI. No collections were remained in the vault. All cash in are recorded and are placed in the vault.	In everyday, collections are deposited either in BPI or cebuana. No collections were remained in the vault. All cash in are recorded and are placed in the vault. Moreover, re-count the cash before disbursement and before cash deposit. I properly handle the cash.	Yes
Handles and maintains appropriate recording of Petty Cash Fund.	PCF is daily monitored and replenished. Cash advance and minimal expenses are recorded in Petty Cash Count sheet in a daily basis.	PCF is daily monitored and replenished. Cash advance and minimal expenses are recorded in Petty Cash Count sheet in a daily basis.	PCF is daily monitored and replenished. Cash advance and minimal expenses are recorded in Petty Cash Count sheet in a daily basis.	PCF is daily monitored and replenished. Cash advance and minimal expenses are recorded in Petty Cash Count sheet in a daily basis.	PCF is daily monitored and replenished. Cash advance and minimal expenses are recorded in Petty Cash Count sheet in a daily basis.	Yes
Accurate recording and timely submission & monitoring of insurance claims.	Delayed sending of claims since I am not familiarize yet on some other documents needed. I reviewed the documents submitted especially on the signature of the doctor.	Submit the claims on time and follow-ups after several days if there were no confirmation or approval for the claims. Otherwise, if there were lacking of documents I sent it right away.	Submit the claims on time and follow-ups after several days if there were no confirmation or approval for the claims. Otherwise, if there were lacking of documents I sent it right away.	Submit the claims on time and follow-ups after several days if there were no confirmation or approval for the claims. Otherwise, lacking documents are submit right away.	Submit the claims on time and follow-ups after several days if there were no confirmation or approval for the claims. Otherwise, some lacking documents are submit right after the receipt of the documents from the client.	Yes
Proper management and updated filing of clients' loan files.	Slow filing of client's loan files since I am not yet familiarize all of the cluster names. But, I did my best even though it takes time to segregate into by clusters. Otherwise, I filed the loan forms properly.	Slow filing of clients' loan files since several number of clients were disbursed. I filed more number of loan files and already familiarized some of the clusters. Make new folders for those new clients.	Manageable in filing loan files and forms. Separate all new client from old client. Separate all of the insurance forms from the new member.	Slow filing of loan files due to lack of time. After disbursement I can't able to file since I am the one who transact or entry the balance or the deduction of the clients. Thus, it's hard for me to proceed some tasks.	Slow filing of loan files since I felt confuse whether to file or to print loan cards that are based on the new system. I found difficulties in managing my time. However, I can still file some loan forms in a day.	Yes
Monthly payment of monthly dues (billings and withholding taxes).	On time payment of monthly dues like electric bill, water bill, telephone bill, BIR)	On time payment of monthly dues like electric bill, water bill, telephone bill, BIR)	On time payment of monthly dues like electric bill, water bill, telephone bill, BIR)	On time payment of monthly dues like electric bill, water bill, telephone bill, BIR)	For this month, payments for dues were not yet done or paid since there were	Yes
					Rating (see description above)	4
					Weighted Rating (rating x 60%)	2.4



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<b>Support Needed:</b> By affixing my signature means I will do my best to perform my job efficiently and effectively and hereby ask for the following support: Full compliance on loan applications from operation. Smooth flow on loan/disbursement release from operation. Especially to have a proper time table so that we will not be swamped up of loan application for process during cut off.	<b>Supervisor's Covenant:</b> By affixing my signature means I will do my best to provide the necessary support and supervision to the staff. She can perform well even with less supervision, flexible and willing to learn new things.
 <b>Nenla Fe Pening</b> Name and Signature of Staff	 <b>Menchu B. Sabando/Elwin Garcia</b> Name and Staff Supervisor

**Rating for No. 2, 3 and 4.**

The supervisor will give a rating for each of the following items based on staff actual performance. Check the appropriate cell to indicate rating.  
 1 = Poor (almost never)    2 = Fair (sometimes)    3 = Good (oftentimes)    4 = Very Good (most of the time)    5 = Outstanding (consistently excellent)

2. Quality of Work (20%)	Rating
1. Submits quality reports on time.	4
2. Keeps records orderly.	4
3. Provides appropriate and timely support to operations	4
4. Performs work excellently.	4
5. Exhibits initiative and creativity in performing tasks.	4
Average (add rating from item 1-5 divided by 5)	4
Weighted average (average x 20%)	.80

4. Interpersonal Relations (10%)	Rating
1. Works well with others.	4
2. Responds to conflicts proactively.	3
3. Shares ideas to fellow workers.	4
4. Develops effective working relationships with clients and partners.	4
5. Possesses Christian values in all aspect of life.	4
Average (add rating from item 1-5 divided by 5)	3.8
Weighted average (average x 10%)	.38

3. Work Habits (10%)	Rating
1. Reports to work on time.	3
2. Attends staff weekly meeting and fellowship consistently.	4
3. Willingly works overtime when necessary.	4
4. Works with less supervision.	4
5. Maintains a clean workplace.	3
Average (add rating from item 1-5 divided by 5)	3.6
Weighted average (average x 10%)	.36

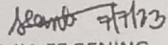
**OVERALL RATING:** (add weighted rating from item 1-5) = 3.94


**RECOMMENDATION**

Do you recommend that this employee be recommended to \_\_probationary/  
 X regular/ \_\_full pledge status?

- ☐ YES, effective , July 17, 2023  
☐ NO, effective \_\_\_\_\_  
☐ Extension of \_\_trainee / \_\_probationary/ \_\_developmental period for \_\_ month(s).

By affixing my signature below means the evaluation result was discussed to me and I received a copy of this form.

  
**NENIA FE PENING**  
 Signature Over Printed Name of Staff/Date

  
**Menchu B. Sabando/Elwin Garcia**  
 Signature Over Printed Name of Supervisor/Date

**ENDORSEMENT**

Endorsed By:

\_\_\_\_\_  
 Name & Signature of  
 Department/Project Manager

**HR/HEAD OFFICE APPROVAL**

Received/reviewed by:

\_\_\_\_\_  
 Name & Signature of  
 HR Staff

Noted By:

\_\_\_\_\_  
 HR Manager  
 Signature

Approved by:

\_\_\_\_\_  
 ED/FD/OD  
 Signature