



Annex P

COMPUTATION OF FINAL INDIVIDUAL RATING FOR ADMINISTRATIVE STAFF

Name of Administrative Staff: **MONA NENA B. GERALDO**

Particulars (1)	Numerical Rating (2)	Percentage Weight (3)	Equivalent Numerical Rating (2x3)
1. Numerical Rating per IPCR	4.92	4.92 X 70%	3.44
2. Supervisor/Head's assessment of his contribution towards attainment of office accomplishments	5.00	5.00 X 30%	1.50
TOTAL NUMERICAL RATING			4.94

TOTAL NUMERICAL RATING: 4.94

Add: Additional Approved Points, if any: 0.00

TOTAL NUMERICAL RATING: 4.94

FINAL NUMERICAL RATING 4.94

ADJECTIVAL RATING: OUTSTANDING

Prepared by:

MONA NENA B. GERALDO
Admin. Aide III *7/6/24*

Reviewed by:

ALICIA M. FLORES
Head, Budget *7/6/24*

Recommending Approval:

LOUELLA C. AMPAC *7/6/24*
Finance Management Director

Approved:

ELWIN JAY V. YU *7/6/24*
Vice-Pres. For Admin. & Finance



BUDGET OFFICE

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Baybay City, Leyte
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INDIVIDUAL PERFORMANCE COMMITMENT & REVIEW FORM (IPCR)

I, **Mona Nena B. Geraldo**, of the Budget Office commits to deliver and agree to be rated on the attainment of the following accomplishments in accordance with the indicated measures for the period **January 1-June 2024**

Submitted by:

MONA NENA B. GERALDO

Ratee

Approved:

ALICIA M. FLORES

Head, Budget

UFMO 5: Support to Operations (STO)

OVPF STO1: ISO aligned management and administrative support system

FMO STO 1: ISO 9001:2015 aligned documents and compliant processes

MFOs/PAPs	Success Indicators	Task Assigned	Target (JAN-JUNE 2024)	Actual Accomplishments	Rating				Remarks
					Q ¹	E ²	T ³	A ⁴	
ISO 9001:2015 aligned documents and compliant processes	PI 1. Percentage of clients served, rated the services received at least very satisfactory or higher	Provide utmost services to the client	100%	100%	5	5	5	5.00	
	PI 3. Percentage of ISO evidences and other related documents compliant with existing BUD quality procedures kept intact and readily available to Auditor	Records, control, file and maintain ISO related documents intact for easy retrieval	100% of ISO documents recorded, controlled, filed, maintained	100% of ISO documents recorded, controlled, filed, maintained	5	5	5	5.00	
	PI 4. Percentage of documents submitted/distributed to other offices/colleges/depts	Prepare necessary ISO documents needed by other offices/college/dept for ISO implementation	100% documents submitted/distributed	100% documents submitted/distributed	5	5	5	5.00	

OVPF STO 3: ARTA aligned compliance and reporting requirements

FMO STO 3: ARTA aligned frontline services

ARTA aligned frontline services	PI 1: Efficient and customer friendly services	Entertain clients and observe no noon break policy	Zero complaint from clients served	Zero complaint from clients served	5	5	5	5.00	
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OVPAF MFO 2: BUDGET SERVICES

FMO GASS 3. Financial Services Management

Budget Preparation	PI 1. Number of Annual Budget Proposal RAF & IGF) with supporting Budget Preparation Forms submitted to different regulatory committees and agencies	Assist in the preparation and data encoding in Online Submission of Budget Proposal	100% Submission (1)	100% Submission (1)	5	5	4	4.67	
Financial Reports Management	PI 1: Percentage of financial reports assisted & encoded, error free	Assist the supervisor/head in budget reports preparation and data encoding online on DBMs Unified Reporting System	100%	100%	5	5	4	4.67	
	PI 2: Percentage of prepared ORS, voucher and supporting documents for fund transfer to satellite campuses	Prepares ORS, vouchers and other supporting for satellite campuses for fund transfer	100%	100%	5	5	5	5.00	
	PI 3. Number of liquidation of obligations completed with in the prescribed period, error free	Prepares liquidation of obligations under fund 101 and 164 to determine actual disbursement/ payments of payees	2,750 obligations for liquidation	4197 obligations liquidated	5	5	5	5.00	
Total Over-all Rating								4.92	
Average Rating :					Comments & Recommendations for Development Purposes: <i>Send to Financial management trainings conducted by PAGEA, & COA.</i>				
Additional Points:									
Punctuality									
Approved Additional points (with copy of approval)									
FINAL RATING									
ADJECTIVAL RATING									

Evaluated & Rated by:


Alicia M. FLORES

Head, Budget Office

Date: 7/8/24


Recommending Approval:


LOUELLA C. AMPAC

Financial Management Director

Date: 7/8/24

Approved by:


ELWIN JAY V. YU

Vice President for Admin & Finance

Date: 7/8/24

Legend:

1 - Quality

2 - Efficiency

3- Timeliness

4 - Average

PERFORMANCE MONITORING & COACHING JOURNAL

X	1st	Q U A R T E R
X	2nd	
	3rd	
	4th	

Name of Office: BUDGET OFFICE

Head of Office: ALICIA M. FLORES

Number of Personnel: SEVEN (6)

Activity Monitoring	MECHANISM				Remarks
	Meeting		Memo	Others (Pls. specify)	
	One-on-One	Group			
Monitoring					
1. Budget Utilization RAF	X				
2. Utilization of Income IGF	X				
3. Earmarks JO, Contract of Services, Purchase Requests	X				
4. Fund Transfer for External Campuses	X				
Coaching					
1. Preparation of Budget Proposals	X				
2. Preparation of Monthly, Quarterly and Year-End Reports	X				

Note: Please indicate the date in the appropriate box when the monitoring was conducted.

Conducted by:

ALICIA M. FLORES

Admin. Officer V

Noted by:

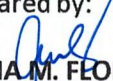
LOUELLA C. AMPAC

Financial Management Director

TRACKING TOOL FOR MONITORING TARGETS

Major Final Output/Performance Indicator	TASK	ASSIGNED TO	DURATION	TASK STATUS				REMARKS	
				1 st Week	2 nd Week	3 rd Week	4 th Week		
MFO 1. Administrative and Support Services Management									
PI 1. Efficient & Customer-Friendly Frontline Service	1. Plans activities and supervises office staffs, prepares communications & files documents of the offices	Alicia M. Flores, Mona Nena B. Geraldo, Esguerra & 4 JO	January-June 2024	X	X	X	X		
PI 2. Number of external linkages for improved financial management developed/ maintained.	2. Attend to meetings/ seminars per advisory by Agency & make follow ups of SARO & NCA for the University budget releases	Alicia M. Flores, Mona Nena B. Geraldo, Esguerra & 4 JO	January-June 2024	X	X	X	X		
MFO 2. Certified Financial Documents & Reports									
PI 1. Percentage of Budget Utilization-Obligations BUR	1. Prepares monitoring of the GAA, GARO, SARO & NCA releases monthly with the actual obligations, TRA & Actual Disbursement of Funds	Alicia M. Flores, Mona Nena B. Geraldo, Esguerra & 4 JO	January-June 2024	X	X	X	X		
PI 2. Percentage of approved budget against budget proposed as submitted and defended before NEDA, CHED, Congress and Senate	2. Prepares reports/ data for Budget Proposals for past years actual obligations and current years appropriation & proposed within the ceiling, per NEP data & released the sub-allotment to offices/ centers concerned per GAA	DO Ferraren, OP, Acctg, Res&Ext. College Deans, External Campuses, ODHRD, PRPEO, USSO, GSD	January-June 2024	X	X	X	X		
PI 3. Number of budget proposals (CY & PY) for utilization of income prepared and defended at UADCO & approved by BOR	3. Prepares data/ reports for current & prior years & proposed utilization of income for Main Campus for FY 2020 & FY 2022 proposal	Louella C. Ampac	J January-June 2024	X	X	X	X		
MFO 3. Certified Financial Documents & Reports									
PI 1. Percentage of total financial documents received are processed and allocated funds	1. Reviews and certifies financial documents (vouchers, payrolls and PR's) as to availability of funds. Prepares request for funding terminal leave pay	Alicia M. Flores, Mona Nena B. Geraldo, Esguerra & 4 JO	January-June 2024	X	X	X	X		
PI 2. Number of budgetary accountability reports prepared, certified correct and approved by the President	2. Prepares Budget Execution Documents, Budget accountability reports monthly, quarterly and year-end reports required by DBM, COA, CHED, PASUC & Other offices.	Alicia M. Flores, Mona Nena B. Geraldo, Esguerra & 4 JO	January-June 2024	X	X	X	X		

Prepared by:


ALICIA M. FLORES 7/8/24
 Head, Budget

PERFORMANCE MONITORING FORM

Name of Employee: MONA NENA B. GERALDO

Task No.	Task Description	Expected Output	Date Assigned	Expected Date to Accomplish	Actual Date accomplished	Quality of Output*	Over-all assessment of output**	Remarks/ Recommendation
1	Prepares liquidation of obligation under RAF, IGF and BRF to determine actual disbursement/payments to payee.	Liquidated funds under RAF, IGF and BRF.	Monthly & Quarterly from Jan-June 2024	Monthly & Quarterly from Jan-June 2024	Monthly & Quarterly from Jan-June 2024	Very Impressive	Outstanding	
2	Prepares ORS and vouchers for Satellite Campuses fund transfer.	Number of prepared ORS for fund transfer	As the need arises	As the need arises	As the need arises	Very Impressive	Outstanding	
3	Assist supervisor in preparing financial reports.	Number of financial reports assisted, error free	Quarterly from Jan-June 2024	Quarterly from Jan-June 2024	Quarterly from Jan-June 2024	Very Impressive	Outstanding	
4	Assist in encoding data to URS and OSBP.	Percentage datas encoded in the system	Monthly & Quarterly from Jan-June 2024	Monthly & Quarterly from Jan-June 2024	Monthly & Quarterly from Jan-June 2024	Very Impressive	Outstanding	
5	Efficient and customer-friendly frontline services	Entertained clients and observed no noon break policy	Daily from Jan-June 2024	Daily from Jan-June 2024	Daily from Jan-June 2024	Very Impressive	Very Satisfactory	Zero Complaint
6	Functions as dDRC of the Office	Filed and retrieved ISO-related documents.	As the need arises	As the need arises	As the need arises	Very Impressive	Outstanding	

* Either very impressive, impressive, needs improvement, poor, very poor

** Outstanding, very satisfactory, satisfactory, unsatisfactory, poor

Prepared by:


ALICIA M. FLORES

Head 7/8/24

EMPLOYEE DEVELOPMENT PLAN

Name of Employee: **Mona Nena B. Geraldo**

Performance Rating: Outstanding

Aim: To develop the employee's competitiveness among colleagues and to explore new ways of delivering outputs.

Proposed Interventions to Improve Performance:

Date: January 2024 **Target Date:** August 2024

First Step: Send to the Philippine Association for Government Budget Administration (PAGBA), Inc training and other financial management related trainings.

Result: To provide a common understanding and uniform interpretation on financial management.

Date: _____ Target Date: _____

Next Step:

Outcome: _____

Final Step/Recommendation:

Recommend to attend training/workshop conducted by PagBa and other Financial Management training.

Prepared by:


ALICIA M. FLORES
Head 7/8/24

Conforme:


MONA NENA B. GERALDO
7/8/24



Instrument for Performance Effectiveness of Administrative Staff

Rating Period: **JANUARY-JUNE 2024**

Name of Staff: MONA NENA B. GERALDO Position: ADMINISTRATIVE AIDE III


Instruction to supervisor: Please evaluate the effectiveness of your subordinate in contributing towards attainment of the calibrated targets of your department/office/center/college/campus using the scale below. Encircle your rating.

Scale	Descriptive Rating	Qualitative Description
5	Outstanding	The performance almost always exceeds the job requirements. The staff delivers outputs which always results to best practice of the unit. He is an exceptional role model
4	Very Satisfactory	The performance meets and often exceeds the job requirements
3	Satisfactory	The performance meets job requirements
2	Fair	The performance needs some development to meet job requirements.
1	Poor	The staff fails to meet job requirements

A. Commitment (both for subordinates and supervisors)		Scale				
1.	Demonstrates sensitivity to client's needs and makes the latter's experience in transacting business with the office fulfilling and rewarding.	5	4	3	2	1
2.	Makes self-available to clients even beyond official time	5	4	3	2	1
3	Submits urgent non-routine reports required by higher offices/agencies such as CHED, DBM, CSC, DOST, NEDA, PASUC and similar regulatory agencies within specified time by rendering overtime work even without overtime pay	5	4	3	2	1
4.	Accepts all assigned tasks as his/her share of the office targets and delivers outputs within the prescribed time.	5	4	3	2	1
5.	Commits himself/herself to help attain the targets of his/her office by assisting co- employees who fail to perform all assigned tasks	5	4	3	2	1
6.	Regularly reports to work on time, logs in upon arrival, secures pass slip when going out on personal matters and logs out upon departure from work.	5	4	3	2	1
7.	Keeps accurate records of her work which is easily retrievable when needed.	5	4	3	2	1
8.	Suggests new ways to further improve her work and the services of the office to its clients	5	4	3	2	1



9	Accepts additional tasks assigned by the head or by higher offices even if the assignment is not related to his position but critical towards the attainment of the functions of the university	5	4	3	2	1
10.	Maximizes office hours during lean periods by performing non-routine functions the outputs of which results as a best practice that further increase effectiveness of the office or satisfaction of clientele	5	4	3	2	1
11.	Accepts objective criticisms and opens to suggestions and innovations for improvement of his work accomplishment	5	4	3	2	1
12.	Willing to be trained and developed	5	4	3	2	1
Total Score		60				
B. Leadership & Management (For supervisors only to be rated by higher supervisor)		Scale				
1.	Demonstrates mastery and expertise in all areas of work to gain trust, respect and confidence from subordinates and that of higher superiors	5	4	3	2	1
2.	Visionary and creative to draw strategic and specific plans and targets of the office/department aligned to that of the overall plans of the university.	5	4	3	2	1
3.	Innovates for the purpose of improving efficiency and effectiveness of the operational processes and functions of the department/office for further satisfaction of clients.	5	4	3	2	1
4.	Accepts accountability for the overall performance and in delivering the output required of his/her unit.	5	4	3	2	1
5.	Demonstrates, teaches, monitors, coaches and motivates subordinates for their improved efficiency and effectiveness in accomplishing their assigned tasks needed for the attainment of the calibrated targets of the unit	5	4	3	2	1
Total Score						
Average Score		5				
Overall recommendation:						
RECOMMEND TO SEND TRAININGS CONDUCTED BY PAGIBA & COA.						


 ALICIA M. FLORES
 Administrative Officer V