



Annex P

COMPUTATION OF FINAL INDIVIDUAL RATING FOR ADMINISTRATIVE STAFF

Name of Administrative Staff: **ERLY S. ESGUERRA**

Particulars (1)	Numerical Rating (2)	Percentage Weight (3)	Equivalent Numerical Rating (2x3)
1. Numerical Rating per IPCR	4.88	4.88 X 70%	3.42
2. Supervisor/Head's assessment of his contribution towards attainment of office accomplishments	5.00	5.00 X 30%	1.50
TOTAL NUMERICAL RATING			4.92

TOTAL NUMERICAL RATING: 4.92

Add: Additional Approved Points, if any: 0.00

TOTAL NUMERICAL RATING: 4.92

FINAL NUMERICAL RATING 4.92

ADJECTIVAL RATING: OUTSTANDING

Prepared by:

ERLY S. ESGUERRA
Admin. Aide VI

Reviewed by:

ALICIA M. FLORES
Head, Budget

Recommending Approval:

LOUELLA C. AMPAC
Finance Management Director

Approved:

ELWIN JAY V. YU
Vice-Pres. For Admin. & Finance



BUDGET OFFICE

Visayas State University, 1/F Admin Bldg.
Baybay City, Leyte
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Website: www.vsu.edu.ph
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INDIVIDUAL PERFORMANCE COMMITMENT & REVIEW FORM (IPCR)

I, ERLY S. ESGUERRA, of the Budget Office commits to deliver and agrees to be rated on the attainment of the following accomplishment in accordance with the indicated measures for the period Jan 1-June 30, 2024.

Submitted by:

ERLY S. ESGUERRA

Ratee

Approved:

ALICIA M. FLORES

Head, Budget

UFMO 5: Support to Operations (STO)

OVPAF 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	
	PI 2. Percentage of ISO related meetings attended	Attends office meetings essential to ISO implementation	100%	100%	5	5	4	4.67	

OVPAF 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	0%	5	5	5	5	
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OVPAF MFO 2: BUDGET SERVICES

FMO GASS 3. Financial Services Management

Financial Reports Management	PI 1: Number of sub-allotment & projects controlled 2 days upon receipt, error free	Controls office/center/dept . augmentation under Internally Generated Funds (IGF) and encode income from IGF Projects to Registry of Receipts & Obligations Subsidiary Ledger of curent and prior years expenses	1500 documents under STF & income recorded to 176 proj/mo.	1500	5	4	5	4.67	
	PI 2.Number of documents obligated, 2 days upon receipt, error free	Obligates and records documents in the subsidiary ledger and files BUR,purchase orders, payrolls & vouchers copy under IGF	2500 documents obligated & filed under IGF	2658	5	5	5	5	

		Encodes purchase orders, vouchers & payrolls under IGF Accounts to BAOM	2500 document	2658	5	5	5	5	
	PI 3. Number of documents earmarked, 2 days upon receipt, error free	Earmarks Job Orders, Contract of services, Purchase Requests, RIS and fund transfer IGF projects	750 document earmarks	1104	4	5	5	4.67	
	PI 4. Number of status of funds monthly, quarterly and year-end status prepared within prescribed period, error free	Prepares monthly, Quarterly & year-end status of funds under IGF projects	6 internal reports	6	5	5	5	5	
Total Over-all Rating								39	
Average Rating :								4.88	
Additional Points:					Comments & Recommendations for Development Purposes: Send to trainings on Laws & Rules on Government Expenditures and other Financial Management related trainings.				
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
Director for Financial Management

Date: 7/8/24

Approved by:


ELWIN JAY V. YU
Vice President for Admin & Finance

Date: 7/8/24

PERFORMANCE MONITORING & COACHING JOURNAL

X	1st	Q U A R T E R
X	2 nd	
	3 rd	
	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 7/8/24
Admin. Officer V

Noted by:

LOUELLA C. AMPAC 7/8/24
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: ERLY S. ESGUERRA

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 Internally Generated Funds (IGF) to determine actual disbursement/payments to payee.	Liquidated funds under IGF.	Monthly & Quarterly from January-June 2024	Monthly & Quarterly from January-June 2024	Monthly & Quarterly from January-June 2024	Very Impressive	Outstanding	
2	Prepares Status of Funds	Monthly Status of Funds generated	Monthly January-June 2024	Monthly January-June 2024	Monthly January-June 2024	Very Impressive	Outstanding	
3	Assist supervisor in preparing financial reports.	Number of financial reports assisted, error free	Quarterly from January-June 2024	Quarterly from January-June 2024	Quarterly from January-June 2024	Very Impressive	Outstanding	
4	Efficient and customer-friendly frontline services	Entertained clients and observed no noon break policy	Daily from January-June 2024	Daily from January-June 2024	Daily from January-June 2024	Very Impressive	Very Satisfactory	Zero Complaint
5	Functions as Alternate 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 7/6/24

EMPLOYEE DEVELOPMENT PLAN

Name of Employee: Erly S. Esguerra
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-June 2024 **Target Date:** September 2024

First Step: Send to Commission on Audit (COA) training entitled Laws and Rules on Government Expenditures and other financial management related trainings.

Result: To provide a common understanding and uniform interpretation of Laws, rules and Regulations on government expenditures and disbursement.

Date: _____ Target Date: _____


Next Step:

Outcome: _____

Final Step/Recommendation:

Recommend to attend training/workshop on LARGE and other Financial Management training.

Prepared by:


ALICIA M. FLORES
Head 7/8/24

Conforme:


ERLY S. ESGUERRA 7/8/24



Instrument for Performance Effectiveness of Administrative Staff

Rating Period: JANUARY-JUNE 2024

Name of Staff: ERLY S. ESGUERRA Position: ADMIN. AIDE VI

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



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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		5				
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						
Overall recommendation: Send to trainings on Laws & Rules on Government Expenditures and other Financial Management Related Trainings						


ALICIA M. FLORES 7/6/24
 Immediate Supervisor