

Annex O

Instrument for Performance Effectiveness of Administrative Staff

Rating Period: JANUARY-JUNE, 2017Name of Staff: JOCELYN T. CO 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
2.	Accepts all assigned tasks as his/her share of the office targets and delivers outputs within the prescribed time.	5	4	3	2	1
3.	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
4.	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
5.	Keeps accurate records of her work which is easily retrievable when needed.	5	4	3	2	1
6.	Suggests new ways to further improve her work and the services of the office to its clients	5	4	3	2	1
7.	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
8.	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
9.	Accepts objective criticisms and opens to suggestions and innovations for improvement of his work accomplishment	5	4	3	2	1
10.	Willing to be trained and developed	5	4	3	2	1

Total Score						50
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						25
Average Score						5

Overall recommendation : She is willing to learn & is willing to work beyond deadline date.

LOUELLA C. AMPAC
LOUELLA C. AMPAC
Director of Finance

COMPUTATION OF FINAL INDIVIDUAL RATING FOR
ADMINISTRATIVE STAFF


Name of Administrative Staff: JOCELYN T. CO

Particulars (1)	Numerical Rating (2)	Percentage Weight 70% (3)	Equivalent Numerical Rating (2x3)
1. Numerical Rating per IPCR	4.77	4.77 x 70%	3.33
2. Supervisor/Head's assessment of his contribution towards attainment of office accomplishments	5.00	5.00 x 30%	1.50
TOTAL NUMERICAL RATING			4.83


TOTAL NUMERICAL RATING: 4.83
Add: Additional Approved Points, if any: 0.00
TOTAL NUMERICAL RATING: 4.83

ADJECTIVAL RATING: OUTSTANDING

Prepared by:


VALERIE D. CIRCULADO
Admin. Aide III

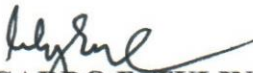
Reviewed by:


LOUELLA C. AMPAC
Director for Finance

Recommending Approval:


REMBERTO A. PATINDOL
Chairman, PMT

Approved:


EDGARDO E. TULIN
President

INDIVIDUAL PERFORMANCE COMMITMENT & REVIEW FORM (IPCR)

I, **JOCELYN T. CO**, of the **Office of the Director for Finance (ODF)** commits to deliver and agree to be rated on the attainment of the following accomplishments in accordance with the indicated measures for the period July 1 to December 31, 2017.

Jocelyn T. Co
JOCELYN T. CO
Ratee

Approved: *LOUELLA C. AMPAC*
LOUELLA C. AMPAC
Director for Finance

Recommending Approval: *REMBERTO A. PATINDOL*
REMBERTO A. PATINDOL
VP for Admin. & Finance

MFO & PAPs	Success Indicators	Tasks Assigned	Percentage of Accomplishment as of December 31, 2017	Target	Details of Actual Accomplishment	Rating				Remarks
						Q1	E2	T3	A4	
Financial Documents	Number of financial documents approved and released on time	Receives, stamps facsimile, records & releases all documents in the Finance Office from Accounting Office		8,900 vouchers & payrolls (3,535 Gen.Fund/ 5,365 STF & Trust Funds)					0.00	
		Receives, stamps facsimile, records & releases all documents in the Finance Office from Cash Office		750 ACIC					0.00	
				1,065 SLCI, NCA utilization, LDDAP					0.00	
				5,550 Checks (1,700 Gen.Fund/ 3,850 STF & Trust Funds)					0.00	
				30 student clearances/withdrawals						
	No. of request received & served within the day upon receipt	Acted referrals & released		70 acted referrals and released					0.00	
		Clients serves within the day		1,320 clients served (10 clients/day)					0.00	
		Customer-Friendly Frontline Service		No complaint					0.00	
Administrative and Support Services Management	No. of Financial Reports/Budget related documents reproduced	Collates, sorts, reproduces, binds budgetary reports/requirements for Congress and Senate		(Without NEP) 30 sets of FY 2018 budgetary reports submitted (15 sets for Congress/15 sets for Senate)					0.0	
		Distributes SARO/NCA to concerned offices		49 cps reproduced (28 cps NCA, 21 cps SARO)					0.00	

MFO & PAPS	Success Indicators	Tasks Assigned	Percentage of Accomplishment as of December 31, 2017	Target	Details of Actual Accomplishment	Rating				Remarks
						Q ¹	E ²	T ³	A ⁴	
Administrative and Support Services Management	No. of Financial Reports/Budget related documents reproduced	Reproduces Budgetary Proposal (Utilization of Income) for BOR Approval		220 sets submitted (136 sets for UADCO, 28 sets for Finance Committee, 56 sets for BOR)					0.00	
		Drafts communications, prepares documents for reimbursement, liquidations, OIC and transmittal letters		85 documents prepared					0.00	
	No. of reports encoded	Encodes Financial Accountability Reports in excel file		16 reports encoded					0.00	
Total Over-all Rating						0.0	0.0	0.0	0.00	
Average Rating (Total Over-all rating divided by # of						0.00				Comments & Recommendations for Development Purpose:
Additional Points:										
Punctuality										
Approved Additional points (with copy of approval)										
FINAL RATING									0.00	
ADJECTIVAL RATING										

Received by:

Calibrated by:

Recommending Approval:

Approved:


TERESITA L. QUINANO
PRPEO


REMBERTO A. PATINDOL
Chairman, PMT


REMBERTO A. PATINDOL
VP for Admin. & Finance


EDGARDO E. TULIN
President

Date: _____

Date: _____

Date: _____

Date: _____

- 1 - quality
- 2 - efficiency
- 3 - timeliness
- 4 - average

INDIVIDUAL PERFORMANCE COMMITMENT & REVIEW FORM (IPCR)

I, **JOCELYN T. CO**, of the **Office of the Director for Finance (ODF)** 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 to June 30, 2017.


JOCELYN T. CO
Ratee

Approved: 
LOUELLA C. AMPAC
Director of Finance

Recommending Approval: 
REMBERTO A. PATINDOL
VP-for Admin. and Finance

MFO & PAPS	Success Indicators	Tasks Assigned	Percentage of Accomplishment as of June 30, 2017	Target	Details of Actual Accomplishment	Rating				Remarks
						Q ¹	E ²	T ³	A ⁴	
Financial Documents	Number of financial documents approved and released on time	Receives, stamps facsimile, records & releases all documents in the Finance Office from Accounting Office	103%	8, 579 vouchers & payrolls (2,580 Gen.Fund/ 5,999 STF & Trust Funds)	8, 899 vouchers & payrolls (3,210 Gen.Fund/ 5,689 STF & Trust Funds)	5.0	5.0	4.0	4.67	
			113%	650 ACIC	740 ACIC	5.0	5.0	4.0	4.67	
			108%	975 SLIC, NCA utilization, LDDAP	1,058 SLIC, NCA utilization, LDDAP	5.0	5.0	4.0	4.67	
			105%	5,225 Checks (1,645 Gen.Fund/ 3,580 STF & Trust Funds)	5,514 checks (1,645 Gen.Fund/ 3,580 STF & Trust Funds)	5.0	5.0	4.0	4.67	
			107%	450 student clearances/ withdrawals	484 student clearances/ withdrawals	5.0	5.0	5.0	5.00	
Administrative and Support Services Management	No. of request received & served within the day upon receipt	Acted referrals released	130%	50 acted referrals	65 referrals	5.0	5.0	4.0	4.67	
			120%	1,320 clients served (10 clients/day)	1,584 clients served (12 clients/day)	5.0	5.0	5.0	5.00	
			100%	No Complaint	No Complaint	5.0	5.0	5.0	5.00	
			111%	127 cps reproduced (56 cps NCA/64 cps SARO/7 cps GARO)	141 cps reproduced (63 cps NCA/71 cps SARO/7 cps GARO)	5.0	5.0	5.0	5.00	
			120%	275 sets submitted (170 sets for UADCO/35 sets for Finance Committee/70 sets for BOR)	330 sets submitted (204 sets for UADCO/42 sets for Finance Committee/84 sets for BOR)	5.0	5.0	5.0	5.00	

MFO & PAPs	Success Indicators	Tasks Assigned	Percentage of Accomplishment as of June 30, 2017	Target	Details of Actual Accomplishment	Rating				Remarks
						Q ¹	E ²	T ³	A ⁴	
Administrative and Support Services Management	No. of documents/vouchers prepared for processing	Drafts communications, prepares documents for reimbursement, liquidations, OIC and transmittal letters	110%	80 documents prepared	88 documents prepared	5.0	4.0	5.0	4.67	
	No. of reports encoded	Encodes Financial Accountability Reports in excel file	131%	16 reports encoded	21 reports encoded	5.0	4.0	4.0	4.33	
Total Over-all Rating						60.0	58.0	54.0	57.33	
Average Rating (Total Over-all rating divided by 9)						Comments & Recommendations for Development Purpose:				
Additional Points:										
Punctuality										
Approved Additional points (with copy of approval)										
FINAL RATING						4.77				
ADJECTIVAL RATING						OUTSTANDING				

Received by:

Calibrated by:

Recommending Approval:

Approved:


TERESITA L. QUINANO
PRPEO


REMBERTO A. PATINDOL
Chairman, PMT


REMBERTO A. PATINDOL
VP for Admin. & Finance


EDGARDO E. TULIN
President

Date: _____

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