



Annex P

**COMPUTATION OF FINAL INDIVIDUAL RATING FOR ADMINISTRATIVE STAFF**

Name of Administrative Staff: **ALICIA M. FLORES**

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	4.94	4.94 X 30%	1.48
<b>TOTAL NUMERICAL RATING</b>			<b>4.92</b>

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:

**ALICIA M. FLORES** 7/8/24  
Administrative Officer V

Reviewed by:

**LOUELLA C. AMPAC** 7/8/24  
Finance Management Director

Recommending Approval:

**LOUELLA C. AMPAC** 7/8/24  
Finance Management Director

Approved:

**ELWIN JAY V. YU** 7/8/24  
Vice-Pres. For Admin. & Finance



**BUDGET OFFICE**

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# INDIVIDUAL PERFORMANCE COMMITMENT & REVIEW FORM (IPCR)

I, **ALICIA M. FLORES**, Head of the Budget Office, commits to deliver and agree to be rated on the attainment of the following targets in accordance with the indicated measures for the period January 1-June 30, 2024

Submitted by:

**ALICIA M. FLORES**

Head of Unit

Approved:

**LOUELLA C. AMPAC**

Director of Finance

## UFMO 5: Support to Operations (STO)

OVPAF STO1: ISO aligned management and administrative support system

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

MFOs/PAPs	Success Indicators	Task Assigned	Target (Jan-Dec 2024)	Actual Accomplishments Jan to June 30, 2024	Rating				Remarks
					Q <sup>1</sup>	E <sup>2</sup>	T <sup>3</sup>	A <sup>4</sup>	
ISO 9001:2015 aligned documents and compliant processes	PI 1. Percentage of clients served rated the services received at least very satisfactory or higher	T 1: Serves and attends to clients requests	100%	100%	5	5	5	5.00	
	PI 2. Number of quality procedures reviewed and updated	T 2: Reviews and updates Quality Procedure and submit to QAC for approval	1	1 QP reviewed	5	5	5	5.00	
	PI 3. Percentage of ISO evidences and other related documents compliant with existing OHB quality procedures kept intact and readily available to Auditor	T 3: Prepares, reviews, process and updates ISO related documents	100% ISO compliant evidences readily available	100% ISO compliant evidences readily available	5	5	5	5.00	
Implementation of administrative processes in accordance with existing approved quality procedures	PI 1. Number of Budget processes implemented in accordance with existing approved quality procedures	T 1: Implement processes in accordance with existing approved quality procedure	1 process implemented according to QP	1 process implemented according to QP	5	5	5	5.00	

## OVPAF STO 3: ARTA aligned compliance and reporting requirements

ODF STO 3: ARTA aligned frontline services

ARTA aligned frontline services	PI 1: Efficient and customer friendly services	T1: Serves and attends to clients requests and inquiries.	Zero complaint from clients served	Zero complaint from clients served	5	5	5	5.00	
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## OVPAF STO4: Innovations & Best Practices

ODF STO 4: Innovations & new Best Practices Development Services

Innovations and Best Practices	PI 1: Number of new systems/innovations introduced and implemented	T 1: Introduces innovations for effective and efficient services	2 new innovation system;	Conducted Financial management Forum (March 20, 2024)	5	5	4	4.67	
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**OVPAF GASS 1: General Administration and Support Services**

**ODF GASS 1. Administrative and Support Services Management**

Administrative and Support Services	PI 1: Number of staff monitored, evaluated coached, supervised for effective and efficient office management	T 1: Coaches, supervises, evaluates the work performances of subordinates	100%	100% (6/6)	5	5	5	5.00	
	PI 2: Number of External linkages with external agencies maintained	T 2: Attend to meetings/seminars per advisory by Agency & make follow ups of SARO & NCA for the university budget releases	4 external linkages Commission on Audit (COA), DBM, CHED, NEDA	4 External linkages (DBM, NEDA, Climate Change Center and COA)	5	5	5	5.00	

**OVPAF MFO 2: BUDGET SERVICES**

**ODF GASS 3. Financial Services Management**

Budget Preparation	PI 1: Number of Annual Budget Proposal (GF & IGF) with supporting Budget Preparation Forms assisted, facilitated for submission to different regulatory committees and agencies	T 1: Prepares data/reports for Budget Proposal for Past Years actual Obligations and Current Year's Appro. & proposed w/in the ceiling per NEP data & released the sub-allotment to offices/centers concerned per GAA	100% Submission	100% (15/15)	5	5	4	4.67	
	PI 2: Number of Budget Preparation forms prepared, approved by the President and submitted to different regulatory committees and agencies	T 2: Prepares, process and submits reports of Budget Preparation to DBM	65 Budgetary reports	40 Budgetary Reports	5	5	5	5.00	
	PI 3: Number of Budget Proposals (CY & PY) for utilization of income prepared for submission to ODF to be discussed in UADCO	T 3: Prepares data /reports for current & prior years poposed utilization of income for Main Campus for FY 2021 & FY 2022	12 Budget Proposal approved by BOR	Assisted the preparation of Budget Proposal documents (30 Proposals)	5	5	4	4.67	
Budget Utilization/Execution	PI 1: Percentage of budget obligated, GAA, IGF and IGP.	T 1: Reviews and certifies financial documents (vouchers, payrolls, and etc.) as to availability of appropriation; prepares request for funding terminal leave pay , follow up and get SARO & NCA from DBM	100% Budget obligated	51% -GAA (4419) 100%-STF( 100%-IGP	5	5	5	5.00	

Financial Reports Management	Pl 1 Number of Monthly, Quarterly and year-end financial reports including request for TLB/Filling up of positions prepared, consolidated, approved and submitted to COA, DBM for all fund clusters within the mandated time	T 1: Prepares Budget Execution Document, Budget Accountability Reports monthly, quarterly & year-end reports required by DBM, COA, PASUC, CHED, etc & provides financial data for Normative Financing, AACCUP and other offices.	60 Budget Exec. Docs. & Budget Financial Accountability reports (BED's & BFAR's) certified & approved by the President & 23 other Financial Reports for internal use.	Prepared, processed and submitted reports (Budget Exec. Docs. & Budget Financial Accountability reports (BED's & BFAR's) certified & approved by the President & 13 other Financial Reports for internal	5	5	5	5.00	
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Total Over-all Rating			65	65	62	64.00	
Average Rating (Total Over-all rating divided by # of entries) 13						4.92	
Additional Points:							<b>Comments &amp; Recommendations for Development Purposes:</b> Is very hardworking and recommended to attend LARGE seminar.
Punctuality							
Approved Additional points (with copy of approval)							
FINAL RATING							
ADJECTIVAL RATING							

Evaluated & Rated by: <u><i>Louella C. Ampac</i></u> <u>LOUELLA C. AMPAC</u> Financial Management Director Date: <u>7/8/24</u>		Recommending approval: <u><i>Louella C. Ampac</i></u> <u>LOUELLA C. AMPAC</u> Financial Management Director Date: <u>7/8/24</u>		Approved by: <u><i>Elwin Jay V. Yu</i></u> <u>ELWIN JAY V. YU</u> VP for Admin. & Finance Date: <u>7/24/24</u>	
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			
<b>Monitoring</b>					
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				
<b>Coaching</b>					
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 <sup>st</sup> Week	2 <sup>nd</sup> Week	3 <sup>rd</sup> Week	4 <sup>th</sup> 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** 7/24  
 Head, Budget



## PERFORMANCE MONITORING FORM

Name of Employee: ALICIA M. FLORESFor the period: January-June 2024

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	Monitors GAA, GARO, SARO & NCA releases with actual obligations and disbursements of funds	Allotment monitored, utilized and obligated	End of the month	5 <sup>th</sup> day of the month	5 <sup>th</sup> day of the month	Impressive	Outstanding	conduct regular monitoring
2	Prepares reports/ data for Budget Proposal for Past years actual obligation and Current years appropriation & proposed within the ceiling and releases sub-allotment to offices/ centers concerned per GAA	Reports/ data prepared for the submission of Budget Proposal	Various dates between January-June 2024	Various dates between January-June 2024	Various dates between January-June 2024	-do-	-do-	
3	Prepares reports/ data for current & prior years utilization of income for Main Campus	Reports/ data prepared for utilization of income.	Various dates from January-June 2024	Various dates from January-June 2024	Various dates from January-June 2024	-do-	-do-	
4	Reviews and certifies financial documents (vouchers, payrolls and etc.) as to availability of funds. Prepares request for funding terminal leave pay.	Reviewed and certified documents. Prepared request for funding.	Daily from January-June 2024	Daily from January-June 2024	Daily from January-June 2024	-do-	-do-	
5	Distributes fund allocation (CY 2024) to different offices/departments/colleges from various programs	Distributed SARO to different offices/colleges/depts	1 <sup>st</sup> week of March, 2023	3 <sup>rd</sup> week of March, 2023	3 <sup>rd</sup> week of March, 2023	-do-	-do-	
6	Prepares Budget Execution Documents, Budget Accountability Reports Monthly, Quarterly & Year-End reports required by DBM, COA, PASUC and CHED	Prepared BED, Monthly, Quarterly and Year-end Reports	10 <sup>th</sup> day of the month & 30 <sup>th</sup> end of the quarter	10 <sup>th</sup> day of the month & 30 <sup>th</sup> end of the quarter	10 <sup>th</sup> day of the month & 30 <sup>th</sup> end of the quarter	-do-	-do-	
7	Prepares documents for fund transfer for external campuses	Documents for fund transfer prepared.	10 <sup>th</sup> day of the month	10 <sup>th</sup> day of the month	10 <sup>th</sup> day of the month	-do-	-do-	
8	Plans activities and supervises office staff	Planned activities and supervised office staff.	Daily from January-June 2024	Daily from January-June 2024	Daily from January-June 2024	-do-	-do-	
9	Attends to meetings/ seminars/ workshops	Attended meetings and seminars	Various dates from January-June 2024	Various dates from January-June 2024	Various dates from January-June 2024	-do-	-do-	

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

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

*LOUELLA C. AMPAC*  
 LOUELLA C. AMPAC  
 Financial Management Director

## EMPLOYEE DEVELOPMENT PLAN

Name of Employee: ALICIA M. FLORES

Performance Rating: Outstanding

**Aim:** To advance in professional competitiveness in government accounting and to have an update on the latest implementations and undertakings as mandated by governing agencies

Proposed Interventions to Improve Performance:

Date: **January** Target Date: **June 2024**

**First Step:** Send to training on "transformational leadership in changing Environment" conducted by POAP and training on laws and rules of Government Expenditures by COA.

Date: \_\_\_\_\_ Target Date: September 2024


Next Step: \_\_\_\_\_

Outcome: To develop skills and increase motivation through continuous update on work related trainings/ workshops.

Final Step/Recommendation:

Recommend to attend training/workshop on Public Financial Management and other supervisory/leadership training.

Prepared by:

  
**LOUELLA C. AMPAC** 7/8/24  
Financial Management Director

Conforme:

  
**ALICIA M. FLORES** 7/8/24





**Instrument for Performance Effectiveness of Administrative Staff**

Rating Period: **JANUARY-JUNE 2024**

Name of Staff: ALICIA M. FLORES Position: ADMINISTRATIVE OFFICER V

**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



**BUDGET OFFICE**

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Phone: +63 53 565 0600 Local 1009

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		59				
<b>B. Leadership &amp; Management (For supervisors only to be rated by higher supervisor)</b>		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		4.94				
Overall recommendation:						
For recommendation to attend LARGE TRAINING						

  
**LOUELLA C. AMPAC** ✓ 7/8/24  
 Finance Management Director