



COMPUTATION OF FINAL INDIVIDUAL RATING FOR ADMINISTRATIVE STAFF

Annex P

Name of Administrative Staff: **LEONARDA P. OTIDA**

Particulars (1)	Numerical Rating (2)	Percentage Weight (3)	Equivalent Numerical Rating (2x3)
1. Numerical Rating per IPCR	4.67	70%	3.27
2. Supervisor/Head's assessment of his contribution towards attainment of office accomplishments	4.67	30%	1.40
TOTAL NUMERICAL RATING			4.67

TOTAL NUMERICAL RATING: 4.67


Add: Additional Approved Points, if any:

TOTAL NUMERICAL RATING: 4.67

FINAL NUMERICAL RATING **4.67**

ADJECTIVAL RATING: **OUTSTANDING**

Prepared by:


LEONARDA P. OTIDA 10/12/2020
Administrative Aide III

Reviewed by:


ERLINDA S. ESGUERRA 10/12/2020
Head, Accounting Office

Recommending Approval:


LOUELLA C. AMPAC 10/12/2020
Director, Finance and Management Office

Approved:


REMBERTO A. PATINDOL 10/13/2020
Vice President, Administration and Finance Office

INDIVIDUAL PERFORMANCE COMMITMENT & REVIEW FORM (IPCR)

I, **LEONARDA P. OTIDA**, staff of the Accounting 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 to June 30, 2020**

Administrative
support services

LEONARDA P. OTIDA

Ratee

10/12/2020

Approved:

ERLINDA S. ESGUERRA

Head of Unit


10/12/2020

MFO & PAPs	Success Indicators	Tasks Assigned	Jan-June 2020	Percentage of Accomplish	Details of Accomplishment	Rating				Remarks
						Q ¹	E ²	T ³	A ⁴	
DISBURSEMENT/ PROCESSING SERVICES	No. of projects controlled error free	Control Project/Releases under NGAS(20201050) funded by DA-BAR, CHED, PCAARD, DENR, DOST & NEDA	40	118%	47	5	5	5	5.00	Controlled 47 projects
		Prepares Journal monthly balances per projects	40	118%	47	5	5	4	4.67	Monitored 47 projects
	No of financial documents	Obligates vouchers, payrolls, & PO's under NGAS Account	500	300%	1,500	5	5	5	5.00	Obligated 1500 financial documents
		Earmarks PR's, Contract of services, under NGAS accounts	90	111	100	5	5	4	4.67	Earmarked 100 documents
BOOKKEEPING SERVICES	No of financial documents obligated/ liquidated error free	Encode the obligated voucher, payrolls, & PO's under NGAS Accounts	500	300%	1,500	5	4	5	4.67	Encoded 1500 financial docs.
		Posting check no. to the obligated documents	500	130%	650	5	5	5	5.00	Posted 650 Financial doc.
	Number of quarterly & terminal financial project reports with supporting schedules prepared and submitted to funding agencies w/n the mandated time	Prepare Financial Report each project	20	130%	26	5	4	4	4.33	Prepared 26 reports
		Prepares schedule of recapitalized liquidations of each project	40	115%	46	5	5	4	4.67	Prepared 46 schedules
		Prepares schedule of accounts payable for each project	40	115%	46	5	4	5	4.67	Prepared 46 schedules
		Prepare liquidation report of accounts payable of the previous year of each projects	20	105%	21	5	5	4	4.67	Prepared 21 schedules
		Prepare Terminal report as project requires	2	200%	4	5	5	4	4.67	Prepared 4 reports


	Number of Innovations to improve university operation		1	100%	1	4	4	4	4.00	
	Number of best practices achieved		1	100%	1	5	4	4	4.33	on process
Administration Support Services & Management	Customer Friendly Service	Served clients with courtesy; immediate response to client needs and inquiries	100	100%	100	5	5	5	5.00	100% no complaint; Served clients with courtesy; immediate response to client needs and inquiries
Total Over-all Rating						69.00	65.00	62.00	65.33	
Average Rating (Total Over-all rating)					4.67	Comments & Recommendations for Development Purpose: To attend training for updates on Acctg. System				
Additional Points:										
Punctuality										
Approved Additional points (with copy of approval)										
FINAL RATING					4.67					
ADJECTIVAL RATING					Outstanding					

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

Evaluated and Rated by:


ERLINDA S. ESGUERRA
 Head, Accounting Office
 Date: 10/12/2020

Recommending Approval:


LOUELLA C. AMPAC
 Director, Finance Office
 Date: 10/12/2020

Approved:


REMBERTO A. PATINDOL
 VP for Administration and Finance
 Date: 10/13/2020

PERFORMANCE MONITORING FORM

Name of Employee: LEONARDA P. OTIDA

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	Control Project/Releases under NGAS(20201050)funded by DA-BAR, CHED, PCAARD, DENR, DOST & NEDA	Journals encoded & recorded	Start of Project	As soon as the complete documents submitted	1 day preparations	Very Impressive	Outstanding	
2	Prepares Journal monthly balances per projects	Prepared Monthly journal Balances	Monthly	End of Month	within a month	Impressive	Very Satisfactory	
3	Obligates vouchers, payrolls, & PO's under NGAS Account	Control & obligate vouchers, payrolls & PO,s	daily	1 day preparations of documents	within a day	Very Impressive	Outstanding	
4	Earmarks PR's, Contract of services, under NGAS accounts	Earmarks, PRs, Appts. Of salaries, Honorarium	daily	1 day preparations	within a day	Impressive	Very Satisfactory	
5	Encode the obligated voucher, payrolls, & PO's under NGAS Accounts	Encode the obligated vouchers, payrolls, PO's to BAOM	daily	1 day of preparations	within a day	Very Impressive	Outstanding	
6	Posting of check no. to the obligated documents	Posting of chks issued to individual obligation	Monthly	5 days after the reports posted &	2 days after	Impressive	Very Satisfactory	
7	Prepares schedule of recapitulated liquidations of each project	Encode the paid obligated vouchers & payrolls for liquidation	Monthly	5 days preparations all funds	2 days after	Impressive	Very Satisfactory	
8	Prepares schedule of accounts payable for each project	Encode the obligated vouchers & payrolls for Accounts Payable	Monthly	5 days after preparations of necessary docs	2 days after	Impressive	Very Satisfactory	
9	Prepare Financial Report each project	Prepared Financial Reports by each projects	Quarterly, Semi-Annual, & Annually	5 days preparationm	3 days after	Impressive	Very Satisfactory	
10	Prepare liquidation report of accounts payable of the previous year of each projects	Prepared Financial Statements per project	Annually	5 days after preparations of necessary docs	3 days after	Impressive	Very Satisfactory	
11	Prepare Terminal report as project requires	Terminal	End of Project/extension	after reconcillation	upon reconciled	Impressive	Very Satisfactory	

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

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

Prepared by:

Egn 10/12/2020
ERLINDA S. ESGUERRA
 Head, Accounting Office



Instrument for Performance Effectiveness of Administrative Staff

Rating Period: **January 1 – June 30, 2020**

Name of Staff: **LEONARDA P. OTIDA**

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		56				

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	4.67				

Overall recommendation : _____


ERLINDA S. ESGUERRA
 Head, Accounting Office

10/12/2020

Exhibit L

EMPLOYEE DEVELOPMENT PLAN

Name of Employee: **LEONARDA P. OTIDA** (*Retirable*)

Performance Rating: Outstanding

Aim: Effective delivery of administrative service

Proposed Interventions to Improve Performance:

Date: January 1 Target Date: _____

First Step:

Result:


Date: _____ Target Date: _____

Next Step:


Outcome: _____

Final Step/Recommendation:

Prepared by:

 *12/12/2020*
ERLINDA S. ESGUERRA
Unit Head

Conforme:

 *12/12/2020*
LEONARDA P. OTIDA
Name of Ratee Faculty/Staff