



Republic of the Philippines
Department of Education
Region VIII
SCHOOLS DIVISION OF TACLOBAN CITY

April 11, 2024

DIVISION MEMORANDUM

No. 280, s. 2024

REITERATION OF REGIONAL MEMORANDUM NO. 391, S. 2024 TITLED "INTERIM GUIDELINES FOR THE OFFICE PERFORMANCE PLANNING AND ASSESSMENT FOR 2024 AND ONWARD"

To: Assistant Schools Division Superintendent
Chief of the Schools Governance and Operations Division
Chief of the Curriculum Implementation Division
Administrative Officer V
Human Resource Management Officer II
PSDSs/DLC In-Charge
Elementary and Secondary School Heads
All Others Concerned

1. Attached is a Regional Memorandum No. 391, s. 2024 titled Interim Guidelines for the Office Performance Planning and Assessment for 2024 and Onward dated April 3, 2024, relative to the provisions of Memorandum (DM-OUHROD-2024-0586) from Wilfredo E. Cabral, Officer-in-Charge, Office of the Undersecretary for Human Resource and Organizational Development dated March 27, 2024, containing the 'Interim Guidelines for the Office Performance Planning and Assessment for 2024 Onwards' and the revised Office Performance Commitment and Review Forms (OPCRF).
2. The Memorandum seeks to ensure that offices shall diligently and consciously integrate the agency priorities and strategic directions in work plans as determined during the office planning and commitment
3. The revised OPCRf shall be used throughout the RPMS cycle by the heads of offices/functional divisions/units in the Central Office (CO), Regional, Schools Division Offices, and public elementary and secondary schools.
4. Attached is Regional Memorandum No. 391, s. 2024 and Memorandum DM-OUHROD-2024-0586 for more information and guidance.
5. Immediate dissemination of and strict compliance with this Memorandum are enjoined.

Sherlita A. Palma
SHERLITA A. PALMA EdD, CESO VI
Assistant Schools Division Superintendent
Officer-In-Charge
Office of the Schools Division Superintendent

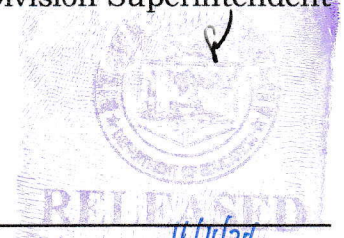
Enclosures: as stated
Reference: R.M Order no. 391, s. 2024 and Memo. DM-OUHROD-2024-0586
To be indicated in the Perpetual Index under the following subjects:

OPCR

RPMS

POLICY GUIDELINES

JG/OASDS
April 11, 2024





Republic of the Philippines
Department of Education
REGION VIII - EASTERN VISAYAS

April 3, 2024

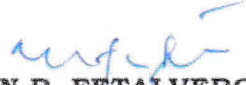
REGIONAL MEMORANDUM

No. **391** s. 2024

INTERIM GUIDELINES FOR THE OFFICE PERFORMANCE PLANNING AND ASSESSMENT FOR 2024 AND ONWARD

To: Schools Division Superintendents
Regional Office Division Chiefs
Public Elementary and Secondary School Heads
All Others Concerned

1. Attached is a Memorandum (DM-OUHROD-2024-0586) from Wilfredo E. Cabral, Officer-in-Charge, Office of the Undersecretary for Human Resource and Organizational Development dated March 27, 2024, containing the 'Interim Guidelines for the Office Performance Planning and Assessment for 2024 Onwards' and the revised Office Performance Commitment and Review Forms (OPCRF).
2. The Memorandum seeks to ensure that offices shall diligently and consciously integrate the agency priorities and strategic directions in work plans as determined during the office planning and commitment.
3. The revised OPCRf shall be used throughout the RPMS cycle by the heads of offices/functional divisions/units in the Central Office (CO), Regional, Schools Division Offices, and public elementary and secondary schools.
4. Assistant Directors in the CO, Assistant Regional Directors, Assistant Schools Division Superintendents, and Assistant School Principals shall likewise use the revised OPCRf.
5. A series of national orientations shall be conducted to capacitate heads of offices and functional divisions in all governance levels on the interim guidelines and the accomplishment of the revised OPCRf.
6. Immediate dissemination of and compliance with this memorandum are desired.


EVELYN R. FETALVERO CESO IV
Regional Director

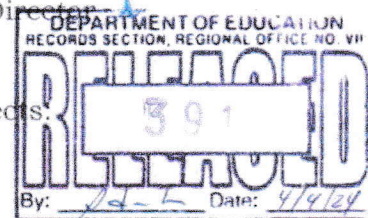
Enclosures: As stated

References: None

To be indicated in the Perpetual Index under the following subjects:

OPCR RPMS

PPRD-RCB





Republika ng Pilipinas

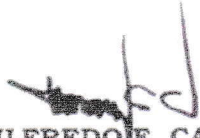
Department of Education

OFFICE OF THE UNDERSECRETARY
HUMAN RESOURCE AND ORGANIZATIONAL DEVELOPMENT

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| DEPARTMENT OF EDUCATION |
| RECEIVED |
| RECORD SECTION - REGIONAL OFFICE - DIVISION VIII |
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MEMORANDUM
DM-OUHROD-2024-0586

TO : Undersecretaries
Assistant Secretaries
Bureau and Service Directors
Regional Directors
Schools Division Superintendents
Public Elementary and Secondary School Heads
All Others Concerned

FROM : 
WILFREDO E. CABRAL
Regional Director
Officer-in-Charge, Office of the Undersecretary for Human Resource
and Organizational Development

SUBJECT : **INTERIM GUIDELINES FOR THE OFFICE PERFORMANCE PLANNING AND ASSESSMENT FOR FY 2024 ONWARDS**

DATE : 27 March 2024

- Pursuant to DepEd Order (DO) No. 2, s. 2015 or the *Guidelines on the Establishment and Implementation of the Results-based Performance Management System (RPMS) in the Department of Education* and to ensure that the offices diligently and consciously integrate the agency priorities and strategic directions in work plans as determined during the office planning and commitment, this Department releases the **Interim Guidelines for the Office Performance Planning and Assessment for FY 2024 Onwards**, including the revised Office Performance Commitment and Review Form (OPCRF).
- This Interim Guidelines shall ensure that office plans, commitments, and performance account for the achievement and contribution of the different delivery units in all governance levels to the Agency's Organizational Outcomes as committed in the General Appropriations Act (GAA), Basic Education Development Plan (BEDP), and MATATAG Agenda, among others.
- With this, offices shall utilize the **Office Performance Commitment and Review (OPCR) Form, Revised 2024**, as attached in **Annex A**, in reflecting the commitments and performance based on its office mandates, in ensuring the immediate integration of and alignment with the Agency's Organizational Outcomes, and in reflecting office's contributions in achieving the strategic priorities set under

the MATATAG Agenda as well as their respective education development plans in the Region, Divisions, and schools as a direction in resolving basic education challenges.

4. The salient features of the revised OPCRf include the following:
 - a. Alignment of the office/school commitments with the overall Organizational Outcomes and Programs
 - b. Streamlining commitments and targets as follows:
 - i. **Commitment to Organizational Outcomes** – office commitments and accomplishments based on the office functions and Key Result Areas (KRAs) with clear attribution to their direct contribution to the organizational outcomes/outputs indicated in the GAA Programs/Subprograms outputs/outcomes, BEDP Pillars, and MATATAG Agenda.
 - ii. **Innovating and Intervening Accomplishments** – office outputs/outcomes enabling, supportive, and/or contributory to the achievement of the organizational commitments and office Key Result Areas (KRAs).
 - iii. **Organizational Effectiveness** – office accomplishments in relation to the Performance-Based Bonus (PBB) oversight requirements.
 - iv. **Leadership Competencies** – competencies expected of heads of functional offices who hold managerial and executive/supervisory positions.
 - v. **Core Behavioral Competencies** – individual competencies required from all DepEd personnel in all job groups within the organization, upholding the DepEd's core values and the Code of Conduct and Ethical Standards for Public Officials and Employees pursuant to RA 6713. They represent the way individuals embody and live the values of the organization and the civil service.

5. The revised OPCRf shall be used throughout the RPMS Cycle which covers the performance for one (1) whole year following a four-stage cycle, to wit: (i) Performance Planning and Commitment (Phase I); (ii) Performance Monitoring and Coaching (Phase II); (iii) Performance Review and Evaluation (Phase III); and (iv) Performance Rewarding and Development Planning (Phase IV).

6. The revised OPCRf shall be used by the heads of offices and functional offices/divisions/units in the Central, Regional, and Schools Division Offices, and heads of schools in the elementary and secondary levels. In addition, Assistant Directors in the CO, Assistant Regional Directors, Assistant Schools Division Superintendents, and Assistant School Principals shall likewise use the revised OPCRf to capture their specific performance contributing to the office/school plans and accomplishments.

7. To provide guidance to offices, ratees, and raters in office performance planning, monitoring, and assessment, the comprehensive **Interim Guidelines** is attached as **Annex B**.

8. Annexes of this Memorandum shall be made available for accessing/viewing and downloading at this link: <https://bit.ly/OPCRF2024Annexes>

9. A series of national orientations shall be conducted to capacitate heads of offices and functional divisions in all governance levels on the interim guidelines and the accomplishment of the revised OPCR. A separate Memorandum shall be issued on this.

10. For more information, please contact the **Bureau of Human Resource and Organizational Development**, 4th Floor, Mabini Building, Department of Education Central Office, DepEd Complex, Meralco Avenue, Pasig City through email at bhrod.hrdd@deped.gov.ph or telephone number (02) 8470-6630.

11. **Immediate dissemination of and strict adherence to this Memorandum is directed.**

Annex A



Republika ng Pilipinas
Department of Education

OFFICE PERFORMANCE COMMITMENT AND REVIEW FORM (OPCRF)
Revised 2024

| | |
|--|-------------------------|
| Name of Employee | Name of Title |
| Office/Division | Position |
| Strand/Element/Service Region/Zone | Appropriation Authority |
| Strategic Business Unit/Service Region/Zone - Statement of Purpose | Date of Review |

PART I-A. COMMITMENT TO ORGANIZATIONAL OUTCOMES (10%)

Part I-A. Commitment to Organizational Outcomes shall capture office commitments, performance, and accomplishments based on office mandates and KRAs as reflected in the official issuance on the Compendium of Office Functions. This part shall capture the contributions of the office directly targeting the Organizational Outcomes indicated in the General Appropriation Act (GAA) Programs/Subprograms, Basic Education Development Plan (BEDP) Pillars, MATATAG Agenda priority deliverables, and other national level commitments that are aligned with and relevant to the office KRAs. Clear attribution shall be made to ensure such alignment.

| TO BE ACCOMPLISHED DURING PLANNING | | | | | | | | | | TO BE FILLED DURING EVALUATION | | | | | | | | |
|---|---|--------------------------|--------------|---|----------|-------------------|---|--|-------------------------------------|--------------------------------|--------------------------|---------------------|-----------------------|------------------------------|------------------------|----------------|-----------------|------------------|
| Organizational Outcomes Alignment | | | | Objectives (Based on Office Functions) | Timeline | Weight Allocation | Performance Targets (Target Outcome/Output of the Bureau/Division/Service/Division assigned with the Outcome/Output Indicators in the Organizational Outcomes) | | Rating Scale | | | | | Means of Verification (MOVs) | Actual Accomplishments | RATING (G,E,T) | AVERAGE (G,E,T) | WEIGHTED AVERAGE |
| Key Result Areas (KRA) (Based on Office Mandate and Functions) | Organizational Outcomes Attribution (Refer to the GAA Programs/Subprograms and BEDP Pillars) | | | | | | Value (numerical, statistical, rank) | Description (inserted outcome output/service) | Quality (Efficiency, Timeliness) | 5 (Outstanding) | 4 (Very Satisfactory) | 3 (Satisfactory) | 2 (Unsatisfactory) | | | | | |
| | | GAA Programs/Subprograms | BEDP Pillars | MATATAG Pillars | | | | Quality | | | | | | | | | | |
| | | | | | | | Efficiency | | | | | | | | | | | |
| | | | | | | | Timeliness | | | | | | | | | | | |
| | | | | | | | Quality | | | | | | | | | | | |
| | | | | | | | Efficiency | | | | | | | | | | | |
| | | | | | | | Timeliness | | | | | | | | | | | |
| | | | | | | | Quality | | | | | | | | | | | |
| | | | | | | | Efficiency | | | | | | | | | | | |
| | | | | | | | Timeliness | | | | | | | | | | | |
| Part I-A Total Score | | | | | | | | | | | | | | | | | | |

PART I-B. INNOVATING AND INTERVENING ACCOMPLISHMENTS (10%)

Part I-B. Innovating and Intervening Accomplishments shall capture the outcome/outputs of the office that are enabling, supportive, and/or contributory to the achievement of the organizational commitments and KRAs in Part I-A. Accomplishments can be innovations, interventions, and enhancements of the processes, services, and/or outputs.

| TO BE FILLED IN DURING PLANNING | | | | | | | | | | TO BE FILLED DURING EVALUATION | | | | | | | | |
|---------------------------------|------------|----------|-------------------|---|--|--|--------------------|--------------------------|---------------------|--------------------------------|-------------|------------------------------|--------------------------------|----------------|-----------------|------------------|--|--|
| Key Result Areas (KRA) | Objectives | Timeline | Weight Allocation | Performance Targets (Target Outcome/Output of the Bureau/Division/Service/Division that are enabling, supportive, and/or contributory to the achievement of the organizational outcomes and KRAs plan/lay) | | Performance Measure (Quality, Efficiency, Timeliness) | RATING SCALE | | | | | Means of Verification (MOVs) | Actual Results/Accomplishments | RATING (G,E,T) | AVERAGE (G,E,T) | WEIGHTED AVERAGE | | |
| | | | | Value (numerical, statistical, rank) | Description (inserted outcome output/service) | | 5 (Outstanding) | 4 (Very Satisfactory) | 3 (Satisfactory) | 2 (Unsatisfactory) | 1 (Poor) | | | | | | | |
| | | | | | | | Quality | | | | | | | | | | | |
| | | | | | | | Efficiency | | | | | | | | | | | |
| | | | | | | | Timeliness | | | | | | | | | | | |
| | | | | | | | Quality | | | | | | | | | | | |
| | | | | | | | Efficiency | | | | | | | | | | | |
| | | | | | | | Timeliness | | | | | | | | | | | |
| | | | | | | | Quality | | | | | | | | | | | |
| | | | | | | | Efficiency | | | | | | | | | | | |
| | | | | | | | Timeliness | | | | | | | | | | | |
| Part I-B Total Score | | | | | | | | | | | | | | | | | | |

PART I.C. ORGANIZATIONAL EFFECTIVENESS (11/14)

Part I.C. Organizational Effectiveness and captures accomplishments/outputs produced or obtained in the aspects of Financial Stewardship, Process Improvement, and Client Satisfaction. It shall focus on the results achieved by the office that are aligned with the Performance-based Bonus (PBB) oversight requirements.

| Organizational Effectiveness Area | Objectives | Timeline | Budget Allocation | Performance Measure (Quality, Efficiency, Timeliness) | RATING SCALE | | | | | Means of Verification (MOVs) | Actual Results/Accomplishments | RATING (S,E,T) | AVERAGE (RET) | WEIGHTED AVERAGE |
|-----------------------------------|--|--------------------------|-------------------|---|---|--|--|--|---|------------------------------|--------------------------------|----------------|---------------|------------------|
| | | | | | 5 (Excellent) | 4 (Very Satisfactory) | 3 (Satisfactory) | 2 (Marginal/Deficient) | 1 (Poor) | | | | | |
| | | | | | | | | | | | | | | |
| Financial Stewardship | Utilized 95% of the budget allocation in accordance with the quarterly disbursement program with no over/shortfalls/allowance from oversight agencies | Within the rating period | 5% | Quality | Budget allocation disbursed within the regulatory period with no over/shortfalls/allowance from oversight agencies | Budget allocation disbursed within the regulatory period with 1-2 over/shortfalls/allowance from oversight agencies | Budget allocation disbursed within the regulatory period with 3-4 over/shortfalls/allowance from oversight agencies | Budget allocation disbursed within the regulatory period with 5-6 over/shortfalls/allowance from oversight agencies | Budget allocation disbursed within the regulatory period with 7 or more over/shortfalls/allowance from oversight agencies | | | | | |
| | | | | Efficiency | Budget is utilized according to the BUR target based on the official BUR report of the Finance Service/Section/Unit (i.e. 95% of the budget allocation is utilized within the FY) | Budget is utilized with 1-5% variance from BUR target based on the official BUR report of the Finance Service/Section/Unit (i.e. 93-97% of the budget allocation is utilized within the FY) | Budget is utilized with 6-10% variance from BUR target based on the official BUR report of the Finance Service/Section/Unit (i.e. 88-92% of the budget allocation is utilized within the FY) | Budget is utilized with 11-15% variance from BUR target based on the official BUR report of the Finance Service/Section/Unit (i.e. 83-87% of the budget allocation is utilized within the FY) | Budget allocation disbursed within the regulatory period with more than 15% variance from BUR target based on the official BUR report of the Finance Service/Section/Unit (i.e. 78% or less of the budget allocation is utilized within the FY) | | | | | |
| | | | | Timeliness | Quarterly basis: Budget is utilized according to the quarterly disbursement program (i.e. 95% of the quarterly BUR target is utilized by the end of each quarter) | Quarterly basis: Budget is utilized with 1-5% variance from the quarterly disbursement program (i.e. 93-97% of the quarterly BUR target is utilized by the end of each quarter) | Quarterly basis: Budget is utilized with 6-10% variance from the quarterly disbursement program (i.e. 88-92% of the quarterly BUR target is utilized by the end of each quarter) | Quarterly basis: Budget is utilized with 11-15% variance from the quarterly disbursement program (i.e. 83-87% of the quarterly BUR target is utilized by the end of each quarter) | Quarterly basis: Budget is utilized with more than 15% variance from the quarterly disbursement program (i.e. 78% or less of the quarterly BUR target is utilized by the end of each quarter) | | | | | |
| Process Improvement | Streamlined core processes and management of service processing of frontline and other office deliverables to ensure ease of transactions and/or digitalization | Within the rating period | 5% | Quality | Improvements/Reduction on all of the service standards: 1. no. of documentary requirements 2. total processing time 3. transaction cost 4. client/agency action steps 5. no. of signatures | Improvements/Reduction on 4 service standards: 1. no. of documentary requirements 2. total processing time 3. transaction cost 4. client/agency action steps 5. no. of signatures | Improvements/Reduction on 3-3 service standards: 1. no. of documentary requirements 2. total processing time 3. transaction cost 4. client/agency action steps 5. no. of signatures | Improvements/Reduction on 1 service standards: 1. no. of documentary requirements 2. total processing time 3. transaction cost 4. client/agency action steps 5. no. of signatures | No change in no. of documentary requirements, total processing time, transaction cost, process steps, signatures | | | | | |
| | | | | Efficiency | Streamlined and/or digitized all office core processes identified in the QMS planning documents | Streamlined and/or digitized 75-80% of the office core processes identified in the QMS planning documents | Streamlined and/or digitized 51-75% of the office core processes identified in the QMS planning documents | Streamlined and/or digitized 26-50% of the office core processes identified in the QMS planning documents | Streamlined and/or digitized 0-25% of the office core processes identified in the QMS planning documents | | | | | |
| | | | | Timeliness | | | | | | | | | | |
| Client Satisfaction | Achieved 100% resolution and compliance rate to RRRB and CCB complaints within the prescribed processing time (simple - 3 days, complex - 7 days, highly technical - 20 days) with at least Satisfactory overall average result on the Client Satisfaction Measurement (CSM) | Within the rating period | 5% | Quality | 95.0% - 100% (Satisfactory) overall average on the results of the Client Satisfaction Measurement (CSM) | 90.0% - 94.9% (Very Satisfactory) overall average on the results of the CSM | 85.0% - 89.9% (Satisfactory) overall average on the results of the CSM | 80.0% - 84.9% (Fair) overall average on the results of the CSM | Below 80.0% (Poor) overall average on the results of the CSM | | | | | |
| | | | | Efficiency | 100% resolution and compliance rate to RRRB and CCB complaints | At least 90% resolution and compliance rate to RRRB and CCB complaints | At least 80% resolution and compliance rate to RRRB and CCB complaints | At least 70% resolution and compliance rate to RRRB and CCB complaints | 7% resolution and compliance rate to RRRB and CCB complaints | | | | | |
| | | | | Timeliness | Complaints are acted upon and closed within prescribed processing time (simple - 3 days, complex - 7 days, highly technical - 20 days) | Complaints are acted upon and closed with documented delays based on the prescribed processing time (simple - 3 days, complex - 7 days, highly technical - 20 days) | | | No complaint action upon and resolve | | | | | |

Part I.C. Total Score

RATE

RATE

PART II-A: LEADERSHIP COMPETENCIES (2.5%)

Part II-A. Leadership Competencies shall capture competencies expected of heads of functional offices who hold managerial and executive/supervisory positions. The Leadership Competencies expected to be demonstrated include Leading People, People Performance Management, and People Development.

| Competencies | Behavioural Indicators | Remarks/ Observations | RATING | Average |
|-------------------------------|--|-----------------------|--|---------|
| Leading People | 1. Uses basic persuasion techniques in a discussion or presentation e.g., staff mobilization, appeals to reason and/or emotions, uses data and examples, visual aids | | | |
| | 2. Persuades, convinces or influences others, in order to have a specific impact or effect. | | | |
| | 3. "Sets a good example", is a credible and respected leader, and demonstrates desired behavior. | | | |
| | 4. Forwards personal, professional and work unit needs and interests in an issue. | | | |
| | 5. Assumes a pivotal role in promoting the development of an inspiring, relevant vision for the organization and influences others to share ownership of DepEd goals, in order to create an effective work environment. | | | |
| People Performance Management | 1. Makes specific changes in the performance management system or in own work methods to improve performance (e.g. does something better, faster, at lower cost, more efficiently; improves quality, customer satisfaction, morale, revenues). | | | |
| | 2. Sets performance standards and measures progress of employees based on office and department targets. | | | |
| | 3. Provides feedback and technical assistance such as coaching for performance improvement and action planning. | | | |
| | 4. States performance expectations clearly and checks understanding and commitment. | | | |
| | 5. Performs all the stages of result-based performance management system supported by evidence and required documents/forms. | | | |
| People Development | 1. Improves the skills and effectiveness of individuals through employing a range of development strategies. | | | |
| | 2. Facilitates workforce effectiveness through coaching and motivating/developing people within a work environment that promotes mutual trust and respect. | | | |
| | 3. Conceptualizes and implements learning interventions to meet identified training needs. | | | |
| | 4. Does long-term coaching or training by arranging appropriate and helpful assignments, formal training, or other experiences for the purpose of supporting a person's learning and development. | | | |
| | 5. Cultivates a learning environment by structuring interactive experiences such as looking for future opportunities that are in support of achieving individual career goals. | | | |
| | | | Part II-A Total Score (Weighted Average) | |

PART II-B: CORE BEHAVIOURAL COMPETENCIES (2.5%)

Part II-B. Core Behavioral Competencies shall capture competencies required from all DepEd personnel in all job groups within the organization, upholding the DepEd's core values and the Code of Conduct and Ethical Standards for Public Officials and Employees pursuant to RA 6713. They represent the way individuals embody and live the values of the organization.

| Competencies | Behavioural Indicators | Remarks/ Observations | RATING | AVERAGE |
|----------------------------|---|-----------------------|--------|---------|
| Self-Management | 1. Sets personal goals and direction, needs and development. | | | |
| | 2. Understands personal actions and behavior that are clear and purposeful and takes into account personal goals and values congruent to that of the organization | | | |
| | 3. Displays emotional maturity and enthusiasm for and is challenged by higher goals | | | |
| | 4. Prioritize work tasks and schedules (through Gantt charts, checklists, etc.) to achieve goals | | | |
| | 5. Sets high quality, challenging, realistic goals for self and others. | | | |
| Professionalism and Ethics | 1. Demonstrates the values and behavior enshrined in the Norms and Conduct and Ethical Standards for Public Officials and Employees (RA 6713). | | | |
| | 2. Practices ethical and professional behavior and conduct taking into account the impact of his/her actions and decisions. | | | |
| | 3. Maintains a professional image: being trustworthy, regularity of attendance and punctuality, good grooming and communication. | | | |
| | 4. Makes personal sacrifices to meet the organization's needs. | | | |
| | 5. Act with a sense of urgency and responsibility to meet the organization's needs, improve system and help others improve their effectiveness. | | | |

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|---|--|--|--|--|
| Results Focus | 1. Achieves results with optimal use of time and resources most of the time. | | | |
| | 2. Avoids rework, mistakes and wastage through effective work methods by placing organizational needs before personal needs. | | | |
| | 3. Delivers error-free outputs most of the time by conforming to standard operating procedures correctly and consistently. Able to produce very satisfactory quality of work in terms of usefulness/acceptability and completeness with no supervision required. | | | |
| | 4. Expresses a desire to do better and may express frustration at waste or inefficiency. May focus on new or more precise ways of meeting goals set. | | | |
| | 5. Makes specific changes in the system or in own work methods to improve performance. Examples may include doing something better, faster, at a lower cost, more efficiently, or improving quality, customer satisfaction, morale, without setting any specific goal. | | | |
| Teamwork | 1. Willingly does his/her share of responsibility | | | |
| | 2. Promotes collaboration and removes barriers to teamwork and goal accomplishment across the organization. | | | |
| | 3. Applies negotiation principles in arriving at win-win agreements. | | | |
| | 4. Drives consensus and team ownership of decisions | | | |
| | 5. Works constructively and collaboratively with others and across organizations to accomplish organizational goals and objectives. | | | |
| Service Orientation | 1. Can explain and articulate organizational directions, issues and problems. | | | |
| | 2. Takes personal responsibility for dealing with and/or correcting customer service issues and concerns. | | | |
| | 3. Initiates activities that promotes advocacy for men and women empowerment. | | | |
| | 4. Participates in updating office vision, mission, mandates and strategies based on DEPED strategies and directions. | | | |
| | 5. Develops and adopts service improvement program through simplified procedures that will further enhance service delivery. | | | |
| Innovation | 1. Examines the root cause of problems and suggests effective solutions. Foster new ideas, processes, and suggests better ways to do things (cost and/or operational efficiency). | | | |
| | 2. Demonstrates an ability to think "beyond the box". Continuously focuses on improving personal productivity to create higher value and results. | | | |
| | 3. Promotes a creative climate and inspires co-workers to develop original ideas or solutions. | | | |
| | 4. Translates creative thinking into tangible changes and solutions that improve the work unit and organization. | | | |
| | 5. Uses ingenious methods to accomplish responsibilities. Demonstrates resourcefulness and the ability to succeed with minimal resources. | | | |
| Part II-B Total Score (Weighted Average) | | | | |

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| RATEE |
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| RATER |
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PART III: SUMMARY OF RATINGS

| Final Performance Components | Weight Allocation | Obtained Score | Overall Score | RPMS Rating | |
|------------------------------|---|----------------|---------------|------------------|-------------------|
| | | | | Numerical Rating | Adjectival Rating |
| PART I | A. Commitment to Organizational Outcomes | 60% | | | |
| | B. Innovating and Intervening Accomplishments | 20% | | | |
| | C. Organizational Effectiveness | 15% | | | |
| PART II | A. Leadership Competencies | 2.5% | | | |
| | B. Core Behavioural Competencies | 2.5% | | | |

| Range | Numerical Rating | Adjectival Rating |
|-------------|------------------|-------------------|
| 4.500-5.000 | 5 | Outstanding |
| 3.500-4.499 | 4 | Very Satisfactory |
| 2.500-3.499 | 3 | Satisfactory |
| 1.500-2.499 | 2 | Unsatisfactory |
| 1.000-1.499 | 1 | Poor |

Ratee-Rater Agreement

The signatures below confirm that the employee and his/her superior have agreed to the contents of the performance as captured in this form.

| |
|-------------------|
| Name of Employee: |
| Signature: |
| Date: |

| |
|-------------------|
| Name of Superior: |
| Signature: |
| Date: |

PART IV: IMPROVEMENT AND DEVELOPMENT PLANS

Part IV-A: Office Improvement Plan

| Gap Analysis (SWOT) | Improvement Area | Action Plan | | Timeline | Resources Needed |
|------------------------|------------------|-------------------|--------------------------------------|----------|------------------|
| | | General Objective | Recommended Improvement Intervention | | |
| | | | | | |
| | | | | | |
| | | | | | |

Feedback:

Part IV-B: Individual Development Plan

| Strengths | Improvement Needs | Action Plan | | Timeline | Resources Needed |
|-----------|-------------------|--|--|----------|------------------|
| | | Learning Objectives (based on the developmental intervention) | Recommended Developmental Intervention | | |
| | | | | | |
| | | | | | |
| | | | | | |

Feedback:

RATEE

RATER

APPROVING AUTHORITY

**Interim Guidelines on the Office Performance
Planning and Assessment for FY 2024 Onwards**

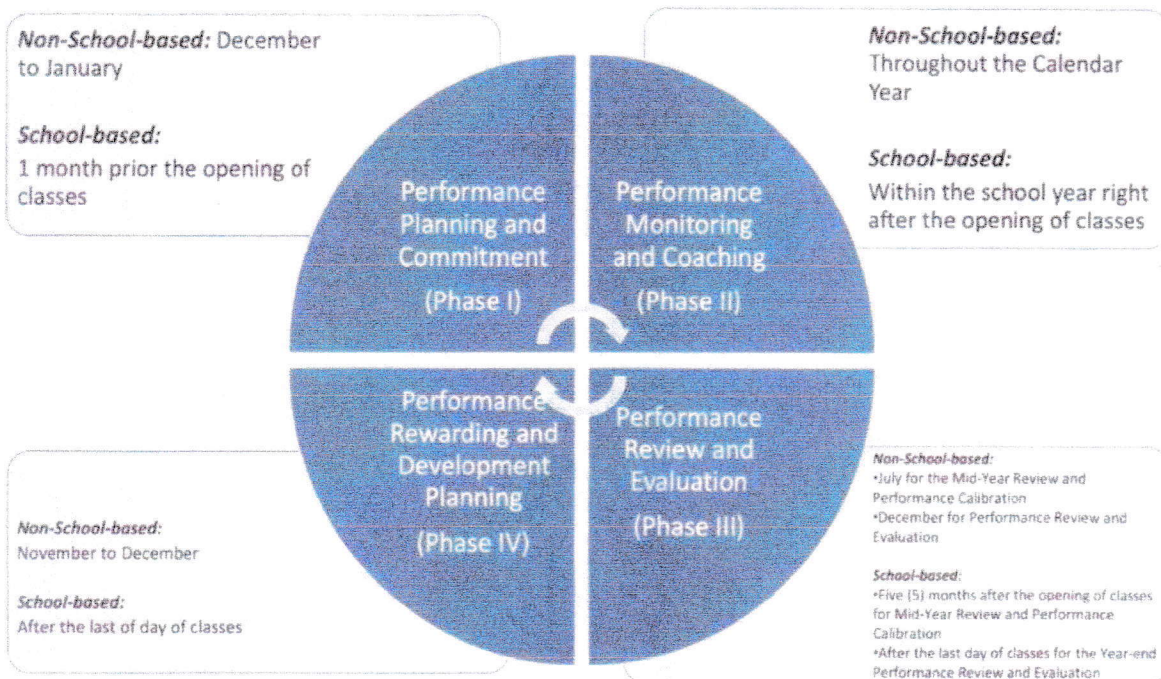
I. The RPMS Cycle and Office Performance Management Timeline

1. The office performance cycle shall follow the four-phase performance management system cycle prescribed in DO 2, s. 2015:

- a. Performance Planning and Commitment (Phase I);
- b. Performance Monitoring and Coaching (Phase II);
- c. Performance Review and Evaluation (Phase III); and
- d. Performance Rewarding and Development Planning (Phase IV)

Figure 1 illustrates the four (4) phases of the RPMS Cycle including the timeline for the Office Performance Management.

Figure 1. The Office Performance Management Cycle



2. The Office Performance Cycle shall cover the period of one (1) whole year or a period of 12 months, as follows:

Table 1. The Office Performance Management Timeline in DepEd

| RPMS Cycle Phase | Task/Activity | Schedule | |
|---|--|---|---------------------------------------|
| | | Non-school-based offices and functional divisions in CO, RO, SDO | School |
| PHASE 1 Performance Planning and Commitment | Target and Commitment Setting | December to January | 1 month prior the opening of classes |
| | Initial Office/School and Individual Development Planning | | |
| PHASE 2 Performance Monitoring and Coaching | Performance Monitoring | Year-round | School Year-round |
| | Accomplishment of PMCF and provision of L&D interventions | | |
| PHASE 3 Performance Review and Evaluation | Mid-Year Review and Assessment Recalibration of targets | July | 5 months after the opening of classes |
| | Year-end Performance Assessment | November to December | After the last day of classes |
| PHASE 4 Performance Rewarding and Development | Finalization of the Office/School and Individual Development Plans | November to December | After the last day of classes |
| | Submission of signed OPCR | | |

A. Phase I: Performance Planning and Commitment

3. The performance planning and commitment shall be done at the beginning of the performance cycle. In this period, the rater and ratee (head of office/functional division) shall discuss and agree on the Office KRAs, Organizational Outcome Attribution, Objectives, Timeline, Weight allocation, Performance Targets, Performance Measure, Rating Scale, and Means of Verification.

4. In the OPCRf template, the following parts shall be accomplished and discussed by the rater and the ratee during the Phase I - Performance Planning and Commitment:

- a. Part I-A: Commitment to Organizational Outcomes (60%)
- b. Part I-B: Innovating and Intervening Accomplishments (20%)
- c. Part I-C: Organizational Effectiveness (15%)

5. **Determining the Key Results Areas.** The head of office shall identify the Office KRAs based on the official issuance on the *Compendium of Office Functions* and the overall organizational outcomes of the Agency.

- a. For **Heads of Offices in the Regional Offices and Schools Division Offices** (i.e., Office of the Regional Director and Office of the Schools Division Superintendent), refer to the provided recalibrated KRAs based on the Functions of the Office anchored on the organizational outcomes and Job Descriptions of the RD and SDS (*Annex C*).
- b. For **offices/divisions in the CO and functional divisions in the RO and SDO**, refer to the *Compendium of Office Functions, version 3* (as issued through Memorandum DM-HROD-2023-0617) which can be accessed through this link <https://bit.ly/OfficeFunctionsv3>
- c. For **Heads of Schools in the Elementary and Secondary Levels**, refer to the prescribed KRAs that are aligned with the School Based Management (SBM) domains (*Annex D*).

6. **Attributing the KRA to the Organizational Outcomes.** Based on the determined office KRAs, the Office shall identify the organizational outcomes/outputs in the GAA, BEDP Pillars, and the MATATAG Agenda that the office is directly contributing to.

The five (5) programs in the DepEd **GAA** include:

- a. Education Policy Development;
- b. Basic Education Inputs;
- c. Inclusive Education;
- d. Support to Learners and Schools; and
- e. Education Human Resource Development.

As for the **BEDP**, it includes four (4) pillars of *Access, Equity, Quality, and Resilience*, and the *Enabling Mechanisms for Governance and Management*. The intermediate outcomes for each pillar and enabling mechanisms are as follows:

| | |
|--|--|
| Enabling Mechanisms: Governance | Modern, efficient, nimble, and resilient governance and management processes <ol style="list-style-type: none"> 1. Education leaders and managers practice participative, ethical, and inclusive management processes 2. All personnel are resilient, competent, and continuously improving 3. Ideal learning environment and adequate learning resources for learners improved 4. Internal systems, and processes are efficient, responsive modern, and continuously improving 5. Key stakeholders actively collaborate to serve learners better 6. Public and private education operate under a dynamic and responsive complementarity framework |
|--|--|

For the **MATATAG Agenda**, the following are the four components:

- a. **MA**ke the curriculum relevant to produce competent and job-ready, active, and responsible citizens;
- b. **TA**ke steps to accelerate delivery of basic education facilities and services;
- c. **TA**ke good care of learners by promoting learner well-being, inclusive education, and a positive learning environment; and
- d. **GI**ve support to teachers to teach better.

Office KRAs may have cross-cutting attribution such that it supports the achievement of multiple Organizational Outcomes.

7. **Setting the Objectives.** Based on the set KRAs and their attribution to the organizational outcomes, the rater and the ratee shall discuss and agree on the office objectives. Setting at least three (3) objectives per KRA is highly recommended. However, the rater and the ratee may set more than three (3) objectives per KRA depending on the priorities of the office for the specific performance year.

For Part II-B: *Innovating and Intervening Accomplishments*, the rater and the ratee shall discuss and agree on Objectives that are **enabling, supportive**, and/or **contributory** to the achievement of the organizational commitments and KRAs in Part I-A. Objectives for this part can target accomplishments and outputs which are innovations, interventions, and/or enhancements on the processes, services, and/or outputs of the office.

Objectives are specific tasks that are considered as concrete outputs which an office needs to do to achieve specific KRAs. Objectives are action verbs written in past tense. In objective setting, the SMART criteria, which stands for *Specific, Measurable, Attainable, Relevant, Time Bound*, shall be applied.

Objectives shall also capture the specific directives and priority deliverables that are set and cascaded from national level down to functional offices in the CO, RO, SDO, and schools (e.g., MATATAG Agenda, Strand priorities, etc.).

8. **Setting the Timeline.** The timeline shall define the target date for accomplishing each of the performance Objectives. The timeline for the office Objectives shall be set by the head of office in coordination with the Planning Office

and School Planning Team, as aligned with the GAA Physical Targets, Annual Work and Financial Plan for DepEd offices or Annual Improvement Plan for schools/CLCs.

The head of functional office shall indicate the target period of accomplishment of objectives and outputs. If the objective is a regular deliverable (e.g., preparation of payroll), the Timeline should indicate the specific period and/or frequency within which the specific Objective is expected to be delivered (e.g., every end of the month).

9. **Assigning the Weight.** The assignment of weights shall be done per Objective. The rater and ratee shall ensure that each Objective under each KRA has been assigned with weights based on the nature and scope of work, difficulty and complexity of accomplishing the specific task, and the required time to finish the specific task and achieve the Objective. The assignment of weights shall be discussed and agreed upon by the rater and the ratee. The sum of the assigned weights of the Objectives shall be equal to the weight assigned to a particular part of the OPCR.

Illustrative sample:

Part I-A – Weight allocation is 60%

KRA 1

- Objective 1 is 10%
- Objective 2 is 5%
- Objective 3 is 5%

KRA 2

- Objective 1 is 8%
- Objective 2 is 7%
- Objective 3 is 5%

KRA 2

- Objective 1 is 5%
- Objective 2 is 5%
- Objective 3 is 5%

10. **Identifying Performance Targets.** The rater and the ratee shall identify, discuss, and agree on the Performance Targets for each of the Objectives. Performance Targets are the expected output/s based on the KRAs and Objectives determined. It is elaborated further into 'Value' and 'Description' to provide clearer and more concrete targeting of output/s.

Illustrative sample:

| Performance Targets <i>(Target Outcome/Output of the Bureau/Center/Service/Division aligned with the Outcome/Output Indicators in the Organizational Outcome)</i> | |
|---|--|
| Value <i>(numerical, statistical, trend)</i> | Description <i>(expected outcome/output/service)</i> |
| 1 (numerical) | Draft DepEd Order on... |
| 90% (statistical) | Filling up of vacant positions |
| 2% decrease (trend) | Dropout rate |

11. **Determining Performance Measures.** Using a five (5)-point rating scale, the rater and the ratee determine the performance indicators for Quality, Efficiency, and Timeliness (QET) as measures of performance and means to verify the achievement of output/deliverable. Depending on the *Objective*, performance may be rated in terms of at least two (2) measures (quality, efficiency, and timeliness); provided that Quality is always measured.

The operational definition of each numerical rating (5-4-3-2-1) shall be clearly defined and indicated under each component (i.e., QET). This shall ensure that the rating is objective, impartial, and verifiable.

Refer to Table 3 for the definition of performance measures for each component.

Table 3. Performance Measures

| COMPONENT | DEFINITION |
|------------|--|
| Quality | <p>The extent to which actual performance compares with targeted performance.</p> <p>The degree to which objectives are achieved and the extent to which targeted problems are solved/issues are addressed with a certain degree of excellence.</p> <p>Quality relates to effectiveness and getting the right things done. It draws focus on the output or service itself.</p> <p>Quality Indicator answers the question, <i>“Is the actual output or service delivery at par with the established quality measures or meet the expected quality of output?”</i></p> <p>Elements: Meeting the standards, acceptability or soundness of output, accuracy, completeness or comprehensiveness of reports and client satisfaction.</p> |
| Efficiency | <p>The extent to which time or resources are used for the intended task or purpose.</p> <p>Measures whether targets are accomplished with a minimum amount or quantity of waste, expense, or unnecessary effort.</p> <p>Efficiency relates to doing things right. It draws focus on the process by which outputs or services are delivered.</p> <p>Efficiency Indicator answers the question, <i>“How are the outputs or services delivered? Is the manner of achieving the Targets follow the minimum service standards? Is resource utilization optimized in terms of the program objective's realization? Are there better, more efficient ways to deliver program outputs?”</i></p> <p>Elements: Standard response time, number of applications acted upon over number of applications received, optimum use of resources (financial) - actual spending/budget allocated.</p> |

| | |
|------------|--|
| Timeliness | <p>Measures whether the deliverable was done on time based on the requirements of the rules and regulations, and/ or clients/ stakeholders.</p> <p>Time-related performance indicators evaluate such things as project completion deadlines, time management skills and other time-sensitive expectations.</p> <p>Timeliness Indicator answers the question, <i>“Are the Objectives achieved within the period agreed upon?”</i></p> <p>Elements: Claim processing time, target date or deadline, product development rate, delivery time, etc.</p> |
|------------|--|

12. **Determining Means of Verification.** After identifying the performance measures for each of the Objectives, the ratee shall list the possible proof or evidence of accomplishments. It can be official documents, reports or any outputs showing the actual results certified by authorized officials/personnel.

13. **Complying with the Areas for Organizational Effectiveness.** The rater and the ratee shall discuss the areas for organizational effectiveness aligned with PBB-based oversight requirements as prescribed for compliance of all offices, which include (i) Financial Stewardship, (ii) Process Improvement, and (iii) Client Satisfaction.

Table 4. Organizational Effectiveness Areas

| Organizational Effectiveness Area | Description |
|--|--|
| Financial Stewardship | This refers to the utilization of the budget allocation in accordance with the quarterly disbursement program with no overdraft/deficit/disallowance from oversight agencies. |
| Process improvement | This refers to the streamlined core processes and management of service provisioning of frontline and other office deliverables to ensure ease of doing business/ease of transactions and/or digitalization/digitization based on the Department’s Citizen’s Charter and in line with the Anti-Red Tape Authority (ARTA)’s Whole-of-Government (WOG) Reengineering Manual. |
| Client Satisfaction | This refers to the resolution and compliance rate to the Hotline #8888 and Contact Center ng Bayan (CCB) within the prescribed processing time pursuant to the ARTA and EODB standards, following the Client Satisfaction Measurement mechanism. |

14. **Reaching Agreement.** Once the office KRAs, Objectives, Weights, Timeline, and Performance Measures are clearly defined, the rater and the ratee shall commit and reach an agreement by signing the OPCR Form. The signed/approved OPCR Form shall be the basis for monitoring and assessment, which shall take place in Phase II and Phase III, respectively.

B. Phase II: Performance Monitoring and Coaching

15. The performance monitoring and coaching shall commence after the rater and the ratee commit on the KRAs, Objectives, Weights, Timeline, and Performance Indicators, and sign the OPCR Form. This shall be done throughout the year.

16. Performance monitoring and coaching shall be a proactive responsibility of both the rater and the ratee to ensure achievement of planned targets and continuously improve office performance and individual competencies of the head of office throughout the year.

17. The two main (2) components of Phase II are the following:

- a. Performance monitoring; and
- b. Coaching and feedback.

Performance monitoring shall provide key inputs and objective basis for rating. It shall facilitate feedback and provide evidence of performance.

Coaching and feedback shall be a continuous process and shall be provided by the rater and/or be sought by the ratee to improve office performance and individual behavior. The rater, as the coach or mentor of the ratee, plays a critical role in the performance monitoring and coaching. They shall provide an enabling environment and intervention for continuous improvement.

18. To ensure compliance, quarterly rater-ratee checkpoint meetings shall be conducted through one-on-one and/or small group meetings, LAC sessions, FGD or other means necessary to track progress in the achievement of planned targets, flag positive and negative behaviors that are observed in the workplace, and plan appropriate actions steps, as may be necessary. A more frequent rater-ratee conversation may be done as necessary. These quarterly checkpoint meetings shall require diligent documentation using the **Performance Monitoring and Coaching Form (PMCF)** as enclosed in **Annex E**.

19. The PMCF shall be used by the rater and the ratee to track and record significant incidents. Significant incidents are actual events and behaviors in which both positive and negative performances are observed and documented.

The PMCF shall provide a record or evidence of office and work performance as well as the demonstrated behaviors and competencies of the head of office. It shall be an effective substitute in the absence of quantifiable data. The rater and the ratee shall sign each significant incident recorded in the PMCF to ensure that agreement has been reached.

20. Prior to every quarterly performance monitoring and coaching session, the rater shall prepare a list of observations pertaining to the performance and behavior of both the office and head of office. The rater shall communicate the observed significant incidents with the ratee during the performance monitoring and coaching sessions. The ratee shall validate the rater's observations and may provide the further information that may either confirm or justify such observations.

Based on the validated performance observations, the rater and the ratee shall then discuss and agree on appropriate action steps to further improve or correct performance and behavior.

C. Phase III: Performance Review and Evaluation

21. The performance review and evaluation shall be done in the middle and at the end of the performance cycle to assess the office performance based on the commitments and measures as contained in the signed OPCR Form.

Mid-Year Review

22. An office-wide mid-year review shall be required to determine the progress in achieving the agreed office performance Targets. In exceptional cases, and only if the situation warrants, a **one-time calibration** of office performance Targets, Weights, Timeline, and Performance Indicators shall be allowed during the mid-year review.

23. Exceptional cases that may warrant performance calibration shall include, but not limited to the following, subject to the approval of the concerned Performance Management Team (PMT):

- a. Instances when high level decisions are taken into effect which resulted in changes in strategic directions and/or reprioritization of programs, activities, projects (PAPs);
- b. Adjustments in the systems, procedures, and strategies involved in the delivery of committed targets (e.g. use of alternative strategies and work arrangements);
- c. Changes in the necessary administrative, financial, procurement, and other processes, rules, and regulations that are not within the jurisdiction or discretion of the office and/or employee; and
- d. Circumstances that are beyond the control of the ratee such as natural and/or man-made calamities, including typhoon, earthquake, and other fortuitous events.

24. The **Performance Calibration Form (PCF)** enclosed in **Annex F** shall be used during the one-time calibration of performance, as may be authorized. The PCF must be discussed and agreed upon by the rater and the ratee and approved by the approving authority. The calibrated performance Targets, Weights, Timeline, and Performance Indicators shall only be in effect upon approval of the concerned PMT.

25. The initial rating during the mid-year review shall be reflected in the **Office Performance Mid-Year Review Form (OPMRF)** enclosed in **Annex G**. The final

rating depends solely on the year-end performance assessment unless exceptional cases deem it necessary to use the mid-year review as the final rating such as promotion, transfer, or in cases of untimely death where the ratee could no longer complete the full RPMS cycle.

Year-End Assessment

26. The head of the functional office shall assess the performance of the office vis-à-vis the committed targets at the beginning of the performance cycle or the calibrated targets, if any, agreed during the mid-year review.

The rater and the ratee shall discuss and agree on the individual assessment based on the MOVs presented and actual accomplishments of each of the KRAs and Objectives. The final rating shall be based solely on the accomplishment of the specific objectives as measured by the Performance Indicators. The OPCR Form shall be accomplished and completed by the rater and the ratee to:

- a. Reflect actual accomplishments and results;
- b. Rate each of the objectives;
- c. Compute for the score (i.e., average, weighted average, and score per Part);
- d. Assess the competencies;
- e. Determine the overall score; and
- f. Reach an agreement.

27. **Reflecting Actual Accomplishments and Results.** The rater and the ratee shall discuss and agree on the actual accomplishments and results based on the performance commitments and measures made at the beginning of the rating period or the calibrated targets, if any, agreed during the mid-year review.

28. **Computing the Performance Rating.** All outputs shall be evaluated vis-a-vis the standards set in performance measures.

- a. **Rating the Objectives.** The rater and the ratee shall evaluate each objective whether it has been achieved or not based on the evidence presented. Each objective shall be rated in the components (i.e., Quality, Efficiency, Timeliness) determined as performance measure at the beginning of the rating period or the calibrated targets using the 5-point rating scale, if any, agreed during the mid-year review.

Note: Depending on the Objective, performance may be rated in terms of Quality and Efficiency, Quality and Timeliness, or Quality, Efficiency and Timeliness. The quality component is always being measured.

The RPMS rating scale below shall be used in rating the Objectives:

Table 5. The RPMS Rating Scale

| NUMERICAL RATING | ADJECTIVAL RATING | DESCRIPTION OF MEANING OF RATING |
|------------------|-------------------|--|
| 5 | Outstanding | Performance represents an extraordinary level of achievement and commitment in terms of quality and time, technical skills and knowledge, ingenuity, creativity, and initiative. Employees at this performance level should have demonstrated exceptional job mastery in all major areas of responsibility. Employee achievement and contributions to the organization are of marked excellence. |
| 4 | Very Satisfactory | Performance exceeds expectations. All goals, objectives, and targets were achieved above the established standards. |
| 3 | Satisfactory | Performance met expectations in terms of quality of work, efficiency, and timeliness. The most critical annual goals were met. |
| 2 | Unsatisfactory | Performance failed to meet expectations, and/or one or more of the most critical goals were not met. |
| 1 | Poor | Performance was consistently below expectations, and/or reasonable progress toward critical goals was not made. Significant improvement is needed in one or more important areas. |

- b. **Average.** The average of the individual ratings for QET shall be computed to get the rating for each Objective.

$$\text{Average QET} = \frac{\text{Quality (Q)} + \text{Efficiency (E)} + \text{Timeliness (T)}}{3}$$

Note: For Objective that has only two performance measures, the divisor shall also be 2.

- c. **Weighted Average.** To get the Weighted Average per Objective, the Average QET Rating shall be multiplied with assigned weight agreed upon at the beginning of the rating period or the calibrated weight, if any, approved during the mid-year review.

Weighted Average (Rating per Objective) = Average QET x Weight Allocation

- d. **Total Score.** To determine the total score per Part, the Weighted Average per Objective shall be added up.

The score for each Objective and the total score for each Part shall be written in three (3) decimal points.

Total Score per Part = Objective 1 + Objective 2 + Objective 3 + ...

Table 6. Sample Computation

Part I-A: Commitment to Organizational Outcomes (60%)

| KRAs | Organizational Outcome Attribution | OBJECTIVES | WEIGHT PER OBJECTIVE | RATING (QET) | AVERAGE | WEIGHTED AVERAGE |
|-----------------------|---|-------------------|-----------------------------|---------------------|----------------|-------------------------|
| KRA 1 | OO Attributions | Objective 1 | 10% | 5 | 4.666 | 0.466 |
| | | | | 4 | | |
| | | | | 5 | | |
| | | Objective 2 | 5% | 5 | 4.333 | 0.216 |
| | | | | 4 | | |
| | | | | 4 | | |
| | | Objective 3 | 5% | 5 | 3.666 | 0.183 |
| | | | | 3 | | |
| | | | | 3 | | |
| KRA 2 | OO Attributions | Objective 1 | 10% | 5 | 4.500 | 0.450 |
| | | | | 4 | | |
| | | | | -- | | |
| | | Objective 2 | 8% | 4 | 3.500 | 0.280 |
| | | | | -- | | |
| | | | | 3 | | |
| | | Objective 3 | 7% | 5 | 5.000 | 0.350 |
| | | | | 5 | | |
| | | | | 5 | | |
| KRA 3 | OO Attributions | Objective 1 | 5% | 4 | 4.000 | 0.200 |
| | | | | -- | | |
| | | | | 4 | | |
| | | Objective 2 | 5% | 4 | 3.666 | 0.183 |
| | | | | 4 | | |
| | | | | 3 | | |
| | | Objective 3 | 5% | 3 | 3.000 | 0.150 |
| | | | | 3 | | |
| | | | | -- | | |
| Part I-A Score | | | | | | 2.478 |

29. **Assessing Competencies.** The rater shall discuss with the ratee the set of leadership and core behavioral competencies observed during the performance cycle. The ratee shall choose his/her self-perceived competencies.

- a. **Rating the Competencies.** In Part II (Part II-A and Part II-B) of the OPCR Form, the rater shall write the appropriate rating for each behavioral indicator observed using the 5-point rating scale shown in Table 7.

Table 7. DepEd Competencies Scale

| Numerical Rating | Adjectival Rating | Definition |
|-------------------------|-------------------------------|--|
| 5 | Role Model | Behavioral indicator is consistently exhibited and is worthy of emulation. |
| 4 | Consistently Demonstrated | Behavioral indicator is constantly showed. |
| 3 | Most of the Time Demonstrated | Behavioral indicator is often showed. |
| 2 | Sometimes Demonstrated | Behavioral indicator is irregularly showed. |
| 1 | Rarely Demonstrated | Behavioral indicator is seldomly showed. |

- b. **Providing detailed remarks and/or observations** is highly recommended to support the rating for each behavioral indicator. Remarks and observations may include significant incidents observed, feedback, and suggestions for improvement, among others.
- c. **Average per competency.** The average of the individual ratings for behavioral indicators shall be computed to get the rating for each Competency.

$$\text{Average} = \frac{\text{BI 1} + \text{BI 2} + \text{BI 3} + \text{BI 4} + \text{BI 5}}{5}$$

- d. **Total Score (Weighted Average).** To get the Total Score (Weighted Average), the total average for the set of competencies shall be multiplied with assigned weight. The weight allocation for the Leadership Competencies and Core Behavioral Competencies shall be 2.5% each respectively.

$$\text{Total Score (Weighted Average)} = \text{Average Rating} \times 2.5\% \text{ Weight Allocation}$$

30. **Determining the Overall Score.** The Overall Score shall be computed by adding the total obtained scores in Part I and Part II. This shall be inputted in the *Part III Summary of Ratings* of the OPCR Form.

$$\text{Overall Score} = \text{Part I-A} + \text{Part I-B} + \text{Part I-C} + \text{Part II-A} + \text{Part II-B}$$

31. **Determining the Numerical and Adjectival Ratings.** The numerical performance rating shall be given corresponding RPMS numerical and adjectival ratings in accordance with the following rating table:

Table 8. RPMS Rating Table

| RANGE | NUMERICAL RATING | ADJECTIVAL RATING |
|---------------|-------------------------|--------------------------|
| 4.500 – 5.000 | 5 | Outstanding |
| 3.500 – 4.499 | 4 | Very Satisfactory |
| 2.500 – 3.499 | 3 | Satisfactory |
| 1.500 – 2.499 | 2 | Unsatisfactory |
| Below 1.499 | 1 | Poor |

32. **Reaching an Agreement.** Upon determining the performance rating for the actual accomplishments and results, the rater and the ratee shall reach an agreement by signing the OPCR Form.

All appeals relative to the performance rating shall be subject to the appeals process as stipulated in the DO 2, s. 2015. A performance rating under appeal shall not be considered final and shall not be used as a basis for promotion and other performance-related incentives.

D. Phase IV: Performance Rewarding and Development Planning

33. The results of the performance review and evaluation shall be used in performance rewarding and development planning.

34. **Performance Rewarding.** Outstanding performance, adherence to minimum office standards, and consistent demonstration of desired competencies shall serve as a basis for recognition and rewards, including monetary and non-monetary incentives. In addition to incentives and awards system under the Program on Awards and Incentives for Service Excellence (PRAISE), the head of office shall establish office-based initiatives to recognize and incentivize meritorious performance.

35. **Office Improvement Planning.** During Phase IV, the head of functional office, in collaboration and in agreement with the personnel, shall determine the office strengths and opportunities for improvement and plan definitive action steps to further enhance service delivery and/or address identified bottlenecks. These can be written under the 'Strengths' and 'Development Needs' columns of the Part IV-A: Office Improvement Plan of the OPCR Form.

Based on the office performance and improvement plan, the head of functional office and the next higher approving authority shall discuss and agree on the office improvement plan and interventions, which shall include the team development plan, office process improvement plan, equipment and physical facilities repair, acquisition, and upgrade, among others.

36. **Individual Development Planning.** During Phase IV, the rater shall discuss and provide qualitative comments, observations, and recommendations pertaining to the individual (head) competency assessment, as observed in the significant incidences provided in the PMCF. These can be written under the strengths and development and needs column of Part IV-B: Individual Development Plans of the OPCR Form and shall serve as bases for training and professional development for the head of functional office.

The competencies the ratee demonstrated consistently and the areas where it meets or exceeds expectations shall be called the ratee's strengths. The competencies, which the ratee rarely demonstrates and the areas where the ratee has room for improvement and has not met expectations, shall be identified as the ratee's development needs.

37. The following steps shall be applied in improvement and development planning:

- a. Identify the development needs;
- b. Set goals for meeting the development needs;
- c. Prepare specific action plans for meeting the development needs such as list of learning activities, resources and support, measures of success, among other needs;
- d. Implement action plans; and
- e. Evaluate.

38. The heads of functional offices, in coordination with the office in-charge of human resource and organizational development in each governance level, shall ensure that the action plan and interventions for office improvement and individual (head) development are appropriate for the identified office and process improvement needs.

**Table 9. Interim Ratee-Rater-Approving Authority Matrix
for the Office Performance Planning and Assessment**

| RATEES | RATERS | APPROVING AUTHORITY |
|---|--|--|
| Central Office | | |
| Undersecretary | Chief of Staff | Secretary |
| Assistant Secretary | Undersecretary | Chief of Staff |
| Director | Assistant Secretary | Undersecretary |
| Assistant Director | Director | Assistant Secretary |
| Functional Division Chief/Head | Assistant Director | Director |
| Regional Office | | |
| Regional Director | Undersecretary for Field Operations | Chief of Staff |
| Assistant Regional Director | Regional Director | Undersecretary for Field Operations |
| Functional Division Chief/Head | Assistant Regional Director | Regional Director |
| Functional Unit Head (Public Assistance Unit/Legal/ ICT Unit) | Assistant Regional Director | Regional Director |
| Division Office | | |
| Schools Division Superintendent | Assistant Regional Director | Regional Director |
| Assistant Schools Division Superintendent | Schools Division Superintendent | Assistant Regional Director |
| Functional Division Chief/Head | Assistant Schools Division Superintendent | Schools Division Superintendent |
| School | | |
| School Head/Principal/ OIC/TIC | Assistant Schools Division Superintendent | Schools Division Superintendent |
| Assistant School Principal | School Head | Assistant Schools Division Superintendent |

Note: In case that there is no applicable rater or approving authority in offices/ bureaus/ services/ divisions/ schools, the rater and the approving authority shall be adjusted accordingly so that the next higher official shall perform such function.