

PERFORMANCE MANAGEMENT SYSTEM (PMS)

GENERAL INSTRUCTIONS: Please read the instructions carefully before proceeding with your evaluation. For further clarifications, kindly get in touch with Human Resource Management Services (HRMS) personnel.

I. PMS RATING CRITERIA

You, as staff shall be evaluated on the following criteria:

Part 1 – Key Performance Indicators – **60 points**

Part 2 – Core Values – **25 points**

Part 3 - Leadership – **15 points**

Total Score – **100 points**

Please note that deliverables must be measured in terms of quantity and quality.

II. PMS RATING PROCESS

1. Before or at the start of the evaluation period, you and your immediate superior shall discuss and agree on:
 - a. key performance areas (KRAs) / key performance indicators (KPIs)
 - b. the weight of KRAs/KPIs; and
 - c. how to determine the % fulfillment

This is Part 1 of your evaluation and shall serve as your performance contract for applicable period.

Example 1 (Operations Group):

Objective: To deliver 300 clients per month. Weight: 20 points

How to calculate % fulfillment and your KPI score -

- If you delivered 300 clients per month, your % fulfillment is 100%. Your score is 20 x 100% or 20 points
- If you delivered 350 clients per month, your % fulfillment is 117%. Your score is 20 x 117% or 23.4 points
- If you delivered 250 clients per month, your % fulfillment is 83%. Your score is 20 X 83% or 16.6 points

Example 2 (Support Group):

Objective: To submit reports every 5th of the month. Weight: 20 points

How to calculate % fulfillment (quantity and quality) and your KPI score:

- If you submitted reports every 5th of the month, your % fulfillment is 100%. Your score is 20 x 100% or 20 points
- If you submitted reports every 1st of the month, your % fulfillment is 110%. Your score is 20 x 110% or 22 points
- If you submitted reports every 10th of the month, your % fulfillment is 90%. Your score is 20 x 90% or 18 points

Please take note too that the % fulfillment may be an item of negotiation at the beginning of the evaluation period. For instance, you and your immediate superior may agree that if you submit quality reports on the 1st, your % fulfillment is 110%, if you submit on the 10th, your % fulfillment is 90%. Quality of reports shall always have a factor in % fulfillment.

2. Rate yourself (Part 1 to Part 5) on the spaces for self rating, provide justification (why did you rate yourself as such) and evidence if needed (i.e., client feedback form, letter of thanks from the clients, etc.). **Do not write your comments nor affix your signature in Part 6 yet.** After completion, submit all the forms to your immediate superior for evaluation.

3. Your immediate superior shall rate you on the spaces for supervisor's rating, provide comment (why did he rate you as such) and evidence if needed.

4. You and your immediate superior shall discuss the rating to determine the accuracy, fairness and truthfulness. If both of you agreed on the rating, please write your comments and affix your signatures on Part 6. The final rating is the rating mutually agreed upon between you and your immediate superior. Before submission to HRMS, your immediate superior shall retain 1 copy and give you another copy.

5. In cases where there will be significant disagreements, please **do not sign Part 6** until the discussion with the "Review Manager". Your immediate superior shall forward the PMS forms to his immediate superior or manager for review. You may bring the matter to HRMS for assistance. There shall be a discussion between you and the review manager. Once disagreements are resolved, write your comments and affix your signature on Part 6. Immediate superior and Review Manager shall likewise sign as indicated in Part 6. Before submission to HRMS, immediate superior shall retain 1 copy and give you another copy.

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Name and Employee #		Date Hired/Position	
Department / Branch		Supervisor's Name	
Date Prepared		Supervisor's Position	

ANNUAL PERFORMANCE CONTRACT

At start of year:

Key results areas (KRAs) / key performance indicators (KPIs) and targets should be set for each employee, and **pre-agreed** between the Employee and his / her Superior at the start of the year. All KPI weights must sum up to **100%** for every trimester. KPIs and goals should be defined for every trimester.

At the end of each trimester: Employee should indicate his/her performance against each of these KPIs based on actual accomplishments. Rating should be based on % of accomplishment against the goal. The score is simply the weight multiplied by the rating. After accomplishing this self-rating, this should be sent to the employee's superior for his/her comments.

KRA / KPI #1		
GOAL: 1st Trimester / Weight	GOAL: 2nd Trimester / Weight	GOAL: 3rd Trimester / Weight
KRA / KPI #2		
GOAL: 1st Trimester / Weight	GOAL: 2nd Trimester / Weight	GOAL: 3rd Trimester / Weight
KRA / KPI #3		
GOAL: 1st Trimester / Weight	GOAL: 2nd Trimester / Weight	GOAL: 3rd Trimester / Weight
KRA / KPI #4		
GOAL: 1st Trimester / Weight	GOAL: 2nd Trimester / Weight	GOAL: 3rd Trimester / Weight
KRA / KPI #5		
GOAL: 1st Trimester / Weight	GOAL: 2nd Trimester / Weight	GOAL: 3rd Trimester / Weight
KRA / KPI #6		
GOAL: 1st Trimester / Weight	GOAL: 2nd Trimester / Weight	GOAL: 3rd Trimester / Weight
KRA / KPI #7		
GOAL: 1st Trimester / Weight	GOAL: 2nd Trimester / Weight	GOAL: 3rd Trimester / Weight
KRA / KPI #8		
GOAL: 1st Trimester / Weight	GOAL: 2nd Trimester / Weight	GOAL: 3rd Trimester / Weight
Total Weight:	Total Weight:	Total Weight:

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Name and Employee #		Date Hired/Position	
Department / Branch		Rating Period Covered	
Supervisor's Name		Date Prepared	
Supervisor's Position		Date Received by HRMS	

PART 1 – Key Performance Indicators (KPIs) – 60 points

Weight - Distribute a total of 60 points only among the listed objectives / goals. Assign more points to the objective / goal with the highest priority. % Fulfillment - Measure achievement of objective/ goal in terms of actual result compared to target. <i>Example 1: Actual Result-240 clients, Target-300 clients: 240/300: Fulfillment is 0.8 (80%); if Actual Result- P330 clients, 330/300: = Fulfillment is 1.1 (110%).</i> <i>Example 2: If reports submitted always <u>ahead of time</u>: fulfillment is 1.1 (110%), if reports submitted <u>on time 3 times only vs. 4 deadlines</u> = 3 / 4: fulfillment = 0.75 (75%), if never on time, (assign a value ex. 20% if you don't want it to be zero = 0/4), etc. </i>	Weight (W) out of 60 points	% Fulfillment (F) = Actual Result vs. Target	Score = (W * F)
<u>KPI / Objective 1 and how to measure % fulfillment:</u>			
<u>Self rating and justification:</u>			
<u>Supervisor's rating and comments:</u>			
<u>KPI / Objective 2 and how to measure % fulfillment:</u>			
<u>Self rating and justification:</u>			
<u>Supervisor's rating and comments:</u>			
<u>KPI / Objective 3 and how to measure % fulfillment:</u>			
<u>Self-rating and justification:</u>			
<u>Supervisor's rating and comments:</u>			
<u>KPI / Objective 4 and how to measure % fulfillment:</u>			
<u>Self-rating and justification:</u>			
<u>Supervisor's rating and comments:</u>			
<u>KPI / Objective 5 and how to measure % fulfillment:</u>			
<u>Self-rating and justification:</u>			
<u>Supervisor's rating and comments:</u>			
TOTAL SCORE (by the ratee / employee)			
TOTAL SCORE (by the rater / immediate supervisor)			

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PART 2 – TSPI Core Values – 25 points

Please rate the extent to which the employee has demonstrated behavior that support the TSPI Mission, Vision and Core Values using scale below. Indicate relevant critical incidents to support your observation and perception.	
Scale: 6.25 = Organization / department has recognized the employee because of his/ her contribution/s to promoting the Core Value; an example to all his/ her co-employees. 5.00 = Has strongly demonstrated the Core Value, and has actively influenced co-employees to do the same. 3.75 = Has consistently demonstrated the Core Value. 2.50 = Has not consistently demonstrated the Core Value. 1.25 = Does not demonstrate the Core Value.	Score
1. Excellence: Each one to work for the glory of God (“Whatever you do, work at it with all your heart, as working for the Lord and not for men.” – Colossians 3:23) <ul style="list-style-type: none"> • Doing things in the most effective and efficient way within a given time frame • Doing the things right the first time consistently (no re-work) • Ability to influence a culture of excellence to one’s area of responsibility 	
<u>Self rating & justification:</u>	
<u>Supervisor’s rating & comments:</u>	
2. Integrity: Each one to do what is right despite the cost even when no one is looking (“He whose walk is blameless and who does what is righteous...He who does these things will never be shaken.” – Psalm 15:2 & 5) <ul style="list-style-type: none"> • Full compliance with rules, policies and procedures at all times • Fair and honest in dealing with clients, peers, subordinates, superiors, the company and external agencies • Honesty and transparency in handling financial matters. Has word of honor/honoring commitments 	
<u>Self rating & justification:</u>	
<u>Supervisor’s rating & comments:</u>	
3. Stewardship: Each one to take responsibilities as faithful stewards (“Whoever can be trusted with very little can be trusted with much and whoever is dishonest with very little will also be dishonest with much.” – Luke 16:10) <ul style="list-style-type: none"> • Prudence in the use of resources – time, supplies, equipment, money, people • Sense of responsibility and accountability in achieving a common goal/teamwork • Accountability to develop, retain, utilize staff 	
<u>Self rating & justification:</u>	
<u>Supervisor’s rating & comments:</u>	
4. Servanthood: Each one to work with a servant heart (“Whoever wants to become great among you must be your servant.” – Matthew 20:26) <ul style="list-style-type: none"> • Willingness and able to serve clients, peers, superior and the company beyond the call of duty • Shows concern for the welfare of others • Treats other with dignity and respect 	
<u>Self rating & justification:</u>	
<u>Supervisor’s rating & comments:</u>	
TOTAL SCORE (by the ratee/employee)	
TOTAL SCORE (by the rater / immediate superior)	

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PART 3 – Leadership – 15 points

Please rate the extent to which the employee has demonstrated leadership potential using scale below. Indicate relevant critical incidents to support your observations and perception.	
Scale: 5 = Organization / department has recognized the employee's leadership potential making the employee qualified to handle leadership posts. 4 = Has strongly demonstrated leadership potential and has influenced co-workers to do the same. 3 = Has consistently demonstrated leadership potential. 2 = Has not consistently demonstrated leadership potential. 1 = Does not demonstrate leadership potential.	Score
1. Dealing with Clients (External i.e. TKP members for Operations Group and Internal i.e. co-employees from other departments for Support Group): Customer Satisfaction (based on feedback from clients) <ul style="list-style-type: none"> Builds strong relationships with clients. Proactively seeks feedback from clients. Responds actively and sensitively to clients' needs. Seeks ways to add value for clients. Keeps commitments. 	
<u>Self rating & justification:</u>	
<u>Supervisor's rating & comments:</u>	
2. Dealing with Peers: Team work and how they fit in (based on feedback from peers: same branch for Operations Group or same department for Support Group) <ul style="list-style-type: none"> Treats co-workers with respect, consideration and dignity. Listens to others and makes decision that will be for the good of the majority. Helps other employees when in need and without being asked. Supports the team goals and encourages others to do the same. Inspires enthusiasm and builds confidence in others. 	
<u>Self rating & justification:</u>	
<u>Supervisor's rating & comments:</u>	
3. Dealing with Superiors: Respect and Conformity (based on feedback from superior) <ul style="list-style-type: none"> Gives due respect to superior. Listens and follows instructions carefully. Delivers expectations ahead of or on time. Enthusiastic in doing extra-curricular assigned by superior. Helps and participates in collateral activities. 	
<u>Self rating & justification:</u>	
<u>Supervisor's rating & comments:</u>	
TOTAL SCORE (by the staff)	
TOTAL SCORE (by the supervisor)	

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PART 4 – Summary of Rating

		Self Rating		Supervisor's Rating	
Part 1	Key Performance Indicators – 60 points	Total score =		Total score =	
Part 2	Core Values – 25 points	Total score =		Total score =	
Part 3	Leadership – 15 points	Total score =		Total score =	
Total – 100 points		Total Self Rating		Total Supervisor's Rating	
FINAL RATING =					

Final Rating	Qualitative Descriptions	
100 & above	Outstanding	Far exceeded all expectations
90 to 99	Very Satisfactory	Exceeded most expectations
80 to 89	Satisfactory	Met expectations
70 to 79	Needs Improvement	Failed to meet some expectations
below 70	Unacceptable	Failed to meet most expectations

PART 5 – Development Plans

	Self - Evaluation	Supervisor's Comments	Development Plan	Timetable
A. Strengths				
B. Areas of Improvement				
C. Career Aspirations/Career Scenarios				

PART 6 – Comments and Signatures

Employee's Comments (required) Please comment on the appraisal's accuracy and completeness. Your signature below indicates that you have read the forms, discussed the rating with your immediate superior and understood and agreed with the rating.			
Review Manager's Comments (required if Employee doesn't agree with Superior's rating) Review Manager (Supervisor's immediate Manager) must review this document for fairness and consistency after the supervisor has completed the form.			
Employee's Signature over printed name	Supervisor's Signature over printed name	Review Manager's Signature over printed name	HRMS Signature over printed name
Date	Date	Date	Date