

**MEMORANDUM ORDER NO. 149**

**AMENDING MEMORANDUM ORDER NO. 4, DATED FEBRUARY 1, 2001, ENTITLED: "IMPLEMENTING IN THE OFFICE OF THE PRESIDENT (PROPER) A PERFORMANCE MANAGEMENT AND EVALUATION SYSTEM (OP-PMES)"**

Pursuant to the provisions of Section 33, Chapter 5, Personnel Policies and Standards, Book V of Executive Order No. 292 (Administrative Code of 1987), and CSC-Resolution No. 99-1792 dated August 11, 1999, the revised Office of the President Performance Management and Evaluation System (OP-PMES) is hereby adopted in this Office. This amends Memorandum Order No.4 dated February 1, 2001.

**I. OBJECTIVES**

The OP-PMES aims to improve personnel performance and efficiency and organizational effectiveness and productivity.

**II. POLICIES AND GUIDELINES**

1. The OP-PMES is hereby made an integral part of the personnel and performance management and development programs of this Office.
2. The performance standards and targets shall be in consonance with the organizational mandate and goals.
3. The employees concerned shall be properly informed of their rights and obligations under this System.
4. Employees shall be given appropriate rewards in recognition of exemplary and meritorious performance as defined in the Program on Awards and Incentives for Service Excellence (PRAISE).
5. Refusal or failure to assume responsibilities attached to the position or accept reasonable work assignment shall be ground for disciplinary action.

### III SCOPE

The revised OP-PMES shall apply to all employees of this Office belonging to the First and Second Levels who are in the Regular Plantilla. However, Coterminous employees and those paid under the lump-sum appropriations may be covered by this System as may be deemed appropriate.

The Performance Evaluation form for supervisors shall be accomplished by heads of divisions or those occupying positions of equivalent rank who are performing supervisory functions; the Performance Evaluation form for non-supervisors shall be accomplished by the subordinates within the divisions.

### IV. RATING PERIOD

Evaluation shall be done twice a year-January to June, and July to December. Those who enter the service within a rating period shall be rated for performance within a period of not less than three (3) months.

### V. PROCEDURES

#### A. Creation and Functions of the Performance Evaluation Review Committee (PERC)

A Performance Evaluation Review Committee (PERC) is hereby created with composition and responsibilities hereunder enumerated:

##### A. 1 *Composition*

- Chairman -Executive Secretary or his representative
- Members -Chief of Personnel Office of the President
- 2 representatives from the Rank & File: one for second level position and the other for the first level position
- Head of the Primary Unit or Office whose performance targets and ratings are under review

##### A. 2 *Functions*

- a. Review of Employees' Performance Targets
- b. Review of Performance Standards
- c. Determination of final rating in case of disagreement in the lower level
- d. Final monitoring and evaluation of the revised OP-PMES

The Performance Evaluation and Review Committee (PERC) may review and evaluate the effectiveness of the Performance

Management and Evaluation System (OP-PMES), particularly in connection with the setting and attainment of performance targets and may recommend modifications or amendments thereof.

The Personnel Office shall provide secretarial services.

**B. Performance Standards and Targets**

1. At the beginning of the rating period, the Rater (chief of division) and the Ratees (the subordinates) shall confer and determine Performance Standards and Targets to be undertaken by the Division for the Rating Period (January - June or July - December).

2. The activity of each Ratee shall be entered in the Functional & Performance Standards Form.

3. The Performance Standards in terms of Quantity, Quality and Time measures shall be set upon by the Rater and Ratees in accordance with the provisions of this Memorandum Order (OP-PMES).

4. The draft of the Functional and Performance Standards Form with the Activities/ Work Assignment portion filled out is submitted to the Head of Office for final review and approval.

5. In case of disagreement between the Rater and the Ratee, the Head of the Office shall be consulted before submitting the matter for final decision to the PERC, if necessary.

**C. Performance Evaluation**

1. Within one week at the end of the Rating Period, the Performance Evaluation Forms shall be accomplished.

2. The Ratee rates himself/herself; the Rater reviews the ratings entered in the Performance Evaluation Form.

3. An assessment of the individual ratings shall be done by the whole division in a session. This will provide for comparative evaluation of the performance of the individual Ratees, and group censure of bias in rating process, if any.

4. Changes in the work assignment as may be necessary within the Rating Period shall be properly noted and adjustments in the rating shall be done as required in accordance with the rating process.

## D. Performance Rating Factors

The Performance Rating Factors and corresponding points for each are as follows:

### D.1 For Supervisors

- a. Performance (Quantity, Quality, Time) \_\_\_\_\_ 70%
- b. Critical Factors \_\_\_\_\_ 30%
  - Leadership \_\_\_\_\_ 5%
  - Stress Tolerance \_\_\_\_\_ 5%
  - Initiative \_\_\_\_\_ 5%
  - Human Relations \_\_\_\_\_ 5%
  - Courtesy \_\_\_\_\_ 5%
  - Punctuality & Attendance \_\_\_\_\_ 5%

### D.2 For Non-Supervisors

- a. Performance (Quantity, Quality, Time) \_\_\_\_\_ 70%
- b. Critical Factors \_\_\_\_\_ 30%
  - Stress Tolerance \_\_\_\_\_ 6%
  - Initiative \_\_\_\_\_ 6%
  - Courtesy \_\_\_\_\_ 6%
  - Human Relations \_\_\_\_\_ 6%
  - Attendance & Punctuality \_\_\_\_\_ 6%

### D.3 Guidelines in the Computation of the Rating

1. Sum of ratings equals *Total Score (TS)*.
2. Totals Score (TS) divided by the number of ratings equals *Average Score (AS)*.
3. In Part I: Average Scores multiplied by 70% equals *Numerical Rating (NR)* for Performance.
4. In Part II: Average Score multiplied by 30% equals *Numerical Rating (NR)* for Critical Factors.



5. Sum of Part I & II of Numerical Rating equals *Total Numerical Rating (TNR)*.
6. Intervening rating (.01-1.00) shall be added to the *Numerical Rating (NR)*.
7. To get *Adjectival Rating (AR)* refer to the Conversion Table.

**Conversion Table:**

Numerical Rating		Adjectival Rating
9.50 -	10.0 -	OUTSTANDING
7.51 -	9.49 -	VERY SATISFACTORY
4.01 -	7.50 -	SATISFACTORY
2.01 -	4.00 -	UNSATISFACTORY
2.00	Below	POOR

Note: Intervening rating and Outstanding rating should be fully supported/justified by a certification of the immediate supervisor, and approved by the Head of Office. Documentary evidence should be submitted.

## VI. APPEALS

All Appeals in connection with ratings under this System shall be addressed to the PERC thru the Personnel Office within fifteen (15) calendar days after a Ratee receives his copy of the Rating for a specific period.

## VII. RESPONSIBILITIES

The Heads of offices shall have the responsibility for the implementation of the revised OP-PMES.

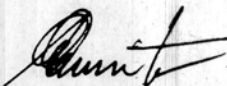
The Career Development and Employees Welfare Service, Personnel Office, shall be responsible for the administration of the System including monitoring of compliance and keeping records of reports.

Orientation of raters and ratees to ensure effective implementation of the System shall be conducted.

**VIII. EFFECTIVITY**

The revised OP Performance Management and Evaluation System (OP-PMES) shall take effect immediately.

By authority of the President:



**EDUARDO R. ERMITA**  
Executive Secretary

Manila, October 15, 2004

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Date