




Republic of the Philippines
Office of the President




Strategic Performance Management System (SPMS)

(Revised 2017)

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1.0 INTRODUCTION

Through the years, the Bases Conversion and Development Authority (BCDA) has been implementing various rating systems that were administered in accordance with rules and regulations promulgated by the Civil Service Commission (CSC). However, these systems focus mainly on individual appraisals and are being used as pre-requisites for promotion and other personnel actions including separation and performance-based incentives. Under the previous systems, too much emphasis was placed on performance evaluation or performance appraisal which is just one part of a larger approach in managing performance.

To address the gaps and weaknesses found in the previous performance evaluation systems, the CSC promulgated **Memorandum Circular No. 6, s. 2012** directing agencies to establish and implement a **Strategic Performance Management System (SPMS)** following the guidelines prescribed therein.

The SPMS aims to give emphasis to the alignment of an agency's vision, mission and strategic priorities with the day-to-day operations of the departments/offices/units in the agency. The SPMS focuses on measures of performance results that are reviewable over the period of implementation of the agency's targeted performance outputs and provides a verifiable basis in assessing not only of individual performance but also of organizational performance and the collective performance of individuals within a department or office.

More importantly, the SPMS focuses on linking the individual performance vis-à-vis the agency's vision, mission and strategic goals. It is a mechanism to ensure that the employee, on the one hand, achieves the objectives set by the organization and the organization achieves the objectives that it has set for itself in its strategic plan.

Organizational performance, on the other hand, is governed by **Republic Act (R.A.) No. 10149** which mandates the Governance Commission for Government Owned or Controlled Corporation (GCG) to establish a performance management system for Government Owned or Controlled Corporations (GOCCs) that would include performance scorecards.

Pursuant to such mandate, the GCG issued **Memorandum Circular No. 2013-02 dated April 29, 2013** institutionalizing a Performance Evaluation System (PES) for the GOCC Sector. The PES is intended to help the GCG ascertain whether a GOCC should be reorganized, merged, streamlined, abolished or privatized. The PES is intended to set the organizational targets of the GOCCs through a Performance Agreement between the GOCC and GCG.

The PES of GCG is not the same as the SPMS of the CSC, which links individual performance to organizational performance. The PES looks at the performance of a GOCC based on perspectives to be established through the performance

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scorecard by the GOCC to help the GCG determine whether a GOCC should be reorganized, merged, streamlined, abolished or privatized.

Under the PES of GCG, therefore, the organizational targets of BCDA are set in its corporate and department/office scorecards, which will then be cascaded to the individual officers and employees. Under the SPMS, individual performance targets should be aligned with the department/office scorecards. Hence, the BCDA SPMS, while aligned with the principles of SPMS prescribed by the CSC designed to strengthen performance and accountability, is an amalgamation of the CSC SPMS and the PES as currently implemented and practiced in BCDA.

The PES and the SPMS shall serve as the basis for compensation and rewards, including the grant of performance-based incentives, promotion, bonuses, and other rewards and incentives for the officers and employees of BCDA. In addition, under the SPMS, performance ratings of individual officers and employees shall be used for Human Resource (HR) systems such as, but not limited to, HR planning and intervention, career and succession planning, discipline and other personnel actions, and determination of learning and development needs of employees.

Use of the SPMS shall also qualify BCDA to employees to the grant of step increment/s due to meritorious performance, in addition to the step increment being granted due to length of service.

2.0 SCOPE AND COVERAGE

The implementation of the BCDA SPMS covers all permanent employees, both first and second levels, and coterminous employees.


3.0 REFERENCES

The following are the laws and issuances related to the establishment of the SPMS:

- 3.1 Section 33, Chapter 5, Book V of Executive Order No. 292
- 3.2 Items 1 (d), 4 and 17 (c) of the Senate and House of Representatives Joint Resolution No. 4 (Governing Principles of the Modified Compensation and Position Classification System and Base Pay Schedule of the Government)
- 3.3 Section 5 of Administrative Order No. 241 dated October 2, 2008
- 3.4 Administrative Order No. 25 dated December 21, 2011
- 3.5 CSC-Department of Budget and Management (DBM) Joint Circular No. 1, s. 2012
- 3.6 CSC Memorandum Circular No. 6, s. 2012
- 3.7 Executive Order No. 80 dated July 20, 2012 issued by the Office of the President

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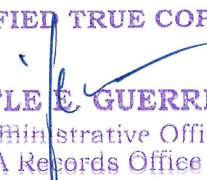
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- 3.8 GCG Memorandum Circular No. 2013-02 dated April 29, 2013
- 3.9 Guidelines on Accomplishing the Department and Individual Scorecards and Initiative Profiles issued by the Corporate Planning Office (CPO)
- 3.10 BCDA Program on Awards and Incentives for Service Excellence (PRAISE) and subsequent amendment/s

4.0 TERMS AND DEFINITIONS

The following terms and definitions shall be used in this System:

TERMS	DEFINITIONS
Activity	A work process that contributes to a program or sub-program or project.
Baseline Data	Historical data based on past performance, usually during the previous year, on which growth-oriented targets for the current year shall be reasonably based.
Corporate Scorecard	A plan that proposes strategies to be implemented over the coming planning period that are designed to improve BCDA's contribution to societal and/or sector outcomes by either improving performance in respect of existing outputs (MFOs) or changing the mix of MFOs.
Corporate Planning	A process undertaken by BCDA to develop the Corporate Scorecard, Department Scorecard and Individual Scorecard for improving organizational performance and BCDA's ability to deliver MFOs.
Department Initiative/Project Profile	Details prepared by a Department/Office with respect to initiatives/projects that were identified to achieve its targets as contained in its Department Scorecard.
Department Scorecard	The annual work plan programmed for the organizational unit of BCDA, i.e. Departments/Offices. It contains the activities and tasks of the Departments/Offices duly aligned towards the attainment of organizational targets of BCDA, which are implemented through the tasks allocated to the individuals in the Departments/Offices.
General Administrative and Support (GASS)	Activities dealing with the provision of overall management support to the entire BCDA operations, e.g. general management and supervision, legislative liaison services, human resource management and development, and financial and administrative services. Funds provided for GASS are management overhead expenses and are therefore indirect costs of delivering MFOs.


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TERMS	DEFINITIONS
Human Resource Management and Development	Organizational function designed to maximize employee performance in the accomplishment of BCDA's strategic objectives/Major Final Output, focusing on systems such as promotion, bonuses, rewards and incentives, HR planning and interventions, rewards and incentives, discipline, other personnel actions and determination of training and other development needs of employees.
Individual Scorecard	A summary of activities/tasks allocated to individuals (reporting to their respective managers) to implement strategies in the Department/Office Scorecard. At this level, organizational strategies are broken down into tasks for individuals so that concrete actions are identified and responsibilities allocated.
Initiatives/Projects	A special undertaking carried out within a definite time frame and intended to result in some predetermined measure of goods and services. These are time-bound programs that have significant impact on the Scorecard and do not form part of the day-to-day operations of BCDA.
Major Final Output (MFO)	A good or service that BCDA is mandated to deliver to external clients through the implementation of programs, activities, and projects.
Operations	Activities directed toward fulfilling the BCDA's mandate, e.g. business development, project management, land assets development.
Performance Measure for MFO	<p>A characteristic of performance that will be measured and will illustrate the standard of performance by which a department/office or individual has delivered its MFO. Performance measures shall include any one, combination of, or all of the following:</p> <p>Quality/Effectiveness – means getting the right things done. It refers to the degree to which objectives are achieved as intended and the extent to which issues are addressed with a certain degree of excellence. This may involve any of the following: acceptability, meeting standards, client satisfaction, accuracy, completeness, comprehensiveness, creativity, innovation.</p> <p>Efficiency – The extent to which targets are accomplished using the minimum amount of time or resources. This may involve the following: the quantity of outputs, requests acted upon over total number of requests, standard response time, optimum use of resources, personal initiative.</p>

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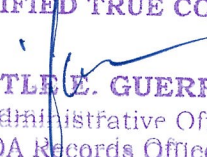
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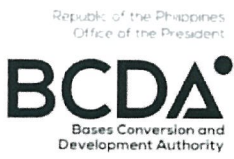
TERMS	DEFINITIONS
Performance Measure for MFO	Timeliness – indicates a measure of whether the deliverable was done on time based on the requirements of the law and/or clients/stakeholders. Time-related performance indicators evaluate such things as project completion deadlines, time management skills and other time-sensitive expectations. Indicators for each dimension should be SMART: specific, measurable, attainable, realistic, time-bound.
Performance Target	A predetermined level of quality/effectiveness, efficiency and timeliness of an output.
Results	The output, outcome, or impact (intended or unintended, positive and/or negative) of a development intervention.
Scorecard	A governance and management tool forming part of the performance management system which consists of a set of measures, targets and initiatives that facilitate the achievement of results and performance through the effective and efficient monitoring and coordination of the strategic objectives of the agency (Section 3(u) of R.A. 10149).
Societal Goals	The societal benefits sought from sector-based economic activity; they describe the intended desirable impacts of MFOs on society.
Success Indicators	Performance level yardsticks consisting of <i>performance measures/standards</i> and <i>performance targets</i> .
Support to Operations (STO)	Activities that provide technical and substantive support to the operations and projects of BCDA, e.g. planning and policy formulation, program monitoring and evaluation, public information programs, research and development, statistical services, and information systems development. The types of services included under STOs are common across agencies, and are considered indirect cost of delivering MFOs.

5.0 OBJECTIVES

The following are the objectives of the BCDA SPMS:

- 5.1 To ensure organizational effectiveness by cascading institutional accountabilities to the various levels of BCDA anchored on the establishment of objective and rational basis for performance targets and measures;
- 5.2 To align individual performance goals with BCDA’s Vision and Mission, Corporate Scorecard and Department Scorecard.

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- 5.3 To encourage collective efforts of management and employees in the attainment of BCDA's Strategic Objectives;
- 5.4 To improve Department/Office and individual performance through a systematic approach via an ongoing process of establishing strategic performance objectives, measuring performance, and collecting, analyzing, reviewing, and reporting performance data; and
- 5.5 To link performance management with other Human Resource (HR) systems such as promotion, bonuses, rewards and incentives, HR planning and interventions, rewards and incentives, discipline, other personnel actions and determination of training and other development needs of employees.


6.0 CHARACTERISTICS OF THE BCDA SPMS

The BCDA SPMS has the following characteristics:

- 6.1 **The System is aligned to National Plans, BCDA Mandate and Strategic Priorities.** Performance goals and measures are aligned to the national development plans, BCDA's mandate/vision/mission and strategic priorities. The standards and measures are pre-determined to ensure efficient use and management of inputs and work processes and these are integrated into success indicators as BCDA objectives are cascaded down to operational level.
- 6.2 **The System is output/outcome-based.** The BCDA SPMS puts premium on major final outputs that contribute to the realization of the BCDA mandate, vision/mission, strategic priorities, outputs and outcomes.
- 6.3 **The System employs a team-approach to performance management.** Accountabilities and individual roles in the achievement of BCDA goals are clearly defined to give way to collective goal-setting and performance rating. The individual's work plan or commitment and rating form is linked to the Department/Office work plan or commitment and rating form to establish a clear linkage between organizational performance, department/office performance and individual performance.
- 6.4 **It is user-friendly.** The forms used for both the organizational and individual performance are similar and easy to accomplish. The BCDA and Department/Office major final outputs and success indicators are aligned to facilitate cascading of organizational goals to the individual staff members and the harmonization of organizational and individual performance ratings.

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- 6.5 **It is developmental.** While it is concerned primarily with performance improvement and personal development, it also gives emphasis on organization development.
- 6.6 **It is a partnership.** The system involves discussion, forming agreements during target setting, monitoring of performance, coaching and evaluation of performance by the supervisors and employees.

7.0 RESPONSIBILITIES

POSITION/ROLE	FUNCTIONS/RESPONSIBILITIES
BCDA SPMS CHAMPION President and Chief Executive Officer (P/CEO)	<ul style="list-style-type: none"> • Together with the Performance Management Team (PMT), the Champion is primarily responsible and accountable for the establishment and implementation of the BCDA SPMS. • Leads in implementing BCDA performance goals/objectives and performance measures set by the Board of Directors. • Determines BCDA target setting period. • Approves Department/Office performance scorecard and rating. • Assesses performance of Departments/ Offices. • Assesses the performance and determines the ranking of Senior Management • Provides the CSC Regional/Field Office concerned with a copy of the Consolidated Individual Performance Review Report indicating alignment of the collective individual performance rating with the Organizational Performance Rating.
PERFORMANCE MANAGEMENT TEAM (PMT) Composition: <ol style="list-style-type: none"> 1. <i>Executive Vice President/Chief Operating Officer</i> 2. <i>All Group Heads</i> 3. <i>Department Head, Corporate Planning Office (CPO)</i> 	<ul style="list-style-type: none"> • Sets consultation meetings with Heads of Departments/Offices to discuss the Department Scorecard and Department Initiative/Project Profile, if any. • Ensures that Department/Office performance targets and measures, as well as the budget, are aligned with those of BCDA and that work distribution of Department/Offices are rationalized. • Reviews, validates and recommends approval of the Department/Office Scorecards and performance ratings to the P/CEO.

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POSITION/ROLE	FUNCTIONS/RESPONSIBILITIES
<p>PERFORMANCE MANAGEMENT TEAM (PMT)</p> <p>Composition (cont.):</p> <p>4. <i>Department Head, Organization Development and Management Department (ODMD)</i></p> <p>5. <i>Employee Representative</i></p> <p>The Corporate Planning Office shall serve as the <i>PMT Secretariat</i>.</p> <p><i>*The PMT may be reconstituted by the P/CEO as may be necessary.</i></p>	<ul style="list-style-type: none"> • Acts as appeals body and final arbiter for performance management issues. • Identifies potential top performers and provide inputs to the BCDA Program on Awards and Incentives for Service Excellence (PRAISE) Committee for grant of awards and incentives. • Adopts its own internal rules, procedures and strategies in carrying out the above responsibilities including schedule of meetings and deliberations, and delegation of authority to representatives in case of absence of its members. • Performs other related functions as may be necessary.
<p>CORPORATE PLANNING OFFICE (CPO)</p>	<ul style="list-style-type: none"> • Functions as the PMT Secretariat. • Facilitates conduct of annual corporate planning and provides assistance in the operational planning of Departments/Offices. • Conducts performance planning and review conference annually for the purpose of discussing the Department/Office assessment for the preceding performance period and plans for the succeeding rating period with concerned Groups Heads and Heads of Department/Offices. • Monitors submission of Department Scorecard and Department Performance Evaluation Report Forms and schedules the review/evaluation of Department/Office Scorecard by the PMT before the start of a performance period. • Consolidates and reviews the Department/Office Scorecards and Department/Office Performance Evaluation Reports. • Provides each Department/Office with the final Department/Office assessment to serve as basis in the assessment of individual employees. • Performs other related functions as may be necessary.

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POSITION/ROLE	FUNCTIONS/RESPONSIBILITIES
GROUP HEAD	<ul style="list-style-type: none"> • Leads the Departments/Offices under him/her in implementing their performance goals/objectives and performance measures set in their Scorecards. • Conducts performance planning and review conference annually for the purpose of discussing the Department/Office assessment for the preceding performance period and plans for the succeeding rating period with concerned Heads of Department/Offices. • Assesses performance of Departments/ Offices and respective Heads Departments/ Offices under the Group. • Reviews, validates and evaluates the initial performance assessment of the Heads of Departments/Offices based on their reported accomplishments against the performance measures/targets, and the allotted budget against the actual expenses. The result of the assessment shall be the basis of the PMT's recommendation to the P/CEO who shall determine the final Department/Office rating. • Approves Individual Performance Evaluation Reports of Heads of Departments/Offices under the Group.
ORGANIZATION DEVELOPMENT & MANAGEMENT DEPARTMENT (ODMD)	<ul style="list-style-type: none"> • Monitors submission of Individual Scorecards and Individual Performance Evaluation Report Forms by Heads of Departments/Offices. • Reviews the Summary List of Individual Performance Rating of each department/office to ensure that the average performance rating of the employees is equivalent to or not higher than the Department/Office performance rating as assessed by the Group Head, recommended by the PMT and approved by the P/CEO. • Prepares the Consolidated Individual Performance Review Report indicating alignment of the collective individual performance rating with the Organizational Performance Rating. • Provides analytical data on retention, skill/competency gaps, and talent development plans that are aligned with strategic plans.

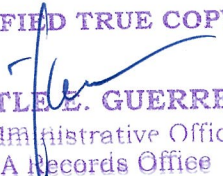
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POSITION/ROLE	FUNCTIONS/RESPONSIBILITIES
ORGANIZATION DEVELOPMENT & MANAGEMENT DEPARTMENT (ODMD)	<ul style="list-style-type: none"> • Coordinates developmental interventions that will form part of the HR Plan. • Performs other related functions as may be necessary.
HEAD OF DEPARTMENT/ OFFICE	<ul style="list-style-type: none"> • Assumes primary responsibility for performance management in his/her Department/Office. • Works closely with the PMT to discuss and establish their Department/Office performance measures that are relevant to the core functions and strategic priorities of BCDA. • Conducts strategic planning session with the supervisors and staff and agree on the outputs that should be accomplished based on the goals/objectives of the organization and submits the Department Scorecard and Department Initiative/Project Profile to the Corporate Planning Office. • Reviews and approves Individual Scorecard for submission to the ODMD before the start of the performance period. • Monitors closely the status of the performance of their subordinates and provide support and assistance through the conduct of performance monitoring and coaching for the attainment of targets set by the Department/Office and individual employees. • Undertakes initial assessment of Department/Office's performance using the approved Department Scorecard and Department Initiative/Project Profile. • Determines final assessment of performance level of the individual employees in his/her Department/Office based on proof of performance. • Recommends developmental intervention. • Informs employees of the final performance rating and identifies necessary interventions to employees based on the assessment of developmental needs.

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POSITION/ROLE	FUNCTIONS/RESPONSIBILITIES
HEAD OF DEPARTMENT/ OFFICE	<ul style="list-style-type: none"> • Recommends and discusses a developmental plan with the subordinates who obtain Unsatisfactory performance during the rating period not later than one (1) month after the end of the said period and prepares written notice/advice to subordinates that a succeeding Unsatisfactory performance shall warrant their separation from the service. • Provides preliminary rating to subordinates showing Poor performance not earlier than the third (3rd) month of the rating period. A development plan shall be discussed with the concerned subordinate and issue a written notice that failure to improve their performance shall warrant their separation from the service. • Performs other related functions as may be necessary.
INDIVIDUAL EMPLOYEE	<ul style="list-style-type: none"> • Act as partners of management and co-employees in meeting organizational performance goals. • Submits the Individual Scorecard and Individual Performance Evaluation Report on time.

8.0 PROCEDURES

8.0

8.0 The BCDA SPMS shall follow the four-stage PMS cycle that underscores the importance of performance management: 1) Performance Planning and Commitment; 2) Performance Monitoring and Coaching; 3) Performance Review and Evaluation; and 4) Performance Rewarding and Developmental Planning.

8.0

8.0 8.1 STAGE 1: PERFORMANCE PLANNING AND COMMITMENT

8.0

8.0 8.1.1 Setting the Corporate Scorecard


8.0

8.0 8.1.1.1 During the annual BCDA Corporate Planning Workshop, specific Initiatives and Projects aligned with the **Major Final Outputs (MFOs)** are identified by the BCDA Board of Directors and Management.

8.0 8.1.1.2 Performance measures are identified along the dimensions of Quality/Effectiveness, Efficiency and Timeliness measure in the delivery of MFOs.

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8.1.1.3 Performance measures shall include any one, combination of, or all of the following:

Quality/ Effectiveness	<p>Getting the right things done. It refers to the degree to which objectives are achieved as intended and the extent to which issues are addressed with a certain degree of excellence.</p> <p>Quality or effective performance involves the following elements:</p> <ul style="list-style-type: none"> • Acceptability • Meeting standards • Client satisfaction with services rendered • Accuracy • Completeness or comprehensiveness of reports • Creativity or innovation • Personal initiative
Efficiency	<p>The extent to which targets are accomplished using the minimum amount of time or resources.</p> <p>Efficient performance applies to continuing tasks or frontline services (e.g., issuance of licenses, permits, clearances, and certificates). It involves the following elements:</p> <ul style="list-style-type: none"> • Standard response time • Number of requests/applications acted upon over number of requests/applications received • Optimum use of resources (e.g., money, logistics, office supplies)
Timeliness	<p>Indicates a measure of whether the deliverable was done within the scheduled or expected timeframe, or on time based on the requirements of the law and/or clients/stakeholders. Time-related performance indicators evaluate such things as project completion deadlines, time management skills and other time-sensitive expectations.</p>

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8.1.1.4 The **BCDA Corporate Scorecard** containing the MFOs and performance measures and targets are then prepared, including those committed to the GCG.

8.1.1.5 While MFOs are delivered by core business processes of the operating Departments/Offices, the Departments/Offices that do not directly deliver goods and services to the external clients may contribute to BCDA's MFOs through **Support to Operations (STO)** or **General Administration and Support Services (GAS)** activities.

8.1.2 Setting the Department/Office Scorecard

8.1.2.1 Taking off from the Corporate Scorecard, Heads of Departments/Offices meet with the supervisors and staff before the start of the rating period to conduct an operational planning in order to determine and agree on the **Major Final Outputs (MFOs)** and the performance measures and targets that should be accomplished. The process should commence by the start of the last quarter of the preceding year.

8.1.2.2 The Department/Office's MFOs are based either on the goals/objectives of BCDA as contained in the Corporate Scorecard and/or derived from the functions of the Department/Office.

8.1.2.3 These MFOs and performance measures and targets, when approved by the Group Head, shall be reflected in the **Department Scorecard**.


8.1.2.4 Performance measures shall include, as may be appropriate, Quality/Effectiveness, Efficiency and Timeliness.

8.1.2.5 The targets shall take into account any or all of the following:

- **Baseline Data.** The data shall consider past performance.
- **Benchmarking.** This involves identifying and comparing the best agencies or institutions or units within BCDA with similar functions or processes. Benchmarking may also involve recognizing existing

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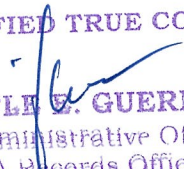
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standards based on provisions or requirements of the law.

- **Client demand.** This involves a bottom-up approach where the Department/Office sets targets based on the needs of its clients. The Department/Office may consult with stakeholders and review the feedback on its services.
- **P/CEO instruction.** The P/CEO may set targets and give special assignments.
- **Future trend.** Targets may be based from the results of the comparative analysis of the **actual** performance of the Department/Office with its **potential** performance.

- 8.1.2.6 Department performance measures shall be assigned weights based on importance. These weights shall be identified by the concerned Department/Office and approved by the Group Head. The sum of all weights spread across MFOs and performance indicators should amount to 100%.
- 8.1.2.7 Departments shall identify their initiatives/projects, if any, and indicate them in the **Department Initiative/Project Profile**.
- 8.1.2.8 The Department Scorecard and Department Initiative/Project Profile should be completed and submitted to the Performance Management Team (PMT) by the end of October of the preceding year.
- 8.1.2.9 The PMT shall review the Department Scorecard and recommend to the P/CEO for approval by the end of the November of the preceding year. It shall ensure that the performance measures and targets and the budget are aligned with those of BCDA's and that work distribution of Departments/Offices is rationalized.
- 8.1.2.10 Amendments to the Department Scorecard may be allowed at any time to accommodate intervening tasks subject to the review of the PMT and approval of the P/CEO.

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8.1.3 Setting the Individual Scorecards

- 8.1.3.1 Once approved, the Department Scorecard shall be the basis of the **Individual Scorecard** to be prepared by employees before the end of the preceding year.
- 8.1.3.2 The Individual Scorecard shall contain the individual performance measures and targets which shall be reviewed and approved by the Head of Department/Office for submission to the ODMD.
- 8.1.3.3 Percentage weight allocation must be assigned for each performance measure/target based on importance, complexity, frequency and difficulty provided that the total aggregate weight does not exceed 100%, except in cases where there are intervening tasks and additional value adding work not covered within the regular duties and responsibilities whose weight should not exceed 20% during performance review and evaluation.
- 8.1.3.4 Assigned weight should be discussed and agreed up between the supervisor and the individual employee.
- 8.1.3.5 Individual employees' performance standards shall not be lower than the Department/Office standards as approved in its Department Scorecard.

8.2 STAGE 2: PERFORMANCE MONITORING AND COACHING

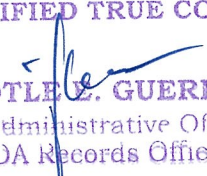
During the performance **Monitoring** and **Coaching** phase, the Heads of Departments/Offices shall:


- Provide an enabling environment/intervention to improve team and individual performance; and
- Manage and develop team and individual potentials.

The Department/Office Head shall periodically check on the progress and quality of work output of the Department/Office and individual employees.

- 8.2.1 **Monitoring.** The performance of Departments/Offices and every employee shall be regularly monitored at various levels, i.e. P/CEO, Group Heads, Corporate Planning Office (CPO), Heads of Departments/Offices and individual, on a regular basis, but shall not be limited to the following schedule:


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- 8.2.1.1 The P/CEO shall review the performance of each Department/Office at least once a year.
- 8.2.1.2 The Corporate Planning Office (CPO) shall summarize and analyze the performance of the Departments/Offices regularly in order to determine the progress of the Departments/Offices in delivering the outputs committed in the Corporate and Department Scorecards.
- 8.2.1.3 The Group Heads and the Department/Office Heads shall monitor on a regular basis the performance of the units and employees under them. They shall meet with their staff to discuss performance and the progress of work. Each individual shall likewise monitor and assess his/her own performance regularly.
- 8.2.1.4 Monitoring may be conducted through meetings, one-on-one discussions, memorandum and review of pertinent documents such as reports, communications and tracking forms to ensure timely completion and quality execution of deliverables. Monitoring is also done to avert any untoward incident or address constraints and challenges, if any.
- 8.2.1.5 The Department/Office Heads shall maintain a record of the conduct of monitoring. The **Performance Monitoring and Coaching Report Form** shall contain the date and form of monitoring, brief statement of the purpose of the monitoring, names of persons monitored as well as critical incidents noted, if any.
- 8.2.2 **Coaching.** This is a critical function of a Department/Office Head aimed at empowering and helping individual employees in their work assignments. The **Performance Monitoring and Coaching Report Form** shall also contain information on the conduct of coaching.
- 8.2.2.1 Department/Office Head shall adopt team coaching in the management of work within the Department/Office to help the unit become focused on a shared goal to accomplish a task or complete a deliverable.
- 8.2.2.2 Department/Office Head and coaches play a critical role at this stage. The focus is on the critical function of Department/Office Heads as coaches and mentors in order to provide an enabling environment or intervention

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to improve team and individual performance and manage and develop team and individual potentials.

8.3 STAGE 3: PERFORMANCE REVIEW AND EVALUATION


This phase aims to assess both Department/Office and individual employee's performance level based on set performance targets and measures as approved in the Department/Office and Individual Scorecards.

8.3.1 Department/Office Performance Assessment

- 8.3.1.1 The Head of Department/Office shall assess the Department's/Office's performance by using the Department Scorecard and the Department Performance Evaluation Report within fifteen (15) days after the end of the rating period.
- 8.3.1.2 The Group Head shall assess and evaluate performance of Departments/Offices under him/her. He/She shall review, validate and evaluate the initial performance assessment conducted by the Department/Office Heads which will be based on their reported accomplishments against the performance measures/targets. This will be done and submitted to the PMT by the end of January after the rating period.
- 8.3.1.3 To assist the PMT in the review and validation of performance, the Corporate Planning Office (CPO) shall consolidate the Department Performance Evaluation Reports and submit them to the PMT.
- 8.3.1.4 To ensure complete and comprehensive performance review, all Department/Offices shall submit a quarterly accomplishment report to the Corporate Planning Office (CPO).
- 8.3.1.5 The Corporate Planning Office (CPO) shall return to the Departments/Offices the reviewed and validated accomplishments with the summary report per Department/Office within fifteen (15) days from submission. A Department/Office is given three (3) working days to comment on the reviewed and validated accomplishments; otherwise, Corporate Planning Office (CPO) shall consider it as final for submission to the P/CEO for final assessment and approval.

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8.3.1.6 A performance review conference with concerned Heads of Departments/Offices shall be conducted annually, preferably within the month of February. The conference shall be chaired by the P/CEO and facilitated by the Corporate Planning Office (CPO) wherein the assessment of Departments/Offices will be discussed. Any issue/protest/appeal on the Department/Office assessment shall be articulated by the concerned Department/Office Head and decided by the P/CEO during the conference, hence the final rating shall no longer be appealable/contestable after the conference.


8.3.2 Performance Assessment and Evaluation for Individual Employees


8.3.2.1 The Heads of Departments/Offices shall assess individual employee performance based on the commitments made at the beginning of the rating period and contained in the Individual Scorecard. He/she shall indicate qualitative comments, observations and recommendations in the Individual Performance Evaluation Report to include behavior and critical incidents (factual information affecting the overall accomplishments of the Department/Office) and for other human resource development purposes such as promotion, training, scholarship and other developmental interventions. Said assessment shall be discussed with the concerned individual prior to the submission of the Individual Performance Evaluation Report to the ODMD.

8.3.2.2 Inputs from the accomplished Performance Monitoring and Coaching Report Form during the year can also be used as basis for evaluation.

8.3.2.3 The Head of Department/Office shall make the final assessment of performance level of the individual employees in his/her Department/Office based on proof of performance. The final assessment shall correspond to the adjectival description of Outstanding, Very Satisfactory, Satisfactory, Unsatisfactory or Poor.

8.3.2.4 The Head of Department/Office may adopt appropriate mechanisms to assist him/her distinguish performance level of individuals, such as, but not limited to peer ranking and client feedback.

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8.3.2.5 The Group Head shall approve the final assessment made by the Department/Office Heads in accordance with Sec. 10.0 hereof.

8.3.2.5 The average of all individual performance assessments shall not be higher than the collective performance assessment of the Department/Office.

8.3.2.6 The Head of Department/Office shall ensure that the employee is notified of his/her final rating.


8.3.2.7 The performance assessments of the employees in a Department/Office shall be prepared by the Department/Office Head in a List of Individual Ratings which shall be submitted to the ODMD by the end of the first quarter of the year.

8.3.2.8 The PMT shall serve as the appeals body and final arbiter on performance concerns. An employee who does not agree with the performance assessment received may file an appeal with the PMT through the ODMD within ten (10) days from receipt of the final approved Individual Performance Evaluation Report from the Head of Department/Office. The PMT shall decide the appeal within one (1) month from receipt of such appeal.

Non-submission or unjustifiable delay in the submission of the Department or Individual Performance Evaluation Report shall disqualify the Department/Office and the staff for awards and incentives.

8.3.2.9 Officials and employees who shall be on official travel, approved leave of absence, training or scholarship programs and who have already met the required minimum rating period of ninety (90) days shall submit the Individual Performance Evaluation Report before they leave the office.

8.3.2.10 Employees who are on detail or secondment to another office shall be rated in their present or actual office, copy furnished their mother office. The ratings of those who were detailed or seconded to another office during the rating period shall be consolidated in the office, either the mother (plantilla) office or present office, where the employees have spent majority of their time during the rating period.

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8.4 STAGE 4: PERFORMANCE REWARDING & DEVELOPMENTAL PLANNING

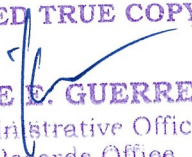
8.4.1 The Performance Rewarding and Developmental Planning phase involves competency assessment of the individual employee vis-à-vis competency requirements of the job. The results of the performance evaluation/assessment shall serve as inputs to the:


- Heads of Departments/Offices in identifying and providing the kinds of interventions needed, based on the developmental needs identified;
- ODMD in consolidating and coordinating developmental interventions that will form part of the Human Resource (HR) Plan and the basis for rewards and incentives;
- PRAISE Committee in identifying potential PRAISE Awards nominees for various awards categories;
- PMT in identifying top performers of BCDA who will qualify for awards and incentives; and
- Entitlement to the grant of the following incentives:
 - One (1) step increment due to length of service for employees who obtain at least a performance rating of Satisfactory in a particular position for three (3) consecutive years/rating periods.
 - Two (2) step increments for two (2) ratings of Outstanding during two (2) consecutive rating periods of one (1) calendar year each.
 - One (1) step increment for one (1) rating of Outstanding and one (1) rating of Very Satisfactory, or two (2) ratings of Very Satisfactory during two (2) consecutive rating periods of one (1) calendar year each.

8.4.2 The Heads of Departments/Offices shall discuss with the individual employee at the end of each rating period to assess the strengths, competency-related performance gaps and the opportunities to address these gaps, career paths and alternatives.

8.4.3 Appropriate developmental interventions shall be made available by the Heads of Departments/Offices in coordination with the

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ODMD, particularly for employees with Unsatisfactory and Poor performance ratings to improve or correct their performance.

9.0 RATING PERIOD

- 9.1 Performance evaluation for Departments and Offices shall be done annually.
- 9.2 Performance evaluation for individual employees shall also be done annually. Should there be a need for a shorter period, the minimum appraisal period is at least ninety (90) calendar days or three (3) months.

10.0 RATING SCALE, COMPUTATION OF RATINGS AND SYSTEM OF RANKING

- 10.1 In determining the final equivalent adjectival rating of both the Department/Office and individual employees, the following five-point rating scale (1 to 5) shall be used, 5 being the highest and 1, the lowest:

Range	Rating		Description
	Numerical	Adjective	
5.00	5	Outstanding (O)	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 which even peers recognized through forced comparison/distribution method.
4.00 – 4.99	4	Very Satisfactory (VS)	Performance exceeded expectations. All goals, objectives and targets were achieved above the established standards. Competence and contribution recognized by peers through forced comparison/distribution. Those screened out in the forced comparison/distribution method for Outstanding performers shall be included in this category.

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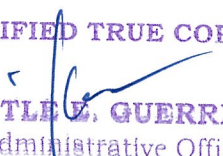
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Range	Rating		Description
	Numerical	Adjective	
3.00 – 3.99	3	Satisfactory (S)	Performance met expectations in terms of quality of work, efficiency and timeliness. The most critical annual goals were met. Those screened out in the forced comparison/distribution method for Very Satisfactory performers shall be included in this category.
2.00 – 2.99	2	Unsatisfactory (US)	Performance failed to meet expectations, and/or one or more of the most critical goals were not met. It is expected that in the next rating period, the employee, under close supervision, will either improve his/her performance for which he/she shall be given at least a Satisfactory rating, or if not, he/she shall get another Unsatisfactory rating. Two (2) successive Unsatisfactory rating shall be a ground for separation from the service.
0 – 1.99	1	Poor (P)	Performance was consistently below expectations, and/or reasonable progress toward critical goals was not made. There is no evidence to show that he/she can improve his/her performance.

10.2 Specific rating per output shall be based on the following rating scales per dimension, where applicable, depending on how success indicators were stated and agreed upon before the start of the rating period:

10.2.1 Quality/Effectiveness (Written Work)

Point Score	Description
5	No mistakes or deficiency; every aspect of work assignment well covered; clearly presented; well organized; no lapse in grammar or error in content.
4	One or two minor errors or deficiencies; work in accordance with instructions; clearly presented; well organized; one (1) or two (2) errors in grammar or errors in content.
3	More than two minor errors or deficiencies; partial minor revision needed; three (3) lapses in grammar or errors in content


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Point Score	Description
2	One or two major errors or deficiencies major revision needed; four (4) or five (5) lapses in grammar or errors in content.
1	Work not acceptable; needs total revision; six (6) or more lapses in grammar or errors in content.

10.2.2 Quality/Effectiveness (Non-written Work)

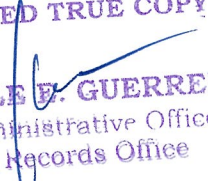
Point Score	Description
5	Excellent results; all aspects of work assignment completed/thoroughly covered; no mistake in performing the duty or 96%-100% accuracy
4	Very good result of work; one or two minor errors in the execution of work assignment; one (1) or two (2) mistakes in performing the duty or 91%-95% accuracy.
3	Result of work acceptable; more than two (2) minor errors or deficiencies in the execution of work assignments; three (3) mistakes in performing the duty or 80%-90% accuracy.
2	One (1) major error or deficiency that can be overcome with help from supervisor; four (4) or five (5) mistakes in performing the duty or 75%-79% accuracy.
1	Haphazard or careless execution of work assignment; unacceptable result.


10.2.3 Quality/Effectiveness (Feedback)

Point Score	Description
5	Excellent Feedback
4	Very Satisfactory Feedback
3	Satisfactory Feedback (No feedback/no valid complaint)
2	Unsatisfactory feedback (with minor complaint)
1	Poor Feedback (with major complaint)

10.2.4 Quality/Effectiveness (100% Accuracy Rule)

Point Score	Description
5	Accomplishment requiring 100% accuracy such as those pertaining to money accountability (cashiering, disbursing, among others); 100% is the standard; no error is allowed.
2	If standard is not met (below 100% Accuracy); there is error.

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10.2.5 Efficiency

Point Score	Description
5	Performance exceeding expectations by 30% and above of the planned targets. Those who met targets for accomplishment requiring 100% of the targets such those pertaining to money and accuracy. Those who met targets for accomplishments which may no longer exceeded (fixed targets).
4	Performance exceeding expectations by 15% to 29% of the planned targets.
3	Performance meeting 90% to 114% of the planned targets.
2	Performance meeting only 51% to 89% of the planned targets. Those who fell short of the targets for accomplishments requiring 100% of the targets such those pertaining to money and accuracy. Those who fell short of the targets for accomplishments which may no longer exceeded (fixed target).
1	Performance failing to meet the planned targets by 50% or below.

10.2.5 Timeliness

Point Score	Description
5	Task completed within ½ of the time required to finish it; critical targets met before or on the deadline; targets met if involving deadlines required by law.
4	Task completed within 2/3 of the time required to finish it.
3	Task completed just before or on the deadline.
2	Task partially completed at the deadline; critical targets not met before or on the deadline; targets not met if involving deadlines required by law.
1	Task not yet begun at the expected date of completion

10.3 Bonus points shall be given for value adding accomplishments and additional work which are not covered within the regular duties and responsibilities, the total weight for which should not exceed 20%, each of which shall be rated by the designated supervisor based on accomplishment/s.

10.4 How to compute performance ratings:

10.4.1 At the end of the rating period, the Head of the Department/Office shall accomplish the Department Performance Evaluation Report

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for his/her Department/Office by filling up all the necessary columns. For the individual employee, the Head of the Department/Office and the employee shall accomplish the Individual Performance Evaluation Report Form.

10.4.2 Accomplishment of the Department/Office and the individual employee is determined based on the target for each performance measure or output as indicated in the respective Scorecards.

10.4.3 Each accomplishment is rated by comparing the target against the accomplishment.

10.4.4 The percentage of accomplishment is computed for each quantitative target using the following formula:

$$\text{Percentage of accomplishment} = \frac{\text{Accomplishment} \times 100}{\text{Target}}$$

Example: $\frac{4}{3} \times 100 = 133\%$

10.4.5 Bonus points shall be given for value adding accomplishments which are not covered within the regular duties and responsibilities, the total weight for which should not exceed 20% to be rated by the designated supervisor based on accomplishment/s.

10.4.6 The Point Score (PS) is determined by adding the ratings for all the Performance Measures, as the case may be, including bonus points, and dividing it with the number of factors.

10.4.7 Compute for the Weighted Point Score (WPS) using the following formula:

$$\text{WPS} = \text{Point Score} \times \% \text{ of Weight Allocation}$$


10.4.8 All the entries from the Weighted Point Score column are summed up and the result will be the Total Weighted Point Score (TWPS).

10.4.9 The Final Numerical Performance Rating and the corresponding Adjectival Rating is determined using the Rating Scale.

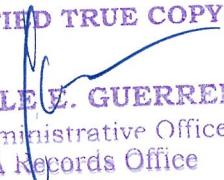
10.5 The system of ranking shall be as follows:


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- 10.5.1 In each level provided for in Section 10.3 above, the ratings of officers and employees under the SPMS shall be quantified to allow for ranking.
- 10.5.2 All employees shall be ranked within their respective levels as follows:
- 10.5.2.1 Senior Management: composed of the executive officers of BCDA (Executive Vice President and Group Vice President) who are primarily involved in the development, evolution, and approval of long-term vision of a Group, and who lead the development of function strategy, implement and maintain policies of the organization for his/her area of responsibility.
- 10.5.2.2 Middle Management: includes Department/Office heads whose work is primarily achieved through others, with direct accountability for setting direction and deploying resources; responsible for people management, including performance evaluation and pay reviews and typically hire/fire decisions.
- 10.5.2.3 Professional and Supervisory: comprises second level personnel whose work is primarily achieved by an individual or through project teams; requires the application of expertise in professional or technical area(s) to achieve results; Typically has a university degree or equivalent work experience that provides knowledge and exposure to fundamental theories, principles and concepts; includes supervisors and junior management that may not have full management authority.
- 10.5.2.4 Clerical/General Staff: includes all clerical, administrative, secretarial and general support staff in the first level with little or no supervisory responsibility but who contribute independently to the organization.
- 10.5.3 Each Group Head, together with and Department/Office Heads under him/her, shall meet, when necessary, for the purpose of calibrating ratings and determining the ranking of employees in each level within their respective Groups.
- 10.5.4 All Group Heads shall meet, when necessary, for the purpose of calibrating ratings and determining the ranking of Department/Office Heads under them, as well as validate the

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ranking of employees across all organizational units. The ranking for Middle Management, Professional and Supervisory, and Clerical/General Staff shall be submitted to the PMT.

10.5.5 The P/CEO shall rate and subsequently determine the ranking of Senior Management.

10.5.6 The PMT shall review and consolidate the rankings and submit to the P/CEO for approval.

11.0 USE OF PERFORMANCE RATINGS

11.1 Security of tenure of those holding permanent appointments is not absolute but is based on performance.

11.2 Employees who obtained Unsatisfactory rating for one rating period or exhibited poor performance shall be provided appropriate developmental intervention by the Head of Department/Office, in coordination with the ODMD, to address competency-related performance gaps.

11.3 If after advice and provision of developmental intervention, the employee still obtains Unsatisfactory rating in the immediately succeeding rating period or Poor rating for the immediately succeeding rating period, he/she may be dropped from the rolls. A written notice/advice from the head of Department/Office at least three (3) months before the end of the rating period is required.


11.4 The PMT shall validate the Outstanding and Very Satisfactory performance ratings and may recommend concerned employees for performance-based awards. Grant of performance-based incentives shall be based on the final ratings of employees as approved by the P/CEO.


11.5 Performance ratings shall be used as basis for promotion, career and succession planning, learning and development interventions, compensation and rewards, and other personnel actions.

11.6 Employees with at least a Satisfactory performance rating in a particular position for three (3) consecutive years/rating periods shall be considered for the grant of a one (1) step increment due to length of service.

11.7 Employees with Outstanding and Very Satisfactory performance ratings shall be considered for the grant of step increment due to meritorious performance, as follows:

11.7.1 Two (2) step increments for two (2) ratings of Outstanding during two (2) consecutive rating periods of one (1) calendar year each.

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11.7.2 One (1) step increment for one (1) rating of Outstanding and one (1) rating of Very Satisfactory, or two (2) ratings of Very Satisfactory during two (2) consecutive rating periods of one (1) calendar year each.

11.8 The maximum number of employees that may be granted step increment due to meritorious performance in any given year shall not exceed five percent (5%) of the total number of incumbent officials and employees based on the rankings done per Section 10.4 above, distributed in the following manner:

- 11.8.1 Senior Management (not more than one grantee)
- 11.8.2 Middle Management (not more than one grantee)
- 11.8.3 Professional and Supervisory (not more than three grantees)
- 11.8.4 Clerical/General Staff (not more than two grantees)

12.0 SANCTIONS, APPEALS AND MOTION FOR RECONSIDERATION

12.1 Unless justified and accepted by the PMT, non-submission of the Department Scorecard and Department Performance Evaluation Report to the PMT, and the employee's Individual Scorecard and Individual Performance Evaluation Report to the ODMD within the specified dates shall be ground for:

12.1.1 Employee's disqualification for performance-based personnel actions that require particular ratings for the given period such as promotion, training or scholarship grants and performance-based bonus, if the failure of the submission of the documents is the fault of the employee.


12.1.2 An administrative sanction for violation of reasonable office rules and regulations and simple neglect of duty for the Department/Office Head or employee responsible for the delay or non-submission of the required documents.

12.2 Failure on the part of the Head of Department/Office to comply with the required notices to their subordinates for their unsatisfactory or poor performance during a rating period shall be a ground for an administrative offense for neglect of duty.

12.3 Department/Office performance assessment as discussed in the performance review conference shall be final and not appealable. Any issue/appeal on the initial performance assessment of a Department/Office shall be discussed and decided during the performance review conference.

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12.4 Individual employees who feel aggrieved or dissatisfied with their final performance ratings can file an appeal with the PMT within ten (10) days from the date of receipt of notice of their final performance evaluation rating from the Head of Department/Office. An individual employee, however, shall not be allowed to protest the performance ratings of other co-employees. Ratings obtained by other employees can only be used as basis or reference for comparison in appealing one's individual performance rating.

12.5 The PMT shall decide on the appeals within one (1) month from receipt.

12.6 Officials or employees who are separated from the service on the basis of Two (2) Unsatisfactory or One (1) Poor performance rating can appeal their separation to the Civil Service Commission Proper or its regional office within fifteen (15) days from receipt of the order or notice of separation.

13.0 SPMS FORMS AND SUBMISSION

13.1 FORMS

13.1.1 Corporate Scorecard (BCDA-SPMS2014-01)

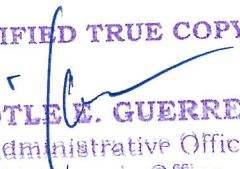
The Corporate Scorecard refers to Key Performance Measures and Targets that are relevant to BCDA's strategic priorities, mandates and core functions. It contains Major Final Outputs (MFOs) and key performance measures that capture four perspectives: Customer, Internal Process, Financial and Learning and Growth that are identified by the Board of Directors.


13.1.2 Department Scorecard (BCDA-SPMS2014-02)

The Department Scorecard refers to operational targets that are cascaded from the Corporate Scorecard. It contains strategic objectives/priorities and key performance measures and targets from which individual employees should find their alignment. Once accomplished, this will be submitted to the P/CEO for approval and will serve as the performance commitment of the department/office for a particular rating period.

13.1.3 Department Initiative/Project Profile (BCDA-SPMS2014-02a)

A special undertaking by the Department/Office carried out within a definite time frame and intended to result in some predetermined measure of goods and services. These are time-bound programs that have significant impact on the Department Scorecard and do

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not form part of the day-to-day operations of the Department/Office. It is submitted to the P/CEO for approval, together with the Department Scorecard.

13.1.4 Individual Scorecard (BCDA-SPMS2014-03)

Individual Scorecard refer to one year performance targets of employees that are cascaded down from Department Scorecard. This will be discussed and agreed upon by the Manager and approved by the Group Head. This shall serve as the individual's performance commitment for a year.

13.1.5 Department Performance Evaluation Report Form (BCDA-SPMS2014-04)

The Department Performance Evaluation Report contains actual accomplishments and performance rating of the Department/Office for a specific rating period. It also contains actual expenditures, if any, versus the allotted budget per initiative which will be used in measuring cost efficiency of the department. Once accomplished, this will be submitted to the Group Head for assessment and then to the PMT for review and validation. It shall then be submitted to the P/CEO for final approval.

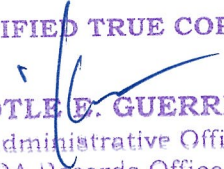
13.1.6 Individual Performance Evaluation Report Form (BCDA-SPMS2014-05)

The Individual Performance Evaluation Report contains performance output/accomplishments of the employee to be rated for specific rating period. It also contains comments and recommendation/s of the supervisor for development intervention purposes. Once accomplished, this will be submitted to the Group Head for approval and then submitted to the ODMD consolidation and summary.

13.1.7 Performance Monitoring and Coaching Report Form (BCDA-SPMS2014-06)

The Performance Monitoring and Coaching Report contains statement of performance being addressed, objective, expected result, methodology used, and progress report of the Group Head or Department/Office Heads. This will be submitted to ODMD for documentation and tracking purposes.

The Report also contains brief statement of results or strength, weaknesses/gaps of individual or employee or team being

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monitored. It also includes the type of mechanism and recommendations on the employee's areas for improvement or recognition and type of intervention needed to improve employee's performance.

Information on the conduct of coaching on a team or on individual employees and the method of coaching methodology employed will also be indicated in the Performance Monitoring and Coaching Report.


13.2 SUBMISSION OF PERFORMANCE TARGET AND RATING


- 13.2.1 Submission of BCDA Performance Agreement to the GCG is governed by GCG MC No. 2013-02.
- 13.2.2 Department/Office Scorecard shall be submitted on the specified date set by the Corporate Planning Office (CPO) within the last quarter of the preceding year.
- 13.2.3 Individual Scorecards shall be submitted annually to the Corporate Planning Office (CPO) simultaneously with the Department/Office Scorecard.
- 13.2.4 Department Performance Evaluation Report shall be submitted to the PMT by the end of January.
- 13.2.5 Individual Performance Evaluation Report shall be submitted to the ODMD within the first quarter for the preceding year's rating period.
- 13.2.6 The Summary List of Employees' Performance Rating shall be submitted to the Civil Service Commission – Field Office within four (4) months after the end of the rating period.

14.0 COMMUNICATION PLAN AND INFORMATION SYSTEM

Monitoring and evaluation mechanisms and information system shall be developed, being vital components of the SPMS in order to facilitate linkage between organizational and employee performance. The Monitoring and Evaluation and Information System will ensure generation of timely, accurate, and reliable information for both performance monitoring/tracking, accomplishment reporting, program improvement, and policy decision making.

A program to orient officials and employees on the SPMS shall be implemented to promote awareness and interest on the system, generate employees' appreciation for the SPMS as a management tool for performance planning, control, and

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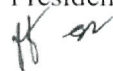
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improvement, and guarantee the internalization of employees of their role as partners of management and co-employees in meeting organizational performance goals.

15.0 PROVISION FOR AMENDMENT

The BCDA SPMS may be amended as necessary in accordance with the Document Control Procedure of the BCDA Quality Management System, provided that amendments are in compliance with CSC Memorandum Circular No. 6, s. 2012.

Approved by:


VIVENCIO B. DIZON
President and CEO


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Chief Administrative Officer
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CORPORATE SCORECARD

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Chief Administrative Officer
BCDA Records Office

GOCC: BASES CONVERSION AND DEVELOPMENT AUTHORITY Performance Scorecard for 201x- 201x

Description	Performance Measures		Targets	
	Formula	2013	2014	
MFO 1:				
Quantity:				
Quality:				
Timeliness:				
Financial:				
Support to Operations (STO)				
Quantity:				
Quality:				
Timeliness:				
Financial:				
General Administrative Services (GAS)				
Quantity:				
Quality:				
Timeliness:				
Financial:				

Description	Performance Measures		Targets	
	Formula	2013	2014	
MFO 2:				
Quantity:				
Quality:				
Timeliness:				
Financial:				
Support to Operations (STO)				
Quantity:				
Quality:				
Timeliness:				
Financial:				
General Administrative Services (GAS)				
Quantity:				
Quality:				
Timeliness:				
Financial:				



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DEPARTMENT SCORECARD

Department: _____

Performance Scorecard for the year 201x

Description	Performance Measures Formula	Weight	Baseline Data (if available)			Targets 2014	Division/Units/Persons Accountable and Responsible
			2012	2013	2014		
MFO 1:							
Quantity:							
Quality:							
Timeliness:							
Financial:							
	Subtotal Weights:	0.00%					
MFO 2:							
Quantity:							
Quality:							
Timeliness:							
Financial:							
	Subtotal Weights:	0.00%					

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MFO 3:								
Quantity:								
Quality:								
Timeliness:								
Financial:								
						Subtotal Weights:	0.00%	
						TOTAL WEIGHTS	0.00%	
Corporate-level Indicators Affected								

Top Initiatives for 2014:

- 1) _____
- 2) _____
- 3) _____
- 4) _____
- 5) _____

Prepared by: _____

Reviewed and approved by: _____

Department/Office Manager

Group Head



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DEPARTMENT INITIATIVE/PROJECT PROFILE

Department: _____

Performance Scorecard for the year 201x

Initiative Profile 1

1. Name of Project						
2. Contact Person/Project Team						
3. Project Description						
4. Project Milestone						
Activities		Timeline		Budget	Funding Source	Status
		Start	End			
5. Measures Affected						

Initiative Profile 2

1. Name of Project						
2. Contact Person/Project Team						
3. Project Description						
4. Project Milestone						
Activities		Timeline		Budget	Funding Source	Status
		Start	End			
5. Measures Affected						

Initiative Profile 3

1. Name of Project	2. Contact Person/Project Team	3. Project Description	4. Project Milestone	Timeline		Budget	Funding Source	Status
				Start	End			
Activities								
5. Measures Affected								

Prepared by:

Reviewed by:

Department/Office Manager

Group Head



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INDIVIDUAL SCORECARD

Department: _____

Performance Scorecard for the year 201x

Description	Performance Measures	Formula	Weight	Baseline Data (if available)			Targets
				2012	2013	2014	
MFO 1:							
Quantity:							
Quality:							
Timeliness:							
Financial:							
		Subtotal Weights:	0.00%				
MFO 2:							
Quantity:							
Quality:							
Timeliness:							
Financial:							
		Subtotal Weights:	0.00%				



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MFO 3:				
Quantity:				
Quality:				
Timeliness:				
Financial:				
			Subtotal Weights:	0.00%
			TOTAL WEIGHTS	0.00%
Corporate-level Indicators Affected				

Top Initiatives for 2014:

- 1) _____
- 2) _____
- 3) _____
- 4) _____
- 5) _____

Prepared by: _____

Reviewed by: _____

Employee, Position/Designation

Department/Office Manager



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DEPARTMENT PERFORMANCE EVALUATION REPORT

For the rating period January 1, 201x to December 31, 201x

Department/Office:	Performance Measures			Remarks	
	Target MFO's	Accomplishments	Rating		
			% Weight (a)	Point Score/Rating (1-5) (b)	Weighted Point Score (WPS) (a x b)
MFO 1:					
Quantity:					
Quality:					
Timeliness:					
Financial:					
				Subtotal WPS	
MFO 2:					
Quantity:					
Quality:					
Timeliness:					
Financial:					
				Subtotal WPS	
Support to Operations					
Quantity:					
Quality:					
Timeliness:					
Financial:					

Department/Office:	Performance Measures			Remarks
	Target MFO's	Accomplishments	Rating	
			% Weight (a) Point Score/Rating (1-5) (b) Weighted Point Score (WPS) (a x b)	
General Administrative Services (GSA)				
Quantity:				
Quality:				
Timeliness:				
Financial:				
Initiatives/Projects				
1.				
2.				
3.				
			100% Total WPS Numerical Rating Adjectival Rating	
Submitted by:	Reviewed by:	Assessed by:	Approved by:	
Department/Office Head	Group Head	PMT	President & CEO	
Date:	Date:	Date:	Date:	



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BCDA Records Office

INDIVIDUAL PERFORMANCE EVALUATION REPORT

For the rating period January 1, 201x to June 30, 201x

Employee: Position/Designation:		Department/Office: Division/Unit:						
Target MFO's		Performance Measures		Accomplishments	% Weight (a)	Rating Point Score/Rating (1-5) (b)	Weighted Point Score (WPS) = (a x b)	Remarks
MFO 1:								
Quantity:					%			
Quality:					%			
Timeliness:					%			
Financial:					%			
						Subtotal WPS		
MFO 2:					%			
Quantity:					%			
Quality:					%			
Timeliness:					%			
Financial:					%			
						Subtotal WPS		
Support to Operations								
Quantity:					%			
Quality:					%			
Timeliness:					%			
Financial:					%			
						Subtotal WPS		
General Administrative Services (GSA)								
Quantity:					%			
Quality:					%			
Timeliness:					%			
Financial:					%			
						Subtotal WPS		



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Initiatives/Projects		Final Numerical Rating		Final Adjectival Rating		Evaluation on Effectiveness of Intervention/s Recommended in the previous Rating Period
1.	2.	%	%	%	%	
1.						
2.						
3.						
		100%		Total WPS		
		Final Numerical Rating		Final Adjectival Rating		
COMMENTS AND RECOMMENDATIONS FOR DEVELOPMENTAL PURPOSES						
Areas of Improvement/Competency Needs	Type of Intervention	Date	Areas for Recognition		Evaluation on Effectiveness of Intervention/s Recommended in the previous Rating Period	
[] Behavior (pls. specify)	[] Coaching [] Job Rotation [] Reassignment [] Training [] Designation [] Others (pls. specify)		[] For Promotion [] Step Increment [] Others (pls. specify)			
[] Technical (pls. specify)						
[] Professional (pls. specify)						
[] Others (pls. specify)						
We discussed and agreed on the above ratings and developmental intervention/s:			Approved:			
Date	Employee	Department/Office Head	Group Head			
		Date	Date			

PERFORMANCE MONITORING AND COACHING REPORT

Department/Office : _____
Division/Unit : _____
Name of Staff : _____

	1st	Q u a r t e r
	2nd	
	3rd	
	4th	

(Please check appropriate box)

Coaching Approach & Methodology: [] Meeting (Group) [] Workshop [] Others: _____
[] One-on-one [] Case Scenario _____
[] Lecturette [] Demonstrations _____
(on site and off site) _____

PROGRESS TO DATE

Empty space for reporting progress to date.

REMARKS

(brief statement of results, strengths, weaknesses or gaps in the performance of tasks)

Empty space for remarks.

RECOMMENDATIONS

(please check)

Areas for Improvement	Type of Intervention	Areas for Recognition
[] Behavior (pls. specify) _____	[] Coaching	[] For Promotion
[] Technical (pls. specify) _____	[] Job Rotation	[] Step Increment
[] Professional (pls. specify) _____	[] Reassignment	[] Incentive
[] Others (pls. specify) _____	[] Training	[] CTO
	[] Designation	[] Others (pls. specify) _____
	[] Others (pls. specify) _____	_____
	_____	_____
	_____	_____

Please indicate the period in the appropriate box and the exact date when the monitoring was conducted.

Conducted by: _____	Noted by: _____
Department/Office Manager	Group Head
Date: _____	Date: _____