



Republic of the Philippines
Department of Education
REGIONAL OFFICE NO. VIII (EASTERN VISAYAS)
 Government Center, Candahug, Palo, Leyte
ISO 9001:2015 CERTIFIED



January 27, 2020

REGIONAL MEMORANDUMNo. **060**, s. 2020

**GUIDELINES IN THE PREPARATION AND SUBMISSION OF OFFICE PERFORMANCE
 COMMITMENT REVIEW FORMS (OPCRFs) AND INDIVIDUAL PERFORMANCE
 COMMITMENT REVIEW FORMS (IPCRFs) AND THE TIMELINES OF ACTIVITIES, ACTION
 PLAN, AND PROCESS FLOW OF THE PERFORMANCE MANAGEMENT SYSTEM (PMT)**

To: Regional Functional Division Chiefs
 Schools Division Superintendents
 All Others Concerned

1. In reference to DepEd Order No. 2, s. 2015 regarding the Policy Guidelines on the Establishment and Implementation of the Results-Based Performance Management System (RPMS) in the Department of Education, this Office, through the Performance Management System (PMS), hereby issues the attached contextualized **Guidelines in the Preparation and Submission of OPCR and IPCR** and the **Timeline of Activities, Action Plan, and Process Flow in the Performance Management System** in the Regional and Schools Division Offices.
2. This aims to provide the Regional Division and Schools Division Offices comprehensive guidelines and criteria as bases in the preparation, rating of performance, and submission of OPCR and IPCR by the respective offices and individual employees.
3. Immediate dissemination of and compliance with this Memorandum are desired.


RAMIR B. UYTICO, Ed.D., CE50 IV
 Director IV 

Enclosures: Guidelines, SPMS Calendar, Process Flow, and Action Plan

References: D.O. No. 32, s. 2018

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

EBIES PLANNING SCHOOL BUILDINGS SCHOOLS DIVISIONS



LEAD, EMPOWER, AND ACHIEVE THROUGH DATA-DRIVEN DECISIONS
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Page 1 of 1



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GUIDELINES IN THE PREPARATION, RATING, AND SUBMISSION OF OPCR_s AND IPCR_s IN DEPED REGION VIII

A. Rationale

In compliance with the guidelines set by the Civil Service Commission (CSC) through its Memorandum Circular No. 6, s. 2012 on the Establishment and Implementation of Strategic Performance Management System (SPMS), the Department of Education (DepEd) has issued DepEd Order No. 2, s. 2015 which stipulates the Guidelines on the Establishment and Implementation of the Results-Based Performance Management System (RPMS) in the Department of Education. As such, the Central, Regional, Division offices and schools adopted the said DepEd Order as a guide in contextualizing the mandate at each level.

Anent to this, a Strategic Performance Management System (SPMS) in the Regional level has been established to serve as a mechanism in linking employees' performance with organizational performance to achieve organizational goals and objectives. Thus, the Results-Based Performance Management System (RPMS) issued by DepEd has been adopted to serve as a guide in establishing standards and measuring performance at the regional and division level.

B. Guidelines in the Preparation, Rating, and Submission of OPCR_s and IPCR_s

In order to establish a fair, balanced, and comprehensive performance rating standard and to ensure a quality, effective, and efficient delivery of functions of regional offices and employees, the following guidelines have been set:

1. The OPCR of each office and the IPCR of each employee shall reflect the Key Result Areas based from the DepEd Compendium of Regional Office functions of each Division and the Schools Division Offices;
2. The objectives, key performance indicators and outputs reflected in the compendium shall also be used in the OPCR_s and IPCR_s.
3. The Objectives, although usually stated in infinitive form, should be stated in past participle form of the verbs to emphasize the accomplishments of these objectives at the end of the rating period.
4. Other indicators stated in the Compendium may not be included if these are not currently performed by the concerned office.
5. Ratings shall be based on actual performance using a standard rating scale which measures the quality, efficiency, and timeliness in the accomplishment of tasks and activities.
6. Specific outputs indicated in the compendium or expected outputs per indicator shall be attached in the OPCR_s and IPCR_s for validation purposes by the PMT.
7. Initial self-rating is encouraged but concerned raters shall ensure that corresponding means of verification (MOVs) for "Outstanding" and "Very Satisfactory" ratings are attached.
8. The rater and ratee (SDS, Division Chiefs and Assistant Regional Director for OPCR_s and Division Chiefs and staff for IPCR_s) shall discuss and agree on the actual accomplishments and results based on the performance



- commitment and measures made at the beginning of the rating period. They shall evaluate if each objective has been achieved or not.
9. The year-end rating in the OPCR of each Regional Chief and SDS shall be presented to the Regional Performance Management Team (PMT) for final evaluation.
 10. The presentation of 2020 OPCR Targets to the PMT shall be on January 20, 2020.
 11. Validated MOVs during the RMEA shall be considered as attachments in the year-end OPCR and IPCRs based on established set of criteria of evaluation by the Quality Assurance Division.
 12. Approved OPCR for 2019 of Regional Division and Schools Division Offices shall be submitted on the first week of February 2020 to PPRD while the IPCRs only of the Regional Division Offices to HRDD.

C. Suggested Descriptive Rating Scales

To help each Office determine the quality, efficiency, and timeliness of each accomplished performance or output, the following rating scale is hereby adopted:

- 4.500 – 5.000 - Outstanding
- 3.500 – 4.499 – Very Satisfactory
- 2.500 – 3.499 – Satisfactory
- 1.500 – 2.499 – Unsatisfactory
- Below 1.499 – Poor

Indicators:

For quarterly **TARGETED ACTIVITIES** conducted such as orientations, trainings, capability buildings, workshops, meetings, conferences, convergences, and similar activities, the following proposed ratings with indicators shall be observed:

Rating	Specific Indicators	Achieved		Remarks/ Sample MOVs
		Yes	No	
	1. If the activity/activities was/were conducted as scheduled			Memo and ACR
	2. If the activity/activities achieved a 100 percent attendance of the expected number of participants as specified in the Memo or Communication			Memo and Attendance Sheets
	3. If all of the objectives were achieved as stated in the Memo or Communication			Memo, ACR, Outputs and Program Matrix
	4. If the services provided by the service provider is complete and of quality in terms of availability and sufficiency of food and served on time; presentable venue; complete sets of tables and chairs; excellent and efficient service staff; complete provision and accessories such as coffee, water, clean and well-furnished toilets (water, soap and tissue), proper ventilation, etc.			Filled up Customer Satisfaction Survey Forms for Service Providers (End User)
	5. If documentary requirements for payments to suppliers and or service providers have been submitted to			ORS, Disbursement Voucher

	Finance within a month period after the date of conduct of the activity/ies.			submitted Finance	to
	To get the rating in the OPCR and IPCR, count the number of "Yes" answers and determine the rating by referring to the following scale:				
5.000	✓ If all of the above indicators are met in all activities conducted regardless of number of activities			Outstanding	
4.000	✓ If only one of the indicators is not met in any of the activities conducted			Very Satisfactory	
3.000	✓ If two or more indicators are not met in any of the activities conducted			Satisfactory	
2.000	✓ If most indicators are not met in any activities conducted			Unsatisfactory	
1.000	✓ If none of the indicators is met			Poor	

For **FIXED TARGETS** such as daily/weekly/monthly/quarterly operational tasks, the following proposed ratings with indicators shall be observed:

Rating	Specific Indicators	Achieved		Remarks/ Sample MOVs
		Yes	No	
	1. If all the number of tasks (reports/payroll/reimbursements/DTRs, communications, etc.) needed to be done in a quarter were acted upon or delivered within the timeframe			AIP/WFP/RMEA results/Others
	2. If all these tasks were done efficiently and submitted on or before the deadline			AIP/WFP/RMEA results/Others
	3. If all the tasks were done completely with no backlogs (backlogs are unfinished or unacted tasks done only after the target date)			AIP/WFP/RMEA results/Others
	4. If all the required tasks were accomplished as required with no deficiencies			AIP/WFP/RMEA results/Others
	5. If the tasks were done with quality and were cost efficient			AIP/WFP/RMEA results/Others
	To get the rating in the OPCR and IPCR, count the number of "Yes" answers and determine the rating by referring to the following scale:			
5.000	✓ If all of the above indicators are met in all tasks required			
4.000	✓ If only one of the indicators is not met in any task			
3.000	✓ If two or more indicators are not met in any task			
2.000	✓ If most indicators are not met in any task			
1.000	✓ If none of the indicators is met			

For other **TRAVEL ACTIVITIES** such as TA Provisions, Monitoring, Evaluations, and Travels to the Schools Divisions, the following proposed indicators with descriptions shall be observed:

Rating	Specific Indicators	Achieved		Remarks/ Sample MOVs
		Yes	No	
	1. If the targeted number of Schools Divisions or schools were all visited for a specific purpose within the targeted date or schedule except for valid reasons as determined by the Head of Office.			Memo/PTRs/CA/Attendance Sheet/Proofs of deviation, if any
	2. If the actual activity has been conducted with the concerned people in the Region/Division/School level			Memo/PTRs/CA/Attendance Sheet
	3. If all the required activities and documentations prior to the travel have been conducted and prepared such as pre-travel planning/logistical arrangements/TA/Monitoring and Evaluation Tools/ etc.			Memo/ACR/Attendance Sheet/VR/PR/Accomplished Tools
	4. If the activities were conducted as planned in terms of number of persons involved, date of deployment, etc., except for valid reasons as determined by the Head of Office.			Memo/TO/PTR/CA/Attendance Sheet
	5. If all the required reports such as but not limited to TA provision reports, Monitoring and Evaluation reports, post travel reports, etc.) were prepared and submitted on time to the concerned Functional Divisions or authorities			Transmittal/Log books
	To get the rating in the OPCR and IPCR, count the number of "Yes" answers and determine the rating by referring to the following scale:			
5.000	✓ If all of the above indicators are met in all required travels to the field			
4.000	✓ If one of the indicators is not met in any required travel to the field			
3.000	✓ If two or more indicators are not met in any required travel to the field			
2.000	✓ If most indicators are not met in any required travel to the field			
1.000	✓ If none of the indicators is met			



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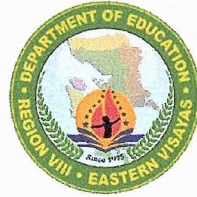
2020 STRATEGIC PERFORMANCE MANAGEMENT SYSTEM CALENDAR

PMS STAGES & ACTIVITIES	2019			2020 SCHEDULE											
	OCT.	NOV.	DEC.	JAN.	FEB.	MAR.	APR.	MAY	JUN.	JUL.	AUG.	SEP.	OCT.	NOV.	DEC.
A. PLANNING & COMMITMENT STAGE															
1. Organization/Reorganization of the Composition of the PMS Team	22nd														
2. Planning Conference cum Target Setting by the PMT		10th													
3. Orientation on the Result-Based Performance System			5th												
4. Preparation & Submission of OPCR's & IPCR's				31 st											
B. MONITORING & COACHING															
1. Monitoring Employee's Performance using a Monitoring Form				20th			20th			20th			20th		
2. Coaching Employees					10th			10th			10th			10th	
C. REVIEW & EVALUATION															
1. Submission of OPCR's & IPCR's with Final Ratings															27 th
2. Performance Review & Evaluation										30th					28th



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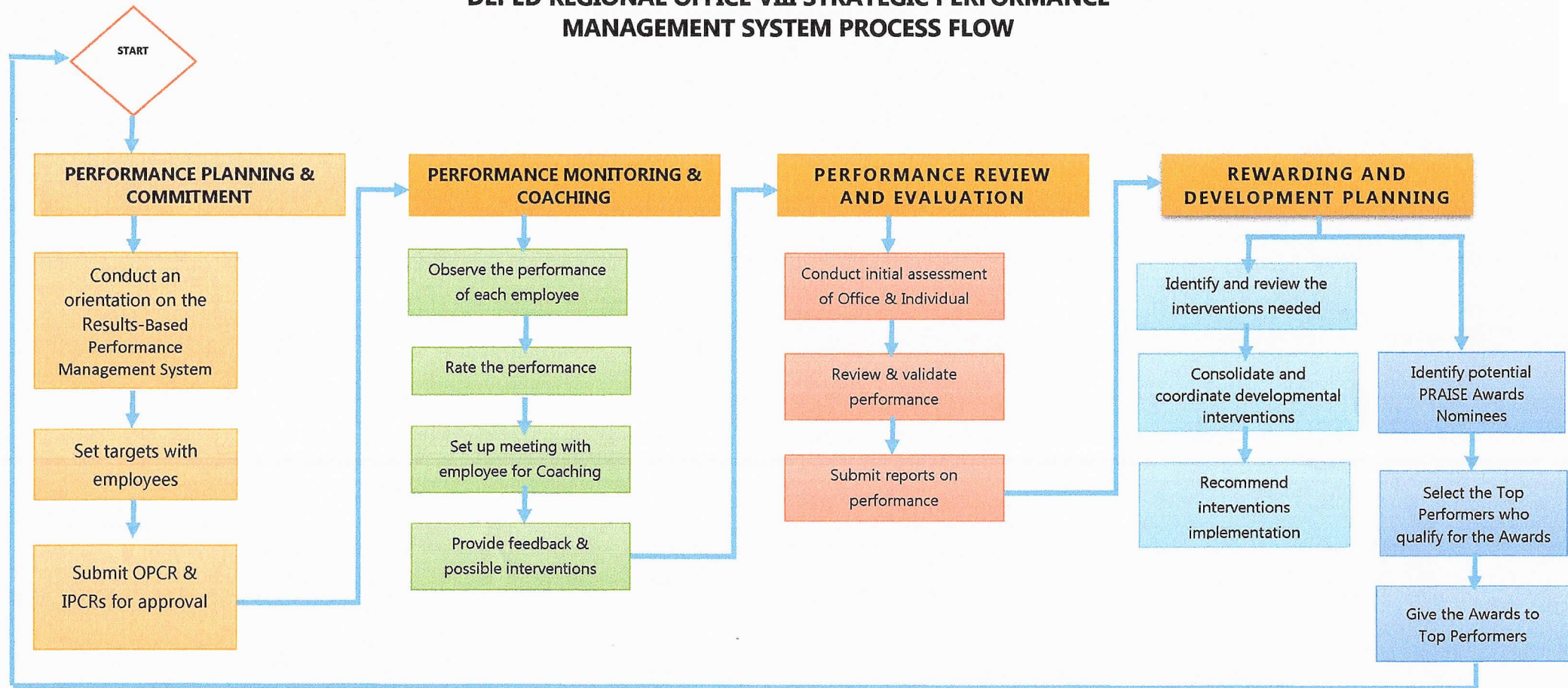
3. Discussion of Results for TNA & Feedback Giving										30th					28th
D. REWARDING & DEVELOPMENT PLANNING															
1. Recommendation of Awards & Nominations by the PMT								15th	15th				15th	15th	
2. Final Evaluation/Screening of Nominees								20th	20 th				20th	20th	
3. Awarding of Top & Best Performers/Achievers										31st					15th



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**DEPED REGIONAL OFFICE VIII STRATEGIC PERFORMANCE
 MANAGEMENT SYSTEM PROCESS FLOW**





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RESULTS-BASED PERFORMANCE MANAGEMENT SYSTEM ACTION PLAN

ACTIVITY/TASK	DATE	PERSONS/DIVISION/UNIT INVOLVED	REMARKS
PHASE I - Performance Planning and Commitment	<ul style="list-style-type: none"> November -January 		
1. Initial Conferences <ul style="list-style-type: none"> Management Conference on RPMS Target Setting PMT Conference on the Adoption of KRA, Targets and Accomplishments 	<ul style="list-style-type: none"> November 	<ul style="list-style-type: none"> RD, ARD, SDS, FD CHIEFS, PMT Members SDS, ASDS, CID and SGOD Chief 	<ul style="list-style-type: none"> KRA identification and realignment of Target and accomplishment to the VMOKRAPI and REDP Resolution of the PMT adopting the KRA, Targets and accomplishments
2. Rater-Ratee Conference <ul style="list-style-type: none"> Office Target Individual Target 	<ul style="list-style-type: none"> December 	<ul style="list-style-type: none"> RD, FD Chiefs, SDS FDC-Individual Employee SDS-Division Chiefs 	<ul style="list-style-type: none"> The performance planning and commitment shall be done where the rater meets the ratee to discuss and agree on: <ul style="list-style-type: none"> Office KRAs, Objectives and Performance Indicators are anchored to the overall organizational outcomes based from the DepEd issued compendium. This is to be undertaken by the RD and the Functional Division Chiefs. Individual KRAs, Objectives and performance Indicators as anchored to the office KRAs and objectives. This activity shall be conducted by the Functional Division Chiefs and Individual employee. Minutes of the meeting will be submitted to the PMT Secretariat.



3. Submission of OPCRF and IPCRF Target	<ul style="list-style-type: none"> January 	<ul style="list-style-type: none"> OPCRF-PPRD IPCRF-HRDD 	
PHASE II - Performance Monitoring and Coaching <ol style="list-style-type: none"> Institutional Mentoring and Coaching Face to face coaching and mentoring 	<ul style="list-style-type: none"> January - December 	<ul style="list-style-type: none"> RD- ARD, SDS Functional Division Chiefs-Employees SDS-ASDS-Unit Heads 	<ul style="list-style-type: none"> The agency head shall provide the Functional Division Chiefs and the SDS with coaching and feedbacking activities during the Convergence of Education Leaders and PMT Meetings or as sought by them in a time agreed by the ratee and the rater to improve their work performance and behavior. The Functional Division Chiefs will likewise undertake the coaching and feedbacking process to the employees under their jurisdiction. The minutes of the activity to be submitted to PMT Secretariat.
PHASE III - Performance Review and Evaluation	<ul style="list-style-type: none"> July- Mid year December- Year-end review 		
<ul style="list-style-type: none"> Midyear Review 	<ul style="list-style-type: none"> July 	<ul style="list-style-type: none"> PMT Members and SDS FDC and employees 	<ul style="list-style-type: none"> A mid-year review will be conducted by the PMT and Head of the Agency through the RMEA and PIR and One on One presentation of agreed targets to determine the progress in determining the objectives. A recalibration of office and individual objectives may be allowed under the following circumstances: <ol style="list-style-type: none"> changes in in strategic direction circumstances beyond the control of the ratee other analogous cases

<ul style="list-style-type: none"> Year End Review 	December or after the 4 th quarter RMEA	<ul style="list-style-type: none"> PMT Members and SDS FDC and employees 	<ul style="list-style-type: none"> A year end performance review and evaluation will be conducted in December or after the 4th quarter RMEA for developmental rating.
PHASE IV. Performance Rewarding and Developmental Planning	December of the succeeding year	<ul style="list-style-type: none"> RD, HRDD, PPRD and PMT member 	