

GUIDELINES ON THE ACCOMPLISHMENT OF OPCRF FY 2024

PART I-A: COMMITMENTS TO ORGANIZATIONAL OUTCOMES (60%)

The Commitments to Organizational Outcomes part shall capture office commitments, performance, and accomplishments based on its mandate and KRAs as reflected in the official issuance on the Compendium of Office Functions. It shall also capture the contributions of the office directly targeting the organizational outcomes and outputs indicated in the General Appropriation Act (GAA), Basic Education Development Plan (BEDP), Performance Informed Budgeting (PIB) targets, MATATAG Agenda priority deliverables, and other national level commitments that may be aligned and relevant to the office KRAs. Clear attribution shall be made to ensure alignment of office commitments, performance, and accomplishments with the overall organizational outcomes.

This part of the OPCRF shall constitute 60% of the overall performance rating of the office.

To be accomplished during Phase 1 - Performance Planning and Commitment of the RPMS Cycle

Personnel involved: *Head of Functional Offices/Ratees, Raters, Planning Office*
Timeline: *January to February 2024*

Organizational Outcomes Alignment

A – Key Results Areas (KRA)

Write your office's KRAs based on the functions of the office as indicated in the Compendium of Office Functions version 3 (as issued through Memorandum DM-HROD-2023-0617) which can be accessed through this link: <https://bit.ly/OfficeFunctionsv3>.

Ensure that each KRA has an attribution to the *Program/Subprogram* in the GAA FY 2024 and *Target Outcome/Output*.

B – Program/Subprogram Attribution

Identify the *Program/Subprogram* attribution indicated in the GAA FY 2024 that your office KRAs are directly contributing to. Refer to the Accountability Matrix from the Planning Service.

GAA FY 2024 Program/Subprograms attributions are the following:

1. Education Policy Development Program
2. Basic Education Inputs Program
3. Inclusive Education Program
4. Support to Schools and Learners Program
5. Education Human Resource Development Program

One or more Programs/Subprograms in the GAA FY 2024 may be identified depending on the nature of the Office KRA.

C – Objectives

Develop your office's *Objectives* under each KRA.

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

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

Offices may refer Office Functions version 3, (as issued through memorandum DM-HROD-2023-0617) which can be accessed through this link: <https://bit.ly/OfficeFunctionsv3> in accomplishing this section.

D – Timeline

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

E – Weight Allocation

Allocate weight for each *KRA* and *Objective* targeted for the year/cycle/period.

The assignment of weights shall be done per objective. The rater and ratee shall ensure that each KRA has been assigned weight according to the office functions and priorities, scope, gravity, or volume of work, timeline of completion, etc.

Each *Objective* under each *KRA* shall likewise be assigned with corresponding weights based on the nature and scope of work, difficulty and complexity of accomplishing the specific task, and the required time to finish the specific Objective. The assignment of weights shall be discussed and agreed upon by the rater and the ratee. The sum of the assigned weights of the Objectives shall be equal to the weight assigned to a particular KRA.

Illustrative sample: KRA 1 – Weight assigned is 0%

1. Objective 1 is 20%
2. Objective 2 is 10%
3. Objective 3 is 10%

F – Performance Targets

Performance Targets are the expected output/s based on the KRAs and Objectives determined. It is elaborated further into 'Value' and 'Description' to provide clearer and more concrete targeting of output/s.

Illustrative samples:

Value (Numerical): 1

Description: Draft DepEd Order on...

Value (Statistical): 90%
 Description: Filling up of vacant positions

Value (Trend): 2% decrease
 Description: Dropout rate

G – Performance Indicators

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

In identifying the performance indicators, the operational definition of each numerical rating shall be clearly defined and indicated under each component (i.e., QET). This shall ensure that the rating is objective, impartial, and verifiable.

Refer to Table 1 for the definition of performance measures for each component.

Table 1. Performance Measures (as defined in DO 2, s. 2015)

COMPONENT	DEFINITION
Quality	<p>The extent to which actual performance compares with targeted performance.</p> <p>The degree to which objectives are achieved and the extent to which targeted problems are solved. In management, quality relates to effectiveness and getting the right things done.</p>
Efficiency	<p>The extent to which time or resources is used for the intended task or purpose. Measures whether targets are accomplished with a minimum amount or quantity of waste, expense, or unnecessary effort.</p> <p>In management, efficiency relates to doing the things right.</p>
Timeliness	<p>Measures whether the deliverable was done on time based on the requirements of the rules and regulations, and/ or clients/ stakeholders.</p> <p>Time-related performance indicators evaluate such things as project completion deadlines, time management skills and other time-sensitive expectations.</p>

To be accomplished in during Phase 2 – Performance Monitoring and Coaching and Phase 3 – Performance Review and Evaluation of the RPMS Cycle

Personnel involved: Head of Functional Office/Ratee, Rater, Planning Office

Timeline: Phase 2 – throughout the calendar year
Phase 3 – July 2024 for Mid-Year Review and Calibration;
December 2024 for Performance Review and Evaluation

The head of office/functional office/school, in coordination with the Planning Office, shall assess the performance of the office vis-à-vis the committed targets set at the beginning of the performance cycle or the calibrated targets during the midyear review.

H – Means of Verification (MOVs)

List the proof or evidence of *Actual Accomplishments*. It can be official documents showing the actual results certified by authorized officials/personnel.

Illustrative example: Plantilla Database Monitoring Report with information on date of publication/posting and appointment, supported by CS Form 9 for date of publication, Report on Appointments Issued (RAI)

I – Actual Accomplishment

Indicate the actual accomplishments for the year/cycle. Actual accomplishments correspond to the attainment of the *Objective and Performance Targets*. To enhance clarity and provide a more detailed understanding of the achieved results, provide specific and quantifiable details about the actual accomplishments, results, and outputs/deliverables, as defined by the *Performance Indicators*.

Illustrative example: 90% of vacant positions filled up within nine (9) months reckoned from the date of publication/posting, with no invalidated appointments

J – Rating

Using the 5-point rating scale, indicate the rating obtained for each of the Objectives based on the actual accomplishments delivered. For reference, Table 2 below provides the description of the ratings in the rating scale.

Table 2. The RPMS Rating Scale (based on DO 2, s. 2015)

NUMERICAL RATING	ADJECTIVAL RATING	DESCRIPTION OF MEANING OF RATING
5	Outstanding	Performance represents an extraordinary level of achievement and commitment in terms of quality and time, technical skills and knowledge, ingenuity, creativity, and initiative.
4	Very Satisfactory	Performance exceeds expectations. All goals, objectives, and targets were achieved above the established standards.

NUMERICAL RATING	ADJECTIVAL RATING	DESCRIPTION OF MEANING OF RATING
3	Satisfactory	Performance met expectations in terms of quality of work, efficiency, and timeliness. The most critical annual goals were met.
2	Unsatisfactory	Performance failed to meet expectations, and/or one or more of most critical goals were not met.
1	Poor	Performance was consistency below expectations, and/or reasonable progress toward critical goals was not made. Significant improvement is needed in one or more important areas.

K – Average (QET)

Indicate the average ratings of Quality, Efficiency, and Timeliness for each Objective. Depending on the Objective, performance may be rated in terms of Quality and Efficiency, Quality and Timeliness, or Quality, Efficiency and Timeliness.

L – Score

Indicate the score obtained by multiplying the average QET Rating with the assigned Weight Allocation per Objective agreed upon at the beginning of the rating period or the calibrated weight allocation, if any, approved during the mid-year review.

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

M – Part I-A Total Score

Indicate the total score obtained in Part I-A by adding the scores of all the Objectives.

PART I-B: INNOVATING AND INTERVENING ACCOMPLISHMENTS (20%)

The Innovating and Intervening Accomplishments part shall capture the outputs/outcomes of the office that are enabling, supportive, and/or contributory to the achievement of the organizational commitments and Key Results Areas. It shall focus on Process Improvement that contributes to the KRA of the Office and shall address targets not achieved in the previous Fiscal Year.

This part of the OPCRf shall constitute 20% of the overall performance rating of the office.

To be accomplished in during Phase 1 - Performance Planning and Commitment of the RPMS Cycle

Personnel involved: *Head of Functional Offices/Ratees, Raters, Planning Office*
Timeline: *January to February 2024*

N – Key Results Areas

Write your office's KRAs based on the functions of the office as indicated in the Compendium of Office Functions version 3.

O – Objectives

Craft at least two (2) objectives that enable, support and/or contribute to the achievement of the organizational commitments (Part I-A). Ensure alignment of the objectives with the KRA.

P – Timeline

Indicate the target period of accomplishment of objectives and outputs.

Q – Weight Allocation

Indicate the weight allocated for each KRA and objective targeted for the year/cycle/period.

The assignment of weights shall be done per KRA. Each Objective under each KRA shall likewise be assigned with corresponding weights based on the nature and scope of work, difficulty and complexity of accomplishing the specific task, and the required time to finish the specific Objective. The assignment of weights shall be discussed and agreed upon by the rater and the ratee. The sum of the assigned weights of the Objectives shall be equal to the weight assigned to a particular KRA.

R – Performance Targets

Performance Targets are the expected output/s based on the KRAs and Objectives determined. It is elaborated further into 'Value' and 'Description' to provide clearer and more concrete targeting of output/s.

Illustrative samples:

Value (Numerical): 1
Description: Draft DepEd Order on...

Value (Statistical): 90%

Description: Filling up of vacant positions

Value (Trend): 2% decrease

Description: Dropout rate

S – Performance Indicators (QET)

Indicate the means to verify the achievement of outputs/outcomes. Determine the Performance Indicator for Quality, Efficiency, and Timeliness as may be applicable. Provide performance descriptions in the rating scale as guide in measuring and rating performance and accomplishments. (Refer to Table 1 for the definition of Performance Measures for each category.)

To be accomplished in during Phase 2 – Performance Monitoring and Coaching and Phase 3 – Performance Review and Evaluation of the RPMS Cycle

Personnel involved: *Head of Functional Office/Ratee, Rater, Planning Office*
Timeline: *Phase 2 – throughout the calendar year*
Phase 3 – July 2024 for Mid-Year Review and Performance Calibration and December 2024 for Performance Review and Evaluation

T – Actual Results/Accomplishments

Indicate the actual results/accomplishments and outputs/deliverables for the year/cycle. To enhance clarity and provide a more detailed understanding of the achieved results, provide specific and quantifiable details about the actual accomplishments, results, and outputs/deliverables.

U – Rating

Using the 5-point rating scale, indicate the rating obtained for each of the Objectives based on the actual results/accomplishments delivered. (Refer to Table 2 for the description of the ratings in the rating scale.)

V – Average (QET)

Indicate the average of ratings of Quality, Efficiency, and Timeliness for each Objective. Depending on the Objective, performance may be rated in terms of Quality and Efficiency, Quality and Timeliness, or Quality, Efficiency and Timeliness.

W – Score

Indicate the score obtained by multiplying the average QET Rating with the assigned weight per Objective agreed upon at the beginning of the rating period or the calibrated weight, if any, approved during the mid-year review.

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

X – Part I-B Total Score

Indicate the total score obtained in Part I-B by adding the scores of all the Objectives.

PART II-A: ORGANIZATIONAL EFFECTIVENESS (12%)

The Organizational Effectiveness Part shall include accomplishments/outputs produced or attained on the aspects of **Financial Stewardship**, **Process Improvement** and **Client Satisfaction**. It shall focus on the **results achieved by the office aligned with the Performance-based Bonus (PBB) oversight requirements**.

This part of the OPCRf shall constitute 12% of the overall performance rating of the office.

To be reviewed during Phase 1 - Performance Planning and Commitment of the RPMS Cycle

Personnel involved: *Head of Functional Offices/Ratees, Raters, Planning Office*
Timeline: *January to February 2024*

Y – Organizational Effectiveness Outputs

The Organizational Effectiveness Outputs that are aligned with PBB-based oversight requirements:

- 1) **Financial Stewardship** – This refers to the attainment of the Disbursement BURs for the Fiscal Year. This includes the following office standards:
 - a. On-track utilization of approved annual budget allocation Disbursement BUR / Adjusted Allotment
 - b. Liquidation of Cash Advances received in the current fiscal year
 - c. Compliance to Audit Findings
- 2) **Process Improvement** – This refers to the substantive improvements in ease of doing business/ease of transactions of core services based on mandated functions and as declared in the Department’s Citizen’s Charter and in line with the Anti-Red Tape Authority (ARTA)’s Whole-of-Government (WOG) Reengineering Manual. This includes the following office standards:
 - a. Updated QMS Operations Manual and Planning Documents (the following Documents must be updated and implemented: Operations Manual, SWOT Matrix, Risk Registry, Opportunity Registry, List of Relevant Interested Parties)
 - b. Documentation of Frontline and Non-frontline Services in the Citizen’s Charter Compliance with the prescribed processing time in RA11032 or EODB-EGSD
 - c. 5S or Workplace Standards
- 3) **Client Satisfaction** – This refers to the accomplishment and submission of reports on the Client Satisfaction Survey (CCSS) and resolution and compliance to reported complaints from Hotline #8888 and Contact Center ng Bayan (CCB).

- a. Client Satisfaction Measurement mechanism
- b. Compliance with ARTA and EODB provisions

Z – Objectives

The target results of the office for the period.

AA – Timeline

The expected period of accomplishment of objectives for each of the Organizational Effectiveness Outputs.

BB – Weight Allocation

The prescribed weight allocated for each objective targeted for the period.

CC – Performance Indicators (Rating Scale)

The means to verify the achievement of results for each of the Objectives in terms of Quality, Efficiency, and Timeliness. Performance descriptions in the rating scale shall serve as guide in measuring and rating performance and accomplishments. (Refer to Table 1 for the definition of Performance Measures for each category.)

To be accomplished in during Phase 2 – Performance Monitoring and Coaching and Phase 3 – Performance Review and Evaluation of the RPMS Cycle

Personnel involved: *Head of Functional Office/Ratee, Rater, Planning Office*
Timeline: *Phase 2 – throughout the calendar year*
Phase 3 – July 2024 for Mid-Year Review and Performance Calibration and December 2024 for Performance Review and Evaluation

DD – Actual Results/Outputs

Indicate the actual results/outputs for the year/cycle.

EE – Rating

Using the 5-point rating scale, indicate the rating obtained for each of the Objectives based on the actual results/outputs delivered. (Refer to Table 2 for the description of the ratings in the rating scale.)

FF – Average

Indicate the average of ratings of Quality, Efficiency, and Timeliness for each Objective.

GG – Score

Indicate the score obtained by multiplying the average QET Rating with the assigned weight per Objective.

HH – Part II-A Total Score

Indicate the total score obtained in Part II-A by adding the scores of all the Objectives.

PART II-B: LEADERSHIP COMPETENCIES (4%)

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

This part of the OPCRf shall constitute 4% of the overall performance rating of the office.

To be evaluated during Phase 3 - Performance Review and Evaluation of the RPMS Cycle

Personnel involved: *Head of Functional Offices/Ratees and Raters*
Timeline: *July 2024 for Mid-Year Review and Calibration;
December 2024 for Performance Review and Evaluation*

II – Rating Scale

Refer to the leadership behavioral indicators for each of the leadership competencies and rate the demonstration of the indicators by ticking the appropriate description:

- 5 – Role Model
- 4 – Consistently Demonstrated
- 3 – Most of the Time Demonstrated
- 2 – Sometimes Demonstrated
- 1 – Rarely Demonstrated

JJ – Remarks/Observation

Highlight behaviors or actions observed based on the day-to-day observation to support the rating provided for each of the leadership behavioral indicators.

KK – Rating

Indicate the rating obtained for each of the leadership behavioral indicators.

LL – Score

Indicate the score obtained by multiplying the average rating with the assigned weight per Objective.

MM – Part II-B Total Score

Indicate the total score obtained in Part II-B by adding the scores in all the behavioral indicators.

PART II-C: CORE BEHAVIORAL COMPETENCIES (4%)

The Core Behavioral Competencies Part shall include competencies that cut across all job groups within the organization. Core competencies uphold the DepEd’s core values. They represent the way individuals embody and live the values of the organization.

This part of the OPCRf shall constitute 4% of the overall performance rating of the office.

To be evaluated during Phase 3 - Performance Review and Evaluation of the RPMS Cycle

Personnel involved: *Head of Functional Offices/Ratees and Raters*
Timeline: *July 2024 for Mid-Year Review and Calibration;
December 2024 for Performance Review and Evaluation*

NN – Rating Scale

OO – Remarks/Observation

PP – Rating

QQ – Average

RR – Score

SS – Part II-C Total Score

Indicate the total score obtained in Part II-C by adding the scores in all the behavioral indicators.

PART III: SUMMARY OF ACCOMPLISHMENTS AND RATINGS

The Summary of Accomplishments and Ratings Part shall provide the overall performance rating of the office obtained from the Part I-A, Part I-B, Part II-A, Part II-B, and Part II-C of the OPCR. Rating from Part I-A shall constitute 60% of the overall performance rating, Part I-B shall constitute 20%, Part II-A shall constitute 12%, and Part II-B and Part II-C shall constitute 4% each respectively.

To be accomplished in during Phase 3 – Performance Review and Evaluation of the RPMS Cycle

Personnel involved: *Head of Functional Office/Ratee, Rater, Planning Office*
Timeline: *December 2024 for Performance Review and Evaluation*

TT – Weight Allocation

UU – Obtained Score

Indicate the total scores obtained from Part I-A, Part I-B, and Part II.

VV – Rating

Indicate the rating for Part I-A, Part I-B, and Part II by multiplying the score from Part I-A by 60% (0.60), the rating from Part I-B by 20% (0.20), and the rating from Part II by 20% (0.20).

WW – Overall Performance Rating

Indicate the Overall Performance Rating by adding the products or the Ratings of Part I-A, Part I-B, and Part II. This is shown below:

$$\text{Overall Performance Rating} = (\text{Part I-A Rating} \times 0.60) + (\text{Part I-A Rating} \times 0.20) + (\text{Part B rating} \times 0.20)$$

Illustrative sample:

$$\begin{aligned} \text{Overall Performance Rating} &= (\text{Part I-A Rating} \times 0.60) + (\text{Part I-A Rating} \times 0.20) \\ &\quad + (\text{Part B rating} \times 0.20) \\ &= (4.207 \times 0.60) + (4.000 \times 0.20) + (4.000 \times 0.20) \\ &= 2.524 + 0.8000 + 0.8000 \\ &= \mathbf{4.124} \end{aligned}$$

Upon determining the overall performance rating for the actual accomplishments and results, the rater and the head of functional office shall reach an agreement by signing the OPCR Form.

PART IV: IMPROVEMENT AND DEVELOPMENT PLANS

The Improvement and Development Plans Part shall detail the action plan of the office/school reflecting the strengths and areas for development and improvement based on the results of the performance review and evaluation done in Part I-A, Part I-B, Part II-A, Part II-B, and Part II-C of the OPCR. It shall include concrete and definitive steps of the office/school to improve office performance within the context of the organizational goals.

To be accomplished in during the Phase 4 – Performance Rewarding and Development Planning of the RPMS Cycle

Personnel involved: *Heads of the Functional Office, Individual personnel*
Timeline:

In collaboration and in agreement with the individual personnel, determine the office strengths and opportunities for improvement based on the results of the performance review in **Part I-A Commitment to Organizational Outcomes, Part I-B Innovating and Intervening Accomplishments, Part II-A Organizational Effectiveness, Part II-B Leadership Competencies, and Part II-Core Behavioral Competencies.**

Plan definitive action steps to further enhance service delivery and/or address identified bottlenecks. These can be written under the strengths and development needs column.

Based on the office/school performance and improvement plan, the head of functional office and the next higher approving authority (rater) shall discuss and agree on the office/school improvement plan and interventions, which shall include the consolidated individual development plans. The office/school improvement plan shall serve as basis for office and process improvement.