

## ABIC PERFORMANCE APPRAISAL REPORT (Rank and File)

<b>Name:</b>		<b>Division/ Department:</b>		<b>Purpose of Performance Appraisal:</b>		
<b>Position:</b>		<b>Immediate Superior:</b>				Quarterly Appraisal
<b>Date:</b>		<b>Assessment Period (From - To):</b>				Mid-Year Appraisal
					Annual Appraisal	
					Promotion	
					Salary Alignment	
					Change of Employment Status	

### General Guidelines

The Performance Management System (PMS) is one of the strategic tools of ALLIEDBANKERS INSURANCE CORPORATION for human resource development.

1. PERFORMANCE PLANNING - Identification and setting of Key Results Areas (KRAs), objectives and Key Performance Indicators (KPIs) that the employee is expected to achieve, and which will contribute to his/her department's KRAs.
2. PERFORMANCE COACHING - Regular feedback and coaching, as necessary, to enable the employee to accomplish the goals that have been mutually agreed upon during the Performance Planning stage.
3. PERFORMANCE APPRAISAL/ PAR - Assessment of the employee versus the set KRAs, KPIs and different critical job dimensions. Aside from accomplishing the Performance Appraisal Report, leaders are also expected to discuss the results obtained with his/her immediate report. This part of the process should be conducted twice a year.

In summary, the PERFORMANCE APPRAISAL PROCESS/ PAR aims to:

1. Align each employee's targets with the overall goals and objectives of his/her division/department, and the company in general;
2. Provide a formal venue and structured process for coaching and feedback between the employee and his/her direct line supervisor;
3. Enable line managers to properly assess each employee's strengths and development areas which shall be the basis of action plans for performance improvement, career development, training needs assessment, and other key HR and/ or performance management strategies.

### Performance Rating

The Overall Performance Rating is a combination of (1) ratings of the identified Key Result Areas and Key Performance Indicators (Part I, 70%) and (2) the average of all the ratings in the different critical job dimensions (Part II, 30%)

To determine the final score of each employee, the raters are expected to rate all Key Result Areas and Critical Job Dimensions using the the following scale:

<b>( 3.0 ) Significantly Exceeds Expectation</b>	Employee exceeded all established performance expectations and is an exceptional contributor to the success of the Group KRAs. Employee demonstrated role model behaviors.
<b>( 2.5 ) Exceeds Expectation</b>	Employee met all and exceeded most (more than 50%) of the established KRAs.
<b>( 2.0 ) Meets Expectation</b>	Employee met all performance expectations and may have exceeded some (less than 50%) of the KRAs. Employee is a solid contributor to the achievement of the Group KRAs.
<b>( 1.5 ) Barely Meets Expectation</b>	Employee met most (more than 50%), but failed to meet some (less than 50%) performance expectations. Employee needs to further improve in one or more KRAs or other critical job dimensions.
<b>( 1.0 ) Below Target/Needs Improvement</b>	Employee met none or only some (less than 50%) of the established performance expectations. Employee needs significant improvement in almost all areas of the KRAs and other critical job dimensions.

If the rater does not have enough basis for rating, he/she may leave the space blank.

**Part I: KEY RESULT AREAS & KEY PERFORMANCE INDICATORS**

Annually, the Corporate goals and Key Result Areas (KRAs) are set by ABIC Top Management and Senior Management. These corporate goals are then cascaded to the different division/departments and employees so they will know their corresponding KRAs and deliverables during the rating period. Along with the KRAs are Key Performance Indicators (KPIs) which are the measurable desired results or critical outputs that are needed to achieve the set objectives.

For the "RATING" column, please refer to this scale:



No.	KEY RESULT AREAS (KRA)	OBJECTIVE	KEY PERFORMANCE INDICATOR / STANDARD	WEIGHT	ACCOMPLISHMENTS / ACTUAL RESULTS	RATING	WEIGHTED RATING	COMMENTS
1								
2								
3								
4								
5								
6								
7								
8								
<b>TOTAL</b>			<b>Total Weight should be 100%</b>			<b>KRA RATING</b>	<b>0.30</b>	

OTHER COMMENTS:

## Part II: BEHAVIORAL ASSESSMENT

The Behavioral Assessment is composed of two parts: (A) Company Values and (B) Behavioral Competencies. These factors are relevant to the accomplishment of an employee's duties and responsibilities. It is important to make these as part of the performance appraisal so that employees will have a conscious effort in manifesting these behaviors as they carry out their tasks.

For the "RATING" column, please refer to this scale:



Note: User may adjust row height if needed.

### A. COMPANY VALUES

RATING

COMMENTS (to support rating)

#### 1: CUSTOMER SERVICE

Ensures that products and services meet and satisfy customer needs.

Renders courteous, pleasant, efficient and prompt service to clients and customers.

#### 2: COST EFFECTIVENESS

Effective without wasting time, effort or expense.

Recognizes the value of economizing, properly using and preserving company property and facilities.

#### 3: INTEGRITY

Forthright, states facts and views truthfully.

Honest in his/her dealings.

Loyal, faithful and devoted to the company and his/her work.

#### 4: PROFESSIONALISM

Gives the company what is due in terms of time, attention and output.

Exercises prudence, care and mature judgment; conscious of adverse effects of improper and careless performance.

Respects and strictly observes company rules and regulations, maintains discipline at all times.

#### 5: INNOVATION

Thinks and creates new methods and ideas that can enhance the products and services the company offer.

#### 6: TEAMWORK

Extends full cooperation and assistance to superiors and peers.

Always acts jointly with others in accomplishing goals.

Goes out of his way to assist others without prodding.

Manner is highly pleasing, cheerful and diplomatic.

B. BEHAVIORAL COMPETENCIES	RATING	COMMENTS (to support rating)
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<b>1: COMMUNICATION SKILLS</b>		
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Highly proficient in both oral and written communication.		
Always able to express his ideas clearly and concisely with ease and facility.		

<b>2: INITIATIVE</b>		
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Demonstrates self-starting ability and work is done without waiting for directions.		
Consistently suggests new and highly workable ideas for the enhancement of work quality.		

<b>3: SENSE OF RESPONSIBILITY</b>		
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Consistently shows deep concern for the job and takes pride in the company.		
Pleasantly accepts additional assignments and pursues the tasks with utmost enthusiasm.		

<b>4: PUNCTUALITY OR ATTENDANCE</b>		
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Has perfect attendance.		
Exceptionally punctual in observing work hours.		

<b>OVERALL RATING for the BEHAVIORAL ASSESSMENT</b>	<b>0.00</b>	
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**Part III: CAREER PLANNING**

In this part of the Performance Appraisal Report, the rater will give an assessment of the strengths and developmental areas which will provide valuable information for performance improvement, to determine training needs, career development and succession planning, among others.

<b>STRENGTHS</b>	
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**Developmental Plan**

DEVELOPMENTAL AREAS	COMPETENCY	FORMAL/INFORMAL TRAINING	METHOD	COMMENTS

**POSSIBLE CAREER PATH:**

Short Term (1 Year):		Medium Term (2-3 Years):		Long Term (Beyond 3 Years):	
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**COMMENTS:**

## Overall Performance Rating

COMPONENTS	RATING	WEIGHT	WEIGHTED RATING	COMMENTS:
Part I: Key Result Areas		70%	0.00	
Part II: Behavioral Assessment		30%	0.00	
<b>Overall Performance Rating</b>		100%	<b>0.00</b>	

**ACKNOWLEDGEMENT OF EMPLOYEE:**

Name and Signature of Employee

Date

**ACKNOWLEDGEMENT RECEIVED BY HRAD:**

Received by:

Date:

**Rated by:**

Name & Signature of Immediate Superior

Date:

**Reviewed by:**

Name & Signature of Next Immediate Superior

Date:

**Approved by:**

Name & Signature of Division/  
Department Head

Date:

**REMARKS:**

**COMMENTS OF IMMEDIATE SUPERIOR:**