

Republic of the Philippines
Department of Education
NATIONAL CAPITAL REGION

19 June 2024

REGIONAL MEMORANDUM

No. 627 s. 2024

To: Schools Division Superintendents
Assistant Schools Division Superintendents
School Heads of Elementary and Secondary Schools
Chiefs of Functional Divisions
All Others Concerned

REMINDER ON THE CONDUCT OF MID-YEAR PERFORMANCE REVIEW AND EVALUATION

1. In reference to the Memorandum DM-OUROD-2024-1187 "Reminder on the Conduct of Midyear Performance Review", this office hereby reiterates the above-captioned subject.
2. The details are stipulated in the attached memorandum as a reference. Legal basis, forms/templates, and other reference materials can be accessed and downloaded through the following links: <https://tinyurl.com/DepEdRPMSLibrary> and <https://tinyurl.com/CalibrationFB1B2>.
3. Immediate dissemination and strict compliance with this issuance are desired.

JOCELYN DR ANDAYA
Director IV



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Republika ng Pilipinas

Department of Education

OFFICE OF THE UNDERSECRETARY
HUMAN RESOURCE AND ORGANIZATIONAL DEVELOPMENT

MEMORANDUM
DM-OUHROD-2024-1187

FOR : **UNDERSECRETARIES**
ASSISTANT SECRETARIES
BUREAU AND SERVICE DIRECTORS
REGIONAL DIRECTORS
SCHOOLS DIVISION SUPERINTENDENTS
CHIEFS OF FUNCTIONAL DIVISIONS
ALL OTHERS CONCERNED

FROM : 
WILFREDO E. CABRAL
Regional Director
Officer-in-Charge, Office of the Undersecretary
Human Resource and Organizational Development

SUBJECT : **REMINDER ON THE CONDUCT OF THE MIDYEAR**
PERFORMANCE REVIEW

DATE : 18 June 2024

This Memorandum is being issued to remind all concerned offices in the Central Office (CO), Regional Offices (ROs), and Schools Division Offices (SDOs) on the conduct of the Midyear Performance Review in accordance with the **DepEd Order (DO) No. 2, s. 2015** or the “*Guidelines on the Establishment and Implementation of the Results-based Performance Management System (RPMS) in the Department of Education*” and **DM-OUHROD-2024-0586** or the “*Interim Guidelines for the Office Performance Planning and Assessment for FY 2024 Onwards.*” It is expected that the following objectives are achieved in the conduct of the midyear review:

- Determine the progress in achieving the committed performance objectives and targets;
- Calibrate performance targets, weights, timeline, and indicators, when necessary;
- Identify catch-up plan in the achievement of the remaining performance targets, and intervention plan to address performance gaps, to include but not limited to coaching and mentoring of individual personnel; and
- Craft initial FY 2025 Office Performance Commitment and Review Form (OPCRF).

Sec. 35 of DO 2, s. 2015 states that:

“35. A mid-year review is prescribed to determine the progress in achieving the Objectives. In exceptional cases, and only if the situation warrants, a one-time recalibration of office and individual Objectives shall be allowed during the mid-year review.”

Further, Sec. 22 under Annex B of DM-OUHROD-2024-0586 elaborates that recalibration shall likewise be allowed for Performance Targets, Weights, Timeline, and Performance Indicators. It also enumerated under Sec. 23 the parameters for recalibration, as follows:

“23. Exceptional cases that may warrant performance calibration shall include, but not limited to the following, subject to the approval of the Performance Management Team:

- a. Instances when high level decisions are taken into effect which resulted in changes in strategic directions and/or reprioritization of programs, activities, projects (PAPs);*
- b. Adjustments in the systems, procedures, and strategies involved in the delivery of committed targets (e.g., use of alternative strategies and work arrangements);*
- c. Changes in the necessary administrative, financial, procurement, and other processes, rules, and regulations that are not within the jurisdiction or discretion of the office and/or employee; and*
- d. Circumstances that are beyond the control of the ratee such as natural and/or man-made calamities, including typhoon, earthquake, and other fortuitous events.*

To facilitate the proper conduct of Midyear Performance Review, all Officials, Heads of Offices/Functional Offices in CO, ROs and SDOs including its concerned personnel shall use the following RPMS documents:

RPMS Form	Purpose
Guide on How to Calibrate FY 2024 Office and Individual Performance (Annex A)	Step by Step Procedure on the Calibration Process for FY 2024 Office and Individual Performance
Office (Annex B1) / Individual (Annex B2) Performance Calibration Form (O/IPCF)	Documentation on the amendments and justifications on the office and individual performance targets, weight, timeline, and

	indicators, subject for approval of the Approving Authority and PMT recommendation
Office Performance Midyear Review Form (OPMRF) (Annex G of the DM-OUHROD-2024-0586)	Progress checking in achieving the agreed office and individual performance objectives and targets reflecting the indicative midyear review rating/results

Note: The final rating depends solely on the year-end performance assessment, unless exceptional cases deem it necessary to use the mid-year review as the final rating such as promotion, transfer, or in cases of untimely death where the ratee could no longer complete the full RPMS cycle.

It is suggested that Mid-Year Review shall be conducted in July while the duly signed OPMRF, resulting from the recalibration process, shall be submitted to the respective Personnel Division/Section/Unit on or before August 31, 2024, or as may be determined by the Head of Office upon the recommendation of the PMT.

The legal basis, forms/templates, OPCRf National Orientation recorded meetings, and other reference materials including the Frequently Asked Questions (FAQs), can be accessed through the DepEd RPMS Library through this link <https://tinyurl.com/DepEdRPMSLibrary>.

It should be emphasized that the provisions under Sec. 35 of DO 2, s.2015 likewise states that:

“[d]uring the midyear review, the rater shall inform in writing the ratee of the status of performance, in case of an Unsatisfactory or Poor performance. Coaching, feedback and appropriate interventions shall be provided where necessary.”

Finally, in line with the preparation of FY 2025 Budget Proposals, all offices are highly encouraged to craft their initial FY 2025 OPCRf, which shall be one of the bases for the finalization of their respective Work and Financial Plans (WFP).

Should you have any clarifications, or concerns and are in need of technical assistance, please contact the following concerned offices:

Office/Divisions	Particulars	Contact Details
BHROD-HRDD	<ul style="list-style-type: none"> RPMS Policy and Tools (OPCRf and IPCRF) 	Email: bhrod.hrdd@deped.gov.ph Direct Line: (02) 8470-6630

<p>BHROD-Organization Effectiveness Division</p>	<ul style="list-style-type: none"> • DepEd Office Functions/Key Result Areas • Job Descriptions • DepEd Accountability Matrix in relation to PREXC targets 	<p>Email: bhrod.oed@deped.gov.ph Direct Line: (02) 8633-5375</p>
<p>Planning Service-Planning and Programming Division</p>	<ul style="list-style-type: none"> • DepEd PREXC targets, BEDP 	<p>Email: ps.ppd@deped.gov.ph Direct Line: (02) 8633-7216; 8638-8634</p>

For strict compliance.

Annex A (DM-OUHROD-2024-1187)

A. Guide on How to Calibrate CY 2024 Office Performance Targets

Reminders:

- a. This Office Performance Calibration Form shall be accomplished by the Head of Office/Functional Division in the CO, RO, and SDO.
- b. Using the initial draft of the 2024 OPCRf as reference, revisit and review your performance objectives, indicators, and timelines for 2024.
- c. Determine which among your office objectives, indicators, and timelines need to be adjusted.

Instructions:

1. Using the **Annex B-1**, indicate in the **OPCRf CONTENT** column the area of the OPCRf that needs to be amended. You may calibrate the following: *objectives, timeline, weight per KRA, performance targets and performance indicators (quality, efficiency, timeliness)*.
2. In the next column, fill out the **PROPOSED AMENDMENT** indicating the proposed change in your 2024 OPCRf.
3. Under the **JUSTIFICATION** column, indicate the specific reason/s why the said area needs to be amended or calibrated. Justifiable or valid reasons for calibration shall be those factors that are considered beyond the control of the office. The specific reasons and possible considerations should fall under the following parameters:
 - a. Changes/adjustments on the strategic directions and/or reprioritization of programs, activities, projects anchored on and in support to the implementation of the Basic Education Learning Continuity Plan (BE-LCP), as approved by the Head of Office;
 - b. Changes/adjustments in the systems, processes, and strategies involved in the delivery and/or performance of planned/committed targets due to the pandemic (e.g., use of alternative strategies); and
 - c. Changes/adjustments in necessary administrative, procurement, financial, and other processes and procedures that are outside the control of the office.
4. The **RATER REMARKS** column shall be accomplished by the designated Rater, as provided in DO No. 2, s. 2015 (DepEd RPMS Guidelines).
5. The accomplished form should be signed by the Ratee, Rater, and Approving Authority upon submission to the Personnel Division/Section/Unit.
6. Guided by the duly approved Office Performance Calibration Form, the Head of Office/Functional Division shall reflect the calibrated performance objectives, indicators, and/or timelines (whichever is applicable) on the 2024 OPMRF.
7. The Calibrated 2024 OPMRF shall be the basis of the office performance review and evaluation (Phase III) by the authorized Rater and Approving Authority as prescribed in DO No. 2, s. 2015, for review and approval. Initial self-rating shall be encouraged prior to the Rater-Ratee discussion.

B. Guide on How to Calibrate CY 2024 Individual Performance Targets

Reminders

- a. This Individual Performance Calibration Form shall be accomplished by individual personnel.
- b. Using the initial draft of the 2024 IPCRF and the duly approved Calibrated 2024 OPCRF as reference, revisit and review your performance objectives, indicators, and timelines.
- c. Determine which among your office objectives, indicators, and timelines need to be adjusted.

Instructions

1. Using the **Annex B-2**, indicate in the **IPCRF CONTENT** column the area of the IPCRF that needs to be amended. You may calibrate the following: *objectives, timeline, weight per KRA, performance targets and performance indicators (quality, efficiency, timeliness)*. Ensure that the changes to be made are aligned with the calibrated 2024 OPCRF.
2. In the next column, fill out the **PROPOSED AMENDMENT** indicating the proposed change in your 2024 IPCRF.
3. Under the **JUSTIFICATION** column, indicate the specific reason/s why the said area needs to be amended or calibrated. Justifiable or valid reasons for calibration shall be those factors that are considered beyond the control of the individual personnel. The specific reasons and possible considerations should fall under the following parameters:
 - a. Changes/adjustments on the strategic directions and/or reprioritization of programs, activities, projects anchored on and in support to the implementation of the Basic Education Learning Continuity Plan (BE-LCP), as approved by the Head of Office;
 - b. Changes/adjustments in the systems, processes, and strategies involved in the delivery and/or performance of planned/committed targets due to the pandemic (e.g., use of alternative strategies); and
 - c. Changes/adjustments in necessary administrative, procurement, financial, and other processes and procedures that are outside the control of the office.
4. The **RATER REMARKS** column shall be accomplished by the designated Rater, as provided in DO No. 2, s. 2015 (DepEd RPMS Guidelines).
5. The accomplished form should be signed by the Rater, Ratee, and Approving Authority upon submission to the Personnel Division/Section/Unit.
6. Guided by the duly approved Individual Performance Calibration Form, the individual personnel shall reflect the calibrated performance objectives, indicators, and/or timelines (whichever is applicable) on the initial 2024 IPCRF.
7. The Calibrated 2024 IPCRF shall be the basis of the individual performance review and evaluation (Phase III) by the authorized Rater and Approving Authority as prescribed in DO No. 2, s. 2015, for review and approval. Initial self-rating shall be encouraged prior to the Rater-Ratee discussion.

OFFICE PERFORMANCE CALIBRATION FORM

Mark an "x" on the appropriate box:

<input type="checkbox"/>	YES, there is a need to calibrate the CY ____ OPCRf
<input type="checkbox"/>	NO, there is no need to calibrate the CY ____ OPCRf

#	ORIGINAL OPCRf CONTENT (Based on approved 2024 OPCRf)	Proposed Amendment	Justification	Rater Remarks	PMT Recommendation
1	Example - Objective: Obj. 1: Released draft policy on Enhanced DepEd RPMS Guidelines to Bureau Director by December 2020	Remove Obj. 1 and reschedule for CY December 2021	Due to COVID-19, there was a reprioritization of office PAPs	<input checked="" type="checkbox"/> Approved <input type="checkbox"/> Disapproved Remarks:	<input type="checkbox"/> Recommended <input type="checkbox"/> Not recommended Remarks:
2	Example - Timeline: Obj. 3 timeline is August 2020	Change Obj 3 timeline from August 2020 to December 2020	Adjusted timeline because of change in program design of the activity	<input checked="" type="checkbox"/> Approved <input type="checkbox"/> Disapproved Remarks:	<input type="checkbox"/> Recommended <input type="checkbox"/> Not recommended Remarks:
3	Example - Weight per KRA: Obj 7 weight is 15%	Change Obj 7 weight to 20%	There was a need to adjust the weight for Obj. 7 due to reprioritization of office PAPs	<input type="checkbox"/> Approved <input type="checkbox"/> Disapproved Remarks:	<input type="checkbox"/> Recommended <input type="checkbox"/> Not recommended Remarks:
4	Example - Performance Indicator: Obj 9 Conducted capacity building to field personnel	Change Efficiency Performance Indicator to: 5-Conducted online workshop in all target regions	Due to COVID-19 pandemic and community quarantine restrictions, face-to-face activities are not allowed	<input type="checkbox"/> Approved <input type="checkbox"/> Disapproved Remarks:	<input type="checkbox"/> Recommended <input type="checkbox"/> Not recommended Remarks:

(Efficiency Performance Indicator): 5-Conducted workshop in all target regions 4-Conducted workshop in at least 14 regions 3- Conducted workshop in at least 10 regions 2- Conducted workshop in at least 7 regions 1- Conducted workshop in below 7 regions	4-Conducted online workshop in at least 14 regions 3- Conducted online workshop in at least 10 regions 2- Conducted online workshop in at least 7 regions 1- Conducted online workshop in below 7 regions			
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**Add rows as may be necessary*

Prepared by:

Recommending Approval:

Name of Ratee and Position

Name of Rater and Position

Date:

Date:

Approved by:

Name of Approving Authority and Position

Date:

INDIVIDUAL PERFORMANCE CALIBRATION FORM

Mark an "x" on the appropriate box:

<input type="checkbox"/>	YES, there is a need to calibrate the CY ____ IPCRF
<input type="checkbox"/>	NO, there is no need to calibrate the CY ____ IPCRF

#	IPCRF CONTENT <i>(Based from approved IPCRF)</i>	Proposed Amendment	Justification	Rater Remarks	PMT Recommendation
1	Example - Objective: Obj. 1: Drafted revised policy on the RPMS Guidelines	Remove Obj. 1 and reschedule for CY December 2021	Due to COVID-19, there was a reprioritization of office PAPs	<input checked="" type="checkbox"/> Approved <input type="checkbox"/> Disapproved Remarks:	<input type="checkbox"/> Recommended <input type="checkbox"/> Not recommended Remarks:
2	Example - Timeline: Obj. 3 timeline is May 2020	Change Obj 3 timeline from May 2020 to August 2020	Adjusted timeline because of change in program design of the activity	<input checked="" type="checkbox"/> Approved <input type="checkbox"/> Disapproved Remarks:	<input type="checkbox"/> Recommended <input type="checkbox"/> Not recommended Remarks:
3	Example – Weight per KRA: Obj 7 weight is 15%	Change Obj 7 weight to 10%	There was a need to adjust the weight for Obj. 7 due to reprioritization of office PAPs	<input type="checkbox"/> Approved <input type="checkbox"/> Disapproved Remarks:	<input type="checkbox"/> Recommended <input type="checkbox"/> Not recommended Remarks:
4	Example – Performance Indicator: Obj 9 Provided technical assistance to personnel on the crafting of their IPCRF (Efficiency Performance Indicator):	Change Efficiency Performance Indicator to: 5-Provided technical assistance to 100% RO personnel through virtual meeting 4-Provided technical assistance to at least 80% RO personnel through virtual meeting	Due to COVID-19 pandemic and community quarantine restrictions, face-to-face activities are not allowed	<input type="checkbox"/> Approved <input type="checkbox"/> Disapproved Remarks:	<input type="checkbox"/> Recommended <input type="checkbox"/> Not recommended Remarks:

	<p>5- Provided technical assistance to 100% RO personnel</p> <p>4- Provided technical assistance to at least 80% RO personnel</p> <p>3- Provided technical assistance to at least 60% RO personnel</p> <p>2- Provided technical assistance to at least 40% RO personnel</p> <p>1- Provided technical assistance to below 39% of RO personnel</p>	<p>3- Provided technical assistance to at least 60% RO personnel through virtual meeting</p> <p>2- Provided technical assistance to at least 40% RO personnel through virtual meeting</p> <p>1- Provided technical assistance to below 39% of RO personnel through virtual meeting</p>			
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**Add rows as may be necessary*

Prepared by:

Recommending Approval:

Name of Ratee and Position

Date:

Name of Rater and Position

Date:

Approved by:

Name of Approving Authority and Position

Date: