

**GUIDELINES IN THE GRANT OF ORGANIZATIONAL UNIT PERFORMANCE
INCENTIVE (OUPI) FOR CY 2015**

I. ORGANIZATIONAL UNIT PERFORMANCE INCENTIVE (OUPI)

The OUPI shall be given based on the performance rating for CY2015 of organizational units or Key Result Area (KRAs) pertinent to organizational units rendered by Management Services Group, reviewed/completed by the respective Performance Evaluation and Review Committee (PERC), and approved by the Senior Management Committee. Provided, however, that the officers and employees' rating do not fall below **Satisfactory** upon review by the respective Performance Evaluation and Review Committee (PERC).

The bases for rating the employees' organizational unit performance are herein attached as Annex A.

II. COVERAGE

All employees occupying regular plantilla positions of the Pag-IBIG Fund (HDMF) as of 31 December 2015, who have submitted a Performance Appraisal System (PAS) for Y2015 including those who were separated from the service during the said year.

III. ENTITLEMENT

For purposes of these guidelines, Y2015 shall be understood to mean as the year when the entitlement of the covered employees becomes effective ("Year of Entitlement"). On the other hand, Y2016 shall be the year when the OUPI is actually released, given, paid to, disbursed or credited in favor of the covered employees ("Year of Disbursement").

Pursuant to **Rule IV Performance Evaluation System (A Model)**, MC 25, series 1999, the minimum appraisal period is at least ninety (90) days or three (3) months.

A pro-rata application shall be applied to those who were hired or separated from the Fund within CY2015 and with at least ninety (90) days or three (3) months in service based on the following formula:

$$\text{Amount of Entitlement} \quad \times \quad \frac{\text{No. of days (Fund Service in Y2015)}}{365}$$

Number of days in the service shall refer to the maximum number of days for the Year of Entitlement, less leave of absences without pay, absences without official leave ("AWOL") and the period of actual service of preventive suspension. In the event a covered employee is separated from the service during the Year of Entitlement, the remaining number of days in the Year of Entitlement shall likewise be deducted from the number of days in service.

For covered employees who were hired during the Year of Entitlement, the number of days in service shall be counted from the date of assumption of office until December 31 of the Year of Entitlement, subject to the conditions provided herein.

The number of days in service and the denominator shall accordingly be adjusted during leap years.

IV. OTHER PROVISIONS

1. Covered employees found guilty of an administrative or criminal offense involving acts or omissions in connection with the performance of their official duties and functions during the Year of Entitlement shall not be eligible to receive his OUPI on the Year of Disbursement, except when the penalty imposed specifically provides otherwise.

In the event the covered employee is exonerated on appeal of the offense mentioned above, he shall be entitled to the back-payment of the OUPI.

If the penalty meted out is only a reprimand, the covered employee shall be qualified to receive the OUPI.

Covered employees with pending administrative or criminal cases involving acts or omissions in connection with the performance of their official duties and functions shall be entitled to the OUPI, subject to other conditions herein stated.

A covered employee who had been issued a preventive suspension order in CY2015 shall be entitled to OUPI. However, the number of days of preventive suspension shall be deducted from the computation of the amount of the entitlement of the covered employee.

If the preventive suspension order issued to a covered employee is declared null and void pursuant to the provisions of Section 5(a) Civil Service Commission (CSC) Resolution No. 030502 (*Policy Guidelines on Preventive*

Suspension), the covered employee shall be entitled to back-payment of the resulting differential in the grant.

On the other hand, in the event the preventive suspension issued to a covered employee is declared invalid pursuant to Section 5 (b) of the said CSC Resolution, the covered employee shall be entitled to back-payment of the resulting differential in the grant only when he is fully exonerated of the charge/s.

2. Absences and Leave Without Pay (LWOP) incurred by covered employee in Y2015 shall be deducted from the amount of entitlement of each covered employee.

A covered employee who is on absence without official leave (AWOL) shall not be paid his OUPI. AWOL shall mean an employee who is continuously absent without an approved leave or when a covered employee after the expiration of his approved leave, extends his absence without proper authorization.

Release of the grant shall only be made upon return of the concerned employee to his official station subject to the approval of the Group Head concerned.

3. The following shall be deducted from the OUPI of the covered employee, unless otherwise has already been deducted from other benefits:
 - 3.1. Unpaid telephone bills for personal account of the concerned employee due to HDMF

- 3.2. The HMO of employees' dependents
 - 3.3. Overpayment of salaries and benefits
 - 3.4. HDMF Housing Loans Arrearages
 - 3.5. Applicable EPP Emergency Loans
 - 3.6. Other Receivables from the covered employees due to HDMF
4. Processing of the OUPI shall be centralized.

EMPLOYEES' ORGANIZATIONAL UNIT PERFORMANCE RATING

Position/Salary Grade	Basis of Rating
Rank and File employees up to Division Chief and equivalent positions, employees with SG 23 to 25 assigned at Legal and General Counsel Group and Internal Audit Services Group	Rating of divisions or equivalent organizational units
Assistant Department Manager	Rating of the Department/ Branch
Department Manager and Staff assigned at the ODM	<p>Rating of the Department/ Branch / MSB / HBC</p> <p><u>For Support and Executive Offices Groups</u></p> <p>60% Department Rating plus 40% Corporate Performance Rating</p> <p><u>For Branches</u></p> <p>60% Division/Organizational Unit Rating plus 40% Branch Rating</p> <p><u>For HBCs</u></p> <p>60% Division/Organizational Unit Rating plus 40% Branch Rating</p> <p><u>For Other Units</u></p> <p>Aggregate Rating of concerned organizational units</p>
IOG Information Officers	Rating of the concerned Department
Vice President / Senior Vice President	Average rating of concerned Departments / Groups / Sectors
Staff assigned at the OVP / OSVP / ODCEO / OCEO	Aggregate Rating of concerned organizational units
VP and Corporate Board Secretary, Staff of the Offices of the Board of Trustees and Corporate Secretary	Corporate Performance Rating
Senior Management Committee (except CEO)	<p><u>DCEO for Operations (MSO and Home Lending)</u></p> <p>60% Organizational Rating plus 40% Corporate Performance Rating</p> <p><u>DCEO for Support Groups</u></p> <p>Aggregate Rating of Concerned Clusters/Sectors</p> <p><u>Chief Legal Counsel and SVP of Admin. Services Sector</u></p> <p>Aggregate Rating of Concerned Units/Groups</p>
Chief Executive Officer	Corporate Performance Rating or Aggregate Rating of Organizational Units, whichever is higher