

Component					Baseline			Target		
	Objective/Measure	Formula	Weight	Rating System	2012	2013	2014	2015	2016	
Social Impact	<b>SO 1</b>	<b>Generate Investment and Foreign Exchange</b>								
	SM 1	Annual Foreign Currency Generated from Visa Deposit	Gross Visa Deposit – Visa Deposit of Cancelled Membership	5%	Actual / Target x Weight	\$22.770 Million	\$28.486 Million	\$38.81 Million	\$38.25 Million	\$50 Million
	SM 2	Establish a System that will Monitor the Actual Expenditures of Retirees (spend on conversion, household, services medical, etc.)		5%	All or Nothing	n/a	n/a	n/a	Management-approved Monitoring System	Establish Baseline
		<b>Sub-total</b>		<b>10%</b>						
Stakeholder	<b>SO 2</b>	<b>Retirees with Excellent PRetA Experience</b>								
	SM 3	Customer Satisfaction Rating		5%	Below Satisfactory = 0%	n/a	n/a	n/a	Satisfactory or its Equivalent Percentage	Satisfactory or its Equivalent Percentage
	<b>SO 3</b>	<b>Improve Customer Loyalty</b>								
	SM 4	Retention Rate for the Year	[1-(Withdrawal at the end of rating period / Net Enrollment Beginning Balance)] x 100%	10%	<95% - Poor = 0% 95-96.9 – Good = 5% 97 and above – Excellent 10%	95.95%	95.99%	96.00%	≥97%	≥97%
Stakeholder	<b>SO 4</b>	<b>Increase Total Enrollees</b>								
	SM 5	Net Enrollment for the Year	Net Enrollment at the End of Rating Period	15%	Actual / Target x Weight	2,573	3,076	3,956	4,250	5,100
	<b>SO 5</b>	<b>Increase Number and Productivity of Industry Partners</b>								
	SM 6	Number of Principal Retirees enrolled by Marketers at the end of the rating period	Absolute Number	5%	Actual / Target x Weight	1,409	1,614	2,209	2,000	2,500
	<b>Sub-total</b>		<b>35%</b>							
Financial	<b>SO 6</b>	<b>Maintain Financial Viability</b>								
	SM 7	Revenue Generated	Absolute Amount	10%	Actual / Target x Weight	P346.23 Million	P413.42 Million	P525.36 Million	P588.32 Million	P660.73 Million
	<b>SO 7</b>	<b>Maximize Revenues</b>								
	SM 8	Net Operating Income	Revenues + Interest Income from Visa Deposit – Operating Expenses	10%	Actual / Target x Weight	P218 Million	P280.05 Million	P356.77 Million	P373.58 Million	P414.41 Million
	<b>Sub-total</b>		<b>20%</b>							

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Internal Process	<b>SO 8</b>	<b>Intensify Marketing and Promotion Campaign</b>								
	SM 9	Percentage of Marketing and Promotion Activities Conducted based on the Board Approved Marketing Activities Programmed for the	Marketing and Promotion Activities Conducted/ Total Marketing and Promotion Activities Programmed for the	5%	Actual / Target x Weight	n/a	n/a	n/a	95% <i>(Marketing Plan based on PPMP)</i>	95% realization of targets set in the marketing plan
	<b>SO 9</b>	<b>Improved Marketing Process</b>								
	SM 10	Percentage Increase in the number of Walk in Principal Member with Approved Applications	(Current year actual – Prior year actual) / Prior Year Actual x 100	5%	Actual / Target x Weight	-9.09%	24.13%	6.67%	10%	16%
	<b>SO 10</b>	<b>Improved After-Enrollment Services</b>								
	SM 11	Number of Retirees availing of Post-enrollment Services	Absolute Amount	5%	Actual / Target x Weight	9,240	11,069	13,960	16,592 <i>(ID Renewal &amp; Re-stamping)</i>	90% of requests with complete documents are processed
	SM 12	Number of New Services/ Programs/Activities Introduced/Launched	Actual Amount	5%	Actual / Target x Weight	2	2	2	2	<i>for replacement in 2016</i>
		Average Number of Post Enrollment Services availed of per Retiree	Average Number of Post Enrollment Services availed of per Retiree							Establish baseline
	<b>Sub-total</b>		<b>20%</b>							
Learning and Growth	<b>SO 11</b>	<b>Quality Management System</b>								
	SM 13	ISO 9001 Accreditation		10%	All or Nothing	n/a	n/a	n/a	ISO Certification all sites all processes	Maintain ISO Certification
	<b>SO 12</b>	<b>Improve Competency of the Workforce</b>								
	SM 14	Development of Board-approved Competency Framework		5%	All or Nothing	n/a	n/a	n/a	Submission of Competency Framework and Tables not later than December 2015	Implementation of Competency model and establishment of baseline
	<b>Sub-total</b>		<b>15%</b>							
	<b>TOTAL</b>		<b>100%</b>							