	PRA POLICY	Document No: PRA-SD-POLC-0001
	Guidelines in the Management of Social Integration Programs (SIPs)	Revision Date: 0001 Effective Date: October 2024
	Projects, Events, Activities and Initiatives under the Philippine Retirement Experience	No. of Pages: 14

I. LEGAL BASIS

United Nations World Tourism Organization (UNWTO) **“Tourism Strategy”** under the UN Sustainable Development Goal No. 3 (Good Health and Wellbeing): “To promote active lifestyle by experiencing the natural, rural, and urban outdoors, as well as traditional, conventional, and adventure sports.”

Section 3(b), Executive Order No. 1037, defines the purpose and objectives of PRA in relation to the conduct of social integration projects, events, and initiatives under the PRA Retiree Care Program (RCP), emphasizing the need for PRA to adopt an integrated approach in the development and establishment of retirement communities in the country considering the eleven (11) basic needs of man.¹ According to Presidential Decree No. 1396, man's basic needs include sports and recreation.

PRA Vision: By 2030, the Philippines is envisioned to become a globally competitive and leading retirement destination in Southeast Asia.

II. BACKGROUND

To successfully achieve PRA Vision 2030, the PRA is bound, not just to expand the SRRV community, but to ensure that its members get the best experience of the Philippines as their second home through a sustainable retiree monitoring and care program.

The Retiree Care Program (RCP) captures all components of an integrated, sustainable, and practical mechanism of providing care to resident retirees, in compliance to the mandate of providing the **“best quality of life² to the targeted retirees in a most attractive retirement package.”**

III. POLICY OBJECTIVE

The policy guidelines shall provide a structure for all PRA offices, officials, and personnel, including third party contractors, on the implementation and administration of social integration projects and initiatives for the SRRV community. The policy aims to ensure good governance and the effective, efficient, and ethical execution of all retiree Social Integration Programs such as projects, events, activities and initiatives.

¹ Such as water, power, food, clothing, shelter, **medical services, education, sports and recreation**, economic base (livelihood), mobility and ecological balance

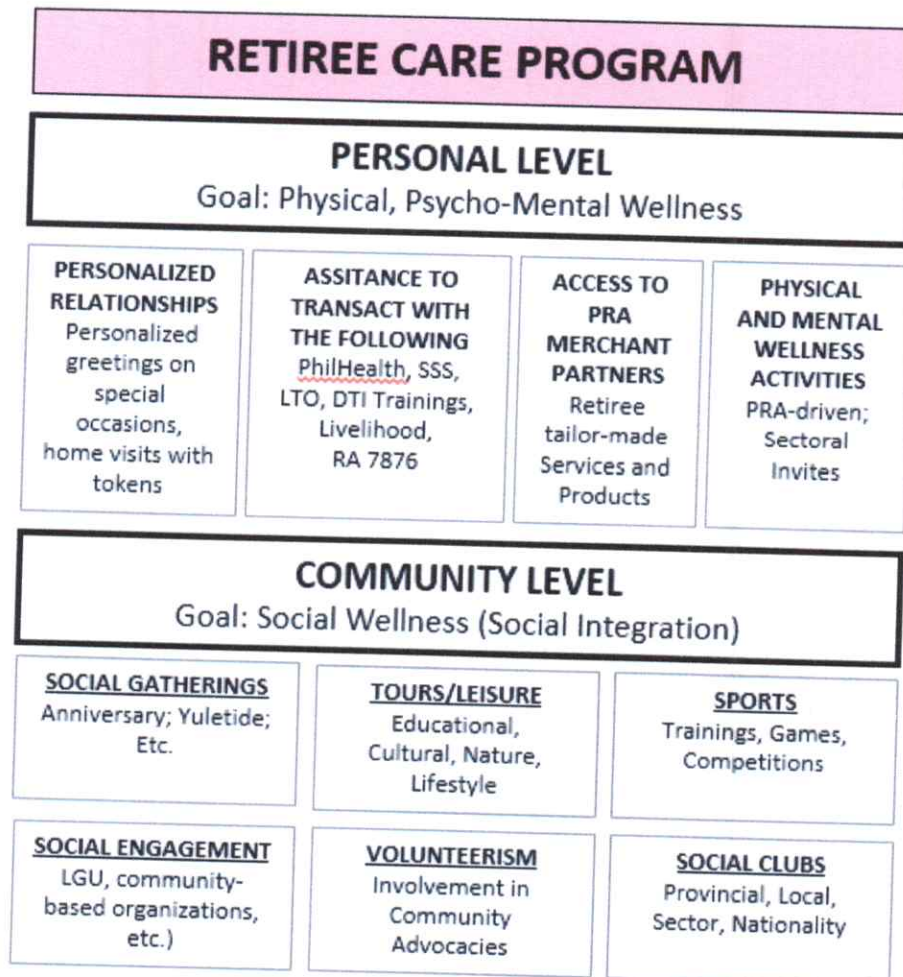
² Happy Retiree

IV. SCOPE

This policy shall apply to all Social Integration Programs such as projects, events, activities and initiatives funded and organized by the PRA.

V. DEFINITION OF TERMS

1. **Retiree Care Program** – is a holistic 2-tier program (strategic initiative) that addresses retiree needs at a Personal Level and Community Level. The program is anchored on the campaign, “Care. Connect. Communicate,” which is designed to create a supportive and nurturing environment for retirees. On a personal level, it embodies caring for retirees’ physical, emotional, mental, social, and security needs through a consistent and institutionalized monitoring system of their conditions and wellbeing. It is about maintaining regular contact with retirees on a personal level and establishing sound feedback mechanisms and providing prompt answers and timely updates on relevant information, such as changes in policies, services, or events they need to get involved in. On a community level, it is about connecting retirees with local community support networks to better access the local care services for a rewarding and fulfilling retirement experience.



2. **Social Integration Program (SIP)** – is a community-level Philippine Retirement Experience, aimed at ensuring the social wellness and positive social wellbeing of resident retirees.
3. **Philippine Retirement Experience (PRE)** – inspired by the DOT’s Philippine Experience Program³, PRE aims to showcase and celebrate the rich culture, heritage, and arts of the Philippines. With PRE, retirees are encouraged to experience the best of the Philippines through SIPs projects that revolve around six (6) PRE focused areas⁴ held throughout the Philippines.
4. **Retiree** – as defined in EO 1037, they are referred to as resident retiree or someone who has been issued a Special Resident Retirees’ Visa (SRRV)
5. **Happy Retiree** – refers to a delighted⁵ retiree that enjoys programs aimed to provide them the best quality of life while staying in the Philippines.
6. **Retiree Retention Strategy** – is a set of actions and mechanisms to produce a Happy Retiree whose wellbeing is cared for and whose community is welcoming and engaging, with the end goal of fulfilling PRA’s raison d’être—contributing to the Philippines’ economic stability by generating foreign exchange reserves through the Special Resident Retiree’s Visa (SRRV) program.

VI. PERFORMANCE MEASUREMENT FOR THE 6 PRE FOCUSED AREAS

Description	Indicators	Means of Verification	Assumptions
<p>Social Gatherings: Foster social connections among retirees and locals through organized social and group events.</p> <p>Social gatherings are opportunities for retirees to reunite, exchange culture, develop fellowship, and appreciate the Filipino culture and traditions. There are two (2) notable celebrations that retirees look forward to: The PRA anniversary parties allow retirees to network with fellow retirees, potentially leading to partnerships, new friendships, or business opportunities. The yearly Retiree Yuletide celebration symbolizes the</p>	<ul style="list-style-type: none"> ▪ Number of happy retirees who attended or benefited from the SIP 	<ul style="list-style-type: none"> ▪ Event attendance records ▪ Post-activity retiree feedback 	<p>Retirees find events socially and culturally enriching and accessible.</p>

³ <https://7641islands.ph/philippine-experience/#:~:text=The%20Philippine%20Experience%20program%20is,and%20arts%20of%20the%20Philippines.>
⁴ Refer to Presidential Decree No. 1396’s 11 basic needs of man
⁵ As per Quality Management System (QMS) Manual PRA-QM-QMNL-001

<p>deep cultural significance of Christmas to every Filipino family, as it is an opportunity to let them feel and enjoy the Filipino-style Christmas celebration.</p>			
<p>Tours/Leisure: Encourage retirees to explore and experience local culture, heritage, and natural wonders.</p> <p>Tours and leisure activities provide opportunities for retirees to explore the country's rich culture, heritage, and natural wonders. Exploring and learning about new places and cultures can stimulate the elderly mind and prevent cognitive decline. Most of these activities involve physical activity, such as hiking, swimming, or biking, improving the overall health and well-being of retirees, as proven in many studies found in <i>The Journals of Gerontology</i> and <i>Ageing & Society</i>.</p>	<ul style="list-style-type: none"> ▪ Number of happy retirees who attended or benefited from the SIP 	<ul style="list-style-type: none"> ▪ Tour records ▪ Post-activity retiree feedback 	<p>Retirees find tours educational.</p> <p>Retirees find the activity satisfying and pleasurable.</p> <p>May attribute to the promotion of SRRVisa.</p>
<p>Sports: Promote health and community engagement through sports activities.</p> <p>Retirees' engagement in sporting activities has tremendous impact on their health and well-being. The National Institutes of Health (NIH) and the International Osteoporosis Foundation (IOF) did extensive research supporting the benefits of sports on osteoporosis prevention and management, emphasizing the role of weight-bearing exercise. Lee, I. M., et al (2000), among many studies, proved that even moderate levels of aerobic exercise and activities are</p>	<ul style="list-style-type: none"> ▪ Number of happy retirees who attended or benefited from the SIP 	<ul style="list-style-type: none"> ▪ Event attendance records ▪ Post-activity retiree feedback 	<p>Retirees are physically capable and interested in participating in sports.</p> <p>Retirees find the activity satisfying and pleasurable.</p> <p>May attribute to the promotion of the SRRVisa.</p>

<p>associated with a significant reduction in all-cause mortality, including cardiovascular mortality.</p>			
<p><u>Community Engagement:</u></p> <p>Strengthen relationship between retirees and local communities to foster integration. To maximize access to opportunities within their locality, the PRA shall partner with respective Local Government Units or other community-based organization.</p> <p>Club systems in the SRRV community provide platforms for retirees to foster social connections and network, personal growth, and shared goals. In collaboration with LGUs or other community-based organization, the PRA can initiate the establishment of a club system per province or city, or the PRA may organize SRRV [Nationality] Club System, in partnership with existing country organizations in the Philippines.</p>	<ul style="list-style-type: none"> ▪ Number of happy retirees who attended or benefited from the SIP 	<ul style="list-style-type: none"> ▪ Activity participation records ▪ Post-activity retiree feedback 	<p>Awareness of retirees that LGUs are existing in their community which may immediately cater to their needs.</p>
<p><u>Volunteerism:</u> Create opportunities for retirees to contribute to local communities through volunteer work.</p> <p>The PRA to organize volunteerism works for the retirees, in partnership with NGOs and public entities. Anderson N, et al (2014) reviewed 113 studies revealing that volunteering among the elderly is associated with reduced symptoms of depression, better self-reported health, fewer functional</p>	<ul style="list-style-type: none"> ▪ Number of happy retirees who attended or benefited from the SIP 	<ul style="list-style-type: none"> ▪ Event attendance records ▪ Post-activity retiree feedback 	<p>Sufficient volunteer opportunities exist, and retirees are motivated to contribute.</p>

<p>limitations, and lower mortality. The extant evidences provide that volunteering increases social, physical, and cognitive activity (to varying degrees depending on characteristics of the volunteer placement), which, through biological and psychological mechanisms, leads to improved functioning; that these volunteering-related functional improvements should be associated with reduced dementia risk.</p>			
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Other activities may be included depending on the needs assessment result and direction of the PRA management during a calendar year.

Attached hereto as **Annex A** is the general guideline to measure the performance of Social Integration Activities. This guideline may be modified or improved depending on the needs of the project.

VII. POLICY COMPONENTS

1. **Classification** – Social integration projects, events, and initiatives are pockets of SRRV member engagements that cater to the Tier-2 (community-level) Retiree Care Program (RCP).
2. **Membership Information** - Social integration projects, events, and initiatives must include PRA orientation or informative opportunities on membership obligation compliance regulations, and other important PRA guidelines and announcements.
3. **Inclusivity** - All retirees are welcome to participate in social integration projects, events, and initiatives, regardless of their background, interests, conditions, or abilities.
4. **Event Diversity** - Projects, events, and initiatives should offer a variety of activities and experiences to cater to diverse interests and preferences.
5. **Accessibility** - Projects, events, and initiatives should be accessible to all retirees, including those with disabilities.
6. **Engagement** - Projects, events, and initiatives should foster meaningful interactions and connections among retirees, or together with an identified community, sector, or group of people whose network and collaboration is beneficial to the retirees.
7. **Budget** - Projects, events, and initiatives should be planned and executed within a designated budget. Due to limited funds, every social integration program, project, and event shall define parameters for retiree participation in its Project Plan or Terms of Reference.

VIII. PLANNING AND ORGANIZING

1. **Needs Assessment** - All social integration projects, events, and initiatives must be anchored on evidence-based studies. The annual conduct of an information gathering and cost-benefit analysis through means such as email, interview, past studies, related literature, and survey results to determine the needs, wants and gaps shall be prerequisite before implementing SIPs. Refer to Annex A.
2. **Planning** – The Resident Retiree Servicing Department (RRSD), together with its Servicing Division and Satellite Offices are the authority in the planning and formulation of retiree-related projects, events, and initiatives.

The plan should include the following components, among others:

- 2.1 Date, time, and location
 - 2.2 Activity deck, theme, or focus
 - 2.3 Activities and entertainment
 - 2.4 Budget
 - 2.5 Logistics (e.g., transportation, catering, facilities)
 - 2.6 Other offices' collaboration and participation
3. **Integration and Collaboration** - All social integration projects, events, and initiatives shall serve as a platform for other offices to promote their programs/interests. Thus, it is encouraged that other offices which would need the retiree community's support must join to maximize the opportunities to promote SRRV and all its programs/interventions.
 4. **Media, Publicity, and Communication**: All social integration projects, events, and initiatives shall be promoted to add value to the SRRV program; it shall capitalize on the use of social media to promote the events for much greater visibility.
 5. **Marketing Purposes** – The use of any part of the program content for PRA marketing purposes must be clearly communicated to the participants, and should require retiree concurrence/approval.
 6. **Budget** - The PRA must allocate an adequate amount for social integration projects, events, and initiatives. Expenses must be carefully managed to stay within the allocated budget.

IX. EVENT EXECUTION

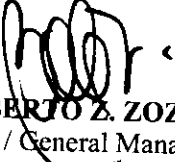
1. **Participation** - Retirees attending the projects, events, and initiatives are encouraged to confirm their attendance in advance, adhere to event rules, and actively engage in activities. An online pre-registration is a must to measure in advance the perception or interests of the retiree in advance.
2. **Retirees' Safety** - Venues must ensure the safety, accessibility, and well-being of retirees, especially for those with mobility concerns or health issues. It should comply with safety regulations, including fire safety and medical emergency preparedness. To ensure the comfort and safety of retirees, it should have accessible restrooms, seating, and adequate lighting.
3. **Accommodation** – Should there be a need to provide hotel accommodation and food, this should not be unconscionable, and extravagant.

4. Mandatory Health and Safety Waiver – All participants to social integration projects, events, and initiatives of PRA shall undertake a Waiver. A designated first-aid or medical response team must be present at all venues.
5. Partnership/Sponsorship – PRA may collaborate with entities for partnership and/or sponsorship. Any sponsorship must be disclosed and approved to avoid conflicts of interest.⁶
6. Event Organizer – The PRA may hire an event organizer to organize and execute PRA-funded social integration projects, events, and initiatives, subject to RA 9184.
7. PRA Personnel Assignment – The PRA shall assign personnel to assist and ensure that every touchpoint of the activity is conducted accordingly.
8. Feedback Mechanism (Evaluation): All social integration projects, events, and initiatives must conduct a post-event evaluation to gather feedback and identify areas for improvement. This feedback is used to make adjustments and improvements to future events.

Any issuance inconsistent with this policy is hereby superseded.

The Resident Retiree Servicing Department (RRSD) shall be the primary responsible unit for the implementation of this Order. The Administration and Finance Services Department shall be responsible for the circularization of this Order.

This Circular shall take effect 15 days after the completion of its registration with the National Administrative Register (ONAR) at the U.P. Law Center.


ROBERTO Z. ZOZOBRA DO
CEO / General Manager

⁶ As per EO 1037, Sec. 11

GUIDELINE IN MEASURING THE PERFORMANCE OF SOCIAL INTEGRATION PROGRAMS

Stage 1: Determination of Purpose:

Purpose must satisfy the PRA's mandate to provide the **best quality of life** to retiree-members by providing activities that will support a Happy Retiree.

Stage 2: Needs Assessment

Annual conduct of an information gathering and cost-benefit analysis through means such as email, interview, past studies, related literature, and survey results determining the needs and wants before implementing the set of SIPs that will be included in the Plans and Programs (PAPs) for a given calendar year.

Stage 3: Project Plan

The project plan will be created based on the PRE focused area and an objective specific to the event.

Stage 4: Implementation of the Plan

Pre-event

- Each project shall abide by prevailing procurement rules and regulations.
- Success indicators and means of verification must be identified for each activity.

During

- Implementation will be guided by the approved project plan.

Post-event

- Each project shall abide by prevailing procurement rules and regulations.
- Success of the objective will be measured through indicators and means of verification such as but not limited to survey results.

Stage 5: Post-Event Report [Feedback Mechanism]

Output: A narrative post-event report to determine project success.

The result of the post-event survey, in comparison with the pre-event survey, will be used in measuring the key performance indicator.

Cost-Benefit Analysis of Social Integration Projects for SRRV Members

SHORT TERM TARGET = HAPPINESS AND SATISFACTION

On a short term, Social Integration Projects (SIP) are aimed to enhance the happiness and satisfaction of SRRV members, citing the **Organizational Commitment Theory** that individuals who are emotionally attached to and identify with an organization are more likely to stay⁷. This commitment can manifest in an individual's emotional attachment to the organization, based on a feeling of identification and loyalty. It also speaks about a continuance commitment where a person stays in an organization based on the perceived loss of benefits when leaving the organization.

This concept of members' satisfaction leading to staying in an organization is further corroborated by **Social Exchange Theory** where individuals tend to assess the costs and benefits of membership in a program or organization, and are more likely to stay if the benefits or rewards outweigh the costs. It is about relationship stability where relationships are likely to be stable if both parties feel that they are getting a fair deal⁸.

LONG TERM TARGET = RETENTION

On a long-term, Social Integration Projects (SIP) are designed to enhance the retention of SRRV members because "membership retention" is a decision-making process.

Retention is neither an instant outcome of an action, nor a single event -- but a cumulative result of various factors over time. It is a long-term process, and requires consistent efforts to create a positive environment, enhance satisfaction, and ultimately improve retention rates.⁹ Retention requires a sustainable investment of adequate resources for SIP.

Citing **Impact Investing Theory** of Jeffrey Sachs which seeks to generate both financial returns and a positive societal impact, **PRA must invest in SIP because these make measurable difference in areas such as tourism and economy.**¹⁰

A study on the role of social integration in the success of retirement communities found that social integration activities are essential for creating a sense of community and attracting retirees to these locations, and thus, contribute to the success of retirement communities.¹¹

This study is substantiated by Johnson, R. (2008) proving the importance of social integration for the well-being of retirees, comprehensively discussing the benefits of social activities and how retirement communities can foster a sense of belonging.¹²

Social integration activities can help to attract retirees to a destination and boost local economic development, claimed by a study that compared the impact of retirement tourism on local economies in different countries.¹³ A study that examined the economic impact of retirees on a retirement

⁷ Meyer, J. P., & Allen, N. J. (1997). Commitment to the organization: The construct validation of a measure. *Journal of Applied Psychology*, 82(1), 527-554.

⁸ Blau, P. M. (1964). *Exchange and power in social life*. New York: Wiley.

⁹ Schein, E. H. (1992). Organizational culture. *American Psychologist*, 47(2), 109-119.

¹⁰ Sachs, J. D. (2019). *The age of sustainable development: Solving the poverty and climate crisis*. Columbia University Press.

¹¹ Jones, M., & Smith, J. (2012). "The Impact of Retirement Tourism on Local Economies: A Comparative Analysis"

¹² Johnson, R. (2008). "Social Integration and Well-being in Retirement Communities"

¹³ Lee, S., & Kim, H. (2015). "The Impact of Retirement Tourism on Local Economies: A Comparative Analysis"

community in South Africa found that retirees contribute significantly to the local economy through their spending, property purchases, and involvement in community activities.¹⁴

Butler, R. N. (2010) discussed the future of retirement and the changing needs of retirees, claiming the importance of social integration activities for promoting active aging and enhancing the quality of life for retirees.¹⁵

CBA ESTIMATED IN THE ABSENCE OF BASELINE DATA

Given the lack of baseline data, the retiree-participants' feedback¹⁶ from the 2024 Anniversary celebration provides valuable glimpse into the SIP's potential benefits, including net benefits.

Taking as a case the 2024 Anniversary celebrations in four Satellite Offices attended by about 600 retirees and their dependents, below is the Cost-Benefit Analysis (CBA).

Potential Direct Cost

P3,000,000.00 spent for project development and implementation, personnel, time, and financial resources from the PRA to manage and execute the programs

Potential Net Benefits

A survey about the SIP participants' projection on the number of years staying in the SRRV program as shown in Figure 1 indicate that a big majority, accounting for 90.90% of the 55 respondents, foresee staying in the program for over 10 years.

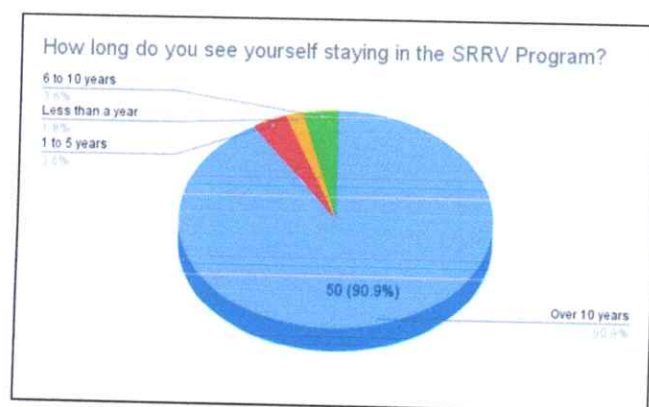


Figure 1 Number of years foreseen to stay in the SRRV program

Using the Annual PRA Fee in the calculation of net benefits, Table 1 estimates the minimum net benefits vis-à-vis direct cost of P3,000,000.00.

¹⁴ Van der Merwe, A., & Du Plessis, A. (2007). "The Economic Impact of Retirees on Local Communities: A Case Study of Sun City, South Africa."

¹⁵ Butler, R. N. (2010). "The Future of Retirement: Trends and Opportunities"

¹⁶ 55 retiree-respondents

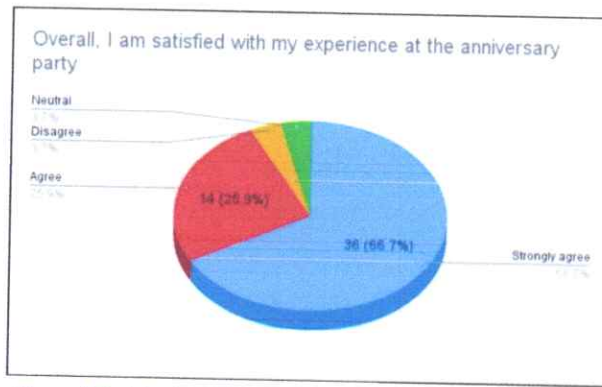


Figure 3 Satisfaction of SIP experience

2. Positive Country Image and Economic Development Contribution

Figure 4 indicates that a big majority (70.4%) of the respondents enjoyed the cultural experience of the event. With this, the SIP is a potent tool to enhance the Philippines' reputation as a desirable retirement destination, which redounds to contributing to the country's economic growth. This was claimed by a study that compared the impact of retirement tourism on local economies in different countries, noting that social integration activities can help to attract retirees to a destination and boost local economic development.¹⁹

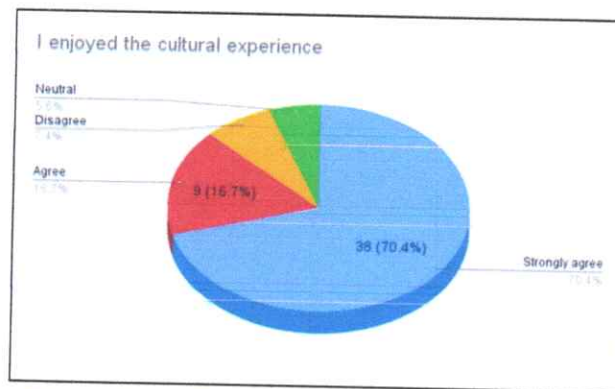


Figure 4 Cultural Experience brought about by the SIP

¹⁹ Lee, S., & Kim, H. (2015). "The Impact of Retirement Tourism on Local Economies: A Comparative Analysis"

3. Strengthened Relationships

Figure 5 indicates that a majority (46%) of the respondents strongly agree that the SIP strengthened their connections with fellow retirees, while another 22% agree of this SIP impact to the retirees. This positive impact to retirees can strengthen loyalty to the SRRV program, citing Organizational Commitment Theory that individuals who are emotionally attached to and identify with an organization are more likely to stay²⁰.

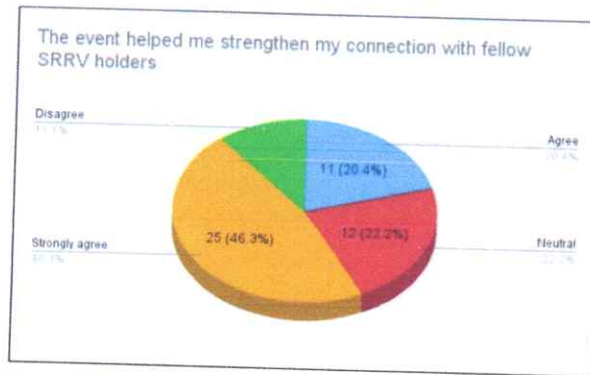


Figure 5 SIP Strengthens relationships and connections with SRRV holders

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²⁰ Meyer, J. P., & Allen, N. J. (1997). Commitment to the organization: The construct validation of a measure. *Journal of Applied Psychology*, 82(1), 527-554.