

**PHILIPPINE RETIREMENT AUTHORITY  
2015 Performance Scorecard**

Component					PRetA Submission		GCG Evaluation		Supporting Documents	Remarks	
Objective/Measure	Weight	Rating System	2015 Target	Actual	Rating	Score	Rating				
<b>Social Impact</b>	<b>SO 1</b>	<b>Generate Investment and Foreign Exchange</b>									
	SM 1	Annual Foreign Currency Generated from Visa Deposit	5%	Actual / Target x Weight	\$38.25 Million	\$36.32 Million	4.75%	\$36.32 Million	4.75%	Report on Investment Deposit and Withdrawal	Acceptable
	SM 2	Establish a System that will Monitor the Actual Expenditures of Retirees (spend on conversion, household, services medical, etc.)	5%	All or Nothing	Management-approved Monitoring System	Approved by Management to be implemented in 2016	5.00%	Approved by Management to be implemented in 2016	5.00%	Monitoring System prepared by the Corporate Planning Division	Acceptable
		<b>Sub-total</b>	<b>10%</b>				<b>9.75%</b>		<b>9.75%</b>		
<b>Stakeholder</b>	<b>SO 2</b>	<b>Retirees with Excellent PRetA Experience</b>									
	SM 3	Customer Satisfaction Rating	5%	Below Satisfactory = 0%	Satisfactory or its Equivalent Percentage	On-going Procurement Process	0.00%	On-going Procurement Process	0.00%		Acceptable
	<b>SO 3</b>	<b>Improve Customer Loyalty</b>									
	SM 4	Retention Rate for the Year	10%	<95% - Poor = 0% 95-96.9 – Good = 5% 97 and above –	≥97%	96.85%	9.98%	96.85% Net enrollees beginning 2015 = 27,815 Cancellation during 2015 = 875	5.00%	Report on Enrollment and Cancellation of PRA Participants	Revised the rating based on the agreed rating system

Component				2015 Target	PRetA Submission		GCG Evaluation		Supporting Documents	Remarks
Objective/Measure	Weight	Rating System	Actual		Rating	Score	Rating			
			Excellent 10%							
<b>SO 4</b>	<b>Increase Total Enrollees</b>									
SM 5	Net Enrollment for the Year	15%	Actual / Target x Weight	4,250	4,155	14.66%	4,155	14.66%	Report on Enrollment and Cancellation of PRA Participants	Acceptable
<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	5%	Actual / Target x Weight	2,000	2,070	5.00%	2,070	5.00%	Report on Enrollment Scheme	Of the total 2,497 principal retirees enrolled, 82% were enrolled thru Marketers commissioned by PRetA.
	<b>Sub-total</b>	<b>35%</b>				<b>29.64%</b>		<b>24.66%</b>		
<b>SO 6</b>	<b>Maintain Financial Viability</b>									
SM 7	Revenue Generated	10%	Actual / Target x Weight	P588.32 Million	P655.37 Million	10.00%	P655.37 Million	10.00%	Unaudited Income Statement	Acceptable
<b>SO 7</b>	<b>Maximize Revenues</b>									
SM 8	Net Operating Income	10%	Actual / Target x Weight	P373.58 Million	P459.98 Million	10.00%	P459.98 Million	10.00%	Unaudited Income Statement	Acceptable
	<b>Sub-total</b>	<b>20%</b>				<b>20.00%</b>		<b>20.00%</b>		

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Objective/Measure	Weight	Rating System	2015 Target	Actual	Rating	Score	Rating				
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 Plan	5%	Actual / Target x Weight	95% (Marketing Plan based on PPMP)	96.52%	5.00%	96.52%	5.00%	Approved PPMP and accomplishment report	Acceptable
	<b>SO 9</b>	<b>Improved Marketing Process</b>									
	SM 10	Percentage Increase in the number of Walk in Principal Member with Approved Applications	5%	Actual / Target x Weight	10%	11.20%	5.00%	11.20%	5.00%	Report on Enrollment Scheme	Acceptable
	<b>SO 10</b>	<b>Improved After-Enrollment Services</b>									
	SM 11	Number of Retirees availing of Post-enrollment Services	5%	Actual / Target x Weight	16,592 (ID Renewal & Re-stamping)	20,793	5.00%	20,793	5.00%	Monthly Report	Acceptable
	SM 12	Number of New Services/ Programs/Activities Introduced/Launched	5%	Actual / Target x Weight	2	2	5.00%	2 VIP Lounge in Airports and enrollment of retirees under the NHIP of PhilHealth	5.00%	Request letters for the use of VIP lounge  MOA of PRetA and PhilHealth	Acceptable
		<b>Sub-total</b>	<b>20%</b>				<b>20.00%</b>		<b>20.00%</b>		

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Objective/Measure	Weight	Rating System	2015 Target	Actual	Rating	Score	Rating				
Learning and Growth	<b>SO 11</b>	<b>Quality Management System</b>									
	SM 13	ISO 9001 Accreditation	10%	All or Nothing	ISO Certification all sites all processes	Not yet certified	0.00%	Not yet certified	0.00%	Acceptable	
	<b>SO 12</b>	<b>Improve Competency of the Workforce</b>									
	SM 14	Development of Board-approved Competency Framework	5%	All or Nothing	Submission of Competency Framework and Tables not later than December 2015	Submitted last 29 December 2015	5.00%	Competency Framework and Tables submitted last 29 December 2015	5.00%	Competency Framework	Acceptable
		<b>Sub-total</b>	<b>15%</b>				<b>5.00%</b>		<b>5.00%</b>		
	<b>TOTAL</b>	<b>100%</b>				<b>84.39%</b>		<b>79.41%</b>			