PHILIPPINE TAX ACADEMY (PTA)
Validated 2023 Performance Scorecard

		COMPONENT					PTA Submission		GCG Validated		Supporting Documents	Remarks
		Objective/Measure	Formula	Wt.	Rating System	Target	Actual	Rating	Score	Rating		
STAKEHOLDERS	**SO 1**	**Professionalization of Revenue Employees**										
	SM 1	Percentage of PTA Learners Who Have Demonstrated Positive Change in Behavior in Job Performance	PTA Learners with Improved Performance / PTA Learners Trained	5%	Actual / Target	60%	100%	5%	0.44% (32/7,242)	0.04%	1. Training Reports 2. Pre and Post Test Results 3. Learners Behavior Inventory Tool	PTA cites the difficulty in coordinating and cascading the post-test. Hence, it was only able to execute a pilot test to 32 learners.
	SO 2	**Improve Customer Satisfaction Rate**										
	SM 2	Percentage of Satisfied Customers	Number of Satisfied Respondents / Total Number of Respondents	10%	Actual / Target If less than 80% = 0%	90%	100%	10%	Non-compliant	0%	Endorsement of the Harmonized Client Satisfaction Measurement Results of GOCCs covered by RA 10149	PTA is considered as non-compliant due to its failure to report the required data under the Guidelines and failure to provide further means of verification
		Sub-total		15%				15%		0.04%		
FINANCE	**SO 3**	**Utilize PTA Budget Optimally and Strategically**										
	SM 3	Budget Utilization Rate (BUR) for All Programs Funded by NG Subsidy	Total Amount Obligated / Total Subsidy	2.5%	Actual / Target	90%	100%	2.5%	100%	2.50%	1. DBM-received SAOUB 2. COA-Audited Statement of Comparison of Budget and Actual Amounts	Subsidy: 73,199,353 Obligation: 73,199,353 Disbursement: 47,940,500
			Total Amount Disbursed / Total Obligations	2.5%	Actual / Target	90%	74.92%	2.08%	65.49%	1.82%		

Perspective	SO/SM	Strategic Measure	Formula	Weight	Rating System	Target		%		%	Means of Verification	Remarks
FINANCE	**SO 4**	**Strengthen PTA Financial Sustainability**										
	SM 4	Development of PTA Financial Sustainability Plan	Actual Accomplishment	5%	All or Nothing	Approved PTA Financial Sustainabi-lity Plan	Approved Financial Sustainabi-lity Plan	5%	Approved Financial Sustainabi-lity Plan	5%	1. Financial Sustainability Plan 2. Interim Guidelines on Training Fees PTA Memorandum Circular No. 011-2023	A Board-approved Financial Sustainability Plan was not required because of the absence of appointees in the PTA Board of Trustees.
			Sub-total	10%				9.58%		9.32%		
INTERNAL PROCESS	**SO 5**	**Adopt and Facilitate Good Governance to Enhance Operational Efficiency and Effectiveness**										
	SM 5	Develop Good Governance Compliance and Operations Manuals	Number of Manuals Developed	5%	Actual / Target	3	3	5%	3	5%	1. Employees Manual 2. Merit Selection Manual 3. Quality Management System Manual	
	SM 6	ISO Certification	Actual Accomplishment	5%	All or Nothing	ISO 9001:2015 Certification	Certainly Certifiable Assessment by DAP	0%	-	0%	1. DAP Certainly Certifiable Assessment Report 2. Timeline of activities of PTA relative to ISO activities	PTA exerted effort by taking the necessary steps to be ISO-Certified. However, the non-accomplishment of the target was not entirely due to factors outside PTA's control
	SO 6	**Efficient and Effective Administration of Learning and Development Programs**										
	SM 7	Enhance Feedback Monitoring and Evaluation System	Actual Accomplishment	10%	Actual / Target	Approved Revised Feedback Monitoring System	Approved Enhanced Feedback Monitoring and	10%	Approved Enhanced Feedback Monitoring and	10%	1. Copy of old Feedback Monitoring System 2. Copy of Enhanced	The enhanced FMES features a structured questionnaire that is more comprehensive than its predecessor.

								Evaluation System		Evaluation System		Feedback and Monitoring System	
INTERNAL PROCESS	SM 8	Number of L&D Programs/ Courses Developed thru the Application of Competency Outcome-Based Education and Learning approach	Number of Courses Developed	10%	Actual / Target	50	52		10%	53	10%	1. Course development guidelines 2. TWG Resolution recommending the approval of the PTA President to the 53 developed courses (dated 22 January 2024) 3. Certification endorsing the developed courses to the TWG 4. Memorandum approval of 2023 Course Packs for Implementation	Note that for the subsequent validation periods, a document timely signed by the President shall form part of the required supporting documents.
	SM 9	Number of Learners who have Completed the Competency Outcome-Based Education and Learning Programs	Total Learners Who Attended Various L&D Programs	10%	Actual / Target	5,000	7,242		10%	7,242	10%	1. Certificate of Completion (samples) 2. Attendance Sheets (with details) 3. Training Reports submitted to Bureaus 4. Summary of delivered courses and trained learners	The accomplishment can be attributed to the use of online platforms for the conduct of the COBEL programs, wherein a total of 5,174 learners of the 7,242 were online learners.

	SM	Strategic Measure	Formula	Weight	Basis						Means of Verification	Remarks
INTERNAL PROCESS	SM 10	Conduct of Research for Program Development and Innovations including Documentation of Tax Practices	Total Number of Researches Completed	5%	Actual / Target	1	1	5%	1	5%	1. Manuscript 2. Memorandum of approval of manuscript 3. Conference highlights	The research is entitled: "Revisiting Reform initiatives in the Philippine Revenue Sector: Basis for the Reinforcement of the PTA Integrity Education Program".
	SM 11	Develop Continuing Professional Development (CPD) Programs with Creditable Units Accredited by PRC	Total Count of PRC-Accredited CPD Course Implemented	5%	Actual / Target	1	4	5%	1	5%	Certificate of Accreditation	PTA implement the CPD program entitled "Tax Exemption on the Importation of Goods in the Philippines (for Aircrafts/Shipping and Cargo Vessels Sector)" which was accredited on 11 September 2023 with a duration of up to 10 September 2026. The other 3 programs submitted by PTA have not been implemented yet.
	SM 12	Uptime of L&D Program Portal	Total Minutes Available and Accessible Online (Uptime) Total Minutes of the Year	10%	Actual / Target	90%	100%	5%	100%	5%	1. Certification of portal uptime from DOF covering January to June 2023 2. Six (6) certification of service availability (monthly) covering July to December 2023	
	SO 7	Facilitate and Mainstream Good Governance Practices thorugh L&D Programs Implementation Levels and Areas for Overall Tax Administration, Efficiency, and Effectiveness										

	SO 8	**Establish Linkages with Domestic and International Academic Institutions**										
		Number of Partnerships with Academic Institutions for L&D Programs										
INTERNAL PROCESS	SM 13	a. Domestic Academic Institution	Total Partnership / Collaboration Initiatives with Academic Institution	5%	Actual / Target	1	2	5%	1	5%	1. Memorandum of Agreement between PTA and UPLB 2. Communication and endorsement letters to KOICA/KOICS 3. 2023 KOICA Course Information 4. Copy of authority to travel of PTA participants for KOICA 5. After-training report of PTA on KOICA/KOICS engagement	For the domestic academic institutions, PTA collaborated with the University of the Philippines Los Baños (UPLB) for the conduct of training programs for qualified employees and partner agencies. UPLB shall provide trainings, local and international continuing education courses, and study tours on the field of Environment and Natural Resources Management and Eco-governance. For its international partner academic institutions, PTA partnered with the Korea International Cooperation Agency (KOICA) through an exchange program for the development of courses and programs.
		b. International Academic Institution		5%	Actual / Target	1	Partnership with KOICA / KOICS	5%	1	5%		
			Sub-total	70%				60%		60%		
LEA	**SO 9**	**Strengthen Organizational Culture and Structure to Inspire Lifelong Learning, Growth, and Better Performance**										

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SM 14	Percentage of PTA Employees Meeting Required Competencies	Incumbents Meeting Required <u>Competencies</u> Filled plantilla	5%	Actual / Target	Establish Baseline	100%	5%	20%	5%	1. Competency Framework 2. Competency Mapping 3. PTA Competency Catalogue 4. Competency-based JDs	3 out of 15 filled plantilla employees met all the competencies required for their respective positions
		Sub-total	*5%*				*5%*		*5%*		
		TOTAL	**100%**				**89.58%**		**74.36%**		