

21 March 2023

MR. GIL S. BELTRAN
President
PHILIPPINE TAX ACADEMY (PTA)
Roxas Blvd. cor. Pablo Ocampo St
Malate, Manila 1004

**RE: TRANSMITTAL OF 2023 CHARTER STATEMENT AND
STRATEGY MAP AND PERFORMANCE SCORECARD**

Dear Secretary Diokno and President Beltran,

We respectfully furnish you the SIGNED 2023 PTA Charter Statement and Strategy Map (**Annex A**) and Performance Scorecard (**Annex B**).

Your compliance with GCG M.C. No. 2012-07 and GCG M.C. No. 2023-01 will be highly appreciated.

Very truly yours,


Justice ALEX L. QUIROZ (ret.)
Chairperson

cc: DOF Secretary BENJAMIN E. DIOKNO

PHILIPPINE TAX ACADEMY (PTA)



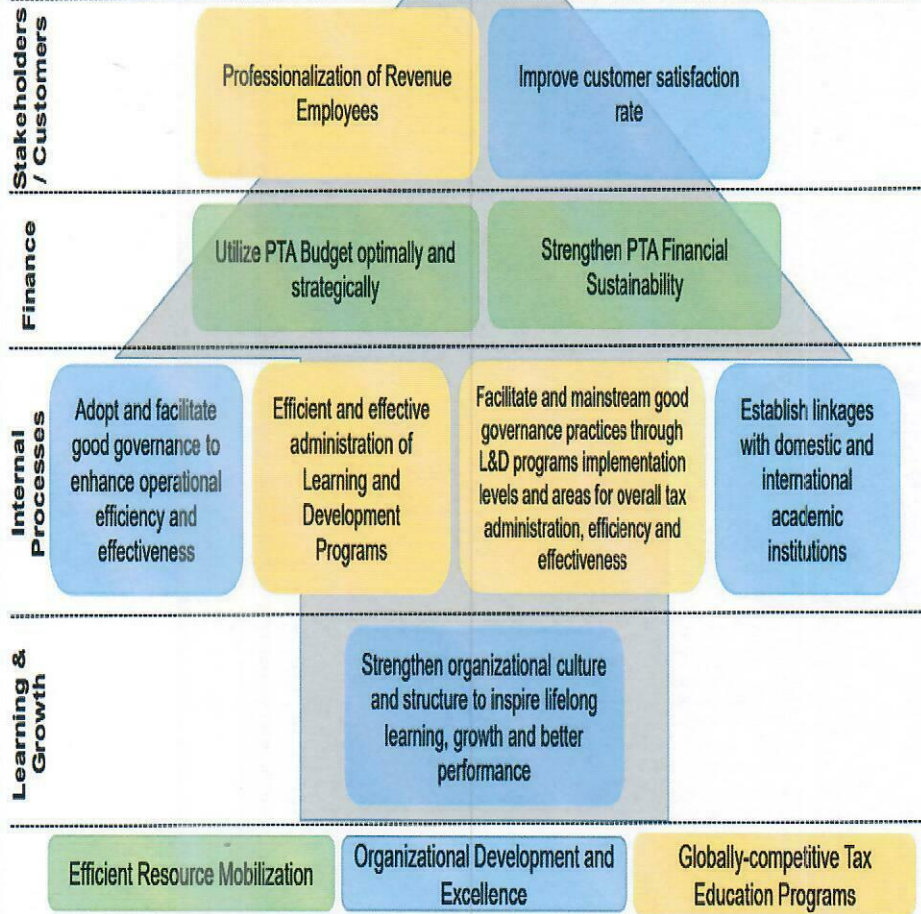
MISSION

A specialized institution that elevates competency and integrity of tax and customs collectors and administrators towards efficient tax collection

CORE VALUES

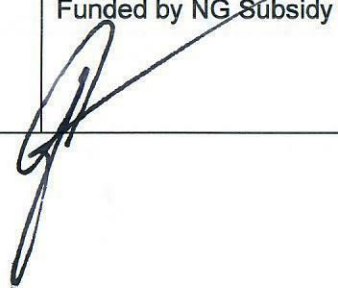
- Husay (Excellence/Competence)
- Giting (Valor/Patriotism)
- Katapatan (Integrity)
- Puso (Compassion)

VISION
By 2028, a world-class tax academy transforming institutions on customs, tax and public finance administration towards nation-building through professionalization of revenue employees

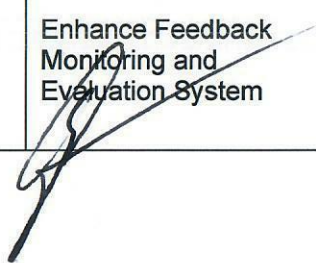


PHILIPPINE TAX ACADEMY (PTA)

Component					Baseline			Targets	
	Objective/Measure	Formula	Wt.	Rating System	2020	2021	2022	2023	
STAKEHOLDERS	SO 1	Professionalization of Revenue Employees							
	SM 1	Percentage of PTA Learners Who Have Demonstrated Positive Change of Behavior in Job Performance	PTA Learners with Improved Performance PTA Learners Trained	5%	Actual over Target	N/A	N/A	N/A	60%
	SO 2	Improve Customer Satisfaction Rate							
	SM 2	Percentage of Satisfied Customers	Number of Satisfied Respondents Total Number of Respondents	10%	Actual over Target Below 80% = 0%	N/A	N/A	N/A	90%
	Sub-total			15%					
	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 over Target	N/A	N/A	N/A	90%
			Total Amount Disbursed Total Obligations	2.5%	Actual over Target	N/A	N/A	N/A	90%




Component					Baseline			Targets	
	Objective/Measure	Formula	Wt.	Rating System	2020	2021	2022	2023	
FINANCE	SO 4	Strengthen PTA Financial Sustainability							
	SM 4	Development of PTA Financial Sustainability Plan	Actual Accomplishment	5%	All or Nothing	N/A	N/A	N/A	Approved PTA Financial Sustainability Plan
		Sub-total		10%					
	SO 5	Adopt and Facilitate Good Governance to Enhance Operational Efficiency and Effectiveness							
INTERNAL PROCESS	SM 5	Develop Good Governance Compliance and Operations Manuals	Number of Manuals Developed	5%	Actual over Target	N/A	N/A	N/A	3
	SM 6	ISO Certification	Actual Accomplishment	5%	All or Nothing	N/A	N/A	N/A	ISO 9001:2015 Certification
	SO 6	Efficient and Effective Administration of Learning and Development Programs							
	SM 7	Enhance Feedback Monitoring and Evaluation System	Actual Accomplishment	10%	All or Nothing	N/A	N/A	N/A	Approved Revised Feedback Monitoring System



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Component					Baseline			Targets	
	Objective/Measure	Formula	Wt.	Rating System	2020	2021	2022	2023	
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 over Target	N/A	N/A	N/A	50
	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 over Target	N/A	N/A	N/A	5,000
	SM 10	Conduct of Research for Program Development and Innovations including Documentation of Tax Practices	Total Number of Researches Completed	5%	Actual over Target	N/A	N/A	N/A	1
	SM 11	Develop Continuing Professional Development (CPD) Programs with Creditable Units Accredited by PRC	Total Count of PRC-Accredited CPD Course Implemented	5%	Actual over Target	N/A	N/A	N/A	1
	SM 12	Uptime of L&D Program Portal	Total Minutes Available and Accessible Online (Uptime) Total Minutes of the Year	10%	Actual over Target	N/A	N/A	N/A	90%

Component					Baseline			Targets	
	Objective/Measure	Formula	Wt.	Rating System	2020	2021	2022	2023	
INTERNAL PROCESS	SO 7	Facilitate and Mainstream Good Governance Practices through L&D Programs Implementation Levels and Areas for Overall Tax Administration, Efficiency, and Effectiveness							
	SO 8	Establish Linkages with Domestic and International Academic Institutions							
	SM 13	Number of Partnerships with Academic Institutions for L&D Programs							
		a. Domestic Academic Institution	Total Partnership / Collaboration Initiatives with Academic Institution	5%	Actual over Target	N/A	N/A	N/A	1
		b. International Academic Institution	Academic Institution	5%	Actual over Target	N/A	N/A	N/A	1
Sub-total		70%							
LEARNING AND GROWTH	SO 9	Strengthen Organizational Culture and Structure to Inspire Lifelong Learning, Growth, and Better Performance							
	SM 14	Percentage of PTA Employees Meeting Required Competencies	Incumbents Meeting Required Competencies Filled plantilla	5%	Actual over Target	N/A	N/A	N/A	Establish Baseline
	Sub-total		5%						
TOTAL			100%						

For GCG:


Justice ALEX L. QUIROZ (ret.)
Chairperson

For PTA:


MR. GIL S. BELTRAN
President