



15 February 2024

**HON. RALPH G. RECTO**

*DOF Secretary*

**HON. GIL S. BELTRAN**

*President*

**PHILIPPINE TAX ACADEMY (PTA)**

Roxas Blvd. cor. Pablo Ocampo St.

Malate, Manila 1904

**RE: TRANSMITTAL OF 2024 PERFORMANCE SCORECARD**

Dear Secretary Recto and President Beltran,

This is to formally transmit the 2024 Charter Statement and Strategy Map (**Annex A**) and 2024 Performance Scorecard (**Annex B**) of the **Philippine Tax Academy (PTA)**. The same is to be posted in **PTA's** website, in accordance with Section 43 of GCG Memorandum Circular (M.C.) No. 2012-07.<sup>1</sup>

The PTA-proposed Charter Statement and Strategy Map were **RETAINED** while the Performance Scorecard submitted through its letters dated 30 November 2023<sup>2</sup> were **MODIFIED** based on the discussions made during the Technical Panel Meeting (TPM) held on 21 December 2023, evaluation of revised documents submitted through letters dated 5 January 2024,<sup>3</sup> and finalized during the Performance Target Conference (PTC) held on 15 February 2024.

We remind PTA that Item 6 of GCG M.C. No. 2023-01<sup>4</sup> requires GOCCs to submit its Quarterly Targets within 15 calendar days from receipt of the GCG-approved Performance Scorecard. Moreover, Item 7 of the same Circular directs GOCCs to accomplish the requisite Quarterly Monitoring Reports detailing its progress in accomplishing its performance targets. The Quarterly Monitoring Reports should disclose substantial changes in circumstances that were unforeseen during the TPM that may affect the timely achievement of targets.

**FOR PTA'S INFORMATION AND COMPLIANCE.**

Very truly yours,

**ATTY. MARIUS P. CORPUS**

*Chairperson*

**ATTY. BRIAN KEITH F. HOSAKA**

*Commissioner*

**ATTY. GERALDINE MARIE B.  
BERBERABE-MARTINEZ**

*Commissioner*

<sup>1</sup> CODE OF CORPORATE GOVERNANCE FOR GOCCs, dated 28 November 2012.

<sup>2</sup> Officially received by the Governance Commission on 30 November 2023.

<sup>3</sup> Officially received by the Governance Commission on 05 January 2023.

<sup>4</sup> PERFORMANCE EVALUATION SYSTEM (PES) FOR THE GOCC SECTOR, dated 19 January 2023.



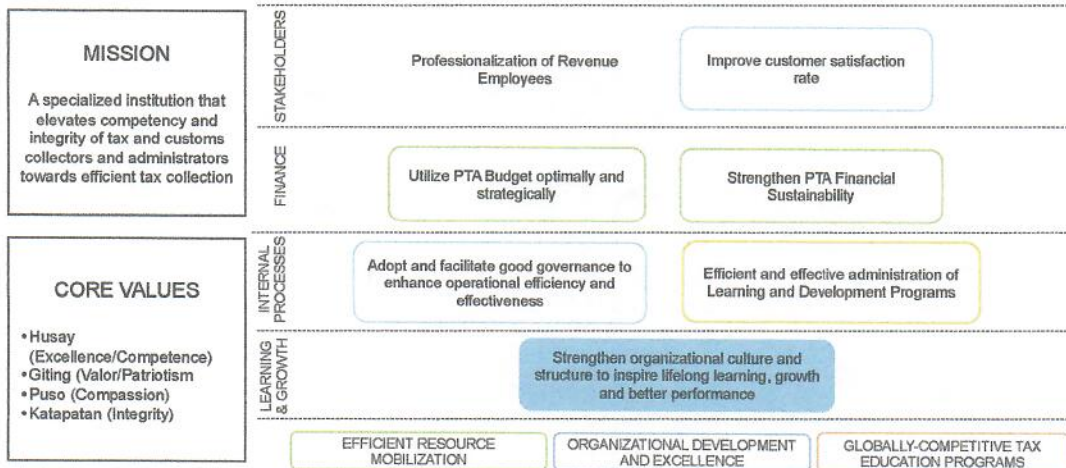
**PTA Mandates**

Section 4 of Republic Act No. 10143 s. 2010 created the Philippine Tax Academy for the following purposes:

- Serve as a learning institution for tax collectors and administrators of the government and selected applicants from the private sector.
- Provide all training, continuing education programs, and other courses for all officials and personnel of the Bureau of Internal Revenue, Bureau of Customs, and Bureau of Local Government Finance.
- Develop and implement a curriculum which includes those pertaining to:
  - technical aspects of tax collection, administration, and compliance; and
  - career orientation and development for all civil servants.
- Conduct lectures, seminars, workshops, and other training programs designed to mold, develop, and enhance skills and knowledge, moral fitness, efficiency and capability of tax collectors and administrators



**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



## 2024 CHARTER STATEMENT AND STRATEGY MAP



### VISION

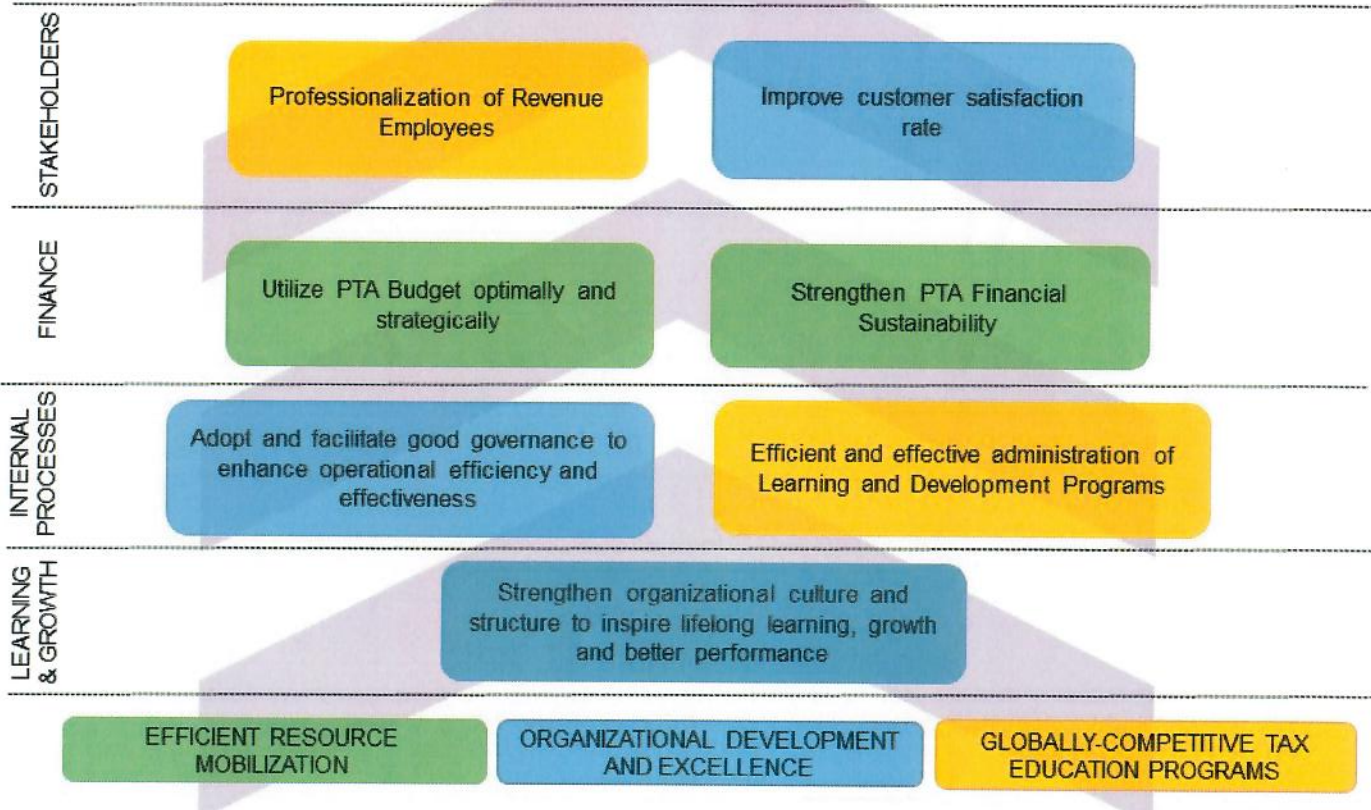
By 2028, a world-class tax academy transforming institutions on tax, customs, and public finance administration towards nation-building through professionalization of revenue employees

### 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)
- Puso (Compassion)
- Katapatan (Integrity)



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PHILIPPINE TAX ACADEMY (PTA)

2024 PERFORMANCE SCORECARD

Component					Baseline		Target		
	Objective/Measure	Formula	Weight	Rating System	2021	2022	2023	2024	
STAKEHOLDERS	<b>SO 1</b>	<b>Professionalization of Revenue Employees</b>							
	SM 1	Percentage of PTA Learners Who Have Demonstrated Positive Change in Behavior in Job Performance	No. of Learners with Improved Behavior in the Workplace over No. of Learners Trained	5%	Actual over Target	N/A	N/A	60%	60%
	<b>SO 2</b>	<b>Improve Customer Satisfaction Rate</b>							
	SM 2	Percentage of Satisfied Customers	No. of Satisfied Customers over Total no. of Customer Respondents	15%	Actual over Target	N/A	N/A	90%	90%
		<b>Sub-total</b>		<b>20%</b>					
	FINANCE	<b>SO 3</b>	<b>Utilize PTA Budget Optimally and Strategically</b>						
		Budget Utilization Rate (BUR)							
SM 3		a. Subsidy Utilization Rate – Obligation	Total Amount Obligated over Total NG Subsidy	2%	Actual over Target	N/A	N/A	90%	90%
		b. Subsidy Utilization Rate - Disbursement	Total Amount Disbursed over Total Obligations	2%	Actual over Target	N/A	N/A	90%	90%

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Component					Baseline		Target	
	Objective/Measure	Formula	Weight	Rating System	2021	2022	2023	2024
	c. Corporate Fund Utilization Rate	Total Amount Disbursed over Corporate Fund based on COB	1%	Actual over Target	N/A	N/A	N/A	90%
<b>SO 4 Strengthen PTA Financial Sustainability</b>								
SM 4	Total Income Generated (Excluding Subsidy)	Actual Total Revenue less NG Subsidy over Previous Year's Internally Generated Revenue	5%	Actual over Target	N/A	N/A	N/A	Improvement from 2023
	<b>Sub-total</b>		<b>10%</b>					
<b>SO 5 Adopt &amp; Facilitate Good Governance to Enhance Operational Efficiency and Effectiveness</b>								
SM 5	Develop Operations Manuals	Total No. of Manuals Developed	5%	Actual over Target	N/A	N/A	3	2
SM 6	ISO Certification	Actual Accomplishment	10%	All or Nothing	N/A	N/A	ISO 9001:2015 Certification	ISO 9001:2015 Certification
<b>SO 6 Efficient and Effective Administration of Learning and Development Programs</b>								
SM 7	Number of L&D Programs/Modules Designed and Implemented	Total No. of Programs over Modules	10%	Actual over Target	N/A	N/A	50	30

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INTERNAL PROCESS

Component					Baseline		Target	
	Objective/Measure	Formula	Weight	Rating System	2021	2022	2023	2024
		Designed and Implemented						
SM 8	Number of Learners Who Have Attended L&D Programs	Total No. of Learners Who Attended Various L&D Programs	10%	Actual over Target	N/A	N/A	5,000	5,000
SM 9	Number of Research for Program Development and Innovations Conducted (New Studies)	Total No. of Research Conducted	5%	Actual over Target	N/A	N/A	1	2
SM 10	Develop Continuing Professional Development (CPD) Programs with Creditable Units Accredited by PRC (cumulative)	Total No. of CPD Courses Developed	5%	Actual over Target	N/A	N/A	1	4
SM 11	Uptime of L&D program Portal	Total Minutes Available and Accessible Online (uptime) over Total Minutes of the Year	10%	Actual over Target	N/A	N/A	90%	90%

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Component					Baseline		Target		
	Objective/Measure	Formula	Weight	Rating System	2021	2022	2023	2024	
	Number of partnerships with Academic and/or Training Institutions for L&D Program (cumulative)								
	SM 12	a. Domestic	Total no. of partnership/co collaboration initiatives with academic and/or training institutions	5%	Actual over Target	N/A	N/A	1	1
		b. International		5%	Actual over Target	N/A	N/A	1	2
		<b>Sub-total</b>		<b>65%</b>					
LEARNING AND GROWTH	<b>SO 7 Strengthen Organizational Culture and Structure to inspire Lifelong Learning, Growth, and Better Performance</b>								
	SM 13	Percentage of PTA Employees Meeting Required Competencies	Incumbents Meeting Required Competencies over Filled Plantilla	5%	Actual over Target	N/A	N/A	Establish Baseline	Improvement from the Baseline
		<b>Sub-total</b>		<b>5%</b>					
	<b>TOTAL</b>		<b>100%</b>						

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For GCG:

  
**ATTY. MARIUS P. CORPUS**  
Chairperson

For PTA:

  
**HON. GIL S. BELTRAN**  
President