



05 March 2026

HON. GIL S. BELTRAN

President

PHILIPPINE TAX ACADEMY (PTA)

7th Floor, EDC Building, BSP Complex

Roxas Boulevard, corner Pablo Ocampo Sr. St.

Malate, Manila City

**RE: TRANSMITTAL OF THE 2026 CHARTER STATEMENT AND
STRATEGY MAP, AND 2026 PERFORMANCE SCORECARD**

Dear President Beltran,

This is to formally transmit the 2026 Charter Statement and Strategy Map (**Annex A**) and the 2026 Performance Scorecard (**Annex B**) of the **PHILIPPINE TAX ACADEMY (PTA)**, to be posted on the PTA's website in accordance with Section 43 of GCG Memorandum Circular (M.C.) No. 2012-07.¹

The PTA's proposed Charter Statement and Strategy Map were **RETAINED** while the Performance Scorecard submitted through a letter dated 16 October 2025² was **MODIFIED** based on: (i) discussions made during the Technical Panel Meeting (TPM) held on 05 November 2025; (ii) evaluation of revised documents submitted through the PTA letter dated 03 December 2025;³ and (iii) agreements during the Performance Target Conference held on 02 March 2026.

Pursuant to Item 9 of GCG M.C. No. 2024-01,⁴ GOCCs are required to accomplish and submit the requisite Quarterly Monitoring Reports (*i.e.*, PES Form 4) for the calendar year, detailing their progress in accomplishing their performance targets. The Quarterly Monitoring Reports shall likewise disclose substantial changes in circumstances, if any, that were unforeseen during the TPM that may affect the timely achievement of the GOCC's targets.

FOR PTA'S INFORMATION AND COMPLIANCE.

Very truly yours,



ATTY. MARIUS P. CORPUS

Chairperson

ATTY. GERALDINE MARIE B.

BERBERABE-MARTINEZ

Commissioner

¹ CODE OF CORPORATE GOVERNANCE FOR GOCCs, dated 28 November 2012.

² Officially received by the Governance Commission on 16 November 2025. Barcode No. 2025-027807.

³ Officially received by the Governance Commission on 5 December 2025. Barcode No. 2025-033775.

⁴ ENHANCED PERFORMANCE EVALUATION SYSTEM (PES) FOR THE GOCC SECTOR, dated 28 June 2024.





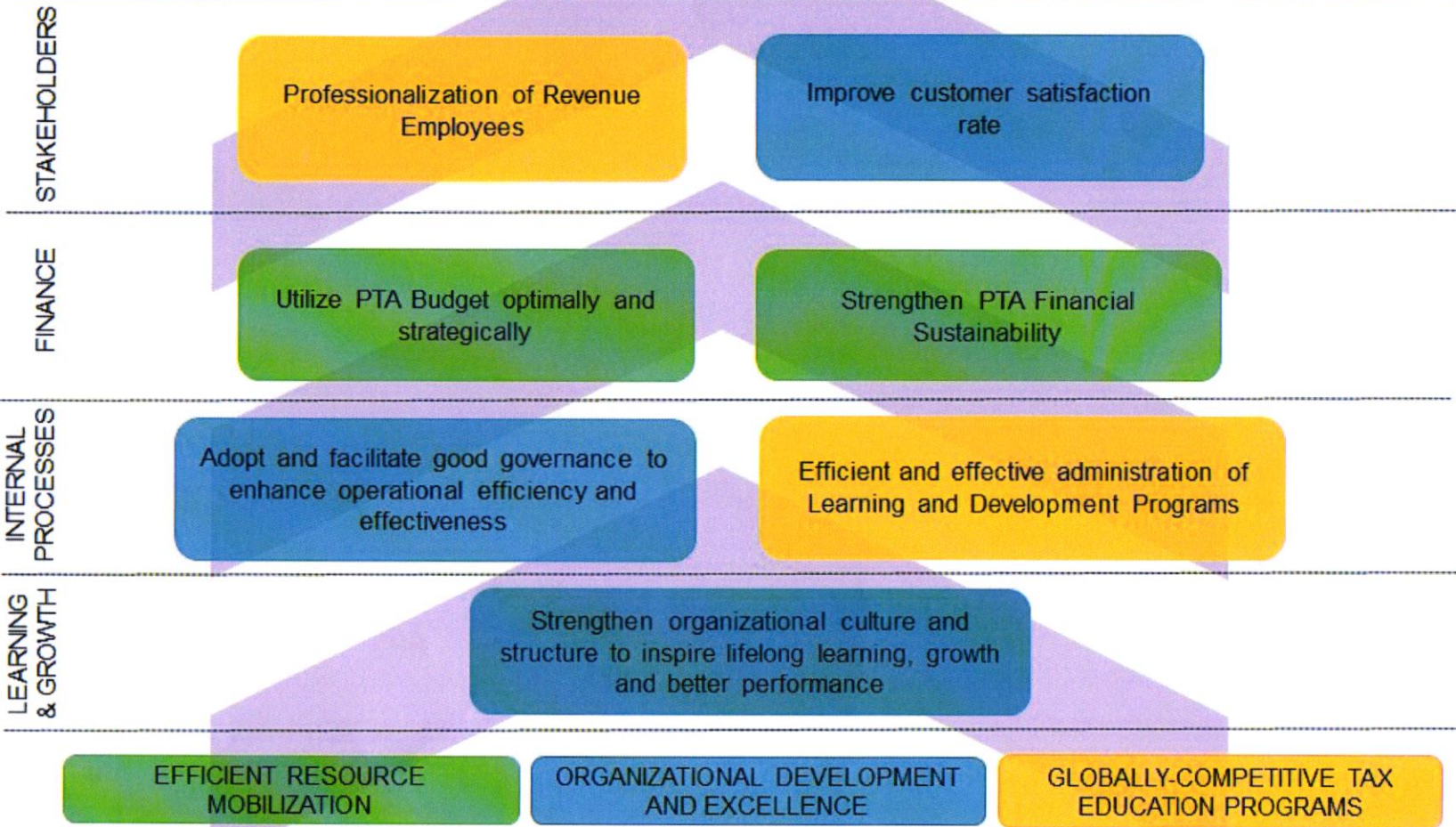
VISION
 By 2028, a world-class tax academy transforming institutions on tax, customs, and public finance administration towards nation-building through professionalization of revenue employees

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)

Component					Baseline		Target		
	Objective/Measure	Formula	Weight	Rating System	2023	2024	2025	2026	
STAKEHOLDERS	SO 1 Professionalization of Revenue Employees								
	SM 1	Percentage of Assessed Learners who have Demonstrated Improvement in Job Performance	Number of Assessable Learners with Improvement over Total Number of Assessable Learners	5%	(Actual / Target) x Weight	0.44% (32/7,242)	Cannot be validated	60% of PTA-Bureau Learners	60% of Assessable Bureau Learners
	SO 2 Improve Customer Satisfaction Rate								
	SM 2	Percentage of Satisfied Customers	Total Number of Respondents who Gave a Rating of At Least Satisfactory over Total Number of Respondents	5%	(Actual / Target) x Weight 0% = if below 80%	Non-Compliant	92%	90%	90%
	SM 3	Learner Satisfaction Survey (LSS)	Total Number of Learners who Gave a Rating of At Least Satisfactory over Total Number of Learners	5%	(Actual / Target) x Weight 0% = if below 80%	N/A	N/A	N/A	90%
		Sub-total	15%						
FINANCE	SO 3 Utilize PTA Budget Optimally and Strategically								
	Budget Utilization Rate (BUR)								
SM 4	a. Disbursement Rate of Corporate Fund/Internally Generated Fund (IGF)	Total Disbursement from IGF over Total COB from IGF (Both Net of PS cost)	1%	(Actual / Target) x Weight	N/A	Cannot be validated	90%	90%	

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Component					Baseline		Target	
Objective/Measure	Formula	Weight	Rating System	2023	2024	2025	2026	
b.1. Obligation Rate								
Current	Total Obligated Subsidy from Current Year's Subsidy over Total COB from Current Year's Subsidy <i>(Both Net of PS cost)</i>	2%	(Actual / Target) x Weight	100%	96.84%	90%	90%	
Carry Over / Prior Years' Balance	Total Obligated Subsidy from Carry Over Subsidy over Total Carry Over Subsidy <i>(Both Net of PS cost)</i>	1%		N/A	N/A	N/A	90%	
b.2. Disbursement Rate								
Current	Total Disbursement from Current Year's Subsidy over Total Obligated Subsidy from Current Year's Subsidy <i>(Both Net of PS cost)</i>	2%	(Actual / Target) x Weight	65.49%	97.48%	90%	90%	
Carry Over / Prior Years' Balance	Total Disbursement from Carry Over Subsidy over Total Obligated Subsidy from Carry Over Subsidy <i>(Both Net of PS cost)</i>	1%		N/A	N/A	N/A	90%	
SO 4	Strengthen PTA Financial Sustainability							
SM 5	Total Revenue Generated	Total Revenue Excluding Subsidy	8%	(Actual / Target) x Weight	N/A	Improvement from 2023 Internally Generated Fund	₱5.46 Million	₱10.84 Million
		Sub-total	15%					
SO 5	Adopt and Facilitate Good Governance to Enhance Operational Efficiency and Effectiveness							

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Component					Baseline		Target	
	Objective/Measure	Formula	Weight	Rating System	2023	2024	2025	2026
SM 6	Compliance to Quality Standards (ISO QMS)	Actual Accomplishment	5%	All or Nothing	No Accomplishment	ISO 9001:2015 Certification	ISO 9001:2015 - Surveillance Audit Passed	Pass the 2 nd Surveillance Audit
SO 6	Efficient and Effective Administration of Learning and Development Programs							
SM 7	Number of Courses Developed/Enhanced	Number of Courses Developed/Enhanced	10%	(Actual / Target) x Weight	53	6	30	30
Number of Bureau Learners and Local Treasurers who have Passed Relevant Training Courses								
SM 8	a. Attendance of at least 30% of Existing Officials and Personnel of BIR, BOC, BLGF, and Local Treasurers in a Seminar or Training Program Conducted by PTA	Total Number of Learners who have Attended Courses under the L and D Program	14%	(Actual / Target) x Weight	7,242	6,041	6,000 PTA-Bureau Learners	5,000 Bureau Learners
	b. Percentage of Newly Hired Employees of BIR, BOC, and BLGF including Local Treasurers who Passed the Relevant Basic Training Course	Total Number of New Employees who Passed the Basic Training Course over Total No. of New Employees who were Trained	14%	(Actual / Target) x Weight	N/A	N/A	N/A	30%
SM 9	Number of Research for Program Development and Innovations Completed (New Studies)	Total Number of Research Published and/or Presented	10%	(Actual / Target) x Weight	1	2	4	4

Component					Baseline		Target		
	Objective/Measure	Formula	Weight	Rating System	2023	2024	2025	2026	
INTERNAL PROCESSES	SM 10	Uptime of Enterprise Learning Management System (ELMS) Portal	Total Minutes of ELMS Availability and Accessibility Online (Uptime) over Total Minutes of the Year	4%	(Actual / Target) x Weight	100%	100%	90%	100%
	SM 11	Number of Active Institutional Partners for Learning and Development Programs	Total Number of Active Institutional Partners for Learning and Development Programs as of 31 December 2026	8%	(Actual / Target) x Weight	2	3 International	4 (new) <i>Cumulative number at the end of 2025 should not be lower than 4 (existing) + 4 new</i>	8
	Sub-total			65%					
LEARNING AND GROWTH	SO 7	Strengthen Organizational Culture and Structure to inspire Lifelong Learning, Growth, and Better Performance							
	SM 12	Percentage of Employees with Required Competencies Met	Competency Level 2026 – Competency Level 2025 (where Competency Level = Total No. of Employees with Required Competencies Met over Total Number of Employees)	2.5%	All or Nothing	20% Competency Level	23.01% Competency Level <i>(improvement of 3.01%)</i>	Improvement from 2024	Improvement from 2025 Competency Level
	SM 13	Development and Implementation of Disaster Risk Reduction and Management (DRRM) Plan	Total Number of Exercises/Drills/Tests Conducted in 2026 over Total Number of Exercises/Drills/Tests Scheduled in 2026	2.5%	(Actual / Target) x Weight	N/A	N/A	Approved Public Service Continuity (PSCP) Plan	Implementation of PSCP
	Sub-total			5%					
TOTAL			100%						

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Component					Baseline		Target	
	Objective/Measure	Formula	Weight	Rating System	2023	2024	2025	2026
BONUS STRATEGIC MEASURE								
FINANCIAL	GAD Budget Utilization Rate	Actual Disbursement for GAD-related activities / Total COB	1%	All or Nothing	N/A		5% of Total COB	5% of Total COB
	ISO Certification on any of the following standards:							
INTERNAL PROCESS	ISO Certification on any of the following Standards: i. Environmental Management System (EMS) Certification ii. Business Continuity Management Systems (BCMS) Certification	Actual Accomplishment	1%	All or Nothing	N/A		Certification on Environmental Management System (ISO 14001:2015) or Business Continuity Management System (ISO 22301:2019)	Certification on Environmental Management System (ISO 14001:2015) or Business Continuity Management System (ISO 22301:2019)

For GCG:



ATTY. GERALDINE MARIE B. BERBERABE-MARTINEZ
Commissioner

For PTA:



HON. GIL S. BELTRAN
President