SOCIAL SECURITY SYSTEM

3Q2016 MONITORING REPORT OF PERFORMANCE TARGETS

Perspective and Objective	Description	Formula	Baseline	2016 1st Quarter Target	1st Quarter Actual	2nd Quarter Target	2nd Quarter Actual	Revised Full Year Target	3rd Quarter Target	3rd Quarter Actual	4th Quarter Target	4th Quarter Actual
FINANCIAL												
SO 1	**Viability of Social Secuirty Institution Sustained**											
SM 1	Amount of Contribution Collections	Contribution collection [Employed + Self-employed + Voluntary paying members + OFWs]	₱132.62 Billion	₱34.56 Billion	₱35.66 Billion	₱69.72 Billion	₱71.07 Billion	**₱ 142.70 Billion**	₱105.22 Billion	₱107.36 Billion	₱142.70 Billion	
SM 2	Net Revenue	Revenues - Expenditures	₱40.69 Billion	Without '85-'89 adjustments: ₱9.99 Billion	Without '85-'89 adjustments: ₱11.58 Billion	Without '85-'89 adjustments: ₱19.59 Billion	Without '85-'89 adjustments: ₱23.49 Billion	**Without '85-'89 adjustments: ₱ 41.51 Billion** **With '85-'89 adjustments: ₱ 27.64 Billion**	Without '85-'89 adjustments: ₱29.44 Billion With '85-'89 adjustments: ₱16.32 Billion	Without '85-'89 adjustments: ₱34.88 Billion With '85-'89 adjustments: ₱27.43 Billion	Without '85-'89 adjustments: ₱41.51 Billion With '85-'89 adjustments: ₱27.64 Billion	
SO 2	**Effectively Manage the Fund**											
SM 3	Return on Investments	Annualized ROI	6.9%	-	7.4%	-	7.4%	**5.0%**	-	7.4%	5.0%	
SM 4	% of Operating Expenses to Charter Limit	Operating Expenses / ((12% x Contribution Collections) + (3% x Investment and Other Income))	52.7%	-	48.6%	-	48.5%	**≤ 70%**	-	47.6%	≤70%	
STAKEHOLDERS												
SO 3	**Improve Customer Satisfaction**											
SM 5	ARTA Rating	[ARTA Rating Branch 1 + ARTA Rating Branch 2 + … + ARTA Rating Branch x] / Number of SSS branches audited	88.5%	-	-	-	-	**90.0%**	-	-	90.0%	
SM 6	3rd Party Customer Satisfaction Rating	[NSR 1 + NSR 2 + … + NSR 11] / 11 transactions	n.a.	-	-	-	-	**Establish Baseline**	-	-	Establish Baseline	
SM 7	Branch Visit Satisfaction System	Average of total responses	n.a.	-	-	-	-	**Pilot implementation to 3 branches by September with an average of "Happy" rating**	Pilot implementation to 3 branches by September with an average of "Happy" rating	IT equiment for the pilot implementation distributed to identified branches	-	-
SO 4	**Adopt a Service Quality Framework**											
SM 8	Implementation of ISSA Service Quality (SQ) Framework	Implementation date	Framework implemented in November 2015	-	-	-	-	**Implement ISSA SQ Framework in the DDR Workflow Process in 2 branches**	-	-	Implement ISSA SQ Framework in the DDR Workflow Process in 2 branches	-
SO 5	**Develop Effective Communication with Stakeholder**											
SM 9	Awareness level on the Value of SSS Membership	Average of total responses	n.a.	-	-	-	-	**80%**	-	-	80%	
INTERNAL PROCESS												
SO 6	**Improve Compliance by Employers and Members**											
SM 10	% of the Number of Referred Delinquent Employer Accounts Filed in Court/PO/SSC, Collected or Settled	Number of delinquent ER accounts referred filed, collected or settled during the period / Total number of delinquent ER accounts referred for legal action as of December 2015	94.3%	-	30.12%	-	57.49%	**90%**	-	88.64%	90%	

![Social Security System logo]

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INTERNAL PROCESS	SM 11	% of Paying Members Over Labor Force (Employed Less Workers in Government/Government Corporations)	Number of paying members / (Employed persons - Workers in Gov't./Gov't Corp.)	36.5%	-	28.01%	-	31.54%	*35%*	-	34.95%	35%	
	SO 7	**Achieve ARTA-compliant Processing Time for Benefit Claims**											
	SM 12	Reduce processing time	Average processing time of benefit applications (in working days)	-Retirement: 36.46 - Death: 54.61 - Disability: 29.89 - Sickness: 12.02 - Maternity: 11.09 - Funeral: 6.12 - Loans granting: 5.00	-	-	-	-	*- Retirement: 18.00* *- Death: 28.00* *- Disability: 23.00* *- Sickness: 12.00* *- Maternity: 11.00* *- Funeral: 5.00* *- Loans granting: 3.50*	-	-	- Retirement: 18.00 - Death: 28.00 - Disability: 23.00 - Sickness: 12.00 - Maternity: 11.00 - Funeral: 5.00 - Loans granting: 3.50	
	SO 8	**Achieve Online/Paperless Transactions**											
	SM 13	By 2020, all processes and filling shall be paperless	Number of piloted processes	n.a.	-	-	-	-	*Pilot selected processes: Online Amendment of Membership Data and Online Benefit Calculator*	-	Online Amendment of Membership Data and Online Benefit Calculator implemented in September 2016	Pilot selected processes: Online Amendment of Membership Data and Online Benefit Calculator	
	SO 9	**Expand the QMS Scope for ISO Certification**											
	SM 14	ISO Certification of DDR System and Manualization of core processes	Number of core processes ISO-certified and Number of core processes manualized	n.a.	-	-	-	-	*ISO Certification of DDR System and Manualization of "Loans" process*	-	-	ISO Certification of DDR System and Manualization of "Loans" process	
	SO 10	**Provide a Conducive Member-Centric Environment**											
	SM 15	Total Number of PE Center	Number of PE Centers established	10	3	3	3	-	*10*	2	-	2	
	SM 16	Number of Branches Created/Relocated	Number of branches created/relocated	15	3	2	5	6	*15*	2	2	5	
LEARNING & GROWTH	**SO 11**	**Build a More Strategically Responsive Organization**											
	SM 17	Average Competency Level	Number of competency tables prepared	Establish Competency Framework	-	-	-	-	*Establish Baseline Competency Level*	-	-	Establish Baseline Competency Level	