

|  |   | COMPONENT   |  |                          | 4TH QUARTER 2020  |                           |                                 |                             |
|--|---|---|--|--------------------------|---|---------------------------|---------------------------------|-----------------------------|
| STRATEGIC OBJECTIVE (SO)/<br>STRATEGIC MEASURE (SM)  |   | FORMULA   | WEIGHT   | RATING SYSTEM            | ANNUAL TARGET   | TARGET                    | ACTUAL                          |                             |
| Financial  | SO 1: Sustain the Viability of the Social Security Institution                                |   |  |                          |   |                           |                                 |                             |
|  | SM 1  | Increase Fund Life  | Actual Accomplishment  | 10                       | (Actual / Target) x Weight<br><br>If earlier than 2035 = 0% | Up to year 2042 or beyond | Up to year 2042 or beyond       | 2054                        |
|  | SO 2: Increase Collection   |   |  |                          |   |                           |                                 |                             |
|  | SM 2  | Increase Amount of Contributions Collected  | Contribution collection (Employed + Self-employed + Voluntary + OFWs)                                | 18                       | (Actual/Target) x Weight                                    | P194.29 Billion           | P194.29 Billion (cumulative)    | P204.72 Billion (tentative) |
|  | SO 3: Ensure Fund Stewardship   |   |  |                          |   |                           |                                 |                             |
|  | SM 3  | Increase the Provision for the Members' and Pensioners' Needs   | Amount of All Loan Type Releases   | 2                        | (Actual/Target) x Weight                                    | P50.7 Billion             | P50.7 Billion (cumulative)      | P65.75 Billion              |
|  | SM 4  | Percentage of Operating Expenses to Charter Limit   | Operating Expenses / (12% of Contribution Collections + 3% of Investment and Other Income)           | 10                       | All or nothing  | ≤70%                      | ≤70%                            | 34.13% (tentative)          |
| Sub-total  |   |   | 40   |                          |   |                           |                                 |                             |
| Stakeholder  | SO 4: Improve Customer Satisfaction   |   |  |                          |   |                           |                                 |                             |
|  | SM 5  | Percentage of Satisfied Customers   | Total number of respondents who gave a rating of at least Satisfactory / Total number of respondents | 10                       | (Actual / Target) x Weight<br><br>Below 80% = 0%            | 90%                       | 90%                             | 91%                         |
|  | Sub-total   |   |  | 10                       |   |                           |                                 |                             |
| SO 5: Provide a Conducive Member-Centric Environment |   |   |  |                          |   |                           |                                 |                             |
| SM 6   | Operationalize e-Centers in the Branches  | Actual Accomplishment   | 5  | (Actual/Target) x Weight | 100 e-Centers   | 100 e-Centers             | 100 e-Centers                   |                             |
| SO 6: Improve Compliance of Employers and Members    |   |   |  |                          |   |                           |                                 |                             |
| SM 7   | Percentage of Referred Delinquent Employer (ER) Accounts Addressed                            | Number of delinquent ER accounts filed in court/PO/SSC, collected or settled / Number of delinquent ER accounts referred as of Oct 2020 | 5  | (Actual/Target) x Weight | 85%   | 85%                       | 100% (as of December 2020 data) |                             |
| SM 8   | Number of Beneficiaries under Small Business Wage Subsidy (SBWS) Program                      | Actual Accomplishment   | 5  | (Actual/Target) x Weight | 3 Million   | 3 Million                 | 3.1 Million                     |                             |
| SM 9   | Make Filipino workers from private sector covered members of SSS to attain Universal Coverage | (No. of SSS Paying Members – Paying OFW) / (Labor Force 15yrs and over – Government Workers)  | 10   | (Actual/Target) x Weight | 41%   | 41%                       | 38.96% (tentative)              |                             |

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|---|---|---|---|---------------|--------------------------|---|---|---|
| STRATEGIC OBJECTIVE (SO)/<br>STRATEGIC MEASURE (SM) |   | FORMULA   | WEIGHT  | RATING SYSTEM | ANNUAL TARGET            | TARGET  | ACTUAL  |   |
| Internal Process                                    | SO 7: Deliver Innovative, Quality Service                     |   |   |               |                          |   |   |   |
|   | SM 10   | Number of IT-enabled Service Delivery Channels                  | Number of IT-enabled service delivery channels implemented  | 5             | (Actual/Target) x Weight | Full Implementation of the following IT Projects:<br>1. Application for SSS number with attachment of supporting documents through SSS Website;<br>2. Application for SSS number with attachment of supporting documents though SSS mobile App;<br>3. Filing of Employer Data Amendment – Contact Information through the SSS Website;<br>4. Filing of Employer Data Amendment – Contact Information through SSS Mobile App;<br>5. Filing of Sickness Claim Reimbursement for Employer through SSS website;<br>6. Filing of Unemployment benefit with e-disbursement through SSS Website;<br>7. Filing of Funeral Benefit Claim for Member-Claimants through SSS website; and<br>8. Filing of Retirement benefit claim with e-disbursement through SSS Website<br>- 65 years old members;<br>- Land-based OFWs and Voluntary members who are at least 60 years old;<br>- Employed members 60-64 years old with online certification | Full Implementation of the following IT Projects:<br>1. Application for SSS number with attachment of supporting documents through SSS Website;<br>2. Application for SSS number with attachment of supporting documents though SSS mobile App;<br>3. Filing of Employer Data Amendment – Contact Information through the SSS Website;<br>4. Filing of Employer Data Amendment – Contact Information through SSS Mobile App;<br>5. Filing of Sickness Claim Reimbursement for Employer through SSS website;<br>6. Filing of Unemployment benefit with e-disbursement through SSS Website;<br>7. Filing of Funeral Benefit Claim for Member-Claimants through SSS website; and<br>8. Filing of Retirement benefit claim with e-disbursement through SSS Website<br>- 65 years old members;<br>- Land-based OFWs and Voluntary members who are at least 60 years old;<br>- Employed members 60-64 years old with online certification | Full Implementation of the following IT Projects:<br>1. Application for SSS number with attachment of supporting documents through SSS Website;<br>2. Filing of Employer Data Amendment – Contact Information through the SSS Website;<br>3. Filing of Employer Data Amendment – Contact Information through SSS Mobile App;<br>4. Filing of Sickness Claim Reimbursement for Employer through SSS website;<br>5. Filing of Unemployment benefit with e-disbursement through SSS Website;<br>6. Filing of Funeral Benefit Claim for Member-Claimants through SSS website; and<br>7. Filing of Retirement benefit claim with e-disbursement through SSS Website<br>- 65 years old members;<br>- Land-based OFWs and Voluntary members who are at least 60 years old;<br>- Employed members 60-64 years old with online certification |
|   | SM 11   | Percentage of Applications Processed within the Applicable Time | Total number of applications processed with complete documents within applicable time / Total number of applications received |               | (Actual/Target) x Weight | 90% of applications processed within the applicable processing time   | 90% of applications processed within the applicable processing time   | Percentage of Applications Processed within the applicable time upon receipt of complete documents:   |
|   |   |   | Retirement  | 2             |                          |   |   | 39.59%  |
|   |   |   | Death   | 2             |                          |   |   | 43.98%  |
|   |   |   | Disability  | 2             |                          |   |   | 74.07%  |
|   |   |   | Sickness  | 1             |                          |   |   | 79.18%  |
|   |   |   | Maternity   | 1             |                          |   |   | 73.06%  |
|   |   |   | Funeral   | 1             |                          |   |   | 86.26%  |
|   |   |   | Loans granting  | 1             |                          |   |   | 100.00%   |
|   |   | Sub-total   | 40  |               |                          |   |   |   |
| Learning & Growth                                   | SO 8: Build a Culture of Continual Improvement and Excellence |   |   |               |                          |   |   |   |
|   | SM 12   | Implement Quality Management System                             | Actual Accomplishment   | 5             | All or nothing           | ISO Certification of All Core Processes of 51 Branches  | ISO Certification of All Core Processes of 51 Branches  | Report not yet available  |
|   | SO 9: Prioritize Competency Build-up of the Organization      |   |   |               |                          |   |   |   |
|   | SM 13   | Improve Average Competency Level of the Organization            | Competenct Baseline 2020 - Competency Baseline 2019   | 5             | All or nothing           | Improvement on the Competency Level of the Organization based on the 2019 year-end Assessment   | Improvement on the Competency Level of the Organization based on the 2019 year-end Assessment   | Report not yet available  |
|   |   | Sub-total   | 10  |               |                          |   |   |   |
|   |   | TOTAL   | 100   |               |                          |   |   |   |

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