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**INTER-AGENCY TASK FORCE ON THE HARMONIZATION OF  
NATIONAL GOVERNMENT PERFORMANCE MONITORING, INFORMATION AND REPORTING SYSTEMS**  
(Administrative Order No. 25 S. 2011)

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March 24, 2022

**MARLENE A. LUCERO-CALUBAG**

Executive Director

National Tax Research Center

3/F, Palacio del Gobernador Condominium

Gen. Luna St. cor. A. Soriano Ave., Intramuros, Manila

ATTENTION: Mr. Gian Carlo D. Rodriguez  
Chief Administrative Officer  
PBB Focal Person

Dear **Executive Director Lucero-Calubag**:

We are pleased to inform you that the **National Tax Research Center (NTRC)** is **ELIGIBLE** for the grant of Performance-Based Bonus (PBB) for the Fiscal Year 2020. However, considering that the NTRC failed to meet **three out of five (3/5) Procurement-GASS requirements**, the unit/s or person/s responsible for the failure to submit the **FY 2020 APP non-CSE, certification of the undertaking of Early Procurement Activities, and the FY 2019 APCPI requirements** should be **isolated** and **excluded** from the FY 2020 PBB ranking. The summary of the final IATF assessment result is attached.

More than the incentive, we hope that the PBB has significantly contributed to your agency's organizational and employee performance, leading to concrete and visible improvements in the delivery of goods and services to the public. To complete the PBB process, may we remind the publication of the **FY 2020 Agency Scorecard** in the NTRC website or official publication. Please coordinate with the AO25 Technical Secretariat for the finalization of the said report cards.

Furthermore, please be informed that the criteria and conditions for the grant of the FY 2021 PBB have been improved to strengthen the effectiveness of the incentives system in helping agencies achieve the mission-critical objectives and expected outcomes of the government. These improvements aim to measure and evaluate agency performance with emphasis on the public's satisfaction on the realization of the agencies' performance targets, quality of service delivery, efficiency in the use of resources, and strengthened agency stewardship.



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Again, we commend the NTRC management and staff and wish you all safety.

Thank you very much for your usual support.

Sincerely yours,

**KIM ROBERT C. DE LEON**

Undersecretary, DBM

Chairperson, AO25 IATF and AO25 Technical Working Group



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<b>National Tax Research Center (NTRC)</b>	
<b>Eligibility Requirements</b>	<b>Final Assessment</b>
<b>2020 Good Governance Conditions</b>	
1. Transparency Seal	• Compliant
2. PhilGEPS Posting	• Compliant
3. Citizen's or Service Charter	• Compliant
<b>2020 Physical Target</b>	
4. Streamlining and Process Improvement of Agency Services	<p>Met the streamlining and process improvement requirement for FY 2020 PBB.</p> <ul style="list-style-type: none"> <li>• The NTRC was able to report all nine (9) services as declared in its FY 2020 Citizen's Charter. However, only critical services covering all Government-to-Citizens (G2C), Government-to-Businesses (G2B), and Government-to-Government (G2G) transactions dealing with external clients will be considered in the assessment. As such, the following five (5) services were subjected to the evaluation:               <ol style="list-style-type: none"> <li>1. Secretariat to the Fiscal Incentives Review Board (FIRB)</li> <li>2. Provision of Technical Assistance on the Imposition/Revision of Fees and Charges</li> <li>3. Provision for Services on Research and Information Dissemination</li> <li>4. Provision on Services on Technical Assistance in the Assessment of Tax Bills and/or Tax Proposals</li> <li>5. Library Services</li> </ol> </li> <li>• The AO25 Composite Team observed that the NTRC did not follow the prescribed manner of writing as stated in Reference B of ARTA MC No. 2019-02 for Client Steps (add the location of the action), checklist of Requirements (indicate number of copy per type of copy), and prescribed manner of numbering for agency action (1.1, 1.2, 2.1, etc.) for most of its services. The NTRC is encouraged to periodically update its Citizen's Charter to reflect necessary revisions and changes in the process. This will help maintain and improve its services and</li> </ul>



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<b>Eligibility Requirements</b>	<b>Final Assessment</b>
	<p>enable the agency to perform its mandates effectively.</p> <ul style="list-style-type: none"> <li>• The NTRC was not able to reduce the number of steps, turnaround time, number of signatures, and required documents for all of its services. The NTRC did not provide explanation/justification for not doing further streamlining.</li> <li>• The NTRC should identify and report the other costs or fees incurred by the transacting client to obtain supporting information from another agency to secure the necessary primary information. These costs also include the additional expenses shouldered by the transacting client until the service has been completed by the government i.e., transportation costs, printing/photocopying costs, internet costs, etc. The NTRC is advised to report the agency's efforts to reduce other transaction costs incurred by clients.</li> <li>• The NTRC was able to provide results of its Citizen/Client Satisfaction Survey (CCSS) for all of its services. The NTRC used a 4-point Likert Scale to measure its clients' satisfaction levels in FY 2019 and FY 2020. The NTRC received a rating of 3 or 4 out of 4 points from clients who availed its services. The NTRC is also encouraged to observe the procedures in conducting the CCSS according to Annex 4 of MC 2021-1.</li> <li>• The NTRC reported digitization initiatives for its Provision of Technical Assistance on the Imposition/Revision of fees, Provision on Services on Technical Assistance in the Assessment of Tax Bills, and Tax Proposals its Library Services. These digitization initiatives include Online access to the Lex Libris Taxation</li> </ul>



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<b>Eligibility Requirements</b>	<b>Final Assessment</b>
	<p>Database, Provision of digitized tax news clippings, and online submission of documents and requests. However, the AO25 Composite Team observed that the agency did not specify the digitization efforts for its other two (2) services.</p> <ul style="list-style-type: none"> <li>• For the agency's best practice in FY 2020, the NTRC cited the introduction of online access to the Lex Libris Taxation database and the provision of digitized tax news to clients availing of Library services. The database provides tax information to the users, which the public can access virtually.</li> <li>• The NTRC is encouraged to continue its initiative in line with the digitization, development of online systems, and transformation of their critical services from manual to contactless transactions for faster and more efficient public service delivery.</li> </ul>
5. Compliance of agencies under priority sectors concerned with Program NEHEMIA commitments	<ul style="list-style-type: none"> <li>• Not applicable               <ul style="list-style-type: none"> <li>○ The NTRC is not included in Annex 9: List of Agencies under Priority Sectors or Program NEHEMIA of MC 2020-1.</li> </ul> </li> </ul>
<b>2020 STO and GASS Requirements</b>	
6. QMS Requirement	<ul style="list-style-type: none"> <li>• Compliant</li> </ul>
7. Submission of FY 2020 APP non-CSE	<ul style="list-style-type: none"> <li>• Non-compliant</li> </ul>
8. Posting of Indicative FY 2021 APP non-CSE	<ul style="list-style-type: none"> <li>• Compliant</li> </ul>
9. Submission of FY 2021 APP-CSE	<ul style="list-style-type: none"> <li>• Compliant</li> </ul>
10. The Undertaking of Early Procurement for at least 50% of goods and services	<ul style="list-style-type: none"> <li>• Non-compliant</li> </ul>



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<b>Eligibility Requirements</b>	<b>Final Assessment</b>
11. Submission of FY 2019 APCPI	<ul style="list-style-type: none"> <li>• Non-compliant</li> </ul>
12. Compliance with at least 30% of Prior Years' Audit Recommendations	<ul style="list-style-type: none"> <li>• Compliant</li> </ul>
13. Budget Utilization Rate (BUR)	<ul style="list-style-type: none"> <li>• <b>Did not meet</b> the 90% target for <b>Obligations BUR</b> under GASS. The actual accomplishment was <b>85%</b>.</li> <li>• <b>Met</b> at least 85% target for <b>Disbursements BUR</b> under GASS. The actual accomplishment was <b>95%</b> based on the DBM BMB-A report dated 9/13/2021.</li> <li>• The DBM BMB-A considered the explanations provided by the NTRC for not meeting the <b>Obligations BUR</b> to be due to <b>uncontrollable factors</b> based on the DBM BMB-A report dated 9/13/2021.</li> </ul>
<b>2020 Other Cross-Cutting Requirements</b>	
14. Posting of Agency Review and Compliance Procedure of Statement and Financial Disclosure	<ul style="list-style-type: none"> <li>• Compliant</li> </ul>
15. FOI Compliance	<ul style="list-style-type: none"> <li>• Compliant</li> </ul>
16. Posting of Agency's System of Ranking Delivery Units	<ul style="list-style-type: none"> <li>• Compliant</li> </ul>
<b>OVERALL ASSESSMENT</b>	<ul style="list-style-type: none"> <li>• Based on the validation results, the NTRC is <b>eligible</b> for the grant of FY 2020 PBB. However, considering that the NTRC failed to meet <b>three out of five (3/5) Procurement-GASS requirements</b>, the unit/s or person/s responsible for the failure to submit the <b>FY 2020 APP non-CSE, certification of the undertaking of Early Procurement Activities, and the FY 2019 APCPI requirements</b> should be <b>isolated</b> and <b>excluded</b> from the FY 2020 PBB ranking.</li> </ul>



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