

STRENGTHENING PROTECTION • DRIVING TRANSFORMATION • BUILDING SUSTAINABLE COMMUNITIES



**FINANCIAL PERSPECTIVE**  
Maintain and Improve Financial Stability and Sustainability

OBJECTIVE	MEASUREMENT	KPI	2024 STATUS	2025 PLAN	2026 PLAN	2027 PLAN
Sustain Revenue Growth	Revenue Growth	Revenue	103,899,854	123,774,910	133,865,867	144,164,321
		Gross Expense	81,904,076	91,502,468	97,957,281	104,635,242
		<b>Net Surplus</b>	<b>21,995,778</b>	<b>32,272,442</b>	<b>35,908,579</b>	<b>39,529,079</b>
Enhance Return on Investments	Return of Investment	Interest Income	16,999,951	20,070,211	23,087,803	26,558,739
Grow Total Assets	Growth in Total Assets	Amount of Total Assets	<b>492,136,887</b>	536,938,501	590,632,351	649,695,586



**MEMBER PERSPECTIVE**  
Provide access to quality, affordable financial and social protection

OBJECTIVE	MEASUREMENT	KPI	2024 STATUS	2025 PLAN	2026 PLAN	2027 PLAN
Increase Membership and Improve Retention		Number of Members	91,423	100,017	109,293	119,342
		Increase in new Members	14,469	14,621	15,848	17,099
		Dropouts	5,144	5,137	5,672	6,100
		Retiring	914	890	900	950
		<b>Net Additional Members</b>	<b>8,411</b>	<b>8,594</b>	<b>9,276</b>	<b>10,049</b>
Provide Social Protection	Increase in enrollment in SSS	Members enrolled in SSS	1,722	1,500	1,550	1,600
		Members enrolled in Dakila Plan	1,833	2,000	2,300	2,700
Provide Social Protection	Increase in enrollment in SEDP Care	Members enrolled in SEDP Care	23,093	33,360	-	59,671



**INTERNAL PROCESS PERSPECTIVE**  
Deliver operational excellence, strengthen governance and ensure compliance

OBJECTIVE	MEASUREMENT	KPI	2024 STATUS	2025 PLAN	2026 PLAN	2027 PLAN
Improve Efficiency	Claims Settlement	% of Claims Released Within Prescribed Turnaround Time	100%	100%	100%	100%
		Claims Reimbursement	% Claims Reimbursed on time	100%	100%	100%
Improve Response and Retention	Technical Assistance Manpower Employee Retention	Response time	100%	100%	100%	100%
		No. of staff	9	10	10	10
		Retention Rate	100%	100%	100%	100%
Improve Internal Process and Availability	Timeliness of Delivery	No. of deliveries per quarter	4	4	4	4
Ensure Compliance to Regulatory and Governance	Ensure Compliance	Bureau of Internal Revenue	12	As the need arises	As the need arises	As the need arises
		Insurance Commission	10	As the need arises	As the need arises	As the need arises
		Credit Information Commission	0	As the need arises	As the need arises	As the need arises
		Social Security System	12	12	12	12
		SEC	3	4	4	4
		National Privacy Commission	3	3	3	3
		Pag-IBIG	12	12	12	12
		Philhealth	12	12	12	12
		RIMANSI	7	As the need arises	As the need arises	As the need arises
		ASEAN Corporate Governance Scorecard	82%	85%	86%	87%
Strengthen Digital Engagement	Digital and Social Media Reach	Website (Monthly Content Updates)	100%	100%	100%	100%
		Facebook Page Followers	1,700	2,500	3,250	4,225
		Increase Facebook Page Reached	1,600	2,500	2,600	3,120
		Percentage Increase Facebook Page Posting	161	192	192	192
		Facebook Page Engagement	3,604	5,000	5,500	6,050



**LEARNING AND GROWTH PERSPECTIVE**  
Develop our people, culture and capabilities for continuous growth

OBJECTIVE	MEASUREMENT	KPI	2024 STATUS	2025 PLAN	2026 PLAN	2027 PLAN
Develop Competent and Capable People	Provision of trainings/seminar	No. of staff attended trainings/seminar	9	9	9	9
Promote Performance and Growth Culture	Increased rating of Performance evaluation	No. of staff with Satisfactory, Very Satisfactory & Outstanding Performance	9	9	9	9

OUR COMMITMENT 2025 - 2027



**STRONGER MEMBERSHIP**  
Expanding protection and creating value for more Filipino families.



**DIGITAL TRANSFORMATION**  
Delivering efficient, reliable, and responsive services.



**GOOD GOVERNANCE & COMPLIANCE**  
Upholding integrity, transparency, and accountability in all we do.



**SOCIAL INCLUSION & PARTNERSHIPS**  
Working together for inclusive communities and shared impact.



**SUSTAINABLE GROWTH**  
Ensuring long-term financial strength and organizational sustainability.



**CONTINUOUS LEARNING**  
Building capabilities and embracing innovation for a better future.

# SEDP MBA 2025-2027 STRATEGIC INITIATIVES

*Four Perspectives. One Mission. One Future.*



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## FINANCIAL PERSPECTIVE

*Financial Sustainability & Growth*



- REVENUE GROWTH & EXPANSION**
  - Increase membership contributions and premium collections
  - Expand social protection products and value-added services
- INVESTMENT & FUND MANAGEMENT**
  - Optimize investment returns
  - Conduct regular performance reviews and strengthen risk monitoring
- PRODUCT SUSTAINABILITY & VIABILITY**
  - Assess financial impact of benefits and claims experience
  - Explore product viability models, especially for aging members
- RESODUCE OPTIMIZATION**
  - Strengthen budget monitoring, expense management, and resource utilization

## MEMBER PERSPECTIVE

*Member Value & Social Protection*



- MEMBERSHIP GROWTH & RETENTION**
  - Strengthen recruitment, retention, and reactivation programs
  - Maximize MBA Coordinators as Center Ambassadors
- SOCIAL PROTECTION EXPANSION**
  - Increase enrollment in SSS, Dakila Plan, and SEDP Care
  - Develop innovative and responsive protection solutions
- MEMBER ENGAGEMENT & AWARENESS**
  - Strengthen digital, radio, and community-based campaigns
  - Enhance member education on benefits and services
- PARTNERSHIPS & SOCIAL INCLUSION**
  - Expand partnerships with SAC for voter education and SILC program
  - Collaborate with Simon of Cyrene for inclusion of vulnerable sectors and differently-abled individuals

## INTERNAL PROCESS PERSPECTIVE

*Operational Excellence & Governance*



- DIGITAL TRANSFORMATION & SYSTEMS DEVELOPMENT**
  - Implement the Microsure System
  - Improve operational efficiency, records management, monitoring and reporting
  - Prepare for BIR Computerized Accounting System (CAS) compliance
- SERVICE EXCELLENCE**
  - Sustain 100% on-time claims settlement and reimbursement
  - Enhance responsiveness to SPO concerns and support
- GOVERNANCE & REGULATORY COMPLIANCE**
  - Strengthen compliance monitoring and governance systems
  - Advance ACGS performance and sustain Golden Arrow standards
- COMMUNICATION & INFORMATION MANAGEMENT**
  - Enhance internal and external communication
  - Ensure timely dissemination of policies, guidelines, and organizational updates

## LEARNING & GROWTH PERSPECTIVE

*People & Organizational Development*



- CAPABILITY BUILDING & STAFF DEVELOPMENT**
  - Continuous training, seminars, and professional development
  - Enhance technical competencies in microinsurance, governance, compliance, and digital systems
- LEADERSHIP DEVELOPMENT**
  - Strengthen leadership pipeline among staff, management, and trustees
  - Implement performance management aligned with organizational goals
- EMPLOYEE ENGAGEMENT & ORGANIZATIONAL CULTURE**
  - Foster a supportive, collaborative, and growth-oriented work environment
  - Strengthen employee engagement, recognition, and retention initiatives
- INNOVATION & KNOWLEDGE MANAGEMENT**
  - Promote a culture of continuous improvement and innovation
  - Leverage partnerships and industry networks to adopt best practices and emerging trends in microinsurance

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