

## Philam Foundation, Inc.

Annual Report

2017

### I. Philam Paaralan

A. In 2017, 34 classrooms were constructed and already turned over.

Partners	Region	Location	Name of School	No. of Classrooms
BPIF	Region 4-B	Coron, Palawan	Sta. Monica ES	2
BPIF	Region 8	Tacloban City, Leyte	Bolante ES	2
BPIF	Region 8	Tacloban City, Leyte	Lucio Vivero Memorial School	3
BPIF	Region 8	Tacloban City, Leyte	Camansihay ES	3
BPIF	Region 4-B	Roxas, Palawan	Tulariquen ES	2
Eagle Cement	Region 3	San Ildefonso, Bulacan	Narra ES	2
Eagle Cement	Region 3	San Ildefonso, Bulacan	Bulacan Agriculture State College	3
BPIF	Region 11	Davao, Davao Oriental	Matina-Biao Elementary School	2
BPIF	Region 12	Koronadal City, South Cotabato	Namnama Elementary School	2
BPIF	Region 13	Surigao City, Surigao del Norte	Navarro Central Elementary School	2
LBCF	Region 5	Bato, Catanduanes	Biao Integrated School	2
LBCF – OVP Angat Buhay	Region 10	Manolo Fortich, Bukidnon	Damilag Elementary School	3
Dole Stanfilco – OVP Angat Buhay	Region 10	Lantapan, Bukidnon	Babahagon Elementary School	2
Dole Stanfilco – OVP Angat Buhay	Region 10	Sumilao, Bukidnon	Sumilao Elementary School	2
Team Energy Foundation	Region 1	Sual, Pangasinan	Sual Central School	2
<b>TOTAL</b>				<b>34</b>

- a. Vice President Leni Robredo attended the inauguration and turnover of 6 classrooms in 3 schools in Bukidnon since they partnered with us in their Angat Buhay Program.
- b. BPI Foundation has partnered with PFI to build 18 classrooms in 8 schools affected by Typhoon Yolanda as part of their education program.
- c. Eagle Cement and Team Energy has partnered with PFI to build classrooms in locations where their presence as a corporation has been established.
- d. Five (5) classrooms were built in partnership with Eagle Cement, while 2 classrooms were built with Team Energy Foundation.

B. Ongoing/Upcoming Projects this 1<sup>st</sup> Quarter of 2018

Partners	Region	Location	Name of School	No. of Classrooms
Embassy of Japan	Region 9	Zamboanga City, Zamboanga del Sur	Tictapul Elementary School	4
LBCF and World Vision	Region 4-A	Laurel, Batangas	Molinete Elementary School	2
Team Energy Foundation & LGU of Pagbilao	Region 4-A	Pagbilao, Quezon	Pagbilao National High School	3
Embassy of Japan	Region XI	Davao City, Davao del Sur	Catalunan Grande Elementary School	6
AY Foundation Lisa Yuchengco and PBSP	ARMM	Butig, Lanao del Sur	Butig National High School	6
ABS-CBN Foundation & TV Patrol	Region VII	Dumaguete City, Negros Oriental	Candau-Ay Elementary School	2
LBCF – OVP Angat Buhay	Region VII	Dumaguete City, Negros Oriental	Batinguel Elementary School	2
LBCF – OVP Angat Buhay	CAR	Kiangan, Ifugao	Duit Elementary School	2
AY Foundation	Region 4-B	Gasán, Marinduque	Quatis Elementary School	2
<b>TOTAL</b>				<b>29</b>

- a. PFI and Embassy of Japan shall inaugurate and turn-over 4 classrooms in Tictapul Elementary School on June 2018.
- b. PFI in partnership with LBCF and World Vision shall inaugurate and turn-over 2 classrooms in Molinete Elementary School in time for opening of classes on June 2018.
- c. PFI and Team Energy Foundation partnered to build 3 classrooms in Pagbilao National High School in Pagbilao, Quezon. Groundbreaking is set on April 2018.
- d. PFI and Embassy of Japan shall partner again to build 6 classrooms in Catalunan Grande Elementary School. Groundbreaking is also set on May 2018.
- e. PFI and AY Foundation through Lisa Yuchengco shall build 6 classrooms in Butig, Lanao del Sur. Butig is the first municipality that ISIS-Maute Group took control of.
- d. PFI in partnership with ABS-CBN Foundation and TV Patrol shall partner to build 2 classrooms in Candau-Ay Elementary School, Dumaguete City. This shall be featured in TV Patrol as their opening of classes activity on June 2018.
- e. LBC Foundation shall partner with PFI to build 4 classroom in Dumaguete City and Kiangan, Ifugao through the coordination with Office of the Vice President – Angat Buhay.
- d. AY Foundation shall partner with PFI to build 4 classrooms in Marinduque and Mindoro to the areas where the RCBC Branches are located.

## II. Philam SAVES

- A. As of December 2017, 14 sessions were held for both Philam SAVES Jr. and Sr. Total of 3,433 students, parents and teachers benefited from the sessions. Volunteer's engagement totaled to 180 with 540 volunteer hours committed.

	<b>Date</b>	<b>School</b>	<b>SAVES Jr.</b>	<b>SAVES Sr.</b>	<b>No. of Volunteers (Philam Employee and Financial Advisors)</b>	<b>Volunteer Hours(3hrs per session)</b>
1	January 26,2017	Palayan City Central School, Palayan, Nueva Ecija	150	60	20	60
2	January 27,2017	Setan Elementary School, Baler, Aurora	100	30	15	45
3	February 16,2017	Luinab Elementary School, Iligan City	150	45	10	30
4	February 17,2017	Macanhan Elementary School, Cagayan de Oro City	150	100	10	30
5	March 2,2017	Labangon Elementary School, Cebu City	100	50	15	45
6	March 3,2017	Maribojoc Central School, Maribojoc, Bohol	80	50	12	36
7	October 6, 2017	USEP, Cebu City, Cebu	302	20	45	135
8	October 12, 2017	Babahagon ES, Lantapan, Bukidnon	100	34	7	21
9	October 13, 2017	Damilag ES, Manolo Fortich, Bukidnon	350	40	6	18
10	October 13, 2017	Sumilao ES, Sumilao, Bukidnon	100	30	6	18
11	November 9,2017	San Jose Central Elementary School	525	300	8	24
12	November 10,2017	Camansihay Elementary School	107	-	3	9
13	November 10,2017	San Jose Central Elementary School	-	90	8	24
14	December 12,2017	Medellin Elementary School	300	70	15	45
<b>Total</b>			<b>2,514</b>	<b>919</b>	<b>180</b>	<b>540</b>

B. For the 1<sup>st</sup> Quarter of 2018, 6 sessions were held for both Philam SAVES Jr. and Sr. Total of 1,880 students, parents and teachers benefited from the sessions. Volunteer's engagement totaled to 86 with 5258 volunteer hours committed.

	<b>Date</b>	<b>School</b>	<b>SAVES Jr.</b>	<b>SAVES Sr.</b>	<b>No. of Volunteers</b>	<b>Volunteer Hours</b>
1	February 22,2018	Cubao Elementary School	400	-	26	78
2	March 6, 2018	Cubao Elementary School	400	-	34	102
3	March 11, 2018	TV Patrol Caravan @ Mariano Ponce National High School	-	70	5	15
4	March 14, 2018	San Jose Central Elementary School	400	50	10	30
5	March 18, 2018	TV Patrol Caravan @ Arayat, Pampanga	-	60	1	3
6	March 22, 2018	Maharlika Elementary School	500	-	10	30
<b>Total</b>			<b>1,700</b>	<b>180</b>	<b>86</b>	<b>258</b>

- C. MOA signing for the Bayan SAVES Program last April 16,2018. A partnership between BPIF and PFI to further reach more students and adults to raise savings awareness.
- D. MOA signing with DepEd Secretary for the Philam SAVES between April-May 2018.
- E. Roll out for school year 2018 shall start by July 2018.
- F. Intensify engagement with the Financial Advisors through an institutional partnership with the Philam Agency Manager's Association (PAMA) that is being led by Anna Blanco.

**III. PhilamCAN**

- a. As of December 2017, we have extended to 26 employees in need amounting to P290,000.00

Requests	Amount of Assistance	Remaining Fund
26	Php 290,000.00	Php 846,207.00

- b. For First Quarter 2018, assistance extended to 10 employees amounting to P110,000.00.

Requests	Amount of Assistance	Remaining Fund
10	Php 110,000.00	Php 746,207.00

- c. PCAN Caravan will be scheduled by June-July 2018.

**IV. Philam Centralized Aid for Agents**

- a. As of December 2017, we have already extended to 12 Financial Advisors in need.

Requests	Amount of Assistance	Remaining Fund
12	Php 85,000.00	Php 776,207.00

- a. For First Quarter 2018, assistance extended to 1 employees amounting to P30,000.00.

Requests	Amount of Assistance	Remaining Fund
1	Php 30,000.00	Php 746,207.00

- b. PhilamCAFA will be revitalized and renamed to Agents Solidarity and Welfare Fund (SoWel Fund). Additional component will be that Financial Advisors shall pledge or give donation to the SoWel Fund. Philam Foundation shall match the total amount collected from the pledges from the Financial Advisors. Launch of the SoWel Fund shall be on June 2018.

**V. Sponsorships**

As of December 2017, we have granted five (5) sponsorship grants amounting to P860,000.00.

Name of Organization	Sponsorship Description	Amount
Department of Education's	Palarong Pambansa on April 23-29 at San Jose, Antique	P100,00.00

League of Corporate Foundations	LCF CSR Expo 2017	P200,000.00
Association of Foundation	Sponsorship for the 45th Annual General Assembly	P50,000.00
CSR Philippines Inc.	Donation for Speaker during CLARC OPF	P10,000.00
Ateneo Alumni Scholars Association	Seed money for their endowment fund	P500,000.00
Total		P860,000.00

For the first quarter of 2018, we have granted five (5) sponsorship grants amounting to P1,030,000.00.

Name of Organization		Sponsorship Description	Amount
1.	National Museum	Installation of the J. Alcantara Sculptures (UN Theater Wood Carvings)	P350,000.00
2.	Association of Foundation	Sponsorship for the 46th Annual General Assembly	P50,000.00
3.	TV8 Media Productions	Video Production for Philam Foundation for 1.) 3min AVP for Philam Sowel Fund 2.) 3min AVP for PCAN and 3.) 1min video message for IC Funa	P280,000.00
4.	PhilCV	Support fo PhilCV's Membership, Policy Advocacy and Institutional Sustainability Goals for 2018	P250,000.00
5.	League of Corporate Foundations	Sponsorship for the 17th LCF CSR Expo	P100,000.00
Total			P1,030,000.00

#### **VI. Philam Agency Solidarity and Welfare Fund (Philam SOWEL Fund)**

We will relaunch the Philam Centralized Aid for Agents into the Philam Agency Solidarity and Welfare Fund during the mid-year sales rally. It will follow the same governance structure as the PCAFA but will be funded differently. We will position it as a “fund for agents by agents” wherein they will be asked to fund it through regular deductions from their monthly statement of account with Philamlife augmenting the fund.

We will be producing an AVP which will be used in the campaign as well as on the onboarding of new financial advisors. We have also enlisted the support of the Philam Agency Managers’ Association for this project.

The Agent's Welfare Fund now stands at about Php1.20 Million and the current PCAFA balance is about Php0.700Million.

### **VII. Philam GoodWell Fund ver 2.0**

In order to support the agencies and our financial advisors on the ground, we are also relaunching the Philam GoodWell Fund which will allow our agency managers to tap funding for local community projects or initiatives related to the core programs of Philam Foundation. We will offer to provide a grant assistance on a matching grant basis for up to a maximum of Php0.250Million per year. This facility is designed to support the agency in generating goodwill for them and the company in line with our drive towards major and undisputed.

### **VIII. Philam Paaralan / Philam SAVES Agency Partnership**

We will be assigning a Philam Paaralan per agency for them to adopt and ensure that Philam Paaralan classrooms are well maintained. In addition to their assigned Philam Paaralan, we will also be assigning other nearby public schools per agency for them to adopt and ensure that Philam SAVES modules are also done regularly in their assigned schools.

These back to back partnership with agency will be able to assist them in generating goodwill and also enable them to do good while doing well in their respective communities. It also serves to reinforce the values of the company and instill the proper mindset among our agents in our drive towards major and undisputed.

### **IX. Alliance for the Philippines' Health and Advocacy**

The ALPHA Advisory Council met last March composed of the regular representatives of Philippine College of Surgeons, Philippine College of Physicians, Cancer Registry Philippines and Philam Foundation.

We reviewed the progress of the project so far and have proposed additional steps to be undertaken for the advocacy component to include production of infomercials, audio-visual presentation on ALPHA to be used for Business Matters, including advocacy testimonials from public figures.

We will be developing materials and content that can be utilized by the business side in their Vitality Campaign including Health and Wellness initiatives and promotions. This will seek to promote our campaign to Screen and Prevent Cancer (SCRAP Cancer).

We are also developing a SCRAP Caravan where we will have diagnostic tools in place within the van/truck and this will visit various parts of the country. This can also be used within Philam Group and also serve as another unique value proposition specially to corporate clients.

We are also looking to hire a senior program officer to handle ALPHA and she shall also address succession planning within Philam Foundation.

### **X. Enterprise Asia – Asia Responsible Enterprise Awards**

Our Philam Paaralan and Philam SAVES programs qualified as finalists for the Enterprise Asia – Asia Responsible Enterprise Awards. The recognition is granted after passing the following parameters : a) solution-oriented b) integration c) sustainability d) innovation and e) impact. We were interviewed and audited by the team of Enterprise Asia last April 17. The awarding is set on June 1 in Manila at the Marriot Hotel.

### **XI. Phil. Coalition on Volunteerism / International Assoc. of Volunteer Efforts**

We were elected as chairman of the Philippine Coalition on Volunteerism and we have participated in the review of the Volunteer Act of 2007. We are pushing for greater support by government in promoting volunteerism and the coalition is also involved in improving the volunteer sector.

Our presentation of Philam SAVES as our corporate volunteering and employee engagement program was well received in the IAVE Asia Pacific Regional Conference in Kuala Lumpur. We were also invited to present our Philam SAVES again in the IAVE World Conference in Germany in October 2018.

## **XII. Corporate Credit Card**

We also seek the approval of the BOT for the issuance of corporate credit cards as per guidelines from Sourcing. A limit of 500K for the president and 30K each of the program officers is recommended.

## **XIII. Review of Compensation and Benefit**

We have submitted a request to Human Resource to review our compensation and benefit package and proposed that it be aligned with Philamlife.