

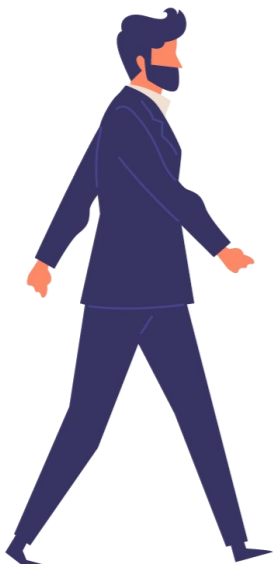
CBO

Community Based Organizations



Share An Opportunity
PHILIPPINES

ABOUT THIS HANDBOOK



This handbook is crafted to support CBOs or Community Based Organizations formed through Share An Opportunity (SAO) Philippines' MAKABATA or Maunlad na Komunidad Angkop sa mga Bata program with supplementary data that will stand as their reference as they lead, organize, and monitor their group.

This handbook aims to guide CBO as they replicate these processes and sustain their efforts.

Some formats and documents are provided in the annexure of this handbook for guidance.

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What is a CBO?

Community Based Organization (CBO) is an organized group of parents that looks after the best interest of the children in their community.

CBO is an avenue where mothers are empowered and fathers are encouraged to be champions and advocates in protecting children in their homes and in their community.

One unique characteristic of CBOs are they grow together as good parents and have fellowship with one another.

In CBO, they are trained and given the opportunity to develop their talents and skills and enhance their relationships within the family, earn livelihood, and build partnership with the barangay.

WE ARE CBO



We have respect for each other and work together with the team and maintain cooperation within the CBO group.

We are united with one vision and that is to provide solution to challenges that we see in our community and advance the causes for the welfare of children.

We believe that it is important to accept the contribution of each other and allow room for grace in times of our shortcomings.

We are responsible and make sure that all activities are done excellently.

As a group, we listen to our leader and in turn, he or she trusts and accepts correction from the team for he or she knows it's for the best of our group.

We value transparency and trust within our group and a high sense of loyalty and volunteerism.

We are a group who has faith in God. With this, we strive to be excellent in integrity, value the importance of family and safety of the children, and loves and respect everybody equally.

UNITY IS STRENGTH

Have you heard the story of the doves caught in a net?

They could not escape when they try to do it one by one.

But when they flew together as a group, carrying their portion of the net, they escaped the trap and reach safety.

We also know from experience that one stick is easy to break. But it is difficult to break a bundle (group) of sticks. There is power in unity.

And CBO groups show us how unity is strength.

When we work together, we are stronger.

HOW DO WE START?



INITIAL STEPS

Step 1. INFORM and INVITE.

In our Parents' Group (PG), the PG officers and the Samahan ng mga Bata (SB) Volunteer group, there was an announcement that they'll be organizing a Community Based Organization (CBO).

CBO is the consolidation of all PG members but the PG officers serves as representatives. SB Volunteers were all encouraged to join the CBO.

Step 2. MEET and GATHER.

The initial meeting took place after the announcement was made from the Parents'

Group meeting that there will be an organizing a CBO.

Step 3. ORIENTATION.

After we were organized and gathered, we were given an orientation about the purpose and role of CBO and how we can be leaders that can impact change in our community.

Step 4. ELECTION.

As we understand that we would be leaders of fellow parents and adults in the community, we need organization and structure of officers for better distribution of roles and tasks. We elected officers that will help us manage our group.

Step 5. SET VMG (Vision, Mission, Goal).

A clear vision is our unifying force that guides us towards oneness of action and effectivity of impact. The mission will help us in our decision making and the goal to help us remain motivated and hopeful to achieve our dream outcome.

Vision
Mission
Goal

HOW TO CRAFT YOUR VISION BOARD?

Who's involved?

The **participants** are members of your CBO group. You can organized by barangay level.

The **facilitators** are leaders of your CBO group that were trained on Basic Facilitation Skills.

Why vision board?

A Vision Board is a collage - a visual picture that signifies the CBO group's hopes and dreams for the next twelve (12) months. This vision board will help you as you craft your activity plan.

This vision board should always be displayed during your CBO meeting to promote awareness and serve as guide as you plan your desired impact in the community.

When is the best time to do this?

The activity is best done as at the start of the calendar year or fiscal year whichever works for you. If the group is new, best to do it a month after the group has been organized.

Time allotment for this session is around one and a half (1.5) hour to two (2) hours.

Where is the best place to do this?

A place where everybody is comfortable to gather around and is conducive for learning. There should be places to post or display the finish vision board.

What are the supplies needed?

Illustration board or Chipboard
Glue/Paste
Used Magazines or Newspapers
Scissors
Marker/Pens
Bond Paper
Plastic cover (to cover and secure your vision board)

How is this done?

TASK 1 (15 mins)

WARM-UP: MY DREAM

- A. In pairs, share your dream to your partner. You can use the sentence, "After 5 years, I want to be a/an _____ because _____."
- B. Ask if there's anybody who wants to share to the big group their dream.

TASK 2 (55 mins)

OUR DREAM

- A. In a triad, share what you hope to see in your CBO group in the next twelve (12) months and how it would be beneficial for your community.
- B. From the old magazines, newspapers, and books - cut out pictures that best represent your hope and dreams for your CBO group. You can group these pictures and illustrations according to theme.
- C. The facilitator can ask representative for each triad to discuss each group's hope and dreams for the CBO group.

If there is a dream or hope mentioned that is the same as those that haven't shared yet, combine the dream into one and continue with the sharing until all group has shared and all dreams are combined per theme.

- D. After agreeing on the dreams shared, the representative from each triad can paste the pictures on the black portion of the illustration board to reflect CBO's unified vision.

TASK 3 (30 mins)

CELEBRATING OUR VISION

- A. The CBO president with the assistance of the participants will craft a statement of their vision. Then, the CBO president will summarize and present the Vision Board or the Vision Statement to the rest of the group members for clarification and affirmation. After that, the president encourages the body to commit in achieving the vision casted.
- B. Celebrate the vision by offering a prayer of commitment and thanksgiving while holding the Vision Board together.
- C. Display the Vision Board in your meeting place.



SAMPLE VISION BOARD

Recruitment of New Members

Qualification of Members

- ◇ Should be an active PG member
- ◇ Resident of their barangay
- ◇ With good behavior
- ◇ Interested to what the CBO is doing
- ◇ Willing to participate in all activities of the group
- ◇ With leadership skills
- ◇ Passionate in helping children, youth, and the community
- ◇ Has respect, care, and love for children, youth, and community
- ◇ Agrees and respect the policies of the group
- ◇ God-fearing
- ◇ Committed and available to attend CBO's activities
- ◇ Responsible and Accountable

Process and Trainings need to be taken to officially become part of CBO group

- ⇒ Will attend orientation for new members
- ⇒ Will have to attend leadership skills training
- ⇒ Will have to attend VMG setting
- ⇒ Will have to finish Understanding God's heart for children
- ⇒ Will have to understand children's rights

Code of Conduct

As we work with and for children, we have a responsibility to ensure that all our activities are child safe and mindful of their best interest.

Code of Conduct

HOW TO CRAFT YOUR CODE OF CONDUCT?

Who's involved?

The participants are members of your CBO group. You can organized by barangay level.

The facilitators are leaders of your CBO group that were trained on Basic Facilitation Skills.

Why is there a need to craft a code of conduct?

It is important for groups to have a well-written Code of Conduct as it **explains and bring clarity to organization's vision, mission, values, and principles connecting it with standards of proper and professional conduct.**

The Code of Conduct aims to articulate the values and principles the group wishes to foster in its leaders and members and in doing so defines wanted behavior.

It is highly encouraged for CBO groups to have their own Code of Conduct because we are working with and for children. The code will be a great help in making sure that children are protected at all times in community events among others.

When is the best time to do this?

If you don't have a Code of Conduct yet, it is best to do this as soon as possible. If you already have one and wishes to revisit it. You can do it every year along with the VMG setting.

Time allotment for this session is around two (2) hours.

Where is the best place to do this?

A place where everybody is comfortable to gather around and is conducive for discussion. There should be places to post or display the final code of conduct output.

What are the supplies needed?

Metacards
Marker/Pens
Bond Paper

Masking Tape
Manila Paper

How is this done?

TASK 1 (20 mins)

WARM-UP: MY SAFE PLACE

- A. In pairs, share your description of a safe and protected place to your partner. You can use the sentence, "I feel safe when people are _____."
- B. In a metacard, write the one-word or short phrase of your safe place and be ready to paste it in one Manila paper with the title as **SAFE PLACE** for the group's definition of safe place.
- C. The facilitator will group same themes of safe place and categorize each group to each theme.

TASK 2 (40 mins)

OUR SAFE PLACE

- A. In a triad, write in a metacard a word or phrase that best describes the good characteristics, values, and principles our CBO group has? Discuss within the group and proceed to pasting the metacard on one of the the Manila Papers with the title **Good Conduct**.

As the participants work on the next task, the facilitator will group each similar theme and categorize under each possible theme.

- B. With the same triad, write in a metacard a word or phrase that you think should never be seen or observed within our CBO group for it to be said as a safe place for us and other children we champion for. Discuss within the group and proceed to pasting the metacard on one of the Manila Papers with the title **Bad Conduct**.

Once the facilitator has group into themes and categorize both the Good and Bad Conduct, he/she can ask the body if they agree on the groupings and categorization done by the facilitator.

- C. After agreeing on the Good and Bad Conduct, the CBO group can now start writing their Code of conduct using these as their guide.

TASK 3 (40 mins)

RULES FOR OUR SAFE PLACE

- A. Back in your triads, the facilitator will distribute each theme to the triads and

each triad will think of one (1) maximum of three (3) elaboration of the said theme to be part of their code of conduct. One to two sentence is enough for each point. Each point should be written in a bond paper and pasted and displayed again in a Manila Paper with the title **Code of Conduct**.

The facilitator can assist the participants as they craft their sentences.

- B. The facilitator will now discuss the Code of Conduct posted by the triads and identify if there's any similar thoughts and make sure none to group same thoughts and paraphrase if needed.

TASK 3 (20 mins)

GIVE THANKS FOR OUR SAFE PLACE

- A. The CBO President will summarize and present the Code of Conduct to the rest of the group members for affirmation of the body. After that, the president encourages the body to commit in following and observing the said Code of Conduct.

- B. Celebrate the making of your Code of Conduct by offering a prayer of commitment and thanksgiving.

- C. Rewrite the Code of Conduct in a Manila paper and display your Code of Conduct in your meeting place.

Sample for simple Code of Conduct is in the Annex page 63-65.

IMPORTANCE OF ELECTING LEADERS

Leaders are essential to a group or to an organization as they guide the team towards execution of the group's vision.

They offer guidance and support to team members to ensure that all roles are fulfilled and members are motivated and cared for.

That's why it is important to make sure that the leaders are not only qualified to do the task ahead of them but also able to catch and keep the vision of the group and move towards completion of it.

In our CBO group, it is highly encouraged to have a process in choosing the leaders who will help us attain making our community a safe and enabling environment for the children and youth.

Election of Leaders

Step 1. IDENTIFICATION OF POSITIONS

Based on the number of members and roles needed for the group, the CBO body should decide how many number of officers they need to properly manage the group for efficacy and efficiency.

A minimum of five (5) position could be your guide. The positions could be consists of President, Vice-president, Secretary, Treasurer, and Auditor.

Other possible inclusions are: Business Manager, Public Information Officer, and Committee Leaders like—Survival Committee Leader, Protection Committee Leader, and Participation Committee Leader. This depends on how you wish the organization structure to look like for better management of the group.

Step 2. DESCRIBE OFFICERS' POSITIONS

In order for the body to better identify who's best to be elected for each position, there must be a role description for each post.

Especially for the five (5) basic positions.

President

The president of a group or an organization acts as the top executive personnel responsible for strategic planning and group's vision.

He/She will provide leadership to the CBO group, make sure that the tasks of each role are fulfilled and the policies are observed and duly followed.

Other duties may include direct reporting to the board of directors and taking on the responsibility for budget and financial health and management of the CBO group.

Vice-president

The vice president (VP) of an organization is generally the second in command. He/She represents the President when the president is unavailable.

He/She also leads, guides, directs, and evaluates the work of other executive leaders as assistance to the president.

He/She assist the president as they formulate and implement the strategic plan of the CBO group. Also, the VP evaluates the success and effectivity of the group in terms of achieving their VMG.

Secretary

The role of the secretary in any formal group is to be the custodian of the process of meetings.

He/She arranges the meetings—including the Agenda of the Meetings (AGMs), and keeps formal records of the CBO group's process and decisions: the minutes of the meeting.

This may include keeping records of correspondence.

Treasurer

The Treasurer has a regulator role over all aspects of financial management of the CBO Group.

He/She works closely with the President and Vice-President to safeguard the organization's finances.

He/She is also responsible for the general financial planning and budgeting of the group including proper filing and documentation of all financial transactions of the group.

Auditor

An auditor in an organization is someone who prepares and examines financial records.

He/She ensures that the financial records are accurate and that taxes (if there's any) should be paid properly and on time.

He/She assesses financial operations and works to ensure that the CBO group is running efficiently.

Also, he/she makes sure that the information reported on financial statements is true and accurate and that the financial statements are prepared with integrity and correctness.

Step 3. NOMINATION OF OFFICERS

We nominate members who we identify to have potential to become our CBO group's leaders.

In the nomination, all members of the CBO group is gathered. Anybody from the group can nominate for all position.

Once all nominated names were given, the nominees will be called up front to accept or deny the nomination.



After this, the nominees will be asked to introduce themselves and share what they can contribute to the CBO group should they be elected and why they should be elected.

Step 4. ELECTION OF OFFICERS

The process of election will be through votation. It can be through secret ballots or through raising of hands whichever is easier for the group.

The election rule to be followed is majority wins. In the event of a tied vote, a toss coin will be done to break the tie.

Step 5. PROCLAMATION OF OFFICERS

Once the election is done, formally proclaim the newly elected officers and pray for them and their commitment to the group.

Last but not the least, do not forget to craft your CBO group's **ORGANIZATIONAL STRUCTURE.**

ORGANIZATIONAL STRUCTURE

IMPORTANCE OF ORGANIZATIONAL STRUCTURE

It provides direction to all members of the CBO group as it lays out the reporting relationships that of the members and the officers that governs the workflow of the organization.

It stands as an official outline of the group's structure which makes it easier to add new positions and committees, as well, providing a flexible and ready means for growth for the organization.

TIPS IN DEVELOPING AN ORGANIZATIONAL STRUCTURE

1. OUTLINE YOUR GOVERNANCE PLAN.

Determine what kind of governance you need in making decisions. Identify the roles in your organization.

Typically, identify the leaders and based on their functions, to whom they will relate to, coordinate to, or report to.

2. ESTABLISH ROLES AND FUNCTIONS.

Clearly define the functions of each role and establish the lines of authority they are subjected to for proper coordination and clarity of tasks.

3. TEST IT OUT.

Best way to check if you have a functioning organizational structure is for you to test it out. Find gaps if there's any and be flexible to change if necessary.

4. SPREAD THE WORD.

Communicate about the organizational structure so that the members of the CBO group is aware and understands who to approach and talk to should there be any specific concern that they have. It would help the group distribute the task and efficiently manage the group's concern.

Sample for Organizational Structure is in the Annex page 66.

Annual
Planning
of
Activities

HOW TO WORK ON YOUR ANNUAL PLAN?

Who's involved?

The participants are members of your CBO group. You can organized by barangay level.

The facilitators are leaders of your CBO group that were trained on Basic Facilitation Skills.

Why is it important to have an annual plan of activities?

The purpose of an annual plan is it identifies your CBO group's goals for next year and helps you prepare and explore different strategies to achieve them.

An annual plan helps you focus on attainable goals and sets a deadline for achieving them. It also allows you to determine concrete foundation on which to build for the coming year.

This also provides structure and direction for your CBO group and your members.

An effective annual plan stands as a useful compass for the entire organization with regard to planning and executing of VMG for the year.

When is the best time to do this?

It is best to do this after the VMG setting for the year and at the first month of the year if possible.

Time allotment for this session is around three (3) hours.

Where is the best place to do this?

A place where everybody is comfortable to gather around and is conducive for discussion. There should be places to post or display the final annual activity plan.

What are the supplies needed?

Metacards
Masking Tape
Marker/Pens

Manila Paper
Bond Paper

How is this done?

TASK 1 (40 mins) **GALAK, GALING, GANDA**

- A. As an CBO member, what are the experiences in the group that brings you joy?

Write one (1) to three (3) experiences max. One joyful experience per metacard. Paste your answers in the Manila Paper titled **GALAK**.

- B. What are the best experiences you have being part of your CBO group?

Write one (1) to three (3) experiences max. One best experience per metacard. Paste your answers in the Manila Paper titled **GANDA**.

- C. In your experience, what are the skills you are good at and your CBO group is excellent at that you can share to your community?

Write one (1) to three (3) experiences max. One skill per metacard. Paste your answers in the Manila Paper titled **GALING**.

- D. While all of them are answering, the facilitator will group the similar themes for each category: Galak, Ganda, and Galing.

TASK 2 (20 mins)

PAGLINANG

- A. In triads, remember our dreams or VMG for this year. How can we develop our **GALAK**, **GANDA**, and **GALING** to reach those dreams?

For example: If we want to recruit more members, what is it that we are good at or something that we've experienced in the CBO group that brings us joy that we can do to attract more members? It can be gathering with food or building relationship with other children, or partnering with other CBO groups.

Write it in a metacard and paste to a Manila Paper titled **PAGLINANG—A.**

- B. Still in triads, how can we measure the development for each GALAK, GANDA, GALING in reaching those dream?

For example: Our goal is to recruit more members. How many members do we desire to recruit every activity and how do we plan on doing so?

Write it in a metacard and paste to a Manila Paper titled **PAGLINANG—B.**

TASK 3 (70 mins)

PAGBUO

- A. If in five (5) years, those listed in GALAK, GANDA, and GALING are still happening in your CBO group, how do you think your group and your community would look like?

Write the thought or image in your metacard, one thought each metacard. You can write as many as you like.

Paste it in the Manila Paper titled **CBO AFTER 5 YEARS.**

The facilitator will group similar themes and categorize each themes.

- B. With our dreams in mind and armed with our experiences, what are the activities we should do to achieve our 5-year development plan? What are our first steps to meet this measure?

Write it in a metacard and paste to a Manila Paper titled **ACTIVITIES.**

C. The facilitator will again group activities that are similar to each other and categorize it.

Once all activities are grouped, divide the CBO body to triads again, if there are themes similar to that of their committees, the groupings can be per committee of survival, participation, and protection.

Each distributed **activity** per group will be discussed using the following questions:

- When and where will the activity be held?
- For whom is the activity? Who will do it?
- What should be prepared and what is its schedule or program?
- How much would it cost?
- How can we use our experiences, joys, and competencies as resource for this activity?
- What are the risks for this activity?
- How is this aligned to our VMG?
- How is this beneficial for the children and our community?
- How are the children included in this activity? What are their roles?

D. Once each group is done. The facilitator will assist the body in scheduling the activities written by them.

Using a Manila Paper with months and weeks on it for next year, for example: **FY 2020-2021**, the whole CBO body will plan their annual activity.

With the use of their gathered thoughts and activities, the facilitator will now ask the groups to paste their activities on the month or week the activity falls based on what they have agreed upon.

Once everything has been placed and scheduled, they can now check if there have been overlaps in the scheduling and allow the body to discuss the following:

- What activity to prioritize?
- When to re-schedule overlapping activities?
- What activities can be postponed for next year?
- And lastly, who's committee will spearhead the said activity?

GBO

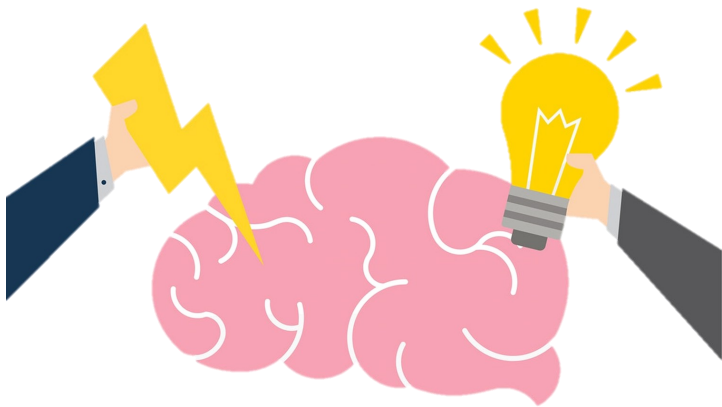
Meeting

Procedures

IMPORTANCE OF CBO MEETINGS

- It's a great way of building supportive relationships within the team. An avenue for the team members to ask and offer support to other teammates.
- It provides us with a safe environment where we can share information we wouldn't be comfortable to share through written report. It also gives us opportunity to learn more about our CBO group co-member and a safe space for us to provide each other feedback.
- It gives us the opportunity to hear each other out as everybody gets the chance to speak and be heard. It helps us understand each other and be on the same page about our CBO group.
- It plays a vital role in leadership as meetings can be the opportunity for him/her to encourage members to keep the vision, clarify the mission and raise the spirits of the members that everybody has a part in what our CBO group is trying to achieve.

- It is a great reminder that we are not alone and that we are part of a team that we can rely on. The closeness, security, and intimacy that meetings provide is nothing like that of group texts or chat message. It may help you get the job done, but relationships are not built and strengthened which we don't want to happen.



STEPS IN PREPARING CBO MEETINGS

1. Draft an agenda based on the pressing matters for the CBO Group.
2. Define a clear goal. At the end of the meeting we will have accomplished _____.
3. Set date and start and end time of the meeting.
4. Distribute agenda and provide supporting material if there's any, like a copy of minutes from previous meeting.
5. Decide the flow of the meeting. Best to have a timed flow of the meeting to make sure you are allotting enough time for the meeting.
6. Send invitations to participants and inform them about the agenda.
7. Designate the secretary to take notes during the meeting and another person for back up.

MEETING PREPARATION CHECKLIST

Use this tool whenever you prepare for your CBO group meeting.

Have you:

- Identified the purpose of the meeting?
- Made sure you really need a meeting?
- Developed a preliminary agenda?
- Selected the right participants and assigned roles?
- Decided where and when to hold the meeting?
- Confirmed availability of the space?
- Sent the invitation?
- Sent the preliminary agenda to key participants and stakeholders?
- Sent pre-reading or requests which require advance preparation?
- Followed up with invitees in person, if appropriate?
- Verified that all key participants will attend and know their roles?
- Prepared yourself (printed handouts, prepared materials, etc.)

Source: Running Meetings (20-Minute Manager Series), Harvard Business Publishing, hbr.org (<https://hbr.org/2015/03/a-checklist-for-planning-your-next-big-meeting>), 11.11.2019

SAMPLE PREP FOR CBO MEETING

Purpose of the meeting

To decide which CBO activities to do next month—December.

When

3rd Sunday of November, 2019; 8AM to 10:30 AM

Where

Covered court near Barangay Hall

Agenda

1. Decide the activity to hold on December
2. Assign tasks and roles to each committee
3. Discuss the logistics for the activities

Meeting Flow

8:00 AM — 8:15 AM	Welcome: Arrival of Participants Icebreaker
8:15 AM — 8:30 AM	Word or Worship
8:30 AM — 10:00 AM	Work: Decide on the activities Assign tasks and roles Logistics of the Activities
10:00 AM —10:30 AM	Wrap up

Materials to prepare

Logbook, Attendance sheet, minutes from previous meeting, snacks, etc.

REMINDERS FOR ACTUAL CBO MEETING

1. **Start and end on time.** It is important to start and end time to foster respect of each others' time and to make sure that meetings remain to be productive.
2. **At the start of the meeting, state the goal of the meeting.** This will help the participants to keep in mind the desired end output of the meeting. This will also help you check if the meeting has been productive or not.
3. **Provide updates on tasks from previous meeting if applicable.** This will help participants of the meeting to be well-aware of what's happening in the organization.
4. **Follow to the agenda, stay on time.** Make sure that there is a timekeeper to keep you within your agreed time for the meeting.
5. **Stay focused, place new topics on parking lot for next meeting.** Should there be any matters arising not related to the agenda and are not urgent, take note the question and include in your agenda for next meeting.

6. **Take clear brief notes.** Distinguish between informational notes and decisions for easier tracking of action points.
7. **Assign tasks.** Assign each task to one person and set due date.
8. **Summarize.** Make sure to sum up all decisions and action points for the participants to easily remember.
9. **Schedule Follow-up Meeting.** It is best to schedule the follow-up meeting immediately after you meet with the participants so you can get their commitment.

MeetingKing. (2011-2019). (Paracas Solutions LLC) Retrieved November 11, 2019, from Checklist for Productive and Effective Meetings: <https://meetingking.com/checklist-for-effective-and-productive-meetings/>



HOW TO LEAD CBO MEETINGS

The 4 Ws which are: **Welcome, Word, Works and Wrap-up** is a simple yet effective format of meeting small groups.

When fully understood, the 4Ws can become a leader's favorite set of tools in terms of meeting groups.

◇ WELCOME

This is the time represented between the first person who arrives and the moment you officially start the meeting. There should be a friendly atmosphere that is inviting and engaging.

There are simple strategies to achieve this. It's not a complicated concept to grasp and execute, but if you don't have a plan, it can sabotage your small group night by making a negative first impression.

◇ **WORD**

The leader is not obligated to share a lengthy teaching. Instead, you can help the group by leading them to draw conclusions from the Word of God.

A simple praying of the scripture. A short reading of a parable or even a short song of worship sang together by the CBO group.

◇ **WORK**

Work is the business proper part of the meeting. Here you will talk about the set agenda, decisions need to be made, planning, budgeting, etc.

The work part is commonly the longest part of the meeting as most of the action happens here.

◇ **WRAP-UP**

It is important to wrap up and summarize the discussion. This helps everybody who participated in the meeting to retain all the needed information remember and the action points pending to be done.

Sample Minutes of the Meeting

CBO GROUP MEETING

Date:

Time:

Location:

Meeting called by:

Facilitator:

Timekeeper:

Notetaker:

Please read:

Please bring:

Attendees:

MINUTES

Agenda item:

Enter agenda item

Presenter:

Enter Presenter here

Discussion:

Conclusion:

Enter conclusions here.

Action Items:

Person Responsible:

Deadline:

OTHER INFORMATION

Observers:

Enter observers here.

here.

Resources:

Enter resources

Special notes:

Enter any special notes here.

How to
Work on your
Social
Accountability
Community
Scorecard?

Who's involved?

The participants are members of your CBO group. You can be organized by barangay level.

The facilitators are leaders of your CBO group that were trained on Basic Facilitation Skills.

Why is there a need for Social accountability (SAc)?

SAc is a process of constructive engagement between citizens and government to check the conduct and performance of public officials, politicians, and service providers as they use public resources to deliver services, improve community welfare, and protect people's rights.

When is the best time to do this?

The activity is best done as at the start of the calendar year or fiscal year whichever works for you. Time allotment for this session is around three (3) hours.

Where is the best place to do this?

A place where everybody is comfortable to gather around and is conducive for learning. There should be places to post or display the Community Score card.

What are the supplies needed?

Metacard

Pentel Pens

Masking Tape

Bond Paper

Pentel Pen

Manila Paper

Community Score Card Template

How is this done?

TASK 1 (20 mins)

WARM-UP: How well do I know my community?

In a group of three (3) you will be given a Bond Paper and pentel pens.

In your group, answer each question.

1. Who is your Punong Barangay or Barangay Chairperson?
2. Who is the Barangay Kagawad in-Charge or Committee Chairperson assigned in Education?
3. What does BCPC stands for?
4. Who is the Barangay Kagawad in-charge or the Committee Chairperson assigned in Health?
5. What is the current population of your barangay?



TASK 2A (20 mins)

Short Lecture on Social Accountability

- As part of the community, you have the right to participate and to take part in different activities and affairs of your community. It is also important to understand the programs, projects, and activities (PPA) of the local government and appreciate why they do what they do and recognize the changes and the benefits this could bring to the community, most specially, to the children and youth.
- It is important for you to know and understand the necessities of the community so you can help check and see if the programs, projects, and activities of the local government matches to what you and your community actually needs.
- As part of CBO, you have the right and the responsibility to be aware and to be active participants in meddling in your community's affairs. You can start doing this through monitoring and evaluation of your own community's program, projects, and activities (PPA).

TASK 2B (30 mins)

Programs, Projects, and Activities (PPAs)

- A. In your triads, based on what you know, write in your metacards, one thought each card, the PPAs (Programs, Projects, and Activities) done in your barangay, especially those that involves and benefits children and youth.
- B. Paste all of your metacards on a Manila Paper **titled PROGRAMS, PROJECTS, and ACTIVITIES.**
- C. Once done, the facilitator will call on one for each triad to discuss similar activities they each noticed while other facilitators group per activity each posted PPAs.
- D. Once all groups has shared, the facilitator will now address the body and ask if they all agree on how each themes are grouped and if the following activities are happening in their own community.

TASK 2C (30 mins)

Categorize PPAs

- A. The facilitator will distribute grouped activities or themes to each triad. The triad will now categorize the activities under specific categories.

B. After discussing which category each activity should be under, the triad will now proceed to post the activities under different categories which are:

Peace and Order	Health
Education, Cultural Affairs and Tourism	Women, Family, Senior Citizens and Children
BDRRMC	BCPC
Public Welfare and Safety	Livelihood and Job Employment
Youth and Sports Development	Justice and Human Rights
Social Services and Sanitation	Public Works and Infrastructure
Environmental Protection and Waste Management	Transportation, Communication, and Public Services

TASK 2D (50 mins)

Community Scorecard

- A. Based on the categories each triad made for the PPAs, we will now work on our Community Scorecard or (CSC). The focus of our CSC will be about PPAs of our community, most specially our *barangays*, that we think we can accommodate to monitor and evaluate.

As a group, we will decide which PPAs we can monitor and evaluate. We will identify these PPAs and we will discuss and work on the standards and indicators that will help us better evaluate these activities.

- B. Once the PPAs are already identified, the facilitator will now discuss the **Sample Community Scorecard that can be seen in Annex page 88.**
- C. After the discussion of the Sample Community Scorecard along with its legends, the facilitator will now distribute one identified PPA of the group per triad. The triad will then be instructed to preliminary discuss the Standards and Indicators for their specific PPA.
- D. Once the triad is finished working on their standards and indicator for their assigned PPA, they will paste it on the Manila Paper titled **Community Scorecard.**

- E. When every triad has posted their answers on the Manila Paper. The CBO President will now facilitate the discussion of the group if they agree to what each triad has included or if there are revisions they need to make.

TASK 3 (15 mins)

Celebrate Commitment to Social Accountability

- A. When everything has been discussed, revised, and agreed upon, the CBO President will now summarize and present the Community Scorecard to the group. After that, the president encourages the body to commit to be accountable in monitoring and evaluating the PPAs in their community and to always find ways to share their recommendations for the betterment of their community.
- B. Celebrate the accomplished Community Scorecard by offering a prayer of commitment and thanksgiving.
- C. Always have a copy of your Community Scorecard readily available.

Now that you have your Community Score Card, it's now time for the CBO group to talk about when and how would this be presented to your Barangay Council.

This could be done during one of the Barangay Sessions.

The Barangay Council could help suggest on how you'll do the monitoring and assist you as you schedule it.



Let's understand Advocacy

WHAT IS ADVOCACY?

Have you ever felt not being able to say something on a topic that directly affects your life?

How did you feel not being able to express your opinion over something? It must have been hard and difficult not to be heard especially if those people making that decision that affects you doesn't fully understand you.

Everyone should be able to say what they want and need when decisions that will affect their lives are being made. But sometimes people have difficulty being heard by the people making those decisions.

With that, advocacy comes in. **Advocacy is about making your views heard, or acting on another's behalf to make his or her views heard, by people making decisions that affect you or the other person.**

Adapted from: Speak up and Be Heard: Steps to Effective Advocacy. (2005). Representative for Children and Youth. Retrieved November 21, 2019, from <http://www.rcybc.ca/>

Advocacy isn't always easy...

Sometimes people feel frustrated, discouraged or angry, but they don't speak out, because they:

- ◇ feel they don't have enough time, energy or information to take action
- ◇ believe nothing they say or do will make a difference, or that no one will listen
- ◇ are afraid of speaking out to someone who has the power to affect their finances, make life difficult for them or their family, or affect the quality of the services they receive
- ◇ are afraid of not being believed, of looking stupid, of being put down, or of getting too mad, sad or out of control
- ◇ don't feel smart enough, educated enough, or competent enough
- ◇ don't understand what is being said, because they have difficulties with language or reading, or because others are using jargon or technical language
- ◇ feel intimidated by people in authority
- ◇ don't want to make trouble for anyone else, or they
- ◇ don't want to go through what they went through the last time they speak out.

..but it's worth it!

There is no guarantee that just because you speak out, you will get what you want. However, if you don't speak out, nothing will change.

Here are some reasons to speak out for yourself or for another person:

- ◇ The only way that others will know that you disagree with a decision, or that your rights have been violated, is if you speak out.
- ◇ If people who have the authority to make decisions that affect you don't know that there are problems, they will assume that everything is all right.
- ◇ Everyone should be able to challenge the "rules" they are required to live by; just because something is a law or policy doesn't mean that it is fair or just.
- ◇ If you stand up for yourself, you will have the satisfaction of knowing that you tried to take care of yourself, even if you don't achieve your goal in the end. Similarly, if you are advocating for someone else, both you and that person will know that you tried. Speaking out helps people keep their self-respect and dignity.
- ◇ People who speak out often find that they are not alone; by refusing to be silent, you may lead the way to changes that affect a lot of other people.

—Adapted from *The AdvoKit: A Step-by-Step Guide to Effective Advocacy*

4 PARTS OF ADVOCACY

1. Rights

Rights are owned not earned.

- ⇒ **Protection and survival** – Children have the right to life and the right to be protected from all abuse, violence, exploitation and neglect.
- ⇒ **Participation** – Children are persons with the right to express their views and participate in decision-making concerning them.
- ⇒ **Development** – Children are entitled to grow to adulthood in a nurturing family and community environment, with an adequate standard of living to support their full development.
- ⇒ **Non-discrimination** – All children are entitled to respect and the protection and benefit of their fundamental human rights regardless of their race, ethnic origin, color, religion, sex, age, disability, or other characteristics.

2. Information

Having adequate information is a basic requirement of becoming an active participant in the system.

Information is power. Power is not evenly shared. Those within the **'system'** or those in positions in the government have information and are empowered. Those outside, especially those without access to information, are not.

3. Voice

The voice of children, youth, and their families is valuable; it is not a problem.

With information, support, and resources—children and youth are their own best advocates.

To really have a voice, children and youth need the opportunity to say it “their way” to someone who really listens and can do something about it.

4. Inclusion

To even the playing field, equal respect must be given to all perspectives.

When everyone who “cares” or “should care” has a voice, better decisions will be made.

Inclusion is not just about inviting people to the table – it is about genuinely welcoming and considering their point of view, regardless of their title, age, or status.

—Adapted from resources developed by the Office of the Child, Youth and Family Advocate from the Speak up Be Heard: Steps to Effective Advocacy



HOW TO ADVOCATE?

THREE (3) STEPS of ADVOCACY

1. PLAN AND PREPARE

Planning and preparation are essential to effective advocacy.

Planning and preparation includes:

Assess the situation

The first step in trying to solve a problem is to clearly identify and define what the problem is.

Gather all the facts about the situation

In order to present a strong case, and to develop an action plan, you will need to gather and organize all the facts and information that you can.

□ **Look for other ways to resolve the problem**

Before you can make a case for getting what you want, you may need to show that you have looked for other ways to resolve the situation.

Come up with some options or alternatives. Try to think in broad terms.

For example, rather than specifying that you need a taxi to get you to an appointment, think of it in terms of transportation to the appointment.

Ask yourself:

- ⇒ Is there any way we can get what we want or need from another source?
- ⇒ (For example, could you get the service you want from another organization?)

- ⇒ Is there something we could do or use instead of what we're asking for?

- ⇒ Is there some other approach that would work?

- ⇒ One way to come up with alternatives is to find out what other people in similar situations have done.

Even if your situation is complex, it's likely that someone has had a similar experience.

Try asking any of the agencies or organizations that you approach for information whether they know of any other children and youth who have been in your situation.

⇒ Be sure to keep track of everything you do to find alternative solutions. And be specific: write down the agencies or organizations you approach, the names of the people you speak to and when you speak to them, and the results that you get.

□ **Make an action plan**

Every advocacy situation is different, so some of the suggestions in this section may not apply. Or you might want to use them in a different order than they appear.

Based on everything you have learned, decide what you need to do to get your concern addressed or resolved.

2. PERSUADE

You have finished preparing, and you are ready to persuade the decision-maker.

In this step, we look at three (3) ways to present our advocacy in person, on the phone, and by mail. We would also look at other advocacy tools that we can do.

First, however, three important points are covered:

□ **Being Assertive (versus being aggressive)**

Advocacy is an assertive and collaborative approach to solving problems. It's important not to confuse being assertive with being aggressive.

Assertiveness is a way of thinking and behaving. It is also a skill that you can learn and practice.

Being assertive means:

- knowing what is best for you, and knowing how to ask for it
- expressing yourself simply, clearly and directly – in a way that doesn't attack, negate or manipulate anyone else

- striking a balance between being aggressive and being passive (not participating actively)
- standing up for yourself, while respecting the needs and interests of others.

□ **Interests (versus positions)**

Effective advocacy focuses on interests rather than positions. A simple way to understand the difference between interests and positions is that a position is what someone wants, whereas an interest is why someone wants something.

Positions are stated like this:

- I want...
- I don't want...
- You should...
- Everyone must...
- I need to...
- We have to...

Interests are often more complex, because they are more personal. They involve what is important to a person, including our concerns, beliefs, hopes, fears, assumptions and values.

□ **Communicating clearly**

Effective advocacy requires good communication skills.

Whether you are advocating for yourself or for someone else, and no matter how you are going to present your case – in person, by phone, or in writing – being able to make yourself understood, and listening carefully in order to understand what others are saying, will increase your chances of getting what you want.

Listen carefully to the other people when they are speaking. Pay close attention to what they are saying.

If you don't understand what they are saying, tell them that you don't understand. If they are using jargon or technical terms that you don't understand, ask them to use different words.

3. MOVE FORWARD

If you have already achieved what you wanted to, congratulations!

If you have presented your case and are still not satisfied with the outcome, take some time now to think about what to do next.

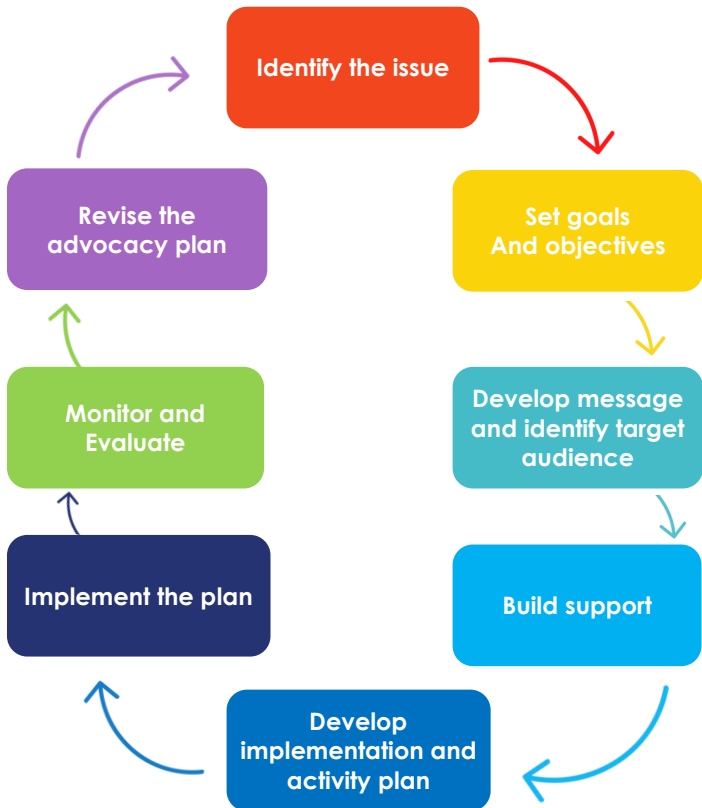
Ask yourself:

- ⇒ Did I accomplish part of what I set out to do?
- ⇒ What went well?
- ⇒ Who was helpful to me?
- ⇒ What would I do differently if I could do it again?
- ⇒ What will happen if this resolution stands?
- ⇒ Can I find any new information that could lead to a resolution in my favor?
- ⇒ Is there someone else who has the authority to resolve things in my favor?
- ⇒ Do I want to take my case further? Where can I do that?
- ⇒ Do I have the time and energy to continue?



Adapted from: *Speak up and Be Heard: Steps to Effective Advocacy*. (2005). Representative for Children and Youth. Retrieved November 21, 2019, from <http://www.rcybc.ca/>

STEPS IN ADVOCACY CYCLE



IDENTIFY THE ISSUE

Depending on your CBO group's capacity, prioritize or limit your efforts to addressing only one issue at a time and make sure your group is knowledgeable about the chosen issue.

Gather research and statistics, and develop supporting documents, such as presentations or fact sheets, to defend the issue at hand.

SET GOALS AND OBJECTIVES

What are you hoping to achieve as a result of the advocacy efforts?

Sample:

- Change in national health policy?
- Increased resource allocation to support health systems?
- Increased awareness of a largely neglected issue?

DEVELOP THE MESSAGE AND IDENTIFY TARGET AUDIENCE

It is important to establish key messages regarding the issue and to keep the messages as simple and concise as possible.

Be straightforward in identifying what the problem is and how you suggest it be improved.

Continuously repeat the key messages throughout your advocacy efforts.

When developing your key messages, first identify who the target audience will be and adapt your messages to suit this audience (e.g. if the audience is mostly politicians, don't use clinical terminology that only physicians would understand).

BUILD SUPPORT

Advocacy is about raising your voice.

The messages are heard much louder when the voice of many is combined. Before moving forward with advocacy efforts, try to build support among stakeholders and the public.

This can be done by approaching the media, launching public campaigns, or promoting the issue through social media.

It is also worthwhile to consider forming a coalition by bringing together likeminded organizations who share the same opinion on the issue.

DEVELOP AN IMPLEMENTATION AND ACTIVITY PLAN FOR YOUR ADVOCACY WORK

Decide what types of activities will be included as part of your advocacy efforts.

Depending on the urgency of the issue or the extent of your supporters, activities could range from writing a letter to a member of parliament, organizing a public event near parliamentary offices, face to face meetings with decision makers, or it could involve a combination of activities over a longer period of time.

IMPLEMENT THE PLAN

Once you have established the key messages and a group of supporters, you are ready to move forward with the advocacy activity plan.

MONITOR AND EVALUATE

As like any project, it is important to continuously monitor progress and evaluate the plan put forth.

- Are you on your way to meeting the set goals and objectives?
- How are the messages being received by the target audience?
- Have the advocacy efforts been contested, causing setbacks?

REVISE THE ADVOCACY PLAN

If after evaluating your initial advocacy efforts you find the need to make changes or improvements, return to the activity plan and revise it accordingly.

Remember that advocacy is not always successful after one try; it often involves many attempts over a long period of time. Be consistent with your messages, persistent with your efforts, and remain optimistic.

SAMPLE

ADVOCACY TOOLS

Personal meetings

This are the most effective and participatory advocacy tools.

Lobbying

This is to influence the policy process by working closely with key individuals in political and governmental structures.

Negotiation

This is done to reach a common position

Project visits

This is to demonstrate good practice.

Production of Advocacy materials

- Letters and newsletters
- E-mail/internet
- Flyers, pamphlets, and booklets
- Fact sheets and posters
- Video and drama

CODE OF ETHICS FOR ADVOCATES

1 Encourages and supports others to advocate for themselves as much as possible.

2 Makes sure they are aware of advocacy resources, before they start to help others.

3 Obtains consent before they speak or act on someone's behalf.

4 Makes sure their own values and belief systems do not interfere with the right of individuals to make their own choices.

5 Places the interests, preferences, and decisions of the individual above their own when acting on someone's behalf.

6 Avoids any false, misleading or unfair statements or claims about the advocacy process, and their role, skills or qualifications.

7 Advocates advise individuals to be honest.

8

Advocates inform others about the consequences and risks associated with any planned actions.

9

Advocates inform others of their right to confidentiality, their right to give consent prior to release of information, and the legal limitations of confidentiality.

10

Advocates declare any potential conflict of interest in their advocacy activities.

11

Advocates do not behave in ways that could cause fear, discomfort or harm to others.

12

Advocates respect and understand cultural, social and individual diversity.

13

Advocates maintain their skills and knowledge about advocacy issues.

14

Advocates withdraw, in a professional manner, when their involvement is no longer appropriate or useful.

Adapted from: **Speak up and Be Heard: Steps to Effective Advocacy. (2005). Representative for Children and Youth. Retrieved November 21, 2019, from <http://www.rcybc.ca/>**

How to Craft Advocacy Plan

Who's involved?

The participants are members of your CBO group. You can be organized by barangay level.

The facilitators are leaders of your CBO group that were trained on Basic Facilitation Skills.

Why is there a need for an Advocacy Plan?

As we wish to move our advocacies further, having an advocacy plan will help us strategize, develop achievable goals, and provide us ways to monitor our advocacies so we can know if we are making the change we hope to see.

Planning will help us find out ahead of time major difficulties that we may encounter. Planning will allow us to avoid surprises that may deter our advocacy.

In addition, as with any project, planning our advocacy will help us to:

- Clarify your goals
- Clarify the steps that will take you to your goals
- Increase your chances of success

If you don't plan, you may waste valuable ener-

gy, miss some opportunities, perhaps even antagonize people you need to keep on your side.

When is the best time to do this?

The activity is best done as at the start of the calendar year or fiscal year whichever works for you. Time allotment for this session is around three (3) hours.

Where is the best place to do this?

A place where everybody is comfortable to gather around and is conducive for learning.

There should be places to post or display the Community Score card.

What are the supplies needed?

Metacard
Pentel Pens
Masking Tape
Bond Paper
Pentel Pen
Manila Paper
Advocacy Plan Template

How is this done?

TASK 1 (10 mins)

WARM-UP: What are your challenges as an adult in the community looking after children and youth's welfare?

- A. In a group of three (3) you will be given a Bond Paper and pentel pens.

In your group, share what you have written in your Bond paper.

- B. Ask anyone if there's anyone who wishes to share their challenges to the group.

TASK 2 (20 mins)

Our ADVOCACY: Problems we want to solve

- A. In your triad, discuss what challenges, issues, or difficult situations you encounter in your community as you desire to protect children and youth?
- B. Put the discussed challenges on your metacard and post it in the Manila Paper titled **Issues/ Situation**.
- C. Once done, the facilitator will call on one for each triad to discuss the situation they've chosen and asked why that's they've chosen problem to solve in their community.

- D. Once all groups has shared, the facilitator will now group similar challenges together and ask if the group if they all agree on how each themes are grouped and if the following problems are what they wish to monitor in their community.

TASK 3 (20 mins)

Goals and Objectives of our Advocacy

- A. In the same triad, based on the identified challenges or situation, imagine what it would look like if you don't have these challenges and discuss it within the group.

List down how you have imagined your community would look like if those said challenges are minimized or totally removed.

- B. Once done visualizing, think what is the first step you can do to achieve that imagine situation.

For example:

If you visualized a child friendly barangay where all children are safe and not physically abused, the first step could be (1) awareness of parents to children's rights and (2) heightened implementation of Children Protection Policy in your barangay.

Write your goals and/or objectives in a bond paper and paste it in the Manila Paper titled **Goals and Objectives**.

- C. Once this is finished, the facilitator will ask the body if these objectives are what they wish to see in their community. If everybody agrees, the goal and objectives for the advocacy are now set.

TASK 4 (40 mins)

Target Audience and Key Message

- A. As we learn from previous discussion, it is important for advocacies to identify its target audience so we can properly and clearly communicate to them what we desire for them to take action on.

As a group, each individual will be given a metacard. They will identify the audience we should take into consideration as we work on our advocacy plan.

- B. Once everybody is done writing, have all of them paste their answers under Manila Paper titled **Target Audience**. The facilitator will now continue with the Key Messages.

- C. We have now understood the challenges that

is the focus of this advocacy plan. With this, we need to define it through a consistent message for your target groups.

To do your key message, you need to answer the question “why” of your advocacy campaign.

With this, in your triad, discuss the identified problem and think of the “why you wish to solve the challenge and why you’re doing the advocacy?”

In order for your key message to be effective, it should be well thought out and easy to remember.

- D. Once done discussing your Key Messages within your triad, write it in your bond paper and then post it in the Manila Paper titled **Key Messages**.
- E. When everybody is done posting their work, the facilitator will then discuss to the body the key messages written by the group.

Together, decide what is the key messages they wish to use in their advocacy plan.

If everybody agrees, the goal and objectives for the advocacy are now set.

TASK 5 (35 mins)

Supporters and Advocacy Tool

- A. In order to achieve the goal of our advocacy, we need to get support from the public and from your network because when we have combined voices the message is louder the more awareness we can bring forth to the public.

So in your triad, identify the supporters, network, or government officials who can be champions of your advocacy.

- B. Once you have identify these supporters, write them on your metacard and paste them in the Manila Paper titled **Supporters**.
- C. When finished, the facilitator together with the body, will discuss who are the supporters they can work with for their advocacy. You can also identify as a group how you can target and approach each supporter and share your advocacy to them.
- D. Then the facilitator can now move forward with the advocacy tools to be used by your CBO group to approach your future champions.

You can do personal meetings, letters, phone call, lobbying, and the likes.

Samples for the Letter Outline, Recording a

Phone Call conversation, and writing a lobby letter is all in Annex pages 130 to 132.

E. Once you've chosen the Advocacy Tool fit for your target audience, you can now move forward with your advocacy activities and efforts.

TASK 5 (45 mins)
ADVOCACY ACTIVITY PLANNING

- A. Still in your triad, you'll be given three (3) metacards.

Each metacard is for the following:

- 1) **Advocacy Activity**—think of one advocacy activity that you think will fit to your key message and to your chosen audience.
- 2) **When**— The date and time you will do this activity.
- 3) **Budget**— What are the logistics and costing for this activity.

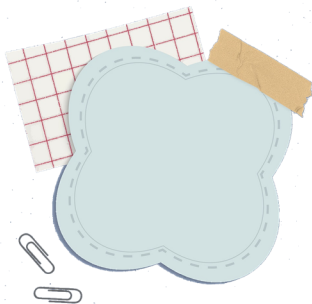
- B. Once done, each triad will post their answers to a Manila Paper titled **Advocacy efforts**.

- C. Now, the facilitator will discuss to

the body all of the activities suggested by each triad.

He/She will facilitate the discussion and allow the body to decide which of the said activities are doable for the said timeline, which of it are to be adjusted, and what are the activities that needs to be delayed for later date or removed if it's not what will make the advocacy more effective.

- D. When everybody agrees with the Advocacy Activity Plan, the facilitator will now present the whole advocacy plan that the CBO group has done.
- E. Together with the body, the CBO president will read the advocacy plan they've made and celebrate the task they've accomplished through thanksgiving and prayer.
- F. Make sure to always have a copy of your Advocacy Plan for future purposes.



Are You ready?

Advocacy Prep Checklist

*Some of these items might not apply to your situation. If all of your answers to those that do apply are **yes**, you are ready.*

*If you answer **no** to some of the questions, take a moment to decide how important each one is to you before moving on.*

I know what happened, when it happened, where it happened, and who was involved, and I can describe the situation in three or four sentences.

YES

NO

I know the reasons why I didn't get what I asked for.

YES

NO

I know what I am entitled to according to the law, regulations or policy.

YES

NO

I have found out whether there is a complaint, review or appeal process.

YES

NO

I have investigated possible alternative solutions, and have kept a record of what I found.

YES

NO

I have asked the person who denied my original request to reconsider his or her decision based on the information I have gathered.

YES

NO

I know how I want this situation resolved, and what my concerns will be if it is not resolved the way I want it to be.

YES

NO

I have kept notes about everything I have found out and every step I have taken to resolve the situation. It includes names of people I have spoken to, the dates I contacted them, and what was said.

YES

NO

I have planned how I want to present my case – in person, by telephone or by mail.

YES

NO

I have planned how I want to present my case – in person, by telephone or by mail.

YES

NO

How to
Write a
Lobby
Letter

Why is there a need for a Lobby letter?

In order to get our message across and express our opinion over challenges we wish to advocate for, writing to decision-makers is one of the best ways to campaign for our advocacy.

It works for different targets: whether a member of the Parliament, a government official, United Nations official or even a celebrity that can become champions for our cause.

Letter-writing is most effective when it acts as a supplement for a wider strategy. If possible, it'll be complemented by other approaches to the target audience, such as personal visits, and other actions, like publicity.

Who to target?

For us to know who we should address our lobby letters, ask yourself the following questions:

- Who has the power to make the change you are seeking?
- What is their current position on the issue?
- Are they open to pressure from within Government?

- Are they open to external pressure and if so, from whom?
- What are the best ways to influence them?

You can also decide to write to a secondary target that can influence the primary target.

For example, you can write to the Women and Children Helpdesk in your Barangay so they can influence the Barangay Chairman same with the Mayor and other powerful decision makers.

Once you've identified your target, the crafting of the letter would now be much easier as you can now decide with the tone and the message of the letter.

Letters is most effective based on your relationship with your target.

Ideally, the best thing to do is to keep writing to the same target person to build consistency, trust, and integrity. But should the situation changes or the target person is not open to carry your cause, be flexible and choose to lobby to someone else.

QUICK TIP!

Make sure that you get the name of your target official and title correctly and use the right salutation and form of address.

How to write effectively?

GET SUPPORTERS TO WRITE

For your lobby to be effective, persuade members of the public and supporters to your advocacy to write letters. They can write newsletters, organize letter writing events, postcards, etc.

REMEMBER YOUR AUDIENCE

In all letters, it is always important to bear in mind the recipient of it. So as you write your lobby letter, make sure you address the target's interest and concerns directly and succinctly.

Make it clear how the constituents will benefit from it and how they can also benefit should they support your cause.

ASK FOR SOMETHING SPECIFIC

Should it be appropriate and your relationship with your target is more consistent now, you can ask the decision maker to do something tangible to move forward your cause.

You can ask them to invite you for hearings, vote for a bill, that is relevant to your advocacy, be your champion for your advocacy, influence other decision makers, etc.

Anything that you find relevant to advance your advocacy, you can ask if your target can help.

KEEP WRITING!

Just like in any other cause, there may be people that will not be interested to be on board with what we fight for. So if you don't like the response that you receive, then write back and continue persuading your future champion.

What to say in the letter?

Since you have identified your target and researched about your advocacy, you should have a good idea about your message.

A typical letter would include:

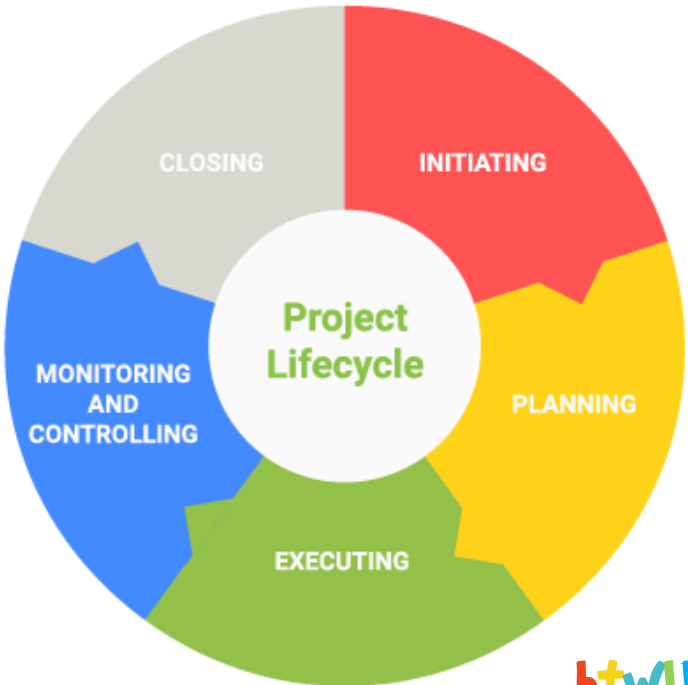
- The official's name, title, address
- Date in full
- Name of official and correct salutation/greeting
- First paragraph: say why you are writing e.g. in it may be a response to a public statement, about an upcoming meeting, to follow up a previous request.

Also include if you are writing on behalf of others or an organization or if you are writing in your personal capacity and what has prompted you to do so.

- Second and third paragraphs are the body of the letter. Here you will develop your arguments, back it up with facts, figures, specific cases, quotes, relevant legislation, etc.
- Final paragraph: here, you will state your recommendations and what action you would like the decision maker to take.
- Closure: Yours sincerely or Yours faithfully
- Your signature, name and if appropriate your title and organization.
- Your address and contact details
- Copies: who has received copies of the letter

International Campaign to Ban Landmines. (2019, November 25). Campaigning Tools. Retrieved from International Campaign to Ban Landmines: <http://www.icbl.org/en-gb/resources/campaigning-tools/lobbying-letters.aspx>

Project Management Cycle



5 Phases of Project Management

There are five phases of project management.

These phases are as follows:

- **Initiation**
- **Planning**
- **Execution**
- **Monitoring and Controlling**
- **Closure**

Phase 1: Project initiation

In this phase is where the project starts. Initial brainstorming and discussion takes place.

In this stage these questions are answered:

- Why this project?
- Is the project feasible?
- Who are going to be potential partners in the project?
- What are the boundaries of the project?
- How does the end-result look like?

Phase 2: Project Planning

This phase is the most challenging in project management.

After you have defined all the objectives and the results you envision for this project to accomplish, it is now time to craft a guide that will help you achieve your objectives.

In this phase you need to craft S.M.A.R.T goals. This will enable you to attain your desired output.

S.M.A.R.T. means:

Specific: To set specific goals and have an answer for every what, who, where, which, when, and how.

Measurable: To define criteria that can be used to measure the success of a goal.

Attainable: To identify what it will take to achieve those goals.

Realistic: To set goals that are actually doable and achievable in the given time.

Time-bound: To create a timeframe to achieve every goal.

In this phase, you will also have to identify which task falls to whom, scheduling of activities and tasks, etc.

Phase 3: Project Execution

The execution phase is usually referred to as the meat of the project. Here is where the project starts to take form and slowly progressing towards the desired result.

This is usually called the implementation phase.

Usually, in this phase is where high communication is needed as there should be progress reports, weekly meetings, monthly visits, etc.

Phase 4: Project Monitoring and Control

The monitoring and control phase are usually combined with the execution phase as they occur at the same time. Because as the project develops, it is important to consistently and constantly monitor the progress so that it is easy to know if the methods used in the implementation is effective and working.

This phase is important as it will help greatly in evaluating the project and making sure best practices are carried on future projects.

Phase 5: Project Closure

In this phase, the project comes to a close when it is finished and the desired outcome has been attained.

This is a vital stage in the life cycle of the project as it allows the team to evaluate and document the project and enables them to move on to the next one using what is backed up with the previous projects' successes and mistakes.

With this process, it will help the next project become better and more successful.



Kashyap, S. (2018, January 19). Demystifying the 5 Phases of Project Management. Retrieved from Proofhub: <https://www.proofhub.com/articles/project-management-life-cycle-5-phases>

Villanova University. (2019, March 14). Five Phases of the Project Management Lifecycle. Retrieved from Villanova University: <https://www.villanovau.com/resources/project-management/5-phases-project-management-lifecycle/>

HOW TO WRITE A PROJECT PROPOSAL

When writing for a proposal, it is important for you to know what suits best for your CBO groups capacity and what project best fit for you and your advocacy.

Once you have decided on these, the next step is to make sure that you have all the necessary information that will make your proposal effective.

Here are the imperative parts of your project proposal:

- Define your audience.
- Determine the problem being solved by your proposal.
- Conduct research on the current state of the issue and potential solutions.
- Proactively determine the effect that this project will have on company success.
- Establish a timeline and determine the type and amount of resources required.
- Begin to outline your proposal document.

SAMPLE OUTLINE

PROJECT PROPOSAL

Step 1. Project Information

This conveys the most important part of the project as it provides the executive summary of what the project is about.

In this part, you need to include the following details:

- Name of the Organization
- Project Title
- Project Summary
- Project Timeframe
- Prepared By
- Attached Documentation
- Project Contacts (any individuals involved in the project)

Step 2. Project Summary

In the project summary, it is expected of you to state all your objectives and reasons why you are doing this project.

It is best to have this section written coherently and concisely. Others would like to write this section last when everything else is already written for easier summing up of thoughts.

As you write, it is best to answer the following guide questions:

- Why are you doing this project?
- What will you be doing?
- How will you be doing it?
- Who will be doing it?
- Where will it be done?
- How long will it take?
- How much will it cost?

Under this section, you may also want to include Project Background and Project Objectives.

Project Background is a critical part that can help you provide information on the current state of the problem you wish to solve and why the reader should support you in solving it.

Be sure to include facts and figures to support your claims. One pager background is best.

Project Objectives is the part of the proposal where you can list all the goals you desire the project to achieve. Make sure that the objectives are measurable for monitoring and evaluation purposes.

Step 3. Project Methodology

In this section of the proposal, you will provide details of your plan and how you envision your objectives be achieved.

This would be the first section of your proposal where details of how you will solve the problem will be broken down.

It is also needed in this section to establish that the solution we have to answer the problem is backed up with research.

To start this, best is to have an outline of the methodology to be used, the specific population involved in the project and the establish process on how to achieve your objectives.

You can also include in this part task breakdown and time estimates depending on how long the project is.

Step 4. Project Risk Management

In this section, you will elaborate how you will manage changes should there be any during the execution of your project.

The clients or supporters that you wish to send the proposal will appreciate to see that you are prepared for any risk there is as you achieve your output.

You can also include in this section how you will manage the monitoring process of your project throughout the entire life cycle of the project.

This will help you, at the end of the project, to show clients the changes that occurred through the project.

This section can be broken down into two (2) parts:

- **Risk Management Plan** - it is a detailed plan of action to minimize the chance of risk all throughout the project's lifecycle
- **Risk Register** - this is a line-item list of risks and potential counter efforts that will be used should these risks arise.

Step 5. Project Costs

In this part of the proposal, you will discuss about the overall cost of the proposed project.

You can break it into three (3) major parts:

- **Project Budget** - it is a detailed line-item budget broken up by different project categories. You need to make sure that all overhead and indirect costs are included in the budget.

Categories could be: personnel, admin, communication, program activities, and the likes.

- **Budget Narrative** - this is a brief list of commentaries on the budget and further clarification or justification if needed.
- **Additional Final Statements** - depending on the complexity of your project, you may need additional financial statements like profit and loss statement, tax return, or funding sources. Should this be unimportant to the project proposal you're working on, you can skip this specific part.

Step 6: Conclusion

In this section, you should talk about the brief review of all the points you've already discussed.

This is the last chance to win over your client so ensure that you incorporate the most important detail to receive your much awaited approval.

This is also the final moment for your team to prove that you have thoroughly researched all solutions and your proposed method is the best for the project.

Section 7: Appendix

In this section you can include all charts, graphs, images, or reports that were cited in your proposal.

Usually, referenced material will go into the appendix as it does not naturally fall into the main body of the proposal.

Mavenlink, Inc. (2019). The step-by-step guide for writing a professional, winning project proposal. Retrieved from Mavenlink, Inc.: <https://www.mavenlink.com/resources/project-proposal>

Monitoring and Evaluation

MONITORING

It is the routine process of data collection (monthly, quarterly, annually) intended to measure whether the program is doing what is set out to do.

EVALUATION

It is the systematic investigation of whether a program is effective: whether the activities implemented are having the desired effect.

It is usually carried out periodically (mid project/end of project).

IMPORTANCE OF MONITORING AND EVALUATION

Based on the definition, monitoring and evaluation is important as it helps us assess if the project or program is effective and is achieving what is set to be done. Monitoring and Evaluation is there to make sure to learn from the data collected and see what needs to be improved and done.

Guidelines in Conducting

CBO's Performance Evaluation Tool

TIMING/SCHEDULE

The CBO Performance Monitoring & Evaluation is done every December and June of each Fiscal Year. This is to be integrated during the regular CBO meeting.

PEOPLE/PARTICIPANTS INVOLVED

All CBO officers and at least five (5) members.

TASKING

The CBO President facilitates the activity and the secretary records and tallies the score using the evaluation tool.

The rest of the participants can freely share their thoughts and opinion about the indicators being asked about.

DURATION

Duration is approximately one (1) and a half (.5) hours but could be more than that depending on the length of the discussion.

MATERIALS NEEDED

CBO Performance Monitoring and Evaluation Tool and Pens.

REFERENCE

The tool is based on The McKinsey 7S Model, a framework for organizational effectiveness that postulates that there are seven internal factors of an organization that need to be aligned and reinforced in order for it to be successful.



Steps on Scoring

1. Each factor has a set of themes and key indicators. And each indicator has a corresponding points or score.
2. Scores ranges from **zero (0) to four (4)**, where each of the themes have different assigned points/ score.
3. Based on the current state of the group and the indicators mentioned, plot the score at the column **“Score Earned”**.

Choose only from (0 - 2) ; (0 - 3) or (0 - 4) as your final score in a given theme.

4. After you have given all your scores at a given theme, get the sum of all the scores earned in each theme and plot it according to the **seven (7) S factors** at the bottom part of the tool.
5. After having a summary of all the scores earned, refer to the Performance Category of the group, to wit:

Non- Functional	0- 56
Semi-Functional	56 - 75
Functional	76 - 100

CBO Performance Evaluation Tool can be found in the Annex page 67-75. Make sure that the CBO Secretary and CBO President will sign the evaluation tool before they submit it.

Annex

Sample Code of Conduct

CODE OF ETHICS AND PROFESSIONAL CONDUCT

Be patient and courteous.

Be inclusive. We welcome and support people of all backgrounds and identities. This includes, but is not limited to members of any, race, ethnicity, culture, national origin, social and economic class, educational level, color, immigration status, sex, age, size, family status, political belief, religion, and mental and physical ability.

Be considerate. We all depend on each other to produce the best work we can as a group. Your decisions will affect clients and colleagues, and you should take those consequences into account when making decisions.

Be respectful. We won't all agree all the time, but disagreement is no excuse for disrespectful behavior.

We will all experience frustration from time to time, but we cannot allow that frustration become personal attacks. An environment where people feel uncomfortable or threatened is not a productive or creative one.

Choose your words carefully. Always conduct yourself professionally. Be kind to others. Do not insult or put down others.

Harassment and exclusionary behavior aren't acceptable. This includes, but is not limited to:

- ⇒ Threats of violence
- ⇒ Discriminatory jokes and language.
- ⇒ Sharing sexually explicit or violent material via electronic devices or other means.
- ⇒ Personal insults, especially those using racist or sexist terms.
- ⇒ Unwelcome sexual attention.
- ⇒ Advocating for, or encouraging, any of the above behavior.

Repeated harassment of others. In general, if someone asks you to stop something, then stop. When we disagree, try to understand why.

Differences of opinion and disagreements are mostly unavoidable. What is important is that we resolve disagreements and differing views constructively.

Our differences can be our strengths. We can find strength in diversity. Different people have different perspectives on issues, and that can be valuable for solving problems or generating new ideas.

Being unable to understand why someone holds a viewpoint doesn't mean that they're wrong.

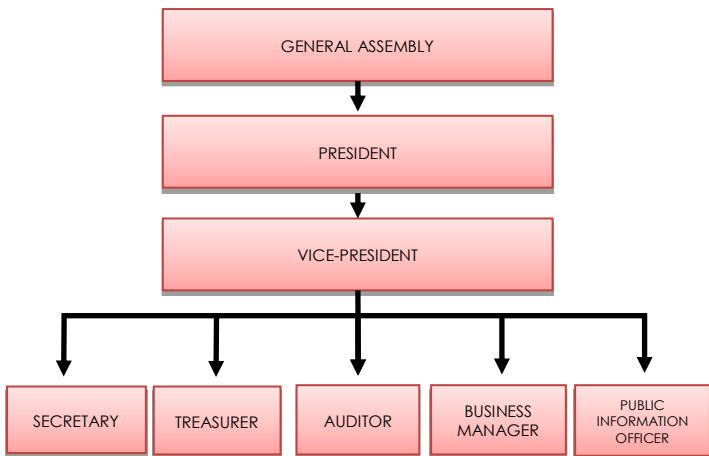
Don't forget that we all make mistakes, and blaming each other doesn't get us anywhere.

Instead, focus on resolving issues and learning from mistakes.

**This code of ethics and professional conduct
downloaded from Betterteam.**



Sample Organizational Structure



CBO Performance Evaluation tool

For the period of : () July-December 20___ / () January - June 20___

NAME OF CBO:

ADDRESS:

STRATEGY

SUSTAINABILITY PLAN	SCORE	SCORE EARNED
No Sustainability Plan	0	
With written sustainability Plan	1	
With written sustainability plan & at least 50 of the plan has been implemented	2	
With written sustainability plan & at least 85 of the plan has been implemented	3	

DEVELOPMENT PLAN	SCORE	SCORE EARNED
No Development Plan	0	
With written 3-year development plan	1	
With written 3-year development plan & at least 50% of the plan has been implemented	2	
With written 3-year development plan & at least 85% of the plan has been implemented	3	

PROGRAM OPERATIONS**SCORE SCORE EARNED**

No existing programs/projects/activities	0	
With existing group-initiated program/project/activities for more than six (6) months but less than a year	1	
With existing group-initiated program/project/activities for more than one (1) year but less than two (2) years	2	
With existing group-initiated program/project/activities for more than two (2) years but less than three (3) years	3	
With existing group-initiated program/project/activities for more than three (3) years	4	

ENTERPRISE**SCORE SCORE EARNED**

No livelihood/ enterprise activities	0	
Has developed a simple business plan and workplan	1	
The group is implementing at least 35% of the plan & members are engaged in economic activities like savings & credit schemes.	2	
The group is implementing at least 75% of the plan & members are engaged in economic activities like savings & credit schemes. Non-members also avail the services of the group	3	
The group is implementing the plan and is getting 85 -100% of the plan done. The members/group have sustained economic activities.	4	

RESOURCE MOBILIZATION**SCORE SCORE EARNED**

No Resource Mobilization activities/schemes	0	
With Resource Mobilization activities/schemes like fund raising etc. and or accessed funds from other individuals, groups, organizations or agencies	2	
Mobilized resources are being used for programs, Projects, and activities of the group	4	

ADVOCACY INITIATIVES**SCORE SCORE EARNED**

No advocacy initiatives/ activities for, to and with the children/ youth	0	
With written advocacy plan	1	
With written advocacy plan & at least 50% of the plan has been implemented	2	
With written advocacy plan & at least 85% of the plan has been implemented	3	

STRUCTURE**ORGANIZATIONAL STRUCTURE****SCORE SCORE EARNED**

No Clear Organizational Structure	0	
With Clear organizational Structure (Management and Board)	2	
With Clear organizational Structure, including different committee	4	

ELECTION OF OFFICERS**SCORE SCORE
EARNED**

Number of election of officers conducted over a period of (one to two) 1-2 years	0	
Election of Officers conducted based on the Constitution and By-Laws of the group	4	

MEETINGS

No Regular Meeting	0	
Irregular Meeting	2	
Regular weekly/ monthly meeting	4	

PARTICIPATION OF MEN

No fathers/men group members	0	
With less than 5 men/ fathers as group members	1	
With 6-10 men/ fathers group members	2	
With more than 10 men/ fathers group members	3	

SYSTEMS

FINANCIAL MANAGEMENT

	SCORE	SCORE EARNED
The group has no financial policy	0	
The group has formulated financial policies and budget based on their plan. Used CRB,CDB, receipts and vouchers	1	
The group is faithfully implementing financial management policies. They use child/ youth-friendly tools.	2	
The group is faithfully implementing financial management policies and is producing a financial report/statement every three (3) months	3	
The group is producing an Annual Audited Financial Report/Statement	4	

MONITORING EVALUATION AND LEARNING

The group has no MEL tools	0	
With Monitoring, Evaluation & Learning Tool/s	2	
Conducts regular (weekly, monthly, quarterly) Monitoring & Reflection	4	

DOCUMENTATION AND REPORTING

No proper documentation/ recording	0	
With documented cases of children with special needs (CAR)	2	
With documented cases of children with special needs (CAR), reported and assisted	4	

GUIDELINES AND POLICIES**SCORE SCORE
EARNED**

No relevant guidelines or policies	0	
With written relevant guidelines or policies	2	
Constitution and By-Laws and other relevant guidelines or policies are popularized among its officers and members	4	

ENACTED POLICIES

No children issues/concerns lobbied at the Barangay Council	0	
Has lobbied policies advocating children's welfare	2	
With policies enacted by the Barangay Council	4	

SKILLS**CAPACITY BUILDING**

CBO officers or members are attending training activities or seminars on Leadership & Group Development and other related topics on child and youth welfare and development	2	
CBO initiates lead roles in the conduct of training activities, seminars, workshop to children, youth, and community members on child-related concerns and activities	4	

SHARED VALUES

MEMBERSHIP	SCORE	SCORE EARNED
Has at least 25-30 members with clear plan for membership growth.	1	
Has at least 30-50 members. At least 25% of the membership plan was implemented	2	
Has at least 50-75 members. At least 50% of the membership plan was implemented.	3	
Has at least 75 -100 members. At least 75% of the membership plan was implemented.	4	

LEGAL IDENTITY

Crafted their CBL and initially prepares requirements for registration	1	
The group has finalized and submitted their CBL and other necessary documents to the concerned Government Agency. The group have applied for Barangay Accreditation	2	
The group has received its Certificate of Registration from concerned government agency. The group has received its Barangay Accreditation through a Barangay Resolution.	3	
The group is renewing its Certification and Accreditation from concerned government agencies. The group is accredited at the Municipal, Regional/ Provincial Development Council.	4	

CLEAR DIRECTION (VMG)	SCORE	SCORE EARNED
The group has written VMG and displays it during their meetings	1	
At least 50% of the officers of the group can recite the VMG by memory	2	
At least 75% of the officers of the group can recite by memory and explain the VMG. Five (5) other group members can recite the VMG.	3	
100% of the officers and five members can recite by memory the VMG and can explain it. Five (5) other members can recite the VMG by memory.	4	

STYLE

LEADERSHIP	SCORE	SCORE EARNED
CBO Officer/s sits at the Barangay Council	1	
CBO is a member of two (2) or more Barangay-Based Institutions	2	
CBO Officer/s sits at the Municipal Development Council	3	
CBO initiates the mobilization of volunteers within the community as the need arises	4	

FUNCTIONALITY OF THE OFFICERS	SCORE	SCORE EARNED
Officers have no clear roles/functions	0	
Officers are not functioning according to their roles/functions	0	
Officers are overlapping in their roles/functions	0	
Officers are not overlapping in their roles & functions	4	

LINKAGE BUILDING

Has identified agencies that it can network with relevant to its existence.	1	
Has networked with one agency, group, association or organization.	2	
Has networked with two to three (2-3) agencies and is accredited by the local Barangay Council.	3	
Has networked with three (3) more agencies and is a member of a network. It is also accredited by the Municipal/City or Provincial government.	4	

SUCCESSION PLAN

No leadership succession plan	0	
With a written leadership succession plan	2	

STAFF

MANAGEMENT	SCORE	SCORE EARNED
No clear roles of the Officers, Members, and Committee	0	
With written policy on the roles of the Officers, Members and Committee	4	

REWARD SYSTEM

No Rewards System	0	
With Rewards System	4	

CBO PERFORMANCE	CREDIT POINTS	SCORE EARNED
STRATEGY	25	
STRUCTURE	13	
SYSTEMS	20	
SHARED VALUES	12	
SKILLS	4	
STYLE	18	
STAFF	8	
TOTAL	100	

CBO PERFORMANCE CATEGORY PER TOTAL POINTS EARNED		SCORE EARNED
Non- Functional	0- 56	
Semi-Functional	56 - 75	
Functional	76 - 100	

Sample Community Scorecard

PPA	Standards	Indicators	Actual Service	Score (1-5)	Reason for Score	Recommendation
DRR: Set-Up Early warning System	Functional Early Warning System	Ang bawat purok ay may Early Warning Device	Yes	3.5	May EWS sa aming mga purok, at functional din ito sa oras ng sakuna	Mas mabuti kung nagkakaroon ng regular na drill upang masiguro na ang ay nakakaalam nito

Those highlighted in **blue**—the PPA, Standards, and Indicators are what you will fill in during the CBO Meeting and those in **green**, will be filled during regular monitoring.



NOTE TO FACI:

Make sure that the Community Scorecard Sample template is in Manila Paper for all to see.

Legends

PPA: These stands for Program, Projects, and Activities of your *Barangay* or community that you can commit to monitor as a CBO group.

Standards: This is the level of quality or your criteria of assessing your PPAs' category.

Indicators: These are signs, hints, or cues that shows that the PPAs are done in your community.

Actual Service: Are these indicators happening and being done in your community or *barangay*?

Score: From 1 to 5, 1 being the lowest, how effective and beneficial the PPA or service is?

Reason for Score: What reason made you decide to score it that way?

Recommendation: What recommendation or suggestion do you think is needed to better the performance of this service?

Sample Advocacy Letter Outline

This is intended only to give you a basic idea of how to write a letter. You do not have to use these exact words.

[Date]
[Person's name]
[Title]
[Organization or department]
[Address]

Dear [*name*],

I am writing to express my concern about [*the problem*].

[*Details about the problem – what has happened to date*]

[*How you want the problem solved*]

Could you please contact me by [**date**] to let me know whether this is possible.

Thank you for your assistance in resolving this matter.

Sincerely,
[Signature]
[Your name]
[Address]
[Phone number]

Sample Advocacy Record of Conversation

Date: _____

Name and position of person I talked to:

Phone number: _____

Issues we discussed:

1. _____
2. _____
3. _____

What I was told:

What I said:

What we agreed to:

Sample Advocacy Lobbying Letter

SAMPLE LETTER TO THE BARANGAY CAPTAIN

April 28, 2014

XXXXXXXXXX
Barangay Captain
XXXXXXX

Dear Hon. Patriana:

PEACE!

The Oro Youth Development Council, a youth-led and agenda-based coalition of different youth organizations from 6 sectors has been organized and recognized by the local government unit of Cagayan de Oro as the city-wide recommending and coordinating body relating to youth concerns and youth action. The 6 sectors are namely (1) in school youth (2) out of school youth (3) youth with special needs (4) faith based youth (5) youth movements (6) IP and Moro Youth.

The youth council is presently engaged in 5 areas of concerns namely (1) access to quality education (2) urban sustainability and disaster (3) child development and health (4) public safety and access to juvenile justice (5) leadership formation towards good governance.

In order to partner and engage the barangay government in achieving its vision for the barangay, the Oro youth development council is more than willing to help in organizing the youth of our beloved barangay. We intend to mobilize the youth per zone/sitio/purok and federate them. In this light, we are humbly asking for your support in this endeavor.

We are hoping in the long run that our barangay will become a model in barangay youth empowerment and this requires the first steps in mobilizing our youth with your support.

please feel free to contact us through xxxxxxxx. We intend to commence as soon as your good office will give the go signal.

Sincerely Yours,

XXXXXXXXXX
Sectoral Representative
Oro Youth Development Council

Noted by:

XXXXXXXXXX
Chairperson
Oro Youth Development Council

Sample Project Proposal

Executive Summary

Create a high-level summary of the project

Background

Highlight the problem and place it within the context of the business

Solution & Approach

Explain your solution, approach, deliverables, and timeframe

Financials

Give an estimate of the budget and benefits

Additional Documents

Create an appendix of additional documents

Finance Forms

Monthly Loan and Interest Collections (Release, Payment and Balance)

Monthly Loan and Interest Collections (Release, Payment and Balance)						Group: Date:			
NAME	LOAN RELEASE		PAYMENT			BALANCE		No. of Days Past Due	R E M A R K S
	Date	Amount	Date	Principal	Interest	Principal	Interest		
TOTAL									

Prepared by: _____
(TREASURER)

_____ (DATE)

Noted by: _____
(LEADER)

_____ (DATE)

Monthly Group Summary: Savings and Loans

Monthly Group Summary: Savings and Loans			CBO Treasurer: Date:	
GROUP NAME	Savings Balance	Amount Loan Released During the Month	Loan Balance	REMARKS
TOTAL				

Prepared by: _____
(TREASURER)

(DATE)

Noted by: _____
(LEADER)

(DATE)

Group Cash Balance

Group Cash Balance	Group name: Date:
ITEMS	AMOUNT
Beginning Balance:	
Add: Inflow	
Less: Outflow	
Ending Balance:	
Cash in Bank	
Cash on Hand	
Total Cash	

Result of Cash Count _____.

Denomination	Quantity	Amount
1000.00	_____	_____
500.00	_____	_____
200.00	_____	_____
100.00	_____	_____
50.00	_____	_____
20.00	_____	_____
10.00	_____	_____
5.00	_____	_____
1.00	_____	_____
.50	_____	_____
.25	_____	_____
.10	_____	_____
.05	_____	_____
TOTAL	_____	

Submitted by: _____
(Treasurer)

(Date)

Noted by: _____
(Leader)

(Date)

Cash Count conducted by: _____
(Auditor)

(Date)

Deposited by: _____

(Date)

BALANCE SHEET

Group Name: _____

Balance Sheet
(Pag-aari, Utang at Puhunan)

For the Month Ending: _____

Assets (Nasaan ang pera?)

Cash on Hand _____	_____
Cash in Bank _____	_____
Loans Receivable (Principal) _____	_____
Properties: _____	_____
_____	_____
_____	_____
Others: _____	_____
_____	_____
_____	_____
TOTAL	_____

Liabilities and Capital (Saan galing ang Pera ng Grupo?)

Account Payables: _____	_____
_____	_____
_____	_____
Total Savings: _____	_____
Net Income (Malinis na Kita)	_____
TOTAL	_____

Prepared by: _____
(Treasurer)

Date: _____

Noted by: _____
(Leader)

Date: _____

Checked by: _____
(Auditor)

Date: _____

INCOME STATEMENT

Group Name: _____

INCOME STATEMENT (Kita ng Grupo)

For the Month: _____

Income (Kita)

Interest on Loans

Fines and Penalty

Others:

TOTAL INCOME (Kabuuang Kita)

Expenses (Mga Gastos)

Total Expenses (Kabuuang Gastos)

Net Income (Malinis na Kita)

(Total Income—Total Expenses)

Prepared by: _____
(Treasurer)

Date: _____

Noted by: _____
(Leader)

Date: _____

Checked by: _____
(Auditor)

Date: _____

Monthly Group Summary: Cashflow and Cash Count

Monthly Group Summary: Cashflow and Cash Count			CBO Treasurer: Date:		
CBO NAME	BEGINNING BALANCE	CASH INFLOW	CASH OUTFLOW	ENDING BALANCE	CASH COUNT, OK? (Y/N)
TOTAL					

Prepared by: _____
(TREASURER)

(DATE)

Noted by: _____
(LEADER)

(DATE)



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