Expanding Participation of People with Disabilities in the Philippines ("EXPAND") Program Summary

In 2012, via the EMPOWER Program funded by the US Department of State, Discovering Deaf Worlds (DDW) began providing Deaf Filipinos with training on organizational development, Deaf education, policy, advocacy, and community outreach. With the EXPAND Program, funded by the USAID, DDW and the Philippine Federation of the Deaf’s (PFD) goal is to “expand” the participation of Deaf Filipinos in their country’s society, workforce, and culture. This is done by working with PFD to improve the sustainability of PFD and its 28 member organizations, creating a stronger pool of Deaf leaders who can carry on this vital advocacy work.

DDW has worked closely with the PFD Sustainability Sub-Committee (PDS-SSC) using a “train the trainer” approach. Our goal is that after DDW program specialists import knowledge and assist with hosting capacity building workshops for the Filipino Deaf community, PFD-SSC members will become self-sufficient in the necessary skills. PFD-SSC then plans, hosts, facilitates, and exports what they have learned by training their peers throughout the country. As a result, PFD and its member organizations will be better equipped to improve the rights, education, economic opportunities, and communication access for the 121,000+ Deaf people in the Philippines.

Following the Importer–Self-Sufficiency–Exporter model, our goals for training are to build up Deaf Filipino leaders’ capacity to do the following:

- Collect data and create strategic plans
- Understand disability law
- Follow organizational governance best practices
- Engage in financial management & fund development
- Develop and evaluate programs
- Carry out marketing, outreach, & public relations
- Conduct a national forum on deaf leadership, and
- Continue the cycle of training through follow-on activities and community workshops.
The American people, through the United States Agency for International Development (USAID), have provided economic and humanitarian assistance worldwide for more than 50 years. In the Philippines, USAID works in partnership with the national government in creating a more stable, prosperous and well-governed country through programs that foster sustainable and inclusive growth; strengthen governance and combat corruption; improve access to water, energy, health and education services; and increase environmental resilience and natural resource management capabilities.

For more information, visit www.usaid.gov/philippines.
Formed in 1997, the Philippine Federation of the Deaf (PFD) works to empower Deaf people, making them independent, united, equal and productive members of society; and also represents Deaf groups in national and international meetings/forums and legislative bodies.

PFD provides training to its grassroots self-help Deaf member organizations specifically on organizational management, community organization, advocacy techniques, leadership training, values formation and other skills necessary for their development.

PFD’s activities include close monitoring with government/non-government agencies on the implementation of Deaf people’s basic rights and equalization of opportunities especially on employment to ensure that they are given just and equitable treatment.

PFD is a national member of the World Federation of the Deaf. For more information, visit www.philfeddeaf.wordpress.com.
Discovering Deaf Worlds is a US-based 501(c)(3) nonprofit organization dedicated to advancing the self-determination of signing Deaf communities through local capacity building in developing countries. Since 2007, DDW staff members have volunteered more than 30,000 hours to connect with more than 300 deaf schools and organizations from 50 countries, creating one of the largest international deaf-advocacy networks in the world.

DDW’s work is now focused on capacity building partnerships with deaf leadership teams in the U.S. and Philippines, which are working to improve access, education, employment opportunities, and human rights circumstances for deaf people.

DDW is an international member of the World Federation of the Deaf. For more information, visit www.discoveringdeafworlds.org.
MEET THE TEAM

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David Justice  
EXPAND Program Coordinator;  
International Programs Director, DDW

David Searls  
EXPAND Program Manager;  
Executive Director, DDW
DEAR READER,

We are pleased to present to you this Organizational Management Training Manual (OMTM), a project that has been many years in the making, and a direct result of the EXPAND Program.

EXPAND was a partnership between the Philippine Federation of the Deaf, Inc. (PFD) and Discovering Deaf Worlds (DDW), funded by the US Agency for International Development (USAID). The purpose of the EXPAND Program was to train the members of PFD Sustainability Sub-Committee (PFD-SSC), a committee established to support PFD and ensure its sustainability. PFD-SSC members received intensive training through five (5) phases over a span of two (2) years. This was followed by a national forum where PFD-SSC became the trainers, passing their knowledge onto 41 representatives from different PFD member organizations across the country.

The program had a very big impact on PFD, because not only did the members of PFD-SSC learn from the training, they also applied what they learned through community workshops and organizational work, such as improving PFD's financial management system, developing different policies such as communications, document retention, authorized signatories, and so on. Prior to this, PFD never had these policies and was very disorganized. But now, our organization has improved, and our time and energy focused on the organization can be seen.

We would like to thank DDW, in particular, Davin Searls and David Justice who have worked with PFD-SSC. To preserve the efforts of this training and collaboration, PFD-SSC developed the OMTM – ensuring that the knowledge we have gained will be passed on.

We are grateful to the support we have received over the years, especially to those who have donated and/or supported the EXPAND program here in the Philippines. We can only imagine if DDW and PFD did not collaborate, our organization would have made limited progress, but thanks to the EXPAND program, we have already made significant changes, and we look forward to continuing our work for years to come.

We hope that by reading this OMTM, you will join us in our efforts.

Mabuhay!

The Philippine Federation of the Deaf Sustainability Sub-Committee
ACKNOWLEDGEMENTS

We are deeply grateful to the people and organizations that helped make the EXPAND Program and this Organizational Management Training Manual possible:

DDW EXPAND Program Specialists:
Dr. Scot Atkins, Mrs. Sally Atkins, Ms. Debbye Byrne, Dr. Alim Chandani, Mr. Shane Feldman, Mrs. Mencie Hairston, Dr. Shilpa Hanumantha, Ms. Heather Harker, Ms. Allie Rice, Mr. Howard Rosenblum, & Ms. Lizzie Sorkin

Advocates, Allies, and Supporters:
Ms. Hergil Roni V. Abat, Mr. John Xandre C. Baliza, Ms. Marybeth Barquereza, Ms. Ana Kathrina L. Bazan, Ms. Kathleen Brady, Mr. Edronell Caluza, Mr. Jean Mart Confino, Ms. Carolyn Dagani, Dr. James DeCaro, Mr. Mark Gaspar, Mr. Bayani Generoso, Jr., Mr. Jemuel D. Japson, Mr. Abner Manlapaz, Mr. Christian Marintes, Dr. Camille Martina, Dr. Liza Martinez, Ms. Mirana Medina, Atty. Jason F. Mendoza, Mr. Philip Nabant, Ms. Natividad P. Natividad, Ms. Diana Ross C. Nono, Ms. Yuliya Novosad, Ms. Noemi Adela Pamintuan-Jara, Ms. Maria Veronica Perez, Mr. Marvin Prieto, Mr. Lauro L. Purcil, Jr., Ms. Marianne G. Quebral, Dr. Khadijat Rashid, Ms. Baby Ruth Evelina C. Reyes, Mr. Emer Rojas, Mr. Jose Sales, Fr. Hozo Sato, Dr. Sara Schley, Ms. Febe Sevilla, Ms. Christina Sison, Ms. Sheena Stuart, Ms. Karen Grace A. Sulse, Hon. Antonio L. Tinio, Ms. Theresa Christine dela Torre, Mr. Michael Vea, Catherine Joy Villareal, Ms. Cristina Virginia L. Villaruz, Mr. George V. Villaruz, Mrs. Normita L. Villaruz

Groups, Businesses, and Organizations:
AllOut Marketing, Baguio SPED Center, City Social Welfare and Development (CSWD) Baguio, Cocoon Boutique Hotel, De La Salle-College of Saint Benilde, Dixon Schwabl, Mason de La Salle Hotel, Pearl Manila Hotel, Provincial Social Welfare and Development (PSWD) La Union, San Fernando La Union SPED Center, Villaruz, Villaruz & Co. CPAs, Websolutions of New York, Inc.

We extend our gratitude to USAID and Discovering Deaf Worlds for their support of PFD, and last but not least, express our appreciation to the Filipino Deaf community. This manual is for you.
While a people preserves its language; it preserves the marks of liberty.

—José Rizal
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Chapter 1
DATA COLLECTION

I. BACKGROUND

A. RESEARCH is a systematic inquiry to describe, explain, predict and control the observed situation being studied.

Ex: Find out how many Deaf people in your area use SEE vs. FSL

Ex: Identify the number of interpreters in your area who are skilled and available.

B. The PURPOSE OF RESEARCH is to collect important data to help your organization solve specific problems within a program, organization or community.

Ex: Find out how many Deaf people in your area use SEE vs FSL. WHY? To prove to local schools that Deaf students should learn FSL, not SEE.

Ex: Identify the number of interpreters in your area who are skilled and available. WHY? To see if there are enough interpreters for the number of Deaf people in the area.

C. WHY IS RESEARCH IMPORTANT FOR YOUR ORGANIZATION?

Research can help you to understand local communities and their experiences, opinions and particularly, develop a project, program or intervention to support those communities.

Brainstorming Activity: With your organization members or Board, discuss what topics you want to research and why. Make a list of what research topics are most important for your organization.

II. OVERVIEW OF THE RESEARCH PROCESS

Here is how to do a research study:

A. Identify a priority research problem: find out the research questions that are important and possible for you to study.
B. Be sure to check and see if someone else has already done this research. If this research has not been done, or if the research needs updating, then plan how you will collect data for your research, how long it will take, what area you will focus on, and how you will analyze your data.

C. Conduct a test study: the purpose is to develop and try out data collection methods and other procedures. You may need to change your methods or process based on this test study.

D. Conduct a main study.

E. Prepare a report on what you have found.

III. IDENTIFYING THE ISSUE AND DEVELOPING A RESEARCH PROBLEM

A. What is a research question?

The research question is the point of your research. It must be a clear, to the point,
and something that you can support with data. You should ask a question about an issue that you are really curious about or you want to solve.

**Ex:** How many Deaf people in your city prefer using SEE vs. FSL?

**Ex:** How many interpreters in your city are skilled?

B. What is the real reason for the research?

The real reason for the research is to gain new information and gather evidence.

**Ex:** You want to know how many Deaf people in your city prefer FSL over SEE to show local schools that Deaf students should learn FSL, not SEE.

**Ex:** You want to know if there are enough skilled interpreters for the number of Deaf people in your city.

C. How can you put a research question in a small sentence or short paragraph?

*Bad example* of a research question: “How many Deaf people are there?”
This is unclear and does not try to answer a specific research question.

*Good example* of a research question: “How many individual members are there in your organization?” This is clear and asks a specific question.

**IV. LITERATURE REVIEW**

When doing research on a certain topic, one must first review previous (secondary) research on that specific topic. This way, you learn and are aware of what previous research has been done and what the results were. By reviewing all past researches, one will know what else needs to be researched and helps you avoid the same data that was done in the previous research, thus saving you time and money.

**Ex:** If doing research on FSL, review FSL books, FSL history and other related materials. The research question will need to answer, “What is the problem?” and/or “What information is not there?” (lack).
One may also do research to disprove a previous research. If one finds a previous research incorrect, he can redo the research to correct the mistakes or disprove the results.

A. Secondary Methods

<table>
<thead>
<tr>
<th>Region</th>
<th>Number of registered deaths</th>
<th>Percentage share of deaths due to diseases of the heart to total deaths</th>
</tr>
</thead>
<tbody>
<tr>
<td>PHILIPPINES</td>
<td>366,814</td>
<td>461,581</td>
</tr>
<tr>
<td>I. Ilocos Region</td>
<td>26,722</td>
<td>31,433</td>
</tr>
<tr>
<td>II. Cagayan Valley</td>
<td>13,387</td>
<td>16,642</td>
</tr>
<tr>
<td>III. Central Luzon</td>
<td>42,556</td>
<td>52,060</td>
</tr>
<tr>
<td>IV-A. CALABARZON</td>
<td>49,408</td>
<td>58,800</td>
</tr>
<tr>
<td>IV-B. MIMAROPA</td>
<td>9,023</td>
<td>11,566</td>
</tr>
<tr>
<td>V. Bicol Region</td>
<td>25,121</td>
<td>29,295</td>
</tr>
<tr>
<td>VI. Western Visayas</td>
<td>35,709</td>
<td>46,231</td>
</tr>
<tr>
<td>VII. Central Visayas</td>
<td>29,256</td>
<td>38,985</td>
</tr>
<tr>
<td>VIII. Eastern Visayas</td>
<td>18,421</td>
<td>19,563</td>
</tr>
<tr>
<td>IX. Zamboanga Peninsula</td>
<td>9,157</td>
<td>12,179</td>
</tr>
<tr>
<td>X. Northern Mindanao</td>
<td>13,179</td>
<td>18,793</td>
</tr>
<tr>
<td>XI. Davao Region</td>
<td>12,715</td>
<td>21,699</td>
</tr>
<tr>
<td>XII. SOCCSKSARGEN</td>
<td>12,017</td>
<td>13,663</td>
</tr>
<tr>
<td>NCR. National Capital Region</td>
<td>56,791</td>
<td>71,943</td>
</tr>
<tr>
<td>CAR. Cordillera Administrative Region</td>
<td>4,988</td>
<td>6,361</td>
</tr>
<tr>
<td>ARMM. Autonomous Region in Muslim Mindanao</td>
<td>2,420</td>
<td>2,464</td>
</tr>
<tr>
<td>XIII. CARAGA</td>
<td>7,943</td>
<td>9,904</td>
</tr>
</tbody>
</table>

Secondary research methods involve results from other’s research from books, reports, government data or the Internet. Selections or summaries are made of the research allowing for evidence to be gathered supporting your conclusions. Secondary methods can include:

i. Government Data
   - NSO- National Statistics Office (Statistics Data)
   - City data
   - Provincial data
   - Country data
   - Education data
   - Health data
   - Facts
   - Historical data
ii. Library Research
iii. Inquiry of Government Officials
iv. Internet Data

v. Research Articles (Peer Reviewed Journals): A step-by-step guide to understanding and finding research articles and referenced journals (also called peer-reviewed journals).

vi. NGO Data

B. Pros and Cons of Secondary Data

<table>
<thead>
<tr>
<th>Pro (+)</th>
<th>Con (-)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• May be valuable in providing some historical insight.</td>
<td>• May be outdated.</td>
</tr>
<tr>
<td>• Can be very good valid data if it is from a reliable source.</td>
<td>• May only give you a part of the picture.</td>
</tr>
<tr>
<td>• Requires less time than primary data collection methods.</td>
<td>• Not a lot of secondary data available related to Deaf people in general.</td>
</tr>
<tr>
<td>• Quickly retrievable.</td>
<td>• Some agencies may not be willing to release the data.</td>
</tr>
<tr>
<td></td>
<td>• Can be misinterpreted for own purposes (bias).</td>
</tr>
</tbody>
</table>

V. METHODOLOGY

A. Primary Methods

You actually do the research and collect the raw data directly from first-hand sources, such as:

i. Individuals

ii. Groups

iii. Organizations

iv. Observations

v. Surveys

vi. Experimentations
B. Qualitative Methods

Collecting and analyzing from interviewed people by observing what people do and say. Follow up interviews should be made to check if the previous answers are correct. Focuses on description of things and situation.

Types of qualitative methods:

i. One-on-One Interviews
   • Conversation between an interviewer and a participant.
   • One asks questions while the other answers.
   • Can be done in person or through videophone

<table>
<thead>
<tr>
<th>One-on-One Interviews</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Pro (+)</strong></td>
</tr>
<tr>
<td>• Good approach to gather in depth attitudes, beliefs and personal data.</td>
</tr>
<tr>
<td>• Personal contact may create rich data.</td>
</tr>
<tr>
<td>• Provides an opportunity to probe and follow up.</td>
</tr>
<tr>
<td>• Participants do not need to read or write.</td>
</tr>
</tbody>
</table>

ii. Focus Group Discussions
   • Form of qualitative research in which a group of people are asked about their awareness, opinions, beliefs and attitudes towards a concept, product, service, idea, etc.
   • An interview with up to 4-5 participants.
• It requires good facilitation and timekeeping skills.
• This may be an approach to use if you have a limited amount of time and limited number of staff.

### Focus Group Discussions

<table>
<thead>
<tr>
<th>Pro (+)</th>
<th>Con (–)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Great approach to gather attitudes, beliefs and data from a large group all at once.</td>
<td>• Requires extra efforts and time to set up a group interview.</td>
</tr>
<tr>
<td>• Might get more data/ideas from a large group rather than 1:1 interviews.</td>
<td>• Requires time to identify specific participants for focus group.</td>
</tr>
<tr>
<td>• Data regarding specific issues could be very detailed.</td>
<td>• Requires a strong facilitator to guide group discussion.</td>
</tr>
<tr>
<td>• Participants: not required to read or write. Record live interviews for preservation of data.</td>
<td>• Requires equipment to record and transcribe group discussion.</td>
</tr>
</tbody>
</table>

iii. Follow-up Interview

• The act of following up or to review new developments
• Increase effectiveness of data collected
• Get further information on previously reported items.
• Emphasize or evaluate previous action

<table>
<thead>
<tr>
<th>Follow-up Interview</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Pro (+)</strong></td>
</tr>
<tr>
<td>• Good way to follow up on participants’ feelings and experiences that were shared earlier through another approach (i.e. survey).</td>
</tr>
<tr>
<td>• Provides a good opportunity to probe and explore with questions.</td>
</tr>
<tr>
<td>• Participants do not need to read or write in response.</td>
</tr>
<tr>
<td>• Can be face-to-face or through phone or online.</td>
</tr>
<tr>
<td>• Requires time to administer follow-up questions.</td>
</tr>
<tr>
<td>• Contact information must be gathered in the beginning.</td>
</tr>
<tr>
<td>• Requires equipment to record and transcribe interviews.</td>
</tr>
</tbody>
</table>

C. Quantitative Methods

• Focuses on the analysis of numbers, objective hard data.
• Counts and measures data.
• Yes/No or number/scale answers.
• Requires a large sample to achieve validity and reliability.

Types of Quantitative Methods:

i. Paper Survey

To ask many people a question or a series of questions in order to gather information about what most people do or think about something.

Ex: A total of 50 Deaf members were surveyed about interpreting service.

Hand out a paper with a series of questions and ask the participant to complete the survey. Questions on the paper can use a “Likert scale” where the options for responses have five possible answers to a specific question. For
example:

<table>
<thead>
<tr>
<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Undecided</th>
<th>Agree</th>
<th>Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Or

Don’t like it at all. Don’t like it. Don’t know. Like it. Like it very much.

Questions on the scale can also have Yes or No answers:

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Yes</th>
<th>No</th>
<th>Unclear</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is the study based on a random or pseudo-random sample?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is the sample of adequate size and representative of the population?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Are the criteria for inclusion in the sample clearly defined?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Were hypotheses linked to explicit theoretical framework?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Did measures have acceptable reliability and validity?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>If comparisons are being made, was there sufficient description of groups?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Was an appropriate statistical analysis used?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Were the findings statistically or clinically significant?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Were findings linked to theoretical framework?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Are the findings generalisable?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Reviewer's Comments

ii. Clipboard Survey

Same concept as paper survey, except this can be done in a public setting. Ex: mall, university, Deaf Festival, International Deaf Day, short events, etc.

Ask a few specific questions on the spot and get answers fast.
### Paper Surveys/Clipboard Surveys

<table>
<thead>
<tr>
<th>Pro (+)</th>
<th>Con (-)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Best for gathering brief responses on attitudes.</td>
<td>• Answers are limited to the questions.</td>
</tr>
<tr>
<td>• Can include open-ended and closed-ended questions.</td>
<td>• Participants need to be able to read and write.</td>
</tr>
<tr>
<td>• <strong>Open-ended question</strong>: How many are the members in your organization?</td>
<td>• Takes time to do a written survey.</td>
</tr>
<tr>
<td>• <strong>Closed-ended questions (Yes/No)</strong>: Do you understand PFD mission/vision?</td>
<td>• Depends on awareness and understanding of the researcher</td>
</tr>
<tr>
<td>• Can be done in written form or online. Can also be done with a clipboard.</td>
<td>• It works better when you have identified a set of answers</td>
</tr>
<tr>
<td>• Personal contact is not required.</td>
<td>• Questions may be misunderstood.</td>
</tr>
<tr>
<td>• It does not require a lot of manpower.</td>
<td></td>
</tr>
</tbody>
</table>

### VI. PILOT STUDY/PILOT TESTING

#### A. What is Pilot Testing?

Pilot testing means finding out if your survey, key informant interview guide or observation form will work in the “real world” by first trying it out on a few people. The pilot testing also helps you to see if you need to modify the research process to ensure that the questions are clear and that it measures what it is supposed to measure (validity).

#### B. Why Pilot Test?

The purpose is to make sure that everyone in your sample not only understands the questions, but understands them in the same way. This way, too, you can see if any questions make respondents feel uncomfortable. You’ll also be able to find out how long it takes to complete the survey in real time.
C. When to Pilot Test?

You should conduct a pilot test once you have a version of your process you are happy with, but before training your data collectors about how to administer it. (During data collector training you will want to conduct another type of test—a field test. In that case you are testing your team, rather than the instrument. But that is another story...)

D. Who to test it on?

You should test people who represent the various subgroups you plan to collect data from within your intended sample. Remember, you want to make sure that everyone will understand your data collection instrument in the same way. Before you test the process, define who your research subjects will (see below). So if you plan to conduct a representative public opinion survey, you might want to include both old and young people, well-educated and less educated, native language users and secondary language users in your test sample. At a minimum, involve several people from each subgroup so others can confirm their views.

VII. RECRUIT PARTICIPANTS

Selecting who will participate is an important step in research or data collection. When choosing participants, it must be noted if they have knowledge or experience related to the data being collected. You need to make sure that you select the right people to participate in the study. For example, if you plan to do a study of leaders in the member organizations, it is fitting to interview only organization officers.

VIII. RESEARCH ETHICS (PROFESSIONALISM)

A. Confidentiality

i. Keep real names and the identities of subjects confidential.

ii. Data should be kept in locked cabinets from theft and copying.

iii. Only the assigned research staff can have access to the data.

B. Waiver forms / consent forms

i. Always ask permission from the participants. If you want to collect data about students, please ask permission from the school principal and parents.
ii. Ask the participants to sign the waiver/consent form if they are willing to join in the study.

iii. Please see sample waiver/consent forms in Appendix B.

C. Plagiarism

i. Plagiarism is the act of copying another person’s writing, conversation, video or even idea and submitting the work as your own.

ii. You are not allowed to copy the language and/or ideas from the author without permission.

iii. Copyright laws protect a person’s work as their legal property. To avoid being accused of plagiarism a person must credit those from whom they borrow or copy writing, conversation, video and ideas.

iv. You can paraphrase the author’s work with proper reference to the author’s name and year. Paraphrase means that you use your own words when you summarize the idea from the author’s works.

D. Research Bias

i. Research Bias means that you present your opinions and views in the study when you agree or disagree. This is **WRONG**. You must have an open mind to keep your personal beliefs separate and remain neutral.

ii. You should write the report including the participants’ opinions and views, **NOT** your opinions and views. The only time you can express your opinions and views is when you are **interpreting** qualitative data. At that time, you ask, what are the themes and data that you need to analyze.

iii. You can ask a non-member to check your report before presenting.

E. Conflicting Roles

i. As a researcher – your work is to gather data and not involve personal or professional opinion,

ii. Explain your role to the participants so they do not misunderstand your role

iii. Always keep your role straight and clear.

iv. Or better if you can ask someone to interview your member so that they will not question your role.
IX. LOGISTICS

A. Coordinator

i. The researcher(s) usually do(es) the logistics, but they may assign somebody depending on size of the project and budget.

ii. If the research will be done in another place, assign a local coordinator who can help you plan and do logistics such as accommodation, food, and transportation, venue, research materials and communications.

iii. If you will assign a local coordinator, have time to meet personally or through video chat to explain the details of the project and discuss logistical matters (see above).

iv. Write a formal letter to the people who will be involved (participants) and request permission to do the research. For participants in an institution, organization or school, send the letter to the head such as President or Principal.

v. Ask assistance from the local coordinator with choosing participants based on the research criteria.

B. Venue

i. When choosing a venue for the research, it should be (1) enough size for the research, and (2) private, free from distraction caused by other people.

ii. The following are examples of venues that can be used for research:
   - Barangay, town, municipal or city multipurpose hall
   - School classroom
   - Government office function room
   - Ministry/Church function room

iii. If budget is enough, the researchers/coordinators may also use a hotel function room to do the research.

C. Scheduling (dates and time)

i. Scheduling will depend who the participants are and where the research will be done.

ii. For participants from schools, government and private offices, it is advisable to schedule during class or work hours, provided that the request to do the research was approved by the head, President or Principal.
D. Transportation
   i. Plan transportation to, from and around the location where the research will be done. This should include routes, modes (airplane, ship, bus, jeep, tricycle, etc.)
   ii. For research in other places, ask the local coordinator to help in planning transportation.

E. Accommodations and Food
   i. Accommodation and food will depend on the location and budget of the research project.
   ii. If there is enough budget and there is a hotel in the location, the researchers may use a hotel room for accommodation. Look for hotels online or ask the local coordinator to it. It is important to considered comfort and security of the researchers in looking for the right hotel.
   iii. If the location is remote or very far from town or city and there is no hotel, the researchers may look for a house where they can stay, preferably home to a trusted friend or acquaintance. In this option, safety and security of the researchers must be considered.
   iv. In choosing accommodation and venue, it should also be taken into consideration the available food choices for the preferences of the researchers and participants, such as vegetarian and Halal (Muslim).

F. Sign Language Interpreters (hearing/deaf relay)
   i. Ask your community leader or assigned representative to recommend a qualified Filipino Sign Language (FSL) interpreter and relay.
   ii. Write a formal letter to the qualified FSL interpreter and relay to request their service.
   iii. Explain the details of the project to the FSL interpreter and relay.
   iv. Explain the roles of the interpreter to the FSL interpreter and relay.
      • The interpreter is responsible for facilitating communication between the deaf and hearing individuals.
      • The interpreter should not interfere or become personally involved during the interview.
      • The interpreter should keep the interview confidential.

G. Other Research Materials
i. Letters of Notifications/Permissions (See a template in Appendix A)
ii. Waivers/Consent Forms (See a template in Appendix B)
iii. Video Transcription Sample (See a template in Appendix C)
iv. Data Retention and Usage Agreement – agreement between the researcher and interviewee on how long the video data will be kept and how it will be used.

H. Equipment Requirements
   i. It is recommended that the researcher have the following equipment to be able to capture in video the information needed to research.
      • Tripod
      • Battery Charger
      • Digital video camcorder
      • Digital camera
      • Memory card or mini dv tape
      • Video Bag

I. Set up of Equipment
   i. Check the assigned room and lighting. The venue should be enough to accommodate the researcher and the interviewee(s) with extra space for equipment. The room should be well lighted and in case of poor lighting, the researcher may bring lighting equipment.
   ii. Set the interview area so that the participants and the researcher are clearly visible in the video. If possible set two or more video equipment to be able to capture the information in video.
   iii. To avoid confusion and being overwhelmed with the tasks, ask an assistant to help in video recording.
   iv. Test the equipment and video before starting with actual interview to make sure that the equipment is working well and that answers from the interviewee(s) are captured clearly.

J. Use of Technology
   i. In case the researcher is far from the person he needs to interview and transportation is expensive, the researcher may use technologies to communicate through the internet. Below are examples of Video Chat software/apps:
• Skype
• Facetime
• Oovoo
• Camfrog
• Google Hangouts
• Viber

K. Attire

i. Wear comfortable attire when meeting your participants.
ii. Wear semi-formal attire for courtesy visit to the assigned representative’s mayor.

L. Courtesy Visit

i. Visit the assigned representative’s mayor, school principal, organization president or parish priest.
ii. Explain a brief background of the project.
iii. Thank them for their interest and support to the local Deaf community.
iv. Offer your business card and organization brochure to them.

X. SET UP GROUND RULES

A. Level of Comfort

i. Select a comfortable place for the interview.
ii. Make sure the interviews are not too long. About 30-40 minutes is OK.
iii. Start with a simple question.

B. Respect

i. Do not force your participant to answer.
ii. Do not get mad at your participant’s negative opinions and views.
iii. Respect your participant regardless of age, class, gender, religion and disability.

C. Taking turns

i. Allow your participant time to finish her/his answer.
ii. Let participants speak one at a time and tell other participants to respect and wait for their turn, especially in a focus group discussion.

iii. Take turns to ask questions and make sure your participants understand your question before they answer.

iv. Give a few seconds time for your participant to reflect on your question and think of his/her answer.

D. Time Control

i. Keep your time under control in your interview.

ii. Try to keep your participant focused on answering straight to your question.

iii. Be courteous of other participants who may be waiting a long time for their turn.

iv. Make scheduled plans for each participant.

E. Communication and Language Considerations

i. Discuss communication and language considerations with the assigned representatives about the participant's background.

ii. Get to know your participant's language preference through interactions before the interview.

iii. Have a sign language interpreter and/or relay ready if your participant is hearing or does not have conversationally fluent communication skills in Filipino Sign Language.

XI. CONDUCT THE RESEARCH

A. Create Interview Questions

i. First, you as a group need to decide what the research question is and what data you want to collect.

ii. And then, you will develop a list of questions to get the data you want. Determine how long your interviews should be.

iii. Next decide if you want to do individual interviews or focus groups?

iv. Create approximately 10 questions. You will use between 5 to 10 questions depending on how much time is available for interviews.

v. Make sure that everyone has the same questions.
B. Getting Started

Include some sample scripts for how you will introduce the interview (purpose of the research, who you are, what you will do with the data collected, etc.).

Sample Script (Source: Interview Guide: EXPAND Program)

i. Opening/Greeting: Thank the participant for taking the time to meet with us. Make the participant(s) feel comfortable by having a short conversation. Brief small talk to break the ice is a good idea. Your goal is to make them comfortable enough to give you good data.

ii. Introduce yourself; tell your name and position with PFD-SSC.

iii. Explain the purpose of the interview/focus group and why we are doing this. IE: PFD is working with DDW as part of a grant that was awarded by an American organization called USAID. The goal is for PFD to collect information from member organizations and to look for ways we can improve ways we can provide support to the member organizations for the long term.

iv. Explain that the interview data will be confidential and will be only shared with DDW, PFD and USAID. Names will not be included in the final reports.

v. Explain the waiver form and have them sign the waiver form. Explain that the interview/FGD will be videotaped so that we can ensure that the data collection is accurate.

vi. Ask if they have any questions so far.

vii. Make them aware that you only have number of minutes for the interview since there are many others you need to interview and you may be looking at the clock or your watch to keep the time.

viii. Getting Started: For the interview, I will be asking you questions and I may be following up with questions to ensure that I get all the information that I need. Again, these questions are to collect important information that will help the project. Are you ready to begin?

ix. Follow the list of standard questions you prepared in advance for the interviews.

x. Leave plenty of time after each question for responses.

xi. Always smile!

C. Take Field Notes

i. Create short cuts that you can use to help you understand what you wrote.
ii. Videotape interviews to help fill in the data gaps.

iii. Repeat the response back to the interviewee and then write a short summary.

D. During the Interview/Closing Interview

i. Go through the questions. If you think the question has already been answered during the interview, skip the question and move on to the next question.

ii. Use probing techniques to follow up on questions that are incomplete. Probing is following up on a question that you already asked.

iii. Probing helps to clarify things that the person is trying to say.

iv. Probing gives you more information and helps to give you rich data.

v. Phrases such as “can you expand more on that”, “Please give me more specific information”, and “Can you please clarify what you said again” are useful for probing purposes.

vi. Thank participant for their time and be sure they have signed up on the attendance log.

vii. Here is a sample of what information should be included on an attendance log:

<table>
<thead>
<tr>
<th>Name</th>
<th>Address</th>
<th>Organization</th>
<th>Position</th>
<th>CP #/Email address</th>
<th>Signature</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

XII. DATA GATHERING AND ANALYSIS

A. Data Gathering

i. Enter any necessary data into the computer. This may mean simply typing comments, descriptions, etc., into a word processing program, or entering various kinds of information (possibly including video) into a database or spreadsheet.

ii. Transcribe any videotapes (DVD or CD). This makes them easier to work with copy and allows the opportunity to clarify and hard-to-understand passages of signs. See Appendix D for sample of how to transcribe a video.

iii. Sort your information in ways appropriate to your interest. This may include sorting by category of by event, by place, by individual, by group, by the time,
or by a combination or some other standard.

iv. When possible, necessary, and appropriate, transform qualitative into quantitative data. This might involve, for example, counting the number of times specific issues were mentioned in interviews, or how often certain behaviors were observed.

B. Data analysis

i. Data Analysis is the process of systematically applying statistical and/or logical techniques to describe and illustrate, condense and recap, and evaluate data. (http://ori.hhs.gov/education/products/n_illinois_u/datamanagement/datopic.html)

ii. You can hire or find a volunteer outside your organization, such as from a nearby college or university, to take care of data analysis for you.

XIII. DEVELOP RECOMMENDATIONS AND ACTION PLANS

After the interviews, focal group discussions, and paper surveys have been complete, and the data has been analyzed, you and your research team will want to get together to discuss next steps—what will you do with this data?

A. Some important questions that you and your research team might consider:

i. What do you see? (e.g., amount and kind of activities implemented; results from the data analysis, trends)

ii. What does it affect? (e.g. kind of issues affected the beneficiaries)

iii. What are suggestions for improvement? (e.g. do the results suggest that the activity should be supported, changed, stopped; what changes are suggested)

B. Depending on what you have learned from this data, you might want to:

i. Increase or strengthen your activity in certain areas or with particular groups.

ii. Change or remove parts of the activity that didn't work well.

iii. Adjust your activity to changing conditions or needs in the community.

C. Action Plan Process (Center for Creative Leadership, 2013)

Once everyone is present, go over your organization’s:
i. Vision
ii. Mission
iii. Objectives
iv. Strategies
v. Targets and agents of change (e.g. youth, women and children)
vi. Proposed changes for each group of the community (e.g. schools, faith, community service organizations, government agencies)

D. Develop your action plan composed of action steps that address all proposed changes. The plan should be complete, clear and present.

i. What action or change will happen?
ii. Who will be responsible?
iii. When it will do and for how long?
iv. What resources (i.e. money, volunteers) are needed to do the change?
v. Communication - who should know what about this plan?

XIV. REFERENCES


Chapter 2
BASIC ORGANIZATION NEEDS AND THEIR IMPORTANCE

1. WHY YOUR ORGANIZATION IS IMPORTANT?

1.1. MISSION

a. What is your Organization’s Mission?

- Mission statement is a statement of the purpose of your organization; helps clarify the reason your organization founded, plus your goals and objectives.
- A clear Mission statement is important, as it connects to your strategic plan and help your organization know what to do when writing a strategic plan.

b. Your Organization’s Mission should include:

- Identity
  Ex. Deaf, Hard of Hearing, Where are you from – Deaf Manilenos, Deaf Boholanos, Deaf in Cotobato

<table>
<thead>
<tr>
<th>What is your organization’s identity?</th>
<th>Who or what do we serve?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deaf/deaf? Hard of Hearing?</td>
<td>Deaf?</td>
</tr>
<tr>
<td>Deaf from a certain place?</td>
<td>Hard of Hearing?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>What does your organization do?</th>
<th>Why do you do it?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Train leaders?</td>
<td>To empower the Deaf leaders?</td>
</tr>
<tr>
<td>Advocate for human rights?</td>
<td>For equality?</td>
</tr>
<tr>
<td>Serve the Deaf community?</td>
<td>For employment?</td>
</tr>
</tbody>
</table>
d. Example of Organization Mission

- **PFD**: To represent Deaf Filipinos, preserve Filipino Sign Language, and empower the Deaf community through capacity building training of D/deaf and hard of hearing Filipinos to ensure their equal human, legal, linguistic, and cultural rights.
- **JOLLIBEE**: To serve great tasting food, bringing the joy of eating to everyone.
- **CARITAS MANILA**: To empower the poor towards total human development
- **GMA NETWORK**: We enrich the lives of Filipinos everywhere with superior Entertainment and the responsible delivery of News and Information.

1.2. VISION

a. What is your Organization’s Vision?

- Vision statement is a description of what the ideal world you wish to achieve looks like if you fulfill your mission. It is intended to guide decisions for choosing current and future courses of action.

- A clear Vision statement is important because it connects to your strategic plan and guides your organization in choosing what will you do when writing a strategic plan.

b. Your Organization’s Vision should include:

- Belief
  
  *Ex. FSL is the natural language of the Deaf.*

- What your Organization plans to achieve.
  
  *Ex. Accessible education for the Deaf*

c. Should answer the following question:

- What do you want to Achieve?
  
  *Ex. Deaf Filipinos will have equal rights in the society.*

- What do you see in the future?
  
  *Ex. Education will be accessible to all Deaf Filipinos.*

d. Example of Organizational Vision

- **PFD**: Filipino Sign Language and Deaf culture will be internationally
recognized and the Deaf community will have equal rights and full participation in the Philippine society.

• **JOLIBEE:** By year 2020, with over 4,000 stores worldwide, Jolibee is truly a global brand. And the Filipino will be admired worldwide

• **GMA NETWORK:** We are the most respected, undisputed leader in the Philippine broadcast industry and the recognized media innovator and pacesetter in Asia.

### 1.3. VALUES

a. What are your Organization’s Values?

![Values Icons]

• Values are what your organization believes in.
• Your culture, principles, the way you interact with each other and other groups.
• Values are important as they connect to your strategic plan and guide your organization on how you will carry out your strategic plan.

b. Your Organization’s Values should include:

• **Culture**  
  *Ex. Volunteerism, Advocacy, Commitment*  
  - *We are a group of volunteers committed in advocating for Deaf rights.*

• **Principles**  
  *Ex. Integrity/Honesty, Transparency, Loyalty*  
  - *We value honesty in all our activities to loyally serve the Deaf community.*
c. Should answer the following question:

• How do you interact with each others in your organization?
  Ex. Committed, Loyal, Honest
  - We are committed to our goal and transparent in all transactions.

• How do you want people to view your organization?
  Ex. Integrity, Transparent, Committed volunteers
  - We are providing the Deaf community with transparent and committed services.

d. Example of Organizational Values

• **Commitment** – We faithfully serve the Filipino Deaf Community
• **Advocacy** – We fight for human rights and equality.
• **Service** – We provide organizational development programs

1.4. **HOW IS YOUR ORGANIZATION UNIQUE?**

It is important to communicate “why people should join your organization and why sponsors/grants/other organization should partner with and support you”; It’s also important to explain why you are better than other similar organizations and what services you can offer.

a. Examples of what makes organizations unique

• **PFD:** the national organization run by the Deaf for the Deaf with 17 years experience.
• **JOLIBEE:** A company that values family; Great tasting products and quality systems.
• **CARITAS MANILA:** the lead church NPO operating in the Philippines, with social services and integrated family development programs for the poor and the vulnerable.
• **GMA NETWORK:** the most awarded television network in the country. By far, it is the only Philippine media company to have won the coveted Peabody Awards for excellence in journalism (2000 and 2010), and the Best Terrestrial Television Station of the Year (2005) from the Asian Television Awards.
1.5. THINGS TO AVOID IN A MISSION/VISION STATEMENT AND VALUES

a. Deep words that only professionals will understand

**Wrong:** Champion  
**Right:** Promote/Advocate

**Wrong:** Comprehend  
**Right:** Understand

*Deep words  
*Simple, easy to understand words

b. Long formal sentences – make it simple

**Wrong:** To equip and arm the Deaf community with knowledge on human rights.  
*This is too formal and deep.

**Right:** To train the Deaf community on human rights.  
*This is simple and easy to understand.

c. Passive voice – use specific action words

**Wrong:** Gabriela is an organization that helps women against abuse.  
*This says only “help” but does not show what they do or no clear active verb to show what they do to help.

**Active:** Gabriela trains women to stop abuse.  
*Clearly says what they do to help and “trains” is an active verb.

d. Focus on the organization, rather than the people it serves.

**Wrong:** To provide training on Deaf Rights so our organization will be recognized as human rights advocate.  
*This is wrong because it is focused on the organization and it’s recognition.

**Right:** To provide training on Deaf Rights, empowering the Deaf community.  
*This is right because the focus is on the Deaf community.

e. Generalities

**Wrong:** “saving the Deaf community” or “eradicating poverty”  
*This is wrong because it is very general, not specific.

**Right:** To train the Deaf community in livelihood to help unemployment.  
*This is right because the goal is very specific.
1.6. WRITING YOUR ORGANIZATION MISSION AND VISION STATEMENT, AND YOUR ORGANIZATIONAL VALUES

a. Who do you want your organization to serve?

   Example for PFD:
   - Filipino Deaf and Hard of Hearing Community

b. What image, reputation or influence do you want your organization to provide?

   Example for PFD:
   - Committed to serve the Filipino Deaf Community
   - Advocates of human rights and equality.
   - Professional Service with Integrity

c. Activity: Brain Storming Session – List down your answers to the following:

<table>
<thead>
<tr>
<th>1. What do you want the image/brand of your organization to be?</th>
<th>2. Who do you want your organization to serve?</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Committed</td>
<td>- Deaf Boholanos. Manila, Visayas</td>
</tr>
<tr>
<td>- Good Leaders</td>
<td>- Hard of hearing</td>
</tr>
<tr>
<td>- Trainers</td>
<td>- Parents of Deaf children</td>
</tr>
<tr>
<td>- Advocates</td>
<td></td>
</tr>
</tbody>
</table>

   3. What services do you want your organization to provide?

   - Leadership training
   - Livelihood training
   - Promote equality and human rights

   d. Mission and Vision statement (to be taken from Activity)

   **Activity:** leadership training, Livelihood training, promote equality and human rights etc.

   **Mission:** To represent Deaf Filipinos, preserve Filipino Sign Language, and empower the Deaf community through capacity building training of D/deaf and hard of hearing Filipinos to ensure their equal human, legal, linguistic, and cultural rights.

   **Vision:** Filipino Sign Language and Deaf culture will be internationally
recognized and the Deaf community will have equal rights and full participation in the Philippine society.

e. What makes your organization unique? You must be prepared to answer this question, and should rely on the Mission and Vision.

   *For example:*  
   - **PFD** is the national organization run by the Deaf for the Deaf with 17 years of experience.  
   - **PFD** believe that Filipino Sign Language is the natural language of the Filipino Deaf Community and fight for Deaf Filipino rights.  
   - **PFD** provides organizational development training to empower its Deaf organization members, to develop self-reliance and to make a strong Filipino Deaf Community.

**RECOMMENDATIONS:** Make sure your organization’s uniqueness is clear to Deaf youth and other organizations.

**IMPORTANT NOTE:** Train the Deaf Leaders and Boards in your organization on your mission and vision. It is important that everyone within your organization is consistent to deliver the same message about your organization’s Mission, Vision, and Values.

### 2. ROLES AND RESPONSIBILITIES

a. **Board**
   - To govern is to decide, direct and control.
   - To lead is to take the initiative, facilitate and ensure organizational focus.
   - To manage is to carry out, implement and accomplish.

b. **Board Governance (FOCUS)**
   - Make sure organization’s vision, mission and values are up to date and relevant.
   - Be strategic, forward-looking and focused on taking the organization to the next level.
   - Establish strategic goals and approve strategic, operational and annual plans.
   - Communicate organizational focus for greater stakeholder engagement.

c. **Board Role in Strategic Planning**
• Commits to planning
• Ensures enough resources
• Decides on approach
• Coordinates steering committee
• Helps prepare and approves “plan to plan”
• Make sure full board participation

d. Accountability

There are 4 components of Accountability:

• Transparency
• Answer-ability/Justification
• Compliance
• Enforcement

How are you held accountable?

• Accountable by votes for organization leaders
• Accountable by members joining (member value?)
• Accountable via roles & responsibilities

What are you accountable for?

Mission

• Governance
• Performance (results)
• Finances

Your organization accountability system (who and what)

• Members
• Bylaws/General Assembly
• Board
• Committees
• Strategic Plan
• Action or Annual Plan

3. YOUR ORGANIZATION’S BYLAWS

a. Bylaws

• Detail the procedures your organization must follow to conduct business in an orderly manner.
They specify when the board meets, when the general assembly takes place, the term of the office for board members and job description, who appoints management and other governance matters.

The by-laws of the organization are rules in the constitution that cannot be adopted or changed without approval of the member at a general assembly and any changes must be reported to the Security Exchange Commission (SEC) (Ex. See Appendix)

b. Importance of creating Bylaws

• Provide deeper definition to the Articles of the Constitution and usually can be changed more easily as the needs of the organization change.

c. Revising Bylaws why important

• When competing interest develop the bylaws that will be followed, it is important to revise the bylaw to make sure the rules for decision-making in your organization are clearly explained, it will help the board to decide.

**STRATEGIC PLANNING**

1. **WHAT IS STRATEGIC PLANNING?**

   A PROCESS that makes decisions and actions that shape and guide what an organization:
   • Is (Image/Brand of your organization)
   • Does (what your organization do/will do)
   • Requires data (need to collect data to know the situations)
   • Explores alternatives (look for other way)
   • Focuses on the future (what your organization wants to achieve)

2. **WHAT IS A STRATEGIC PLAN?**

   A WRITTEN document (a plan that can be read and followed)
   • Developed/written by the board
   • Agreed/approved by the board
   • Communicated with members (It is what members need and want)

3. **WHY STRATEGIC PLAN IS IMPORTANT?**

   • It keeps your organization focused on its goals
• Determine priorities (know what need to do)
• Concentrate on priorities and key strategies (focus on the need to do and find ways)
• Systematic approach to the future (there is a process to follow)
• Accountability (show that organization is responsible and it’s work/activities)
• Evaluate organizational effectiveness (know your organization weaknesses and strengths)
• Clarifies your vision, mission, critical issues, and strategies
• Prepare for possible partnerships
• Provide guidance/instruction to follow to volunteers (and staff, if hired), members
• To stay on track during leadership transitions (new officers have plan to follow)

4. WHY BE STRATEGIC?

• Agree on best approach (way/method) to implementing mission
• To find and know your organization’s unique/own path to success
• Build on assets
• To find and know your organization’s opportunities
• To find and know future problems and prevent them

5. WHO PLANS? WHO APPROVES?

• It is important that roles and responsibilities are clear and specific. In each item below it is important that every section have designated person/persons responsible in making decisions for the organization.
• It is equally important to determine who approves them.

a. Mission & Vision
   • Who decides: Board or members?
   • Who approves: Board or members?

b. Strategic Plan
   • Who decides: Board or members?
   • Who approves: Board or members?

c. Action/Annual Plan
   • Who decides: Board? (per Bylaws)
   • Who approves: Board or members?

d. Committee Plans
   • Who decides: Committees?
• **Who approves**: Board or members?

e. Organization Member Plans?

  • **Who decides**: Organization members?
  • **Who approves**: Board or members?

  • Should your members’ needs align with your organization’s strategic plan?
  • There is no wrong answer, only your members’ answers.

6. IS YOUR ORGANIZATION READY TO PLAN?

**Brain Storming Session** – List down your answers to the following:

6.1. KNOW THE SITUATION

   a. Ask and answer the following questions

      • Is your organization strong/reliable?
      • Does your organization have a strategic plan?
      • Have important strategies/ways been determined?
      • What funding/resources are available?
      • Is the board committed to planning?

   b. Small group activities

      • What is the process?
      • Who should facilitate the process?
      • Is there time to plan?

6.2. WHAT IS THE PROCESS

   a. Do you want to collect feedback from members?

      • Individual
      • Affiliate
      • Network
      • Others?

   b. If so, when, and how long is the feedback period?

      • Be specific (give an exact deadline)
      • Follow the deadlines unless important emergency reason to change.

   c. How many rounds of feedback?
• Define it and keep it limited (ex. 3x before approved and final)

d. Conflict resolution/solving strategies
• There will be conflicts, board must be prepared to take care and solve them.

6.3. WHO WILL FACILITATE THE PROCESS OF CREATING A STRATEGIC PLAN?

a. Could a board member act as facilitator?

Tips:
• Board members are not the best option because you will want full participation of each Board member in the process and you will want the process facilitated without any one person’s personal bias.
• External sources ex. Adviser, PFD, PNASLI, SPED Teacher…
• External sources who are respected and not biased are potentially good facilitators

b. If board member facilitates, he/she must
• Remain objective (not biased)
• Limit insights and ideas (can't actively participate)
• Act as motivator (encourage the board) in planning process

6.4. CAN YOU MAKE TIME TO PLAN?

a. Average time to develop a Strategic Plan:
• Six to nine months

b. Time Is Needed For
• Gathering data
• Research and analysis
• Writing the plan
• Attending meetings

6.5. ACTION PLANS

• What do you want to achieve?
• Who will work?
• What will you do?
• How would you know that you get your goal?
• How long?
7. KNOWING YOUR ORGANIZATION (CURRENT SITUATION)

7.1. SWOT ANALYSIS

a. The meaning of SWOT Analysis
   a.1. SWOT analysis is a structured method used to analyze situations and evaluate the strengths, weaknesses, opportunities, and threats of an organization.

   a.2. Importance:
       • Identification of SWOTs is important because they can inform later steps in planning to achieve your organization’s objective.
       • It’s an important tool in strategic planning and to help write a good strategic plan for your organization.

   a.3. How does SWOT analysis relate to Strategic Plan?
       • A SWOT analysis is an important part of a strategic plan. When creating a strategic plan, one of the most important details to explore is how your organization will make decisions and manage resources.
       • It gives your organization a clear picture of what resources to use and problems to address when creating a Strategic Plan.

b. The meaning of Strength
   b.1. Internal attributes and resources that support a successful outcome in your organization.

   b.2. Examples: Good Leaders, Volunteers, Office, Constitution, SEC and BIR License

c. The meaning of Weakness
   c.1. Internal attributes and resources that work against a successful outcome in your organization.

   c.2. Examples: No office, Not Clear Roles, Communication Technology, Not Clear Goals...

d. The meaning of Opportunities
   d.1. Outside factors your organization can capitalize on or use to its advantage.
d.2. Examples: General Appropriations Act, LGU sponsorship, Partner Organizations...

e. The Meaning of Threat

e.1. Outside factors that could jeopardize your organization.

e.2. Examples: Other competing Deaf organization in your area, Laws not followed, etc.

f. Activity: Brain Storming Session – List down your answers to the following:

Example: SWOT of the organization

- PFD Example:

<table>
<thead>
<tr>
<th>STRENGTHS</th>
<th>WEAKNESSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. 18 member organization</td>
<td>1. No office space</td>
</tr>
<tr>
<td>2. Recognized by the government: SEC &amp; BIR</td>
<td>2. No funding source</td>
</tr>
<tr>
<td>3. Committed officers and volunteers</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>OPPORTUNITIES</th>
<th>THREATS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. DDW-USAID Grant</td>
<td>1. Government agencies and organization ignore the law</td>
</tr>
<tr>
<td>2. Organizational Management Training Manual</td>
<td>2. Parental attitude towards Deaf community</td>
</tr>
</tbody>
</table>


- Write down your top 4 issues for each category
- Rank them in order
- Place them on the wall in their respective orders
- Now you can develop a strategic plan for your organization with focus on the top 4 issues.

7.2. SUSTAINABLE ORGANIZATION

a. What is a sustainable organization?

- Has a clear mission and strategic plan.
- Strong leadership and management.
- Can attract and retain (keep) partner organizations and government agencies.
- The skills to attract resources like donors and grants local, national and
international sources and can manage them effectively to benefit the community.
• Can give benefits for services for maximum impact on communities.
• Has community support and involvement.
• Commitment to building sustainable leadership: IE: If all leaders completely replaced, organization would continue.

b. Why is sustainability important?

b.1. Benefits:
• Can attract potential partners and support from government, local and international community.
• Can raise resources/funds from different sources like donors and grant both locally and internationally.

b.2. Importance
• Make sure that the organization is empowered to provide services and effectively advocate with governments and/or private sector groups to provide services.
• Make sure that the future officers will continue to carry out the work being done by their organization.
• It’s important in strategic planning, a sustainable organization will be able to do your organization’s strategic plans and achieve its goals.

c. Is your organization sustainable?

c.1. Sustainable Vs. Unsustainable Organization

<table>
<thead>
<tr>
<th>SUSTAINABLE</th>
<th>UNSUSTAINABLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>- 18 years</td>
<td>- Needs stronger leadership</td>
</tr>
<tr>
<td>- Board participation</td>
<td>- Member organizations need more support</td>
</tr>
<tr>
<td>- Many deaf leaders continue to support your organization</td>
<td>- Learned about SP but has not applied knowledge</td>
</tr>
<tr>
<td></td>
<td>- Leaders need to prepare for the future</td>
</tr>
<tr>
<td></td>
<td>- “Low Battery” diminishing energy</td>
</tr>
<tr>
<td></td>
<td>- Need to depend less on outside organizations</td>
</tr>
<tr>
<td></td>
<td>- Board does most of the work</td>
</tr>
</tbody>
</table>

c.2. Activity: Sharing – Share your answers to the following:
- Is your organization sustainable? Why?
8. PLANNING YOUR GOALS

8.1. LONG TERM GOAL PLANNING

a. Effective Governance
   a.1. WHY
   • Your organization Mission, Vision and Values
   a.2. WHAT
   • Your organization Strategic Goals and Objectives
   a.3. HOW
   • Your organization Action Plan
   a.4. WHO
   • The People, Systems and Resources in your organization

b. What is SMART?
The SMART tool is an important guide that will help in setting your organization’s objectives and in writing strategic or action plans to achieve your organization’s objectives.

b.1. S.M.A.R.T.
• S = SPECIFIC
  - Clear and exact plans
• M = MEASURABLE
  - How do you know if you can success? Or complete?
• A = ACHIEVABLE
  - Will you be able to complete the project?
• R = RELEVANT
  - See or check your mission and vision
  - It is important that your activity match your Mission and Vision, to make sure that your goals support the Mission and Vision of your organization.
• T = TIME – BOUND
  When will the project be done?
b.2. **BAD VERBS**: not clear and not exact plans  
   **Examples**: Coordinate, partner, support, facilitate, and enhance

b.3. **GOOD VERBS**: Clear and exact plans  
   **Examples**: provide, train, publish, increase, decrease, schedule,

b.4. **EXAMPLE OF SMART GOAL**  
PFD PLANNING A FUN RUN EVENT ON AUGUST 30, 2014: HOW CAN YOU MAKE SURE YOUR GOALS ARE SMART?

**S = SPECIFIC**

Wrong: We will coordinate a fun run to raise funds.  
*This is wrong the goal is not clear and specific.

Right: We will hold a fun run to raise funds for the Organizational Development Training in Bohol.  
*The goal is clear and specific “to raise funds for development training.”

**M = MEASURABLE**

Wrong: We hope many people will come.  
*Not measurable, there is no target number of people to attend.

Right: Tickets will cost PHP100 and plan for at least 50 people to attend.  
*This is measurable because there is an exact target number of people to attend.

**A = ACHIEVABLE**

Wrong: We will sell the ticket to the Deaf.  
*This wrong it is not clear how to accomplish the goal of selling tickets to the Deaf.

Right: We have 15 volunteers who will sell the tickets, we will set up advertisement in Face Book and will start selling 6 months in advance to meet the August 20, 2014 deadline.  
*Clear there are people responsible, how to sell and time period for selling and deadline.
R = RELEVANT (check if match with PFD Mission and Vision)

Mission: To represent Deaf Filipinos, preserve Filipino Sign Language, and empower the Deaf community through capacity building training of D/deaf and hard of hearing Filipinos to ensure their equal human, legal, linguistic, and cultural rights.

Wrong: We will hold the fun run to pay for the president vacation in Hong Kong.
*Does not match because it is for personal profit not connected to PFD Mission.

Right: Holding the fun run will raise fund for training of Deaf leaders in Bohol.
*Match because PFD Mission is to empower Deaf community through capacity building.

T = TIME – BOUND

Wrong: We will sell tickets 1 week before the event.
*Wrong there is no clear time frame and limited time period.

Right: We will sell at least 50 tickets by August 20, 2014 at the Quezon Memorial Circle Quezon City.
*There is a clear goal to sell 50 tickets on a specific date.

c. Develop Strategic Goals using SMART tool

<table>
<thead>
<tr>
<th>1. STRATEGIC GOAL (WHAT?)</th>
<th>- Train 100 leaders in 18 Deaf member organizations in Strategic Planning by 2019.</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. HOW?</td>
<td>- Training Committee will develop and submit project proposal to the board.</td>
</tr>
<tr>
<td></td>
<td>- Discuss with Boards</td>
</tr>
<tr>
<td></td>
<td>- Board to discuss and decide on project</td>
</tr>
<tr>
<td></td>
<td>- Board will approve project for implementation</td>
</tr>
<tr>
<td>c.4. MEASUREMENT?</td>
<td>- The project proposal has been documented for implementation.</td>
</tr>
<tr>
<td>c.5. ACTION PLAN? (What can we do?)</td>
<td>- Training Committee will</td>
</tr>
<tr>
<td></td>
<td>- Develop training materials and manual.</td>
</tr>
<tr>
<td></td>
<td>- Raise funds for the training.</td>
</tr>
<tr>
<td></td>
<td>- Implement the project.</td>
</tr>
</tbody>
</table>
d. Activity: Brain Storming Session – List down your answers to the following:
   • Review your SWOT analysis
   • Review data from your responses to questions
   • Select specific goal
   • Write SMART statement for goal

9. CAN YOU DO YOUR MISSION ALONE?

a. No, you cannot do it without partners and allies

b. Who are your partners and allies?
   • Non Government Organizations
   • Disabled People Organizations
   • Schools and Universities
   • Interpreters
   • Doctors/nurses, audiologists, speech therapists?
   • Senators, Congressman, Mayors, Governors
   • Government agencies
   • National Council on Disability Affairs
   • Technical Education Skills Development Authority,
   • Department Of Labor and Employment

c. Collaboration
   • Formal and informal partnership and collaboration
   • Organizations can enter into formal partnerships

d. Partnership
   • What are the goals for both organizations?
   • Does everyone understand the goals?
   • How do you communicate the goals to the community?
   • What are the implementation plans?
   • How do we hold ourselves accountable for our actions?

e. Activity: Brainstorming
   • Identify partners and allies
   • Which can be formal partnerships?
   • Which need to be informal partnerships?
   • How can you determine the approach to the informal partnerships?
10. CREATING STRATEGIC PLAN

10.1. EXPLAIN HOW YOUR ORGANIZATION IS UNIQUE

a. Why is your organization important to you? – Write and list answers
   Examples:
   • PFD is the mother organization to member organizations – takes care of them and advises them when they have problems
   • PFD teaches us about Deaf culture, disability rights, and equality
   • PFD empowers us
   • PFD advocates for the rights of Deaf people including education, employment, laws, FSL.
   • PFD represents the Filipino Deaf community both at home and internationally

b. Why did you join your organization? – Write and list answers
   Examples:
   • Organizational development improvement
   • Willing to work and support PFD
   • I want to learn from Deaf leaders who have inspired me.
   • Help evaluate organizations and help network/communicate with member organizations
   • I want to contribute to provinces

10.2. MAKE A SWOT ANALYSIS

Write and list your answers

a. Examples
   a.1. Strength
   • Partnership with Disabled People Organizations and Non Government Organizations
   • Deaf community recognizes and supports PFD
   • Member Organization
   • Many volunteers and network organizations

   a.2. Weakness
   • No funding source
   • System/structure is confusing- no clear responsibilities
   • No office / meeting space
   • Lack of leadership transition / training / role models
a.3. Opportunities
• USAID/DDW sub award transfer to PFD
• Organizational Management Training Manual
• Training by Disabled People Organizations & Non Government Organizations
• Many laws that apply / are open to PWD

a.4. Threats
• Anti FSL organizations
• Government agencies and organization ignore the law
• Parental attitude towards Deaf community
• Lack of self determination

10.3. VALUES: WHAT IMAGE DO YOU WANT TO PROJECT?

a. Activity – Write and list answers

Examples
• Committed
• Strong extended network- both hearing and Deaf
• Has integrity
• Professional
• Advocate

10.4. WHAT DO EXPECT TO ACHIEVE?

a. Activity – Write, list and refine answers

Examples
• Organizational integrity and a clear accountability system in place
• Clear mission and vision
• Clear goals and responsibilities
• GA approves mission, vision, and system
• PFD leaders actually show performance

10.5. WRITING THE STRATEGIC PLANNING

a. Choosing Goals
b. Planning your goals (Action Plan)
c. Process for approving
  • Who will write
    - Board or Committee?
• Who will approve
  - Board, Members or Both?

• Feedback
  - how many times and to who?

• Conflict resolution
  - Who will be responsible?
  - Who will facilitate?

• Time frame
  - How Long? Expected Deadline?

• Implementation
  - When will be enforced?

11. REFERENCES

Chapter 3
FINANCIAL MANAGEMENT

I. WHY IS FINANCIAL MANAGEMENT IMPORTANT FOR YOUR ORGANIZATION?

• To help your organization clearly record financial transactions and be able to show clean reports to your donors and the people who benefit from your service.
• To gain the respect and confidence of funding agencies, partners and members.
• To help your organization prepare for long-term financial sustainability.
• To monitor the financial health of the organization.
• To provide a paper trail of the organization's finances.
• To get a big picture of the organization's operations.
• To identify strengths/weaknesses of financial recordkeeping.
• To assist in making major decisions to align with the mission/vision of the organization.
• To use in planning and evaluating budgets.
• To meet and comply with tax, governmental and auditing requirements.
• To share detailed financial information with the Board, management/staff, and public as needed.
• To show Foundations for grant proposals.
• To ensure transparency and show that your organization is using its funding wisely.

II. WHY SHOULD I CARE?

Fiduciary Responsibility
A legal or ethical obligation of a person or entity to behave in the best interest of another person or entity. Often the fiduciary is someone who is trusted to take care of money or property.

• Duty of Care: The Board should always participate in organizational planning, discussions and decision-making to help make the right decisions.
• Duty of Loyalty: When you represent your organization, always think first about the organization before you think about yourself. Avoid conflict of interest if you represent your organization.
• Duty of Obedience: Make sure your organization follows all required laws and regulations, and that it remains committed to its mission.
• Oversight of Finances: Evaluate financial policies, approve annual budget and review financial reports to make sure the organization has resources to do its mission and remains responsible to its donors/the public.
What Questions Should Board Members Ask about Financial Management?

• **Does our financial plan support:**
  - Our strategic plan?
  - Short term goals?
  - Long term goals?
  - What is this year’s annual budget?
  - Is our cash flow (income compared to expenses) estimated to be enough?
  - Do we have enough money in the bank if program expenses are over budget?

*Example:*

- Your organization prepares a budget for a program worth Php50,000 and you expect to raise the exact amount from donors.

- After raising the amount for the program and the program starts, the expenses were Php60,000. This means that the program budget lacks Php10,000.

- Does your organization’s bank account have enough money to pay for the Php10,000 needed to complete the program?

- Example: Money in bank: Php30,000. Withdraw Php10,000 to pay for lack in the program budget. Balance in bank: Php20,000.

- The goal is to avoid this scenario to prevent the organization from bankruptcy.

• Are we spending more money than we thought for specific expenses such as transportation and office rent?

*Continued on next page*
**Example:**

<table>
<thead>
<tr>
<th>Date Range</th>
<th>Budget (Estimated at beginning of year)</th>
<th>Actual Happen (update monthly)</th>
<th>Variance (difference)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/1/15 - 12/31/15</td>
<td>PHP 5,000.00</td>
<td>PHP 2,500.00</td>
<td>PHP 2,500.00</td>
</tr>
<tr>
<td>1/1/15 - 3/31/15</td>
<td>PHP 10,000.00</td>
<td>PHP 0.00</td>
<td>PHP 10,000.00</td>
</tr>
<tr>
<td>1/1/15 - 3/31/15</td>
<td>PHP 10,000.00</td>
<td>PHP 550.00</td>
<td>PHP 9,450.00</td>
</tr>
<tr>
<td>1/1/15 - 3/31/15</td>
<td>PHP 40,000.00</td>
<td>PHP 10,000.00</td>
<td>PHP 30,000.00</td>
</tr>
<tr>
<td><strong>SubTotal</strong></td>
<td><strong>PHP 65,000.00</strong></td>
<td><strong>PHP 13,050.00</strong></td>
<td><strong>PHP 51,950.00</strong></td>
</tr>
</tbody>
</table>

**INCOME**

- **Member Fees** PHP 5,000.00
- **Fundraising Event** PHP 10,000.00
- **Product Sales** PHP 10,000.00
- **Grants** PHP 40,000.00

**EXPENSES**

- **Transportation** PHP 20,000.00
- **Meals/Snacks** PHP 28,000.00
- **Office Supplies** PHP 2,000.00
- **Presenter Honoraria** PHP 15,000.00

**NET BALANCE**

- **PHP 0.00**
- **-PHP 4,950.00**
- **-PHP 4,950.00**

- Are we following guidelines and requirements set by our funders/donors?
- How do we expect to end this year overall? Will we have additional income or lose profit?

**III. DEFINITIONS**

- **Financial Management**: planning, organizing, controlling and monitoring the financial resources of an organization to achieve objectives.
- **Record Keeping**: collecting, organizing, and recording financial transactions to keep a systematic record of financial information about a business/organization in a specific format so that records can be found quickly and easily. Often uses computer programs to record financial information (Ex: Microsoft Excel or QuickBooks).
- **Accounting**: the process of summarizing, analyzing and interpreting financial transactions in financial reports. The financial information is then presented to various people to help make decisions for the business/organization.
- **Transaction**: refers to a financial transaction in business. Recording something of value in exchange for something else of value (Ex: money buys food).
• **Account:** refers to a group of items having similar characteristics (Ex: “Supplies”, “Travel”, “Equipment”, “Service Fees”).
• **Income:** the money RECEIVED. (Ex: donations, grant, fundraising, sponsorship, selling products such as T-shirts).
• **Expense:** the value already paid and recorded (Ex: office supplies, printing, travel, payroll salaries, interpreter fees, internet, etc.).
• **Asset:** items of value that the business owns (Ex: Checking Account, Cash on Hand (or Petty Cash), Ownership of a vehicle or office building, Equipment).
• **Liability:** amount of money the organization must pay or in debt to others. (Ex: unpaid bills, invoice to pay an interpreter for their work that has been received but not yet paid, WFD/WFDAP membership fees, electric bill for office, etc.)
• **Net Worth/Fund Balance:** an organization’s assets after all of liabilities are subtracted.

### IV. DOCUMENT RETENTION

- Decide on a system to follow.
- Where will you keep your records? What location?
- Keep both a paper and an electronic copy.
- Clearly identify who is responsible for maintaining the financial records? Also, who is responsible for cross-checking the file system?
- Create clear labels for different folders and place documents into categories.
- How do you handle a situation if something is not filed, or filed wrong?
- What’s important is that you or any other person can quickly find a specific document or explain a specific transaction at any time.
- **TIP:** Backup all of your financial data!
  - Scan or take photos of all receipts to have electronic copies for backup.
  - Save all documents on a hard drive and keep the hard drive in a separate place from the printed documents and receipts in case there is a flood, fire, or damage.
V. FINANCIAL MANAGEMENT PROCESS

PLAN:
- Set objectives and planned activities.
- Prepare a financial plan for the income and expenses for the project
- Example: Community Workshop Estimated Expenses
  - Income from Your Organization's Funds – Php 900.
  - Expected expenses:
    - Meals – 500
    - Printing for handouts – 200
    - Transportation – 200
    - Total: 900

DO:
- Receive and spend money on the project to achieve objectives in the planned activities
- Example: Community Workshop Actual Expenses
  - Income from Your Organization's Funds – Php 950.
  - Expected expenses:
    - Meals – 625
    - Printing for handouts – 75
    - Transportation – 250
    - Total: 950
REVIEW:
- Compare expenses with budget.
- Evaluate if the project objectives are achieved
- Decide to continue with the same project or set new project
- Example: Community Workshop Review/Compare Estimated and Actual Expenses

<table>
<thead>
<tr>
<th></th>
<th>Estimated Expenses</th>
<th>Actual Expenses</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meals</td>
<td>500 PHP</td>
<td>625 PHP</td>
<td>-125 PHP</td>
</tr>
<tr>
<td>Printing for handouts</td>
<td>200 PHP</td>
<td>75 PHP</td>
<td>+125 PHP</td>
</tr>
<tr>
<td>Transportation</td>
<td>200 PHP</td>
<td>250 PHP</td>
<td>-50 PHP</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>900 PHP</strong></td>
<td><strong>950 PHP</strong></td>
<td><strong>-50 PHP LACK</strong></td>
</tr>
</tbody>
</table>

VI. FLOW OF FINANCIAL INFORMATION

**Recordkeeping:**
1. Business Transaction Occurs
2. Receive Receipt/Documentation
3. Record Business Transaction

**Accounting**
4. Summary Balances in Accounting Software
5. Prepare Financial Reports
6. Share Financial Information Summary
VII. RECORD KEEPING

**Purpose:** To collect, organize, and record financial transactions to keep a systematic record of financial information about a business/organization in a specific format so that records can be found quickly and easily.

1. Business transaction happens (Ex: purchase dinner for the group at McDonalds during a training session).

2. Receive receipt/documentation.
   - Write notes directly on receipts to help you remember special situations (Ex: “meal for guest presenter”, or “print flyer for IDD”).
   - If the printout receipt is unclear, handwrite the information on the receipt so it is clear.

3. Record business transaction in accounting software (Ex: Microsoft Excel or QuickBooks).
   a. What to record?
      - Date
      - Amount
      - VAT Tax Amount
      - Transaction type (check, cash, credit, wire transfer)
• Vendor or Donor name
• Account/Category (Group)
• Notes

b. Tips:
• Continue with tasks on a regular basis so you do not stress/panic when deadlines arrive.
• Record EVERYTHING. If not sure if you should record, YES record the information!
• Keep business and personal expenses separate.
  i. Use business money to pay for business expenses and use personal money to pay for personal expenses.
  ii. If business and personal expenses are on the same receipt, ask for separate receipts. This will make your records more clean for a financial audit.

VIII. ACCOUNTING

Purpose: To interpret financial information from revenue and expense logs and account summaries to create reports and share with the Board, donors, public etc.

1. Summary Balances in Accounting Software

Example: A spreadsheet can show how much was spent each month (January, February, March, etc.) and also how much was spent for the full year.

<table>
<thead>
<tr>
<th>Revenue Account/Category</th>
<th>January</th>
<th>February</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
<th>August</th>
<th>September</th>
<th>October</th>
<th>November</th>
<th>December</th>
<th>2014 TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donation</td>
<td>PHP 1,005,000.00</td>
<td>PHP 1,005,000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fundraiser</td>
<td>PHP 500,000.00</td>
<td>PHP 500,000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Appeal Letter</td>
<td>PHP 10,000.00</td>
<td>PHP 10,000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Presentation</td>
<td>PHP 1,000.00</td>
<td>PHP 1,000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>PHP 500.00</td>
<td>PHP 500.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>PHP 1,516,500.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 1,516,500.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expense Account/Category</th>
<th>January</th>
<th>February</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
<th>August</th>
<th>September</th>
<th>October</th>
<th>November</th>
<th>December</th>
<th>2014 TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel</td>
<td>PHP 10,110.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 12,510.00</td>
<td></td>
</tr>
<tr>
<td>Meals</td>
<td>PHP 438.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 438.00</td>
<td></td>
</tr>
<tr>
<td>Supplies</td>
<td>PHP 500.00</td>
<td>PHP 500.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Room Rental</td>
<td>PHP 100.00</td>
<td>PHP 100.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Honoraria</td>
<td>PHP 1,000.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 1,000.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>PHP 12,538.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 0.00</td>
<td>PHP 12,538.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

***Checks and Balances - These Totals should match the monthly totals on your expense log***
2. Prepare Financial Reports
   a. Print out clear spreadsheets to show the total income and expenses.
   b. Print and review reports each month
   c. Sample Financial Reports:
      Income/Expense Statement
      • Summary of all Income and expense accounts
      • Shows profit or loss over a period of time

   **PFD INCOME STATEMENT**
   **JANUARY 1, 2014 - January 31, 2014**

   **INCOME**
   Donation: PHP 1,005,000.00
   Fundraiser: PHP 500,000.00
   Appeal Letter: PHP 10,000.00
   Presentation: PHP 1,000.00
   Miscellaneous: PHP 500.00

   **TOTAL INCOME**
   PHP 1,516,500.00

   **EXPENSES**
   Travel: PHP 10,510.00
   Meals: PHP 428.00
   Supplies: PHP 500.00
   Room Rental: PHP 100.00
   Honoraria: PHP 1,000.00

   **TOTAL EXPENSES**
   PHP 12,538.00

   **NET INCOME**
   PHP 1,503,962.00
Asset/Liability Balance Sheet

- Summary of Asset and Liability Accounts
- Shows NET worth at a specific time

PFD Balance Sheet
As of January 31, 2014

<table>
<thead>
<tr>
<th>ASSETS</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash in Bank (see PFD Register balance)</td>
<td>PHP 1,570,962.00</td>
</tr>
<tr>
<td>Cash in Hand / Petty Cash</td>
<td>PHP 262.00</td>
</tr>
<tr>
<td>Accounts Receivable (expected money coming into PFD)</td>
<td>PHP 5,000.00</td>
</tr>
<tr>
<td>Equipment (IE: laptop, LCD- things PFD owns)</td>
<td>PHP 70,000.00</td>
</tr>
<tr>
<td><strong>TOTAL ASSETS</strong></td>
<td><strong>PHP 1,646,224.00</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LIABILITIES AND FUND BALANCE</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Liabilities (ie: bills not yet paid)</td>
<td>PHP 5,000.00</td>
</tr>
<tr>
<td>Fund Balance</td>
<td>PHP 1,641,224.00</td>
</tr>
<tr>
<td><strong>TOTAL LIABILITIES AND FUND BALANCE</strong></td>
<td><strong>PHP 1,646,224.00</strong></td>
</tr>
</tbody>
</table>

Budget

- Analysis of estimated income and expenses for a future period of time.
- Allows you to compare budget of estimated income/expenses with the actual income expenses.
- Allows you to look for trends and make adjustments
<table>
<thead>
<tr>
<th>Revenue</th>
<th>Total Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Fundraising</strong></td>
<td>PHP 30,000.00</td>
</tr>
<tr>
<td><strong>Grants</strong></td>
<td>PHP 40,000.00</td>
</tr>
<tr>
<td><strong>Miscellaneous</strong></td>
<td>PHP 4,000.00</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td>PHP 74,000.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expenses</th>
<th>Total Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Programming</strong></td>
<td>PHP 60,000.00</td>
</tr>
<tr>
<td><strong>Fundraising</strong></td>
<td>PHP 8,000.00</td>
</tr>
<tr>
<td><strong>Miscellaneous</strong></td>
<td>PHP 6,000.00</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td>PHP 74,000.00</td>
</tr>
</tbody>
</table>

**Net**

**PHP 0.00**
d. TIP: Cross-check

1. Print original income and expense statement.
2. Print original bank account statement.
3. Check the two documents side by side.
4. With a pencil, put a checkmark next to each transaction that is listed on both documents.
5. Compare and make sure both statements match.

- If you notice a transaction on the bank statement but not on the income/expense statement, then you must make the correction.
- If you notice a transaction on the bank statement that is written twice on the income/expense statement by accident, then you must make the correction.

5. Share Financial Information Summary with Board, members, sponsors, banks, etc.
   a. If someone asks you about a specific expense or income transaction, be prepared to explain it.
   b. You need to be able to understand and explain ALL numbers in a financial report and how those numbers were calculated.
   c. Communicate about financial information with the Board and officers often so there are no surprises!

<table>
<thead>
<tr>
<th>Stakeholders</th>
<th>Why do they need financial reports?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Staff</td>
<td>To know how much money and resources are available for their projects and what has been spent so far.</td>
</tr>
<tr>
<td>Managers</td>
<td>To keep an eye on how project funds are being used, especially compared to the original plans. To help plan for the future.</td>
</tr>
<tr>
<td>Finance Staff</td>
<td>To make sure that there is enough money in the bank to buy the things your organization needs to run its programs.</td>
</tr>
<tr>
<td>Executive Board</td>
<td>To keep an eye on how resources are being used to achieve your organization’s objectives</td>
</tr>
<tr>
<td>Donors</td>
<td>To make sure that their grants are being used as agreed and that the project’s objectives are being fulfilled. To consider whether to support your organization in the future.</td>
</tr>
<tr>
<td>Project Beneficiaries (People who benefit from your organization’s service)</td>
<td>To know what it costs to provide the services they are benefiting from and to decide if this is good value for their community.</td>
</tr>
<tr>
<td>The general public</td>
<td>To know what your organization raises and spends during the year and what the money is used for.</td>
</tr>
</tbody>
</table>
IX. BUDGETING

A. What is a Budget?

a. A budget is a plan of FUTURE events/activities.
b. First think- what events/activities/programs will you have?
c. Second think- what resources/money will you need?
d. A budget is a formal estimate of the resources that an organization plans to receive (income) and spend (expenses)

B. Why is Budgeting needed?

a. Helps the organization plan long-term and short-term programs and events that it can afford to pay for.
b. If lack of money is a problem, a budget can help the organization have notice and prepare in advance.
c. A budget helps the organization compare estimated expenses and income with actual expenses.
d. Tip: budgets should be:
   i. Realistic – do not make up over exaggerated estimates of income. For example, if last year your organization raised 50,000 PHP, do not make up that this year you will have a budget of 800,000 PHP if that is not realistic.
   ii. Flexible – be willing to make a change if actual income or expenses change.
   iii. Watchful – have a plan to review the budget and actual expenses monthly or every 2 weeks.
   iv. Achievable – your budget should balance to zero- the goal should be for neither expenses nor income to be over or under budget.
e. The budget is a critical part of any negotiation with donors. The budget sets out in detail what the NGO will do with a grant, including what the money will be spent on, and what results will be achieved.

C. The Budget Cycle
a. **Planning**: A budget is necessary for planning a new project, so that your organization can build up an accurate idea of the project’s cost. This allows you to analyze if you have the money to complete the project and if you are making the best use of the funds you have available.

b. **Fundraising**: In order to receive the funds needed in the budget, an organization must raise funds. Examples include: requesting donations through letters, hosting fundraising events, applying for grants, sponsors, selling FSL books, etc.

c. **Project Implementation**: A correct budget is needed to control the project, once it has been started. As you begin your work and implement the project, you will have expenses to pay. These expenses should be part of the approved budget.

d. **Monitoring and Evaluation**: The most important tool for on-going monitoring is comparing the actual costs to the budgeted/estimated costs. Without a correct budget, this is impossible.

e. **Note**: Because plans sometimes change, it is necessary to review the budget after a project has started and make revisions for the remainder of the project. The budget is used as a tool for evaluating the success of the project, when it is finished. It helps to answer the question: ‘Did the project achieve its goal with the funds from the budget, or did the project cost more than the budget?’

**D. Budget Planning Guide**

<table>
<thead>
<tr>
<th>Ref</th>
<th>Description</th>
<th>Unit Type</th>
<th>No. units</th>
<th>Qty</th>
<th>Unit cost</th>
<th>Total cost</th>
<th>Notes</th>
<th>Account Code</th>
<th>Donor Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Workshop</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>W-1</td>
<td>USA</td>
</tr>
<tr>
<td>1.1</td>
<td>Room rental</td>
<td>days</td>
<td>3</td>
<td>1</td>
<td>P2,000</td>
<td>P6,000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.2</td>
<td>Meals</td>
<td>days</td>
<td>3</td>
<td>10</td>
<td>P300</td>
<td>P9,000</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Reference (Ref)
- Description
- Unit type
- Number of Units (No. units)
- Quantity (Qty)
- Unit cost
- Total cost
• Notes
• Account Code (Chart of Account)
• Donor Code

E. Chart of Accounts (or, “examples of expense categories”)

This is an accounting term which means the different categories of expenses you will have. Here is a list of some examples:

1. Personnel
   • Salaries, benefits and taxes
   • Staff development

2. Transportation
   • Airfare
   • Ground: Taxi, Bus, Train, Jeepney, etc.
   • Boat

3. Administration
   • Supplies
   • Utilities
   • Office Rent
   • Communication
   • Audit Fees
   • Interpreting Fees
   • Maintenance

4. Equipment
   • Computer
   • Laptop
   • Printer
   • LCD projector
   • Video camera

5. Project Costs
   • Training materials (hand outs, books, manuals, video instructions)
   • Public Relations and Marketing costs (brochures, tarpaulin/banner, flyers, business cards, invitations)
   • Professional fees/Honoraria for presenters/facilitators
   • Accommodation
6. How to develop a budget?

**Decide on a Time Period**

i. One year budget? 6 months? 1 month?

ii. Or is the budget for a specific program? If so, how long is the program?

**Review Short and Long Term strategies**

i. Short Term Goals

ii. Should have more detailed financial estimates for a shorter period of time.

iii. Should match with short term plans.

iv. Long Term Goals (5 to 10 years)

v. Should set true targets and expected schedules.

vi. Should include future estimates of financial goals.

**Estimate Income**

i. Asking for donations and sponsorships

ii. Planning fundraising/special events

iii. Working with government, grants, and foundations

iv. Membership fees

v. Analyzing the impact of local economy

**Estimate Expenses**

i. Review your organization’s priority needs for the year/budget.

ii. What expenses will your organization have for:

   • Short term projects and events?
   • Long term projects and events?

iii. What expenses has your organization had in the past that will happen again?

   • (EX: expense for BIR/SEC, PO Box rental, transportation, CP load, Wi-Fi, etc.)

**Create a Budget Document**

i. Income section (Cash inflow)

ii. Expenses section (Cash outflow)

iii. Net Balance = Income minus Expenses

iv. Net income can be positive or negative
Example of a budget from PFD General Assembly:

<table>
<thead>
<tr>
<th>REVENUE:</th>
<th>40 pax</th>
<th>50 pax</th>
<th>60 pax</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mr. Shane Feldman</td>
<td>21,000.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bazaars</td>
<td>1,000.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mayor of Cagayan de Oro</td>
<td>20,000.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gov. Bambi Emano of CDO</td>
<td>5,000.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Registration fees</td>
<td>120,000.00</td>
<td>150,000.00</td>
<td>180,000.00</td>
</tr>
<tr>
<td>Friends of PFD</td>
<td>10,000.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PCSO</td>
<td>2,000.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>NCDA</td>
<td>3,000.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>NAPC</td>
<td>5,000.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TESDA</td>
<td>10,000.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>AKAP Pinoy</td>
<td>3,000.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Del Monte</td>
<td>5,000.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PSFADC- Fr. Sato</td>
<td>3,000.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sponsors</td>
<td>15,000.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pagcor</td>
<td>20,000.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL REVENUE</strong></td>
<td><strong>243,000.00</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EXPENSES:</th>
<th>40 pax</th>
<th>50 pax</th>
<th>60 pax</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodation &amp; meals</td>
<td>87,000.00</td>
<td>108,750.00</td>
<td>130,500.00</td>
</tr>
<tr>
<td>Air Travel</td>
<td>56,500.00</td>
<td>56,500.00</td>
<td>56,500.00</td>
</tr>
<tr>
<td>Transpo</td>
<td>300.00</td>
<td>300.00</td>
<td>300.00</td>
</tr>
<tr>
<td>Meals for Pre-General Assembly</td>
<td>3,000.00</td>
<td>3,000.00</td>
<td>3,000.00</td>
</tr>
<tr>
<td>Meals for Post General Assembly</td>
<td>1,650.00</td>
<td>1,650.00</td>
<td>1,650.00</td>
</tr>
<tr>
<td>Text Communication</td>
<td>600.00</td>
<td>600.00</td>
<td>600.00</td>
</tr>
<tr>
<td>Printing</td>
<td>400.00</td>
<td>400.00</td>
<td>400.00</td>
</tr>
<tr>
<td>Photocopies</td>
<td>2,000.00</td>
<td>2,500.00</td>
<td>3,000.00</td>
</tr>
<tr>
<td>Supplies</td>
<td>4,280.00</td>
<td>4,850.00</td>
<td>5,420.00</td>
</tr>
<tr>
<td>LCD projector rental</td>
<td>3,500.00</td>
<td>3,500.00</td>
<td>3,500.00</td>
</tr>
<tr>
<td><strong>TOTAL EXPENSES</strong></td>
<td><strong>159,230.00</strong></td>
<td><strong>182,050.00</strong></td>
<td><strong>204,870.00</strong></td>
</tr>
</tbody>
</table>

7. Variance Analysis
   What is a variance?
   i. The difference between a budgeted/planned amount and an actual amount.
   ii. Variance = Budget minus Actual amount.
   iii. Example of a Budget, Actual Amounts, and Variance:
<table>
<thead>
<tr>
<th>INCOME</th>
<th>1/1/15 - 12/31/15</th>
<th>1/1/15 - 3/31/15</th>
<th>1/1/15 - 3/31/15</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Budget</strong></td>
<td><strong>Actual Happen</strong></td>
<td><strong>(difference)</strong></td>
<td></td>
</tr>
<tr>
<td><strong>(Estimated at</strong></td>
<td><strong>update monthly)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>beginning of year)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Member Fees</td>
<td>PHP 5,000.00</td>
<td>PHP 2,500.00</td>
<td>PHP 2,500.00</td>
</tr>
<tr>
<td>Fundraising Event</td>
<td>PHP 10,000.00</td>
<td>PHP 0.00</td>
<td>PHP 10,000.00</td>
</tr>
<tr>
<td>Product Sales</td>
<td>PHP 10,000.00</td>
<td>PHP 550.00</td>
<td>PHP 9,450.00</td>
</tr>
<tr>
<td>Grants</td>
<td>PHP 40,000.00</td>
<td>PHP 10,000.00</td>
<td>PHP 30,000.00</td>
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<tr>
<td><strong>SubTotal</strong></td>
<td><strong>PHP 65,000.00</strong></td>
<td><strong>PHP 13,050.00</strong></td>
<td><strong>PHP 51,950.00</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EXPENSES</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Transportation</strong></td>
<td><strong>PHP 20,000.00</strong></td>
<td><strong>PHP 8,000.00</strong></td>
<td><strong>PHP 12,000.00</strong></td>
</tr>
<tr>
<td>Meals/Snacks</td>
<td><strong>PHP 28,000.00</strong></td>
<td><strong>PHP 2,500.00</strong></td>
<td><strong>PHP 25,500.00</strong></td>
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<tr>
<td>Office Supplies</td>
<td><strong>PHP 2,000.00</strong></td>
<td><strong>PHP 500.00</strong></td>
<td><strong>PHP 1,500.00</strong></td>
</tr>
<tr>
<td>Presenter Honoraria</td>
<td><strong>PHP 15,000.00</strong></td>
<td><strong>PHP 7,000.00</strong></td>
<td><strong>PHP 8,000.00</strong></td>
</tr>
<tr>
<td><strong>SubTotal</strong></td>
<td><strong>PHP 65,000.00</strong></td>
<td><strong>PHP 18,000.00</strong></td>
<td><strong>PHP 47,000.00</strong></td>
</tr>
</tbody>
</table>

| NET BALANCE                         | **PHP 0.00**     | **-PHP 4,950.00**| **-PHP 4,950.00**|

8. Budget Activity

Your organization has been given a one-time donation of 50,000 PHP. Now it’s time to budget!

i. First decide on a project or event (IDD? GA? Deaf Awareness Training?)

ii. Next decide on a time period (1 year? 6 months? 1 month?)

iii. Is there opportunity for extra income? If so, from where?

iv. Be realistic with the financial amounts

v. What expenses will you have?

  NOTE: For ideas to help you brainstorm all possible expenses, view this checklist:
### Checklist of Possible Expenses

<table>
<thead>
<tr>
<th>Staff Positions</th>
<th>Supplies</th>
<th>Program Costs</th>
<th>Administration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Director</td>
<td>Multimedia Projector</td>
<td>GMATM printing</td>
<td>Bank Fees</td>
</tr>
<tr>
<td>Coordinator</td>
<td>Computer Software</td>
<td>DVD burning</td>
<td>BIR</td>
</tr>
<tr>
<td>Facilitator</td>
<td>Video Software</td>
<td>Meals/ Snacks for Meetings</td>
<td>SEL</td>
</tr>
<tr>
<td>Logistics</td>
<td>Video Camera</td>
<td>Presenter Honorarium</td>
<td></td>
</tr>
<tr>
<td>Other Staff / Volunteers</td>
<td>Photo Camera</td>
<td>Presenter/ Participant Meals</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Hard Drive for Storage</td>
<td>Presenter/ Participant Travel</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Cables</td>
<td>Presenter/ Participant Hotel</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Training Materials</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Venue Rental</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Labor</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Travel
- Flights
- Boat
- Regional Bus
- Jeepney/Tricycle
- MRT/LRT

### Service Providers
- Interpreters
- Bookkeeper
- Video editor
- Videographer
- Professional Lecturers
- Guest Speakers
- Transcribers
- Auditor
- Lawyer
- Notary
- Graphic Designer
- Web Designer
- Web Master

### Equipment
- Laptop
- Printer
- Photocopy Machine
- Fax Machine
- Scanner
- Telephone
- Cellphones
- PLDT Modem
- WiFi Pocket

### Supplies
- Photocopies
- FSL book printing
- Brochure printing
- Ticket printing
- Poster/Banner printing
- Receipt/PDV printing
- Business Card printing
- ID Tag printing
- Bond Papers
- Ball pens/Pencils/Markers
- Envelopes
- Folders
- Manila Paper
- Tape/ Scissors
- Ink/ Corrections Fluids
- Money box
- Letters and Cards

### Program Costs
- GMATM printing
- DVD burning
- Meals/ Snacks for Meetings
- Presenter Honorarium
- Presenter/ Participant Meals
- Presenter/ Participant Travel
- Presenter/ Participant Hotel
- Training Materials
- Venue Rental
- Labor

### Administration
- Bank Fees
- BIR
- SEL

# 9. Budget Approval: Questions to think about:

i. What is the policy for approving a budget? Does everyone understand this policy?

ii. Can we change a budget during the term of an already approved budget? If so, have you decided the process for how to do this?

i. For Example, if you had a budget of 5,000 PHP for office supply expenses for the year, but by September of that year you have only used 1,000 PHP, perhaps you can meet to discuss if a portion of the extra 4,000 PHP can be used for a different expense. You can go line by line in your budget to think about this for each source of revenue and each expense line item.
iii. How do you check the expenses and balances on a project? Who does the checking? Who is responsible for communicating this information to the Board? How is the information communicated?

iv. Tips:
- Establish a review schedule.
- Engage everyone in the budget process.

10. Organizational Budget Cycle

X. FINANCIAL POLICIES

a. What is a Financial Policy?
   a.1. Policies related to the control, supervision and monitoring of financial systems.
   a.2. Help use past financial information (past total expenses and past total income) to create future budgets and financial plans.
   a.3. Provide guidelines so that bookkeeping and reporting are consistent.
   a.4. Have rules to reference when making finance decisions.

b. Your organization should be in “Strong Financial Health,” meaning your organization:
   b.1. Can pay bills on time.
b.2. Can pay for future expenses.
b.3. Can balance the budget every year.
b.4. Can provide the needed/required services for your organization on budget.

c. What are Checks & Balances?
c.1. Promotes segregation/separation of duties.
c.2. Internal controls that protect from corruption, mistakes and theft.
c.3. Helps financial operations run smoothly.
c.4. Helps keep the organization honest and accurate.

d. What is Segregation of Duties?
d.1. Assigning financial responsibilities to different individuals
d.2. How?
• One person should control the money (Ex: make deposits, hold petty cash funds, withdraw money, provide reimbursement)
• A different person should approve the transaction to occur (Ex: Board President, or Full Board—see policy).
• A different person should record and report the transactions (Ex: bookkeeper).

![Diagram of segregation of duties]

Approves transactions
Controls the money
Records transactions

e. Policies to consider adopting:
e.1. Bank Authority and General Signatory Policy (Appendix F)
e.2. Travel and Expenses Reimbursement Policy (Appendix G)
e.3. Allowable and Unallowable Expenses Policy (Appendix H)
e.4. Procurement Policy (Appendix I)
e.5. Document Retention Policy (Appendix J)
e.6. Donations Received Policy (Appendix K)
e.7. Cash Fund Management Policy (Appendix L)

f. A Bank Authority and General Signatory Policy

This policy is important because it allows your organization to determine how to approve and manage using the organization’s funds. It answers these questions:

f.1. Who can open and maintain bank accounts of the organization?
f.2. Who can deposit and withdraw money from the bank account?
f.3. What is the limit amount for withdrawals?
f.4. Who give approval to withdraw?
f.5. What are the checks and balances/duty of segregation? (Ex: Approval, Money Handler, Record-keeper should be three different people).
f.6. See Appendix F for a sample policy from PFD.

g. A Travel and Expenses Reimbursement Policy:

This policy is important because it makes sure that the volunteers and staff of your organization maintain proper documentation for allowable expense reimbursement. This policy also:

g.1. Ensures that rules of sponsors/donors are followed.
g.2. Makes sure that the traveler:

1. Spends the organization’s funds reasonably.
2. Completes a travel expense report.
3. Makes sure all expenses for reimbursement are already approved in the budget or by the proper authority.

4. Submits her/his reimbursement request on time (Ex: 1-2 weeks after the expense happened, not 6 months later).

5. Keeps ALL Original Receipts filed.

6. If no receipts are available or a receipt is lost (IE: Jeepney, etc.) write an explanation for those expenses. Include:

   i. Total amount of expense
   ii. Date/time
   iii. VAT tax amount of expense
   iv. Description of expense
   v. Explanation why there is no or lost receipt

\[\text{20 PHP}\]
May 23, 2014
9:10am
0 VAT
Jeepney ride from home to CSB for Financial Management Training
Jeepney does not provide receipt

Submitted by: Hilary Clinton

G.3. Instructions for Reimbursement

1. Complete the traveler expenses report form.
2. Attach all original or copies of receipts.
3. Attach any written explanation of expenses without receipts.
4. Submit all of the above to: {Make it clear who collects the reimbursement forms and receipts}.
5. Authority will review, approve and respond within a certain time (Ex: 7 days or 2 weeks).

g.4. Cash Advance
1. What is the Policy? For example:
   1) Traveler must have a proposal for project approved in advance.
   2) Traveler must submit original receipts after project.
   3) Traveler must explain any difference from project proposal and actual expenses paid.

2. What is the limit for a Cash Advance?
   1) IE: A cash advance of no more than 5,000PHP? Discuss and approve with your organization what amount is appropriate.

g.5. See Appendix L for a sample policy from PFD.

h. Allowable and Unallowable Costs Policy

*This policy is important because it will allow your organization to decide which expenses/costs are acceptable business expenses and which ones are not.*

1. Costs that your organization will allow should follow four rules:
   1. Reasonable – is the expense realistic and necessary?
   2. Allocable – do you have the budget to pay for the expense?
   3. Consistent – have your procedures for deciding on this expense been similar to past procedures?
   4. Allowable – is the expense legal/accepted under the government and/or the grant or funder?

2. ACTIVITY: With the officers of your organization,
   1. Create a list of expenses that are allowable (Ex: travel, printing, interpreter fees, etc.)
   2. Create a list of expenses that are not allowable (Ex: beer, family or friend accommodations during your organization project, personal hygiene/haircut, etc.)
   3. See Appendix H for a sample policy from PFD.

i. Procurement Policy
This policy is important because it ensures that your organization carefully and appropriately selects service providers and products without any bias.

1. To “procure” means to carefully select a vendor, item, or service.

2. This policy clearly explains the process and responsibilities when:
   1. Reviewing and signing contracts. For example, who decides to hire a service provider or contractor? What is the difference if it is a small payment (Ex: 100PHP) compared to a large payment (Ex: 10,000 PHP)?
   2. Purchasing goods and services.

3. Why is procurement important?
   2. Ensure the right financial management policies/rules are in place.
   3. Ensure there is no conflict of interest. (Ex: hiring and overpaying a family member for a service instead of properly procuring a service).

4. General Requirements
   1. Limit – all contracts above XXX PHP must be approved by ______ (see Bank Authority and General Signatory Policy)
   2. If expense is already approved by the Board in the budget, it is okay to pay for.

5. Example of a Competitive Bidding Limit
   1. 0 – 5,000 Php = no procurement needed, can purchase immediately if the expenses is approved within the budget.
   2. 5,001 – 10,000 Php = documentation from three different vendors plus Board President must approve.
   3. 10,001 Php and above = documentation from three different vendors plus full Board must approve.

6. Things to consider:
   1. The cheapest quote may not be the best choice.
   2. Is the quality of product/service very good?
   3. Is the delivery time of the product/service fast?
   4. Does any member in your organization have a past experience with the product/service? Does it have a good reputation?
   5. Are there other vendors/service provider for the same product/service?
   6. Conflict of interest – be ready to justify why you chose a certain vendor if that is questioned by a grantmaker or the government.
   7. See Appendix I for a sample policy from PFD.
j. A Document Retention Policy

This policy is important because it keeps the organization accountable to maintain all financial and legal documents in order and easily accessible.

1. Make sure all important records and documents are kept safe and available when needed.
2. Make sure all non-important records and documents are destroyed only according to standard policy.
3. Have a clear procedure for printed/computer files:
   1. Take photos/scan all printed/original paper copies.
   2. File in computer so they are easy to find.
   3. Assign responsibility to record keeper.
   5. See Appendix J for a sample policy from PFD

k. Donations Received Policy

This policy is important because it helps your organization establish procedures, guidelines and limits for accepting gifts and donations to the organization.

1. All cash donations must be deposited in the next banking day.
2. Upon receiving cash and/or checks, an Official Receipt (OR) must be prepared with the following information:
   1. Date of donation
   2. Name of donor
   3. Address of donor
   4. Particulars/Description of income (Ex: donation, presenter honoraria restricted funds for projects, event sponsors, etc.)
   5. Amount
   6. Details of the check received (name and address of bank, check number, etc.)

3. See Appendix K for a sample policy from PFD.

l. Cash Fund Management Policy

This policy helps your organization financial team maintain clean records for the use of cash to pay for approved expenses. It also explains how to replenish the petty cash fund to have cash on hand that is withdrawn from the bank.

1. Petty Cash represents a small amount of cash used to pay expenditures.
2. Select a limit to have for cash on hand. Select a person who will control the cash box and petty cash. Do not mix petty cash funds with any other
donations or funds that come in—all new donations should be deposited into the bank.

3. For a list of expenses that can be paid for, see Allowable and Unallowable Expenses Policy.

4. See Appendix L for a sample policy from PFD.

m. Dangerous Situations that can Lead to Fraud/Cheating/Theft/Errors

1. Not enough training on financial operations.
2. Not following internal controls (rules, policies, procedures).
3. Not having clear segregation of duties.
4. Missing important deadlines or financial goals.
5. Not updating financial data on time.
6. Disorganized financial records.
7. No attention paid to financial details.
8. Little or no review of the bookkeeper’s work.
9. No or little changes in accounting software.

n. Approving Financial Policies

1. Board will discuss the financial needs and if a new policy is necessary.
2. Board will assign Treasurer and Finance Committee to create new financial policy.
3. Treasurer and Finance Committee will share draft with Board and staff for feedback.
4. Treasurer and Finance Committee will present new policy to Board for approval.
5. Board approves policy.
6. Treasurer and Finance Committee must train staff and anyone who is affected by policy to make sure they understand the policy.

7. TIPS:
   1. Policies should be reviewed and revised if necessary at least every two years.
   2. Use language that everyone understands. Do not over-complicate the policy language.
   3. Make sure you review and understand the financial policies and expectations of a grant maker before signing a contract to receive and manage funds.
XI. AUDITS

a. An audit is an inspection of your financial records, done by an outside company/organization.

b. Why is Auditing important?
   1. Before completing the program/project, this is to make sure you can properly manage a grant before receiving the money.
   2. After completing a program/project, this is to make sure you managed your grant correctly as you said you would.
   3. Show public you managed your money well.
   4. You have proof of clean financial record in case outside people or organizations suspect your organization of fraud/cheating/theft.
   5. Required by government or other agency.

c. What is reviewed during an Audit?
   1. Bylaws and other organization documents
   2. Payment to staff and contractors
   3. Documents showing accounting policies and procedures
   4. Minutes of Board meetings
   5. Annual budget
   6. Checking Excel (spreadsheet software) files
   7. Access to all bills paid and checks received during the year
   8. Check if banks statements and asset and liability accounts are equal
   9. Income/expense analysis (profit and loss statement)
   10. Variance analysis spreadsheet
   11. Information on fixed assets (equipment)
   12. Etc.

XII. SUMMARY

Financial Management policies will help your organization maintain clean financial records to verify that funds are used appropriately by the organization. This helps to build trust with members, donors, grant makers, and the general public that your
organization operates effectively and efficiently with the funds it has. In addition, financial management policies can help your organization plan for future funding needs that will assist in the expansion of your organization's resources and ability to provide services to the deaf community.

XIII. REFERENCES


Chapter 4
FUND RAISING AND IT’S IMPORTANCE

FUND RAISING AND IT’S IMPORTANCE

1. WHY RAISE FUNDS?

   a. Organizations small or big need to raise funds because:
      • It will allow your organization to do its work, projects and activities.
      • It will build team spirit in your organization when working together towards a goal.
      • It will let wider groups of people learn about your organization and expand your network.

2. FUND DEVELOPMENT

   Is the long term process of cultivating (growing and managing) relationships with people who will support your organization. It is about developing relationships with your donors and inspiring people to give to worthy cause and keeping your donors informed of your successes together. It is about making a difference and raising friends; it is NOT just about money. The key to fund development is keeping it simple and always be guided by your organization’s Mission, Vision and Values.

   Process:

   a. Identification: find people who share the same values as your organization, including past, present, and future donors.

   b. Qualification: what can donors give in support of your organization? Time, resources and money

   c. Cultivation: starting and growing friendship with donors.

   d. Solicitation: Ask for support/Ask for your organization needs

   e. Stewardship: Thank the donors/sponsors
3. FUND RAISING

a. Is one part of Fund Development and a way used to gather donations e.g. annual fund, face-to-face asks, online, proposals, etc.

b. Again, Fund Development should NOT only be about making money! It is also about raising friends! It involves identifying people who share the same values as your organization and managing those relationships.

4. FUND RAISING VS. FUND DEVELOPMENT

<table>
<thead>
<tr>
<th>FUND RAISING</th>
<th>FUND DEVELOPMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Focused on collecting money for the short term</td>
<td>- Focused on collecting people who support and believe in your organization (donor base) and continuing relationships for the long term</td>
</tr>
<tr>
<td>- Focused on specific projects ex. International Deaf Day (IDD), General Assembly (GA), Deaf Congress</td>
<td>- Focused on the organization, with a clear plan or strategies that support your organization mission vision values and it's long term activities/programs.</td>
</tr>
<tr>
<td>- Often a “patchwork” approach – raising funds without a plan</td>
<td>ex. International Deaf Day (IDD) is a yearly event, but your organization remains in communication w/ attendees throughout the year and maintains relationships with them.</td>
</tr>
<tr>
<td>ex. International Deaf Day (IDD) is “one time” event each year; little contact with attendees before and after</td>
<td></td>
</tr>
</tbody>
</table>
5. SOURCES OF FUNDS

<table>
<thead>
<tr>
<th>Source of Funds</th>
<th>Characteristics</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants</td>
<td>• Usually limited</td>
<td>• United States Agency for International Development (USAID)</td>
</tr>
<tr>
<td></td>
<td>• Project-based</td>
<td>• Australian Agency for International Development (AusAID)</td>
</tr>
<tr>
<td></td>
<td>• Time-bound</td>
<td>• Japan International Cooperation Agency (JICA)</td>
</tr>
<tr>
<td></td>
<td>• Short-to medium-term funding</td>
<td></td>
</tr>
<tr>
<td>Gifts/Donations/Sponsorships</td>
<td>• Not limited</td>
<td>• SM (Shoe Mart) Foundation</td>
</tr>
<tr>
<td></td>
<td>• Project based that can lead to big gifts</td>
<td>• SMC (San Miguel Corporation) Foundation</td>
</tr>
<tr>
<td></td>
<td>• Medium-to-long term funding</td>
<td>• PAL (Philippine Airlines) Foundation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Family and Friends</td>
</tr>
<tr>
<td>Earned Income</td>
<td>• Not limited</td>
<td>• Livelihood</td>
</tr>
<tr>
<td></td>
<td>• Short-to-long-term funding</td>
<td>• Teaching Sign Language</td>
</tr>
<tr>
<td></td>
<td>• For-profit operation that needs management skills</td>
<td>• Cooperative</td>
</tr>
</tbody>
</table>

6. FILIPINO CULTURE AND PHILANTROPY (Helping Hand)

a. Culture is a set of shared values (beliefs) that a group of people believe in. Culture affects how people think and act and, more importantly, the kind of criteria (model) by which you judge others. Cultural meanings made some behaviors as normal and right and others strange or wrong.

Example: PFD shared culture of Filipino Sign Language as the natural language and advocating for equal rights of the Deaf Filipinos.

b. There is no way to be sure that all people from the same culture will respond the same way. But you can assume based on general Filipino cultural habits. These Filipino culture generalizations will give you clues on what you will most likely experience – and this will impact communication with your donors.

c. Filipino Culture generalizations.

c.1. Family

• Family is very important in Filipino culture
• Filipinos have a large extended family – Grandparents, uncles, aunts, cousins, etc.
• Family always help each other - When you need something, you go to family first
• Activity Discussion
  Ask your group or organization to think about and answer the following questions:
  1. Does your family know your work in your organization?
  2. Do you tell your family about your organization work? Why or why not?
  3. How can you get your family to support your organization?

WHY: It is important that your family understands and supports your work, because the best donors/supporters are your family members. In our close-knit family culture they are the ones who readily help us. Solicitations from family and friends have an 81% success rate (see section 10). You can also practice with your family before contacting other possible donors.

c.2. Extended Family
  • ‘Kumpadre/Kumadre’ system – supporting extended family (close family friends).
  • ‘Barangay’ system - Community members help each other
  • ‘Kababayan’ - provincemates help each others
  • ‘Kaeskwela’ – schoolmates help each others
  • ‘Barkada’ or ‘Kababata’ system - Friends help each other
  • ‘Padrino’ or ‘Ninong/Ninang’ system – Godparents support.

c.3. Traditions
  • “Utang na loob” – debt of gratitude; returning the favor to those who have done you good deeds in the past as thanks giving for past favors received
  • “Limos” or alms-giving where we give money to the poor is part of the Filipino Christian tradition
  • As Penance – we ask forgiveness for our sins by giving
  • Pakikisama – Peer pressure; giving to belong
  • Tithing – giving or donating part of their income to charity or church

7. FILIPINOS ARE CHARITABLE (Helpful)

7.1. Why do Filipinos give?
  • Someone asked them to
  • “It feels good to give!”
  • Affinity (closeness) for the case/personal experiences and values (ex. If you know
someone who had cancer, you will be more likely to donate for cancer cures)

- “Making a difference” – Belief that donations can make lasting change
- “Want to give back” – “utang na loob” paying debt of gratitude
- Personal recognition and benefits (ex. Rich and influential people like Manny Pangilinan donates to Philippine Sports to be recognized in sports and receives benefits like tax deduction for his companies.)
- To honor their loved ones. (ex. Donating to a school for a new building that is named after your grandfather who died.)

7.2. How do Filipinos give?

- Special Events and Public Occasions – charitable tickets, movie premiere, benefit performance. Town fiesta – raffle, dance and singing contest, liga (sports), pageant
- Donating – money and in kind (volunteer or services, not money) to direct mail solicitation, crowd fund raising (Kickstarter, IndieGoGo), internet fund raising
- Contributions to church, organization, school etc.
- Sponsorship of events/programs and projects

7.3. Who gives in the Philippines?

Where is the Giving Market for Non Government Organizations?
*Based on a 2006 survey supported by Venture for Fund Raising, in partnership with Social Weather Stations

- Geographically (locations): giving market is centered (focused) in urban Manila the National Capital Region (NCR)
- Urban or Rural: more people in Urban/city area donate
- Among Socio-economic Classes (SEC: Class A: Rich to Class E: Poor ): Class E (poor and low income) gives more
- Among the 2 Sexes: men donate a higher amount but less often, and women smaller amounts but more often.
- According to Age & Work: Mature Adults

8. TOP IMPORTANT CAUSES FOR GIVING

What do Filipinos give to?
*Based on a 2006 survey supported by Venture for Fund Raising, in partnership with Social Weather Stations
• Housing for the poor – Couples of Christ; Gawad Kalinga
• Health and nutrition – Department of Health (DoH); Knights of Columbus (KC)
• Education – Department of Social Welfare and Development (DSWD)
• Caring for Elderly/Disabled – Home for the Aged; Department of Social Welfare and Development (DSWD)
• Rehab of Drug Dependent Youth – Department of Social Welfare and Development (DSWD)
• Reproductive Health – Public health centers; TRUST Family Program
• Orphans/Street Children – Department of Social Welfare and Development (DSWD); Bantay Bata 163
• Needs of Abused Women – General Assembly Binding Women for Reforms, Integrity, Equality, Leadership, and Action (GABRIELA), Department of Social Welfare and Development (DSWD)
• Employment/Livelihood – AD Jesum
• Youth/Juvenile Delinquent – Department of Social Welfare and Development (DSWD)

9. SUCCESSFUL STRATEGIES

It is important to know successful strategies to help guide your organization in its fund development planning and strategies.

A. Based on a 2006 survey commissioned by Venture for Fund Raising in partnership with Social Weather Stations

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Fund Raising Strategies</th>
</tr>
</thead>
<tbody>
<tr>
<td>81%</td>
<td>Solicit to a Friend/Relative</td>
</tr>
<tr>
<td>78%</td>
<td>Second Collection at Church</td>
</tr>
<tr>
<td>75%</td>
<td>Walk-in Donation</td>
</tr>
<tr>
<td>68%</td>
<td>Payroll Deduction</td>
</tr>
<tr>
<td>65%</td>
<td>Solicitation Letter</td>
</tr>
<tr>
<td>65%</td>
<td>Fund Raising Events</td>
</tr>
<tr>
<td>64%</td>
<td>Coin Collection</td>
</tr>
<tr>
<td>64%</td>
<td>Buying Products for a Cause</td>
</tr>
<tr>
<td>63%</td>
<td>House-to-House Solicitation</td>
</tr>
<tr>
<td>62%</td>
<td>Solicitation in Public Places</td>
</tr>
</tbody>
</table>
B. Other effective strategies

1. Special Events – public occasions for an organization to:
   • Raise money
   • Make the organization's cause known
   • Enhance group cohesiveness

2. Direct Mail – An appeal for donations, money, sale or thought made through a mailing package.

3. Earned Income – money received from products sales and service rendered
   • Income from merchandise
   • Income from professional services.

4. Email Fundraising – strategy that can enhance and extend an organization’s reach, with no geographical restraints.

5. Internet fund raising – strategy that uses the web technology to acquire and cultivate donors.

6. Affinity Cards – Benefits organization as the organization earns money from each year’s annual fee and each credit card purchases.

10. BASIC SKILLS AND TOOLS NEEDED FOR FUND DEVELOPMENT

10.1. Your Skills

a. Personal Skills – you must have the right personality to make a good impression!
   • Positive personality – maintain and project a positive attitude
   • Energetic, outgoing – always smile and be friendly
   • Self-confident; calm, poised, not easily panicked – keep calm and handle yourself positively
   • Curious; enjoys learning – eager to learn and listen
   • Inspire confidence and loyalty – show a good example and be a role model
   • Resourceful, creative yet practical – respond skillfully and quickly to new situations
   • Can accept “no” politely – accept rejection with a smile and thank you.

b. People Skills – how you deal and relate with people.
• Be easy to relate with – easy to understand in any given situation or how people feel
• Have a sense of humor – be fun and make people comfortable with you
• Have good manners – be polite and considerate of others

c. Communication Skills – how you interact with people will make an impact
• Communicate clearly to effectively express yourself.
• Effective use of interpreter – work with your interpreter to make sure what you say is understood clearly and be properly translated (see section 11)
• Good listening skills – listen to people, imagine what if you were them. People want to talk about themselves. Let them, listen well, and show you care.
• Good writing skills – write effectively to express what you want to say.

10.2. Skills and Tools Within Your Organization

a. Organizational Shared Culture of Philanthropy (Helping Hand)
• Fund raising is a team effort and involves (requires) the participation of your board, leaders, staff and volunteers. It is important that everyone have the same values (beliefs) to achieve your organization’s fund raising goals and represent your organization with one voice.
• Everyone in the organization must share and communicate to the public the same values of the organization. Everyone must know your organization’s Mission, Vision, and Goals.
• Everyone acts as a representative of your organization, always helping to find new friends and partners.
• Everyone can explain a purpose for giving and describe how their contributions are used.
• Everyone must show how they personally give to your organization, whether through their time, skills, or donations.
• The organization’s leaders should show that they are involved in leading fund raising / fund development efforts.
• Everyone, including Board, staff, and volunteers, should be trained in Fund Development, as it is important to the long term sustainability of your organization. “A well organized and prepared organization is the key to successful fund raising.”
• Promote your organization’s programs when raising funds. Donors want to support the work you are doing in your programs and the impact your programs are having, not administrative costs like meetings and office
space. Ex. Please make a donation to our organization which is working to improve educational opportunities for Deaf youth. **NOT:** Please make a donation to support our meeting where we will talk about Deaf education.

b. Set Fund Development Goals

- What are your organization's funding needs? If a donor gives money for these needs, how will that help your organization succeed in its mission?
  
  ex. Office Rent, Internet, Program like International Deaf Day (IDD) etc.

- How do you decide which need is most important priority?
  
  ex. Assess your organizational needs and choose the 4 most important

- How much to raise?
  
  ex. Need: Website and Web hosting – raise for period of 1 year = PHP10K

- How will the money be used exactly? Create a budget plan and stick to it.
  
  *(See Chapter 3 – Financial Management)*

- Set realistic goals. Make sure they are possible.

- Goal setting should be collaborative effort. Include fund development goal setting as part of your strategic plan and monitor your performance regularly.

- Use the SMART strategy (See Section 2 Strategic Planning) in setting fund development goals and make sure they are in line with your organization’s Mission and Vision.

- Everyone is responsible for achieving the organization’s fundraising goals.

c. Always Look for Donors

- Make connections: Build and expand your network – the more people you know, the more connections you will have.

- You must find donors who have the money or interest to give.

- Your possible donor must share the same Mission, Vision, and Goals.

d. Create a Fund Development Plan

- Plan - having a plan is the 1st step to readiness

- Develop a strategy – make a system that involves your team

- Because fund raising is a process that involves managing relationships, your organization should plan for fund raising and give time to it.

- Measure your results, not only in terms of money, but also regarding:
  
  - Cultivation and stewardship of relations
  - Staff and board relationship building, and:
  
  - Contribution to the vision, strategy and overall leadership of the organization.

- Think about how to use social media, online fundraising, and crowd funding
(Kickstarter, IndieGoGo), as they are changing the means of cultivating and retaining donors.

10.3. Creating your Fund Development Team

- Fund Development is a team effort!
- Choose a Fundraising Leader who has good fund raising skills: Personal, People and Communication skills.
- Board and committee recruitment criteria might include people with:
  - Credentials ex. Dean of CSB
  - Influence ex. Bishop of Manila
  - Leverage ex. Director of NCDA
  - Excitement ex. Actors/Actress
  - Skills ex. Fund Development Manager of a Company

- Fund raising committees should include members focused on:
  - Planning – do over all planning of fund raising activities
  - Logistics – in charge of preparation of physical needs like venue, equipment
  - Budget/Finance – prepares the budget and monitor the cash flow
  - Program – in charge of planning and preparing activities
  - Sponsorship – in charge of soliciting funds, donations etc.
  - Publicity – handles the press release, brochure, advertisements etc.

11. FUND DEVELOPMENT CYCLE IN DEPTH

- A systematic approach to fund raising
- Views fund raising as a long-term process
- Strong donor relationships are critical
- Donors are more than one-time supporters; they are life-long partners
- You must develop different strategies for each donor

PROCCESS:

a. **Identification**: find people who share the same values as your organization, including past, present, and future donors.

b. **Qualification**: what can donors give in support of your organization? Time, resources and money

c. **Cultivation**: starting and growing friendship with donors.

d. **Solicitation**: Ask for support/Ask for your organization needs
e. **Stewardship**: Thank the donors/sponsors

11.1. **Step 1: Identification**

a. Goal is to identify potential donors

   - Look for individuals or organizations that have supported similar programs
   - May include major companies or wealthy individuals in your area, past program participants or volunteers
   - Should have a reason to be interested in your program or organization
   - Be creative but realistic in brainstorming about potential prospects
   - Use your personal networks in identifying potential donors

b. **Who?**

   - Targeting Your Audience
   - Know your community
   - Who are your potential donors? Who will be interested in helping you?
   - How will you reach your donors?

c. **Recruitment - KNOW YOUR DONORS**

1. Individual giving

   a. Individual Donors give because:

      - They share your: Values, Mission, Goals, and Strategy.
      - They get a return or benefit like tax deduction, advertisement etc.
      - It makes them feel better for giving and helping make a change.

   b. Extend your organization's network by identifying your Family, Friends, Supporters, Community Members (constituency) and possible donors.
c. To increase Individual Giving market your fund development approach should aim to:
   • Increase how often a donor gives, or
   • Increase the average amount given per giving occasion, or
   • Increase both how often a donor gives and how much they give

d. Where to find donors
   • Family and friends
     • What do you tell your family and friends about your work?
     • How can you make family and friends support your work?
   • Inside your organization
     - Board members
     - Staff
     - Volunteers
     - Clients
     - Vendors/Suppliers
     - Previous Donors

e. Activity: Brainstorming
   • List 10 family members and friends who might make a donation to your organization.
   • Write the names of 10 possible donors from inside your organization

2. Corporate giving
   a. Corporations: for-profit companies contribute to non-profit organizations or people in need to improve quality of life.
      Ex. Meralco Foundation, SMC (San Miguel Corporation) Foundation
   b. Contributions may include funds, product donations and employee volunteerism.
   c. CSR: Corporate Social Responsibility - Corporate Philanthropy is a key component of a corporation’s wider social responsibility. It is a major link between the corporation and the communities it serves.
   d. Good for business and good for the community - Corporate Philanthropy benefits the business, the stakeholders (shareholders, management, staff), and the community. It improves the corporate and brand name, while improving relationships with government authorities, the community and other key stakeholders.
   e. Why do Corporations give? - corporations have different reasons to give:
      • Response to national issues and emergencies
      • Geographic (location) presence
• Chief Executive Officer’s (CEO) vision
• Response to national
• Good for the brand
• Helps government relations
• Help increase sales
• Help entertain clients
• Improve employee morale & loyalty
• Others – e.g. public image, tax-exemption

f. Challenges
• More difficult than individual or small business donors
• Slower decision-making process
• Does the corporation have a CSR?

g. Advantages of Corporate Donors
• “Seal of approval” - Endorsement from the company
• Employ lots of people – easy to get volunteers and donors
• Has facilities like meeting rooms and venues
• Can donate cash, supplies, materials, equipment
• Can help with marketing
• Can give you funds on a schedule
• Corporate Branding – If the company’s brand is well-known it makes your organization look good.
• It is good advertising for banks and stores

h. What’s the similarity with your mission?
• Find the connection!

i. Activity: Brainstorming
• List 10 potential/target large corporations who might donate to your organization: Include names of contact person in that corporation if you know someone.

3. Small Business
a. Micro Enterprises (Mini Business)
• less than 9 employees
• smallest business which operates with the least capital and number of employees.
• Ex. Sari-sari store, street vendors, repair shops etc.
b. Small and Medium Enterprises (SMEs)
   - 10-199 employees
   - Ex. Grocery Store, Rice Dealer, Fish Pond Operators, Apartment Operators etc.

c. Small businesses make significant contributions to the overall economy and the country’s goal of economic development.
   - 99% of all businesses in the Philippines are small businesses. They give jobs to more than 66% of people, and are responsible for almost 33% of the country’s income.
   - They give small amounts but more often than big companies.
   - They give to promote their business product brand or services.

d. Small business is more tied to local community and customers
   - Why they give?
   - Values of the owners
   - Condition of business
   - Corporate Social Responsibility (CSR)
   - Public relations
   - They know the person asking for funding
   - There is a mutual benefit
   - What can business do?
   - Provide funds
   - Provide supplies
   - Provide expertise
   - Employees as volunteers
   - In-kind donations

e. Activity: Brainstorming
   - List 10 potential/target small businesses in your local area who might donate to your organization. IE: restaurants, print companies, banks, supply companies, etc.
   - Include names of contact person in that company if you know someone

4. Non Government Organization (NGO)
   a. Is an organization that operates independently from any government – though it may receive funding from a government but operates without control or representation from that government. NGOs do the work government can't or won't do. Can also be called a Non-Profit Organization (NPO) or Civil Society Organization (CSO).
b. NGOs perform many duties:
   • Community health promotion and education
   • Managing emerging health crises
   • Community social problems
   • Environmental
   • Economic
   • Development
   • Women's issues

c. Examples of NGOs
   • Philippine Federation of the Deaf (PFD)
   • Philippine National Association of Sign Language Interpreters (PNASLI)
   • Kapisanan ng mga may Kapansan sa Pilipinas (KAMPI)
   • Alyansa ng mga may Kapansanan sa Pilipinas (AKAP Pinoy)
   • Your organization

d. To think about
   • What goals do NGOs and your organization share?
   • Inform NGO officers about your organization.
   • Getting to know NGO officials
   • Doing projects together

e. Activity: Brainstorming
   • List 10 potential/target NGOs who might donate to your organization.
     Include names of contact person in that NGO if you know someone

5. Foundations
   Ex. Bagong Kulturang Pinoy (BKP, Inc.), Butuan City Charities Foundation

b. Family Foundation – set up by rich donors and families; must follow wishes of donors and families.
   Ex. Consuelo Zobel Alger Foundation, Ayala Foundation

c. To think about
   • What goals do foundations and your organization share?
   • Inform Foundation officials about your organization.
• Getting to know Foundation officials
• Doing projects together

d. Activity: Brainstorming
• List 10 potential/target Foundations who might donate to your organization. Include names of contact person in that Foundation if you know someone

6. Religious and Church group
a. Religious groups are part of the system of the important extended family ties, patron-client bonds and other relationships outside the nuclear family. They give small amounts but very often.
   Ex.- Catholic Church – Catholic Charities, Catholic Relief Services
   - Religious Group – Catholic Woman's League. Couples For Christ

b. Churches and religious group – each have their own faith, church and/or religious community. Ex. Local priest/pastor/minister, fellow church members, Sunday group, fellowship etc.

c. Activity: Brainstorming
• List 5 faith-based groups who may be potential/target donors for your organization: Include names of contact person i.e. priest, pastor, minister, fellowship leader

7. International Groups/Grantmakers
a. Sources of grants and funding for projects and programs. They give because they share your organization's Mission, Vision and Goals.

b. Example
• United States Agency for International Development (USAID),
• Australian Agency for International Development (AUSAID),
• Nippon Foundation
• World Bank

c. To think about
• What goals do International groups and your organization share?
• Inform International group officials about your organization.
• Getting to know International group officials
• Doing projects together
d. Activity: Brainstorming
   - List 10 potential/target International groups who might donate to your organization: Include names of contact person in that group if you know someone

8. Filipino Diaspora (Filipinos Overseas / OFW)
   a. Who are they?
      - Overseas Workers – Filipinos working abroad
      - Immigrants
      - Filipinos living abroad
      - 1st Generation – People who moved abroad and started a family.
      - 2nd + Generation – children of the 1st Generation Immigrants
      - Retirees – Retired immigrants
      - Examples
      - Professional Groups – Doctors/Nurses Association etc.
      - Hometown Associations – people who share the same hometown in Philippines
      - Alumni Groups – people who graduated from the same school
      - Faith-based Groups – religious group
      - Community Organizations

   b. Why do Immigrants/OFWs give?
      - Wish to give back to the Philippines
      - Want to support people who are poor (esp. in their hometowns)
      - Desire to ‘pay back’
      - Continue relationship with the Philippines
      - Religious faith
      - Help victims of natural disasters
      - Proof that they are successful abroad

   c. What do Immigrants/OFWs give?
      - Send money to support family members, scholarships
      - Send money as donations to NGOs or churches
      - Send non-monetary donations – equipment, supplies, books
      - Services – medical/dental missions, IT professionals, teachers

   d. Filams/ Filipino Americans
      - Filipinos who left the Philippines moved to America
      - Are the most generous of Immigrants/OFWs
      - Have highest average income
• Influenced by strong U.S. philanthropy tradition
• More organized

e. How do Filams give?
• Informally – through family and friends (hand-carried donations)
• Formally – through:
  • Community organizations
  • Alumni associations
  • Professional associations
  • Hometown associations
  • Faith-based groups
  • Business groups
  • Student groups
  • Cultural associations
  • National associations
  • Dedicated Public Charities (e.g. ABS-CBN Foundation USA; The Ayala Foundation USA)

f. How much do Filams give?
• A total of USD $9,000 - $980,000 in a year (does not include in-kind donations of services and items)
• Number of donors range from 20 to 7,000/year
• Education-related programs are the top cause for donors
• Donations typically go to hometowns

g. Successful fundraising depends on:
• Cause
• Target audience
• Amount requested
• Reputation of public charity and representatives
• Submission of reports on projects funded

h. Fundraising Challenges with Filams
• Most Filam organizations are volunteer-run
• Difficulty of identifying and developing relationships with Filams (3,000 Filam orgs but no database for contacts and activities)
• Difficulty in developing relationships Filam orgs in philanthropic endeavors (most groups are established for specific goals)
• Need for a strong Filam person to serve as a bridge between Filam.org and Philippine NGO
i. Filipino Overseas
   • What do you tell your friends abroad about your work?
   • How can you make family friends support your work?

j. Activity: Brainstorming
   • List 5 Filam or from other country deaf individuals who may be potential donors for your organization.
   • List 5 Filam organizations who may be potential donors for your organization, include name of person you know

9. Hearing People
   a. To think about
   • Why should hearing people care about your organization?
   • Hearing people hold the most money and power
   • Getting to know hearing people – what is a personal connection that you share? (Ex: both of you like basketball, or both of you like going to the beach – don’t just focus on FSL or Deaf culture)
   • How to communicate through interpreters or writing notes (See Section XX)
   • Doing projects together

   b. Activity: Brainstorming
   • List 10 potential/target hearing people who might donate to your organization

10. Break out session
    • Compare your lists of possible funders who might support your organization and brainstorm as many as you can for each category:
      - Friends or family members
      - Organization Insiders
      - Corporations
      - Small businesses
      - Organizations with complimentary missions to your organization
      - International groups/organizations
      - Filipinos who live in other countries
      - Churches or Faith-based groups
      - Hearing people
    • This is your ‘prospect list’ – people and groups that may be able to donate to your organization
11. Record Keeping

1. Potential/Target Future Donors: Prospect List
   - Write it down
   - Involve your Board
   - Ask your donors
   - Host events where you do not ask for donations like Seminars, Deaf Awareness Week, International Deaf Day and invite potential donors. The goal is for donors to get to know your organization.
     - Start common interest groups – alumni, bowlers, senior ladies
     - Find out who has ‘influence’ in a group instead of targeting the entire group. Ex: Who is the “Raphy” of their group?
     - Volunteers – treat them like donors!
     - Press Releases – identify reporters and writers who are ‘friendly’ to your organization
     - Involve young people!
       For the Prospect List Template, see page XYZ, site, DVD

2. Past/Current Donors: Your Donor Database
   Should contain important donor information.
   - Who gives? (name, address, other important info)
   - To what does he/she gives? (cause: youth, women, poverty, cancer)
   - How much he/she gives (look at giving to your organization and others)
   - How often does he/she give? (look at giving to your organization and others)
   - How does he/she give? (donates money or materials; volunteers; donates money & volunteer time)
   For the Donor Database Template, see page XYZ, site, DVD

11.2. Step 2: Qualification – donor interest = your interest

a. Qualification is when you find out if the potential/target donor is interested in your programs, and when you evaluate how much they can give to your organization (their capacity to give).
   - Everyone can donate. You must evaluate what the prospective donor is realistically able to give. For example, can all these potential donors give the same amount, or are there some who will give less or more?
     - Single mom with 3 kids in school
     - Married couple with no kids, travel often
     - Student
     - Retired lawyer
• Does the potential/target donor support same causes like your organization?
• Does the potential/target donor have a history of giving to other organizations, events, or programs? (Being rich is not enough!)
• If you do not know the donor personally, find a mutual friend to introduce you.

11.3. Step 3: Cultivation

a. Cultivation is the process of developing a long-term relationship/friendship with the potential/target donor. Remember: the goal of Fund Development is not to raise money, but to get more friends.

b. Cultivation Tips

1. Make a good first impression. You are your organization’s representative.
   • Explain the purpose of your meeting
     - Confirm the date, time, place, and who will join the meeting
     - Send advance info materials about your organization.
   • Be on time
   • Dress professionally
   • Communicate clearly, whether through an interpreter, in FSL, or with written notes.
   • Make small talk to break the ice by asking general questions like:
     - From what province are you from?
     - Where did you go to school?
     - How is your family?

2. Pay attention to your body language
   • Act confident even if you aren’t feeling it. Keep a good posture, but lean forward a bit.
   • Make regular eye contact. Maintain a neutral or positive facial expression to show that you are interested and listening well.
• Don’t wring your hands or use dramatic gestures.
• Practice confident body language in front of a mirror or with a friend or colleague.

3. Learn about the potential/target donor.
• Let the potential/target donor talk about him/herself.
• Ask open-ended questions (not Yes/No questions, but Who, What, Where, When, Why, How questions)

4. Tell the potential/target donor about your organization.
• Tell your story – why do you work with your organization? What inspires you?
• Use your qualification research – what will make the donor interested in your organization? For example...
  - If your potential donor is a PWD advocate, you may want to tell them about your organization’s work/programs for Accessibility
  - If your potential donor is a teacher, you may want to tell them about your organization’s work/programs for Education
  - If your potential donor is a lawyer, you may want to tell them about your organization’s work/programs for Human Rights
  - If your potential donor is a parent, you may want to tell them about your organization’s work/programs for Youth.
• What is the goal of the program? What results you want to see? What is the cost of the program to be successful?
• What personal stories about the impact of your organization can you share? (Heart-strings)

<table>
<thead>
<tr>
<th>Heart-strings</th>
<th>Numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td>• To affect feelings in some way and form a connection and/or make them sympathize with you. (Elicit sympathy)</td>
<td>• Know your numbers! They are important information about your organization.</td>
</tr>
<tr>
<td>Ex. Rufus who is Deaf does not have a job and he cannot feed his children. We need funds to start a livelihood program to help them.</td>
<td>Ex. We need fund to train 5 people who will start a livelihood program that will train 300 present member and future members of our organization.</td>
</tr>
</tbody>
</table>

• What statistics and data can you share? (Numbers)
• Say that your organization is “looking for partners to get this program started,” or “looking for partners to help continue this program.”
• Be prepared to answer the potential donor’s questions about your
programs or organization. For example:
- What is your organization’s mission?
- Why does your organization do what it does?
- Who benefits from your organization’s work?
- How is your organization different from other deaf organizations?
- What organizational structure is in place for Fund Development?
- Who else is supporting your organization?

• Bring materials to give the potential donor, like brochures, business cards, contact information, newspaper articles on your organization, etc.
• Be aware of the time, as people are busy
• Be sure to thank the donor for their time and interest in your organization!
• Think about how you will keep in touch with the donor. Will you set up another meeting? E-mail? SMS?
• Always remember that the Cultivation is about getting to know the person and building a relationship, NOT asking for money.

5. Don't be too direct (‘Shameless’) or too passive (‘Too shy’)

<table>
<thead>
<tr>
<th>TOO PASSIVE</th>
<th>TOO DIRECT</th>
<th>RIGHT</th>
</tr>
</thead>
<tbody>
<tr>
<td>I want to be friends with you.</td>
<td>I want you to give us money.</td>
<td>I know you are interested in my organization’s work, so I want to tell you more about it.</td>
</tr>
<tr>
<td>I will let you decide when we will meet again.</td>
<td>I want to meet again tomorrow.</td>
<td>I will contact you in 2 weeks to find out a good time to meet again.</td>
</tr>
<tr>
<td>I think my organization is doing very good work.</td>
<td>My organization is the best organization and you must support us now.</td>
<td>I'm really excited about (NAME OF PROGRAM) because it will impact (NUMBER OF PEOPLE). I'll keep you updated as we continue our work!</td>
</tr>
</tbody>
</table>

6. Other Things To Remember:
• People give because they want to
• People give to people they like you
• People give to people they respect
• People give to people they trust – always tell the truth!
• People don't give if not asked
• People want to give money to opportunities, not deficits or paying off debts
• People want to donate to successful organizations, not distressed ones
• How are you describing (portraying) your organization?
• People want to be invited to join a cause- rather than seen as a “walking wallet”
c. Activity: Scenarios

1. Donor Profile: You met Manny Pangilinan owner of TV5 during the National Disability Prevention Week Forum on Accessible Communication. His company provides inset interpreter on news programs and open to possibility of employing the Deaf. During your brief conversation, he mentioned he believes in your organization's vision of full accessibility for all.

• Goal: Qualify Mr. Pangilinan as a potential donor. What information will you give him? How will you set up your first meeting with him? What questions will you ask during that meeting? What information will you need to qualify him as a potential/target donor? If he is a potential/target donor, what are some possible next steps in making him interested in your organization?

2. Donor Profile: Mr. Carlo Alonzo, your mother's cousin, is a city councilor. His wife is a businesswoman who owns a grocery store. They live in a modest house in Makati. Their 2 children all go to private schools. You have unexpectedly met him at the city hall, he asked how you were doing. You told him a little about your work with your organization. He seemed very interested to hear more about your work but your conversation got interrupted by another city official.

• Goal: You want to ask your Uncle Carlo for P50,000 to help fund a training program for sign language interpreters. How will you make him interested in your organization before you ask for the donation? What specific steps will you take to make him interested? Who will you involve in the cultivation process? How will you know when he is ready to be asked for support?

3. Donor Profile: You have received an email from your friend in UK, Mathhias, who regularly sends donation to your organization. He mentioned he have a friend Andrew who also want to support your organization's work. He gave you Andrew's e-mail address.

• Goal: How will you thank Matthias for recommending your organization? How will you qualify Andrew as a potential/target donor. What will you include in your first e-mail to him? What questions will you ask in that e-mail? What information will you need to qualify him as a potential/target donor? If he is a potential/target donor, how will you make him interested your organization?
11.4. Step 4: Solicitation

a. Solicitation is the act of asking the potential/target donor for support. This support can be money or an in-kind donation (not money, but supplies, equipment, volunteer time, etc.) You should only solicit the donor after you have cultivated a relationship with them.

b. Planning your Ask

- Decide on an amount to ask for before you ask the donor.
- Be realistic! Do research on the donor's giving history. For example, if the donor gave PHP1,000 to your organization last time, maybe ask for PHP1,500 this time.
- Many of the “Cultivation Tips” apply here as well. (See Section 11.3.b).
- Be sure you can answer these questions: What is the goal of the program you are asking money for? Why is the program important? What results do you want to achieve? What is the cost of the program to be successful? How will the donation be spent?
- Prepare materials to bring, such as:
  - Your organization's Budget; Program/Project Budget
  - Funding sources – individual donations, donations in kind, grants, etc.
  - Funding Levels/Donor Recognition Opportunities
- Pledge(Promissory) Card/Return Envelope or instructions for online giving
- Practice your pitch (see section 12). If it's challenging to say what you want or think, practice typical scenarios(situation) you encounter. Sign what you want to say to yourself. It may help to write it out first, too, so you can practice from a script. Consider role-playing with a friend or colleague and ask for honest feedback.

c. Making the ASK

1. Don't think of it as asking for money- think of it as asking them to invest in your organization. You are not asking for money for yourself, but you are asking them to support your organization's good work.

   Ex. “We would like you to consider a gift of PH2,500 to bring us closer to our goal of making interpreting services available to all deaf people who need them.”

Be sure to share:
- Your organization Mission Vision and Values
- Your statement of need and why it intersect (connected) with their interest
- Common goal and objective
- The impact of your work in the community

Remember:
- Be yourself.
- Focus on cause.
- Be clear and polite about your intentions.
- Don’t beg.
- Consider the donor’s personality.
- Ask for a specific amount – don’t leave it up to the donor to decide.

2. Wait for donor to respond - Give people TIME to think through your request.

2a. What to do next if they say “YES”
- Are you prepared with the next step?
- If ‘yes’, discuss how and when payments will be made; installment; pledge (promise) card; recognition opportunities, anonymous, in memory of __
- Remember that they are INVESTING (Supporting) in your organization – they expect to see a “return”

2b. What to do next if they say “MAYBE” or look hesitant.
- If hesitant, need more info? Need to think it over? Need to talk to wife/ husband? Consider smaller amount?

2c. What to do next if they say “NO”
- Ask why
- Ask if you can follow up with them at a later date to see if they are in a better position to give.
- Accepting ‘no’ graciously. “I understand this is not the right time for you. Can I contact you next year?”
- Don’t take it personally.

3. After the Ask
- Thank the donor for their time.
- Follow up with a thank you

d. Activity: ROLE PLAY Scenarios
1. Donor Profile: You met Manny Pangilinan, owner of TV5, during the National Disability Prevention Week Forum on Accessible Communication. His
company provides inset interpreter on news programs and open to possibility of employing the Deaf. During your brief conversation, he mentioned (said) he believes in PFD vision on full accessibility to all.

• Goal: Considering the previous activity, how will you solicit a donation from Mr., Pangilinan? What will you say if:
  a. The prospective donor says ‘NO’?
  b. The prospective donor says Maybe/Later’ or ‘I will think about it’?
  c. The prospective donor says ‘YES’ right away?

2. Donor Profile: Mr. Carlo Alonzo, your mother’s cousin, is a city councilor. His wife is a businesswoman who owns a grocery store. They live in a modest house in Makati. Their 2 children all go to private schools. You unexpectedly met him at the city hall, he asked how you were doing. You told him a little about your work with your organization. He seemed very interested to hear more about your work but your conversation got interrupted by another city official.

• Goal: Considering the previous activity, how will you solicit a donation P 50,000 donation from Mr. Alonzo? What will you say if:
  a. The prospective donor says ‘NO’?
  b. The prospective donor says Maybe/Later’ or ‘I will think about it’?
  c. The prospective donor says ‘YES’ right away?

3. Donor Profile: You have received an email from your friend in UK, Mathhias, who regularly sends donation to your organization. He mentioned he has a friend Andrew who also want to support your organization’s work. He gave you Andrew’s e-mail address.

• Goal: Considering the previous activity, how will you solicit a donation from Andrew? What will you say if:
  a. The prospective donor says ‘NO’?
  b. The prospective donor says Maybe/Later’ or ‘I will think about it’?
  c. The prospective donor says ‘YES’ right away?

e. Another way to ask: Solicitation/Appeal Letters

1. Solicitation letters
  • Who will you send this to?
  • What is included in the letter?
  • How will you follow-up after the letters are sent?
2. Who to send
   • Use your donor list – strong list of prospects
   • Creating a mail merger
   • Collecting addresses
   • Emailing the letter to people you do not have addresses for
   • Overseas donor prospects– is it worth it?

3. What is in the letter
   a. Strong, clear letter
      • Who are you?
      • What problem are you addressing?
      • Why should they care?
      • What will you do with the money?
      • How can they donate?
   b. Give them three reasons why they should support or engage in your work!

4. How often do you make a letter?
   • Once/year? Twice/Year?
   • What time of year?
   • Careful of donor fatigue (over giving) – people who have made donation in the past and declined (said no) or stop donating to organization, usually due to lack of changes in the present situation and/or inability of the organization to produce positive result
   • Be sure to have connection and updates with your donors in between
   • Requests for donations

5. Tips
   • Keep the length to 1 page
   • Capture (get) the reader's attention within 15 seconds
   • Attach a return slip and include a return envelope
   • Can they send a check? Donate online through PayPal/credit card?
   • Write personal notes in ink on the letter.
   • Send an email follow up 2-3 weeks later

11.5. Step 5: Stewardship
   a. Stewardship is the action of thanking your donors and expressing your gratitude. This is the most important step of the fund development process.
Remember:

• Fund development is a process that never stops!
• Stewarding your donors is key to building long lasting relationships.
• Don't ask someone for money and then never communicate with them again.
• Staying in constant (continuous) communication (at least a few times a year) will go a long way in keeping a donor for life.
• Keep donors updated of what new changes are occurring in your organization. This gives them a sense of belonging.
• Stewardship is not the last stage, but the first stage in re-cultivating the donor for their next gift.

b. Stewardship letters/ follow-ups

• Send a personal email or letter to thank the donor based on your relationship
• You can never say “Thank you” enough!
• Explain what you did with the funding after a project is complete
• Send a link to photos & testimonials about your success

c. Activity/brainstorming

1. Brainstorm ways that your organization can thank its donors.
2. Remember- there are many different kinds of donors who may be thanked in different ways!
   - Individual donors (deaf, hearing, Filipino, international)
   - Member organizations
   - Small businesses
   - Corporations
   - Foundations
   - Religious groups

12. The Pitch / Elevator Speech

a. Your Pitch is a short summary used to simply and quickly define your organization’s Mission, Vision, Value Proposition and Goals. It should be delivered in 30-60 seconds, like talking while riding and elevator delivery done when you reach your floor of destination.

Your pitch is used in many different situations and with many different people. For example, you might use your Pitch to tell your local councilman...
about your organization (but not ask for money), or you might use your Pitch to ask someone to volunteer, or you might use your Pitch to solicit a donor.

b. In general, your pitch/elevator speech should answer these questions in 30-60 seconds:
   - What does your organization do?
   - What is the most important need of Deaf people?
   - Why should someone donate to your organization?
   - What other agencies do your work? Why is your organization special?
   - Why do you care about your organization?

c. If you are using your pitch to solicit a donor, your pitch should also answer the following questions:
   - Why they should give?
   - Who would benefit?
   - What benefit will the donor receive?
   - How will be the donation used?

<table>
<thead>
<tr>
<th>Possible donor who knows you/your organization.</th>
<th>Possible donor who does not know you/your organization.</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Brief introduction of your organization</td>
<td>• Brief but full important introduction of your organization, what you do, where and how you spend donations</td>
</tr>
<tr>
<td>• Find common values, interest</td>
<td>• Find common values, interested</td>
</tr>
<tr>
<td>• Family, friends, teachers, Persons With Disability (PWD) group/organization</td>
<td>• Business owners, schools, etc.</td>
</tr>
</tbody>
</table>

d. Tips
   - Adapt to who you are talking to – have several versions (many kind) of your elevator speech prepared for different audience
   - Know your numbers- for example: How many Deaf members in your organization? How many people do you serve?
   - Become the most positive and enthusiastic person you know
   - Be able to simplify and explain your work to hearing people
   - Most importantly- share why you are inspired.
   - End with a question to generate dialogue and continued conversation
   - Your Pitch should always match your potential donor. For example, what would you say to a:
   - WFD representative visiting the Philippines for the first time who asks about your organization?
   - Hearing people who know about Deaf culture and FSL?
• Wealthy Real Estate Agent (person who sell house and lot) who is hearing and has never met a deaf person before asks about your organization?
  - Use humor (jokes)
  - Do your homework - get your facts straight
  - Get your materials ready
  - Prepare your sign language interpreter
  - Time your presentation
  - Practice, practice!
  - Follow up potential

e. Activity: Develop and practice your pitch

1. Develop a 30-60 second elevator speech about your organization!
• You volunteer a lot of time with your organization.
  - What is your story for why you got involved?
  - Why do you care so much?
  - What inspires you about your organization and your work?

• Write down some notes for yourself.

• Practice: Explain why you care about your organization in 30-60 seconds.
  - Find a partner.
  - Introduce yourself
  - Share your story.
  - Each person should take about 30-60 seconds.
  - Keep time and say “Change partners!” when it’s time to find another partner.

• Debrief (summary)
  - What was your experience like?
  - What were the other people saying?
  - How were they being?
  - Was it easy or difficult?
  - Was it fun or awful (not good)?
  - What was effective? What was not?
  - What did you learn from each others?

2. Develop a 5 sec speech
• This is something we do everyday as we accidentally meet friends or people we know. We start by saying ‘Saan Ka Pupunta?’ (Where are you going?)
Ex. FRIEND: ‘Saan ka pupunta?’
YOU: Attending the Deaf Awareness Week Forum at the city hall.
FRIEND: What is it about?
YOU: I am a volunteer for Deaf organization and advocate for Deaf rights. Maybe we can meet later to talk about it. *after making a connection set up a follow up meeting, the friend can be another possible donor

- Write a note:
- Use 1 sentence to sell your organization.
  - Potential follow up to meet and explain more.
  - Practice:
    - Find a partner.
    - Introduce yourself
    - Share your speech.

3. Group presentation Scenario
- You have been invited to present at a Rotary Club luncheon (lunch meeting). You only have five minutes to present about your organization.
- What will you say? How will you tell your story?

13. 7 RIGHTS FOR SUCCESSFUL SOLICITATION

a. The RIGHT person
   - Finding the right people who can give support to your organization

b. Cultivating the RIGHT prospect
   - Make sure your potential/target donors shares the same values as your organization

c. For the RIGHT amount
   - Make sure what you ask is specific and realistic

d. For the RIGHT purpose
   - Using the money to make a differences and inline (connected) with your donors goals

e. At the RIGHT time
   - Know when to ask, timing (know the right time to ask) is important

f. In the RIGHT setting
   - Do not ask right at bat (do not ask at 1st meeting), cultivate the friendship and set a meeting

g. In the RIGHT way
   - Know your basic fund raising skills use them
14. WORKING WITH AN INTERPRETER

1. You and the interpreter are a team!
2. What the interpreter says (or doesn’t say) will reflect on you—good or bad.
3. Prepare the interpreter in advance. Discuss:
   - Your talking points
   - Questions you will ask
   - How you know the potential/target donor
   - Questions the potential/target donor might ask
   - If it is okay for the interpreter to interrupt for clarification (stop to make clear)
   - Unique or specific signs you will use
4. Introduce who you are to the hearing person
5. Explain the role of the interpreter
6. Explain visual cues (gestures, facial expressions)
7. Check in with the interpreter during the meeting again and again to make sure they are following your signs

15. SOURCES

2006 survey commissioned by Venture for Fund Raising, in partnership with Social Weather Stations (SWS)


EXPAND PPT Training presentation by Ms. Mencie Hairston, Mr. Davin Searls and Mr. David Justice


Chapter 5
ORGANIZATIONAL GOVERNANCE

I. WHAT IS ORGANIZATIONAL GOVERNANCE?

Organizational Governance is the system of roles/positions, rules/policies, and processes used to control and lead an organization for the short and long term.

II. ABSORPTION RATE

Absorption rate is the amount of information or change that people/organizations can “absorb” (learn or accept) at a given time. In Organizational Governance, knowing the absorption rate(s) within your organization and people is important, as at any given time you will be managing change, transitions, and new situations.

A. The CHANGE CYCLE MODEL helps organizational leaders, volunteers, and members respond to changing situations.
Here is an example of how people respond to change, following the change cycle model:

<table>
<thead>
<tr>
<th>Stage 1: Loss</th>
<th>EXAMPLE:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feeling of FEAR</td>
<td>Your organization has a new Board. Your members are afraid that this new Board will not be good. They miss the old Board and are afraid the organization will be ruined.</td>
</tr>
<tr>
<td>Thoughts are CAUTIOUS (careful)</td>
<td></td>
</tr>
<tr>
<td>Behavior is PARALYZED (shock)</td>
<td></td>
</tr>
</tbody>
</table>

| Stage 2: Doubt |
|---------------|----------|
| Feeling of RESENTMENT (complain) | Your members doubt that the new Board members know how to manage the organization. They don't accept the new Board members as their leaders. |
| Thoughts are SKEPTICAL (doubt) |
| Behavior is RESISTANT (avoid) |

| Stage 3: Discomfort |
|---------------------|----------|
| Feeling of ANXIETY (worry) | Your members trust the Board members a little more, but they are still worried. They are confused about what to do. They do not work hard to support the organization. |
| Thoughts are CONFUSED |
| Behavior is UNPRODUCTIVE (block) |

**The Danger Zone**

This is the time that most dangerous for your organization. The change will either be accepted or rejected.

**Change Rejected:**
Your members do not accept the new Board. There is no trust with your new Board and your members. Your members stay in Stages 1, 2, and/or 3.

**Change Accepted:**
Your members begin to trust and accept your new Board. They move to Stage 4.

<table>
<thead>
<tr>
<th>Stage 4 Discovery</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Feeling of ANTICIPATION (hope)</td>
<td>Your members find that they are less worried. They feel good about the organization and excited for the future. They think about how they can support the organization.</td>
</tr>
<tr>
<td>Thoughts are RESOURCEFUL (useful)</td>
<td></td>
</tr>
<tr>
<td>Behavior is ENERGIZED</td>
<td></td>
</tr>
</tbody>
</table>

| Stage 5 – Understanding |
|-------------------------|----------|
| Feelings of CONFIDENCE | Your members feel confident in the Board. They think positively and become more helpful in supporting the Board. |
| Thoughts are PRAGMATIC (fact) |
| Behavior is PRODUCTIVE (helpful) |

| Stage 6 – Integration |
|-----------------------|----------|
| Feelings of SATISFACTION | Your members accept the Board fully. They are involved and eagerly offer their help. They are satisfied and comfortable with the Board and the organization. |
| Thoughts are FOCUSED |
| Behavior is GENEROUS |
As a leader, you must think about how change will impact your organization, your donors, your members, your staff, and so on.

Using the change cycle, think about how you, your members, or your Board would feel if:

- You received a penalty fine of 10,000 PHP from BIR?
- The mayor, who has always supported your organization, is not re-elected?
- Your organization does not receive the membership fees you expected?
- You change your organization’s mission?

B. TECHNICAL VS ADAPTIVE SOLUTIONS

Organizational Governance and implementing organizational change require a technical or adaptive approach, or more often, a blend of the two:

<table>
<thead>
<tr>
<th>TECHNICAL SOLUTIONS</th>
<th>ADAPTIVE SOLUTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>• An expert knows the answer and the solution</td>
<td>• Humans must change beliefs, values and behaviors</td>
</tr>
<tr>
<td><strong>Example 1:</strong> Your organization has received a letter from SEC which says that you are required to have an audit. You must hire an expert auditor to do this.</td>
<td><strong>Example 1:</strong> Your organization’s financial receipts are not well-organized. Your Board and members must change their behavior and organize things better.</td>
</tr>
<tr>
<td><strong>Example 2:</strong> Your organization is blamed for a crime. You must hire a lawyer to defend you. How to change your organization with Technical methods: • Find a volunteer or hire a person who is an expert in the topic you need</td>
<td><strong>Example 2:</strong> Your organization’s board members always show up late to meetings and do not follow through with their appointed tasks. To change this, they must improve themselves. How to change your organization with Adaptive methods: • Clear roles and responsibilities • Set policies and make sure all understand how to follow policies • Clear communication • Recruitment and training • Make clear action plans</td>
</tr>
</tbody>
</table>
III. LEADERSHIP SUCCESSION PLANNING

8. WHAT IS LEADERSHIP SUCCESSION PLANNING?

To prepare for a change in leadership/Board so that the new leader/Board member has the skills and knowledge to be a good leader as soon as they begin their role.

“There are two things a leader can give to an organization: to serve an organization with passion and strength and to know when it is time to leave.”
- Randall Robinson, TransAfrica Forum

Example: Your Board President has finished her term and a new Board President will be elected. How will you prepare for this leadership succession?

The best way to make sure your leadership change is successful is to always have a plan!

9. THREE TYPES OF SUCCESSION PLANNING

• Emergency departure
• Departure-defined (scheduled timeline)
• Strategic leader development

I. What is EMERGENCY DEPARTURE?

1. Board officer leaves unexpectedly for a long time or forever.
2. Causes may be sickness, death, resignation, accident, or fired due to corruption.
3. Your organization MUST have a plan ready before any emergency happens.

   **Example:** A Vice President shall take over as Acting President when a President cannot continue his/her role, and a search committee will establish a process for finding a replacement.

**KEY STEPS IN EMERGENCY SUCCESSION PLANNING**

1. Know the leadership role/skill
2. Decide a backup for each role/skill
3. Develop a cross-training plan for backups
4. Have a plan to replace each leadership role, especially if it is a high position like President or Executive Director. The plan should help you know: Who will the replacement be? Does your Board need to vote or not? How will you train the new leader in advance?
5. Specify board’s monitoring & support role for the new leader.

II. What is **DEPARTURE – DEFINED (SCHEDULED TIMELINE)**?

1. The leader will serve a term with a specific date of completion.
2. If the leader plans to resign within a period of time, she or he must work with the Board to plan for transition to the new leader.
3. It is important to look for a new leader with the same skills.
4. Your organization MUST have a plan ready before the leader leaves.

   **Example:** One of your fellow officers will move to the US in one year and notifies your fellow officers. You or your fellow officers have to find a successor before one year.

**KEY STEPS IN DEPARTURE-DEFINED SUCCESSION PLANNING:**

1. What leadership tasks must be completed?
2. What skills do we need in the replacement leader?
3. How do we train and transfer knowledge, relationships, and tasks to the new leader?
5. How do we support new leaders to:
   - Follow the organization’s mission, vision, and values?
   - Be different and creative, not the same as the last leader?
III. What is **STRATEGIC LEADERSHIP DEVELOPMENT**?

1. How will you plan to grow more leaders for the future? Will you train and encourage youth? Volunteers?
2. You want to make sure that your organization will not collapse, but stay strong for 10, 20, 30+ years.
3. You MUST have a plan to grow more leaders, all the time.

*Example*: You have to look for the members who can assume leadership roles before the election. You can train the members to be familiar with your organization system and philosophy. Think about Deaf camps and youth development to become future leaders and get them involved now.

**KEY STEPS IN STRATEGIC LEADER DEVELOPMENT:**

1. Think about how you will identify potential leaders.
2. Think about how to support and ‘grow’ these potential leaders.

It is important to know organizational governance, the change cycle, technical/adaptive solutions, and leadership succession. Without these things, people in your organization will not have clear roles and they will waste time blaming each other. If you have good organizational governance, you will improve as a leader, and become a role model for other people to copy. Organizational governance will help you to realize and apply the skills that you have.

IV. REFERENCES:


Chapter 6
ADVOCACY AND DISABILITY LAW

I. ADVOCACY

A political process by an individual or organization which aims to influence decisions within political, economic, and social systems and institutions.

10. Importance of Advocacy

• Questions the way laws and policies are implemented.
• Informs the government about the current systems that are not responsive to your organization's needs.
• Participation in agenda setting leads to improvements in policy proposals and solutions.
• More inclusivity and engagement leads to more equal opportunities.

11. Examples of Advocacy Activities:

a. Authorizing and publishing research
   Ex. National Sign Language Committee, UNCRPD Parralel Report

b. Mass advocacy is an action taken by large groups
   Ex. Signature campaigns, rally, public speaking etc.

c. Media advocacy is the use of the mass media as a resource to advance a social or public policy initiative
   Ex. Posting information on Facebook, Advocacy Films, Advertisements, etc.

d. Lobbying is a direct approach to meet with legislators to create laws that will effect changes on important issues
   Ex. FSL Bill, Mother Language Education Law

e. Awareness raising activities
   Ex. International Deaf Day, providing seminars to government and private institutions, etc.
f. Participation in government consultations and forums on government programs and policy
   *Ex. Budgeting, Special Education, Health, Court Interpreting etc.*

12. Solving Big Problems

a. How you advocate is as important as what issues you decide to advocate for

   a.1. How you do your advocacy is very important:
   - Identify the problem and issues
   - Set your advocacy goals
   - Make a strategic plan
   - Prepare and implement your action plan
   - Conduct a S.W.O.T. analysis (see chapter 2 Strategic Planning)
   - Plan plan plan...

b. Know the difference between bad advocacy and effective advocacy

   b.1. Bad Advocacy
   - Unclear or over-generalized problems and issues
   - No goal
   - No clear and direct plan

   b.2. Effective advocacy
   - Always Identify the problems and issues
   - Advocacy goals are defined
   - Prepare short, medium, and long statements summarizing your work and why it is important

   c. Require expertise in use of politics, language, & networking
   - Study and identify the problems, issues and relevant policies and laws
   - Establish credibility as an advocate
   - Negotiate: think about in advance where you can negotiate and compromise on your issues and where you cannot compromise
   - Advocacy is consulting and building relationships

   d. Also requires “big picture” thinking and planning
   - See everything with all eyes; from different perspectives
   - Brainstorm, and be SMART
   - Make a plan
13. Activity: Mental Exercise (2 copies, one for facilitator, one for participant)

What do you see?
• Door

If you step back, what do you see?
• The Door is open
  This can mean:
  • Opportunity - A way to get inside
  • Threat - Someone is already inside

Step further back..
• Open door with barriers
• Now how to get around that barrier?
• Go a different way
• Fight through the barriers

The Big Picture
• Door = Problem
• Open Door = 1st Solution
• Crocodile = Problem with 1st Solution
• Big Picture = Better Solution

Lesson to Learn:
• Advocacy has advantages and disadvantages
• Advocacy is not a straight line
• You should try to see everything with all eyes: brainstorm
• Take the pulse of the masses-- both alies and competitors

Real Life Examples
1. Door = Airlines refuse boarding of 5 Deaf passengers
Open Door = Discuss with airlines management
Crocodile = The management points to a policy that is flawed and unintentionally discriminates against deaf people
Big Picture = Your Ideas to change the policy

2. Door = Department of Education refuses to implement FSL
Open Door = Dialogue with Department Officials
Crocodile = Schools have No FSL Curriculum, Teachers not skilled in FSL
Big Picture = Your Ideas to introduce FSL curriculum and teacher training

14. Levels of Impact
One story has impact. Several consistent stories have a much larger impact when put together. This impact can influence policy and law makers to understand that a systematic change is necessary.

One story = a personal issue
IE: That employer refused me a job
IE: That hospital refused to provide an interpreter

Many of the same stories = systemic issue
IE: That hospital has never provided an interpreter to any deaf person

Think about how your advocacy work confronts the system, not just the personal issue.

II. LEGISLATIVE AND ADMINISTRATIVE GOALS

1. Systemic Change
   a. is a change in the way that a community/government makes decisions about policies, programs, and the distribution of its resources and, in the way it delivers services to its citizens.
   b. Example
      b.1. Not systematic
         • Advocate for 1 interpreter in 1 hospital
         • Provide training for one teacher in your SPED area
      b.2. Systematic
         • Advocate to have interpreters in all hospital all the time in the Philippines
• Provide training for all SPED teachers in the Philippines.

c. Why it is important for your organization to advocate for systemic change?
• Look at the big picture – change to happen across the country, not just for one incident
• We all have individual experiences of discrimination but the Goal is to change the system, to benefit the community and not just a few - benefit for many not just one
• To identify major problems and focus on their solutions.

d. Your organization’s Progress in Systemic Change
• Many of you already have done systemic change and it is important to recognize those changes and advertise them.
• Show that your organization is working for all Filipino Deaf people under your mission and/or target area.
• You all have achieved victories with your own strategies but always be prepared to change strategy and goals as you advocate to fit the needs and result.

e. Your organization must take the lead to make systematic change for the Deaf community in your area.
• Identify the area that needs change ex. No Government department budget for interpreters, Licensure Exam for Teachers not language fair and accesible for the Deaf, etc.
• Get a full understanding of the problem – we all want to effect system change and it is important that we fully understand the problem to effect those changes.
• Find the core issues – what problems or issues does your organization have in common with the government and other organizations?
• Negotiate – find out how your organization can work with the government and other organization, so each can contribute in solving the problem.

2. Long term (Legislative) Vs. Short term (Administrative)

a. Legislative advocacy requires a lot of lobbying and getting many votes to change the law (victory in long term)
Example:
• Include Deaf needs in Batas Pambansa 344 ‘Accessibility Law’
• Pass House Bill 450 ‘Filipino Sign Language Bill’
b. Administrative advocacy requires meetings with government departments/agencies to change the rules (victory in shorter term) policy change. Example:

- Meeting with Philippine Information Agency to make it policy to put subtitle and/or inset interpreting in Media
- Meeting with Supreme Court to make it policy to provide court interpreting for the Deaf

3. Advocacy Strategies

In General:

- Always look at the Big Picture, look for the guard dogs.
- Avoid burning bridges if possible. Try to build relationships and allies.
- Use laws and the United Nations Convention on Rights of Persons with Disability (UNCRPD) as much as possible- push for administrative changes.
- Do not accept “NO” or “WAIT” without full discussion and compromise.
- Always be professional.

Be Prepared

- Do your research before any advocacy on:
  1. What happened before and what is happening now.
  2. Best strategies to achieve your goal (who, what, where, how).
     - Create a position statement that shows your facts, reasons, and a simple message (See Annex for example of position statement).
     - Identify who your allies and opponents are.
     - Never advertise your strategy.
     - Set 2 things: initial request & minimum goals.

When Meeting with Others:

- Invite government officials and people from the general public to your activities and educate them about your organization’s mission and activities.
- Be polite, kind and friendly, not confrontational.
- Smile and make eye contact.
- Give a firm handshake; demonstrate confidence.
- Know the background of the people you are meeting with and make reference to
their interests with your organization’s mission.

- Engage them in a discussion; ask them questions to find out their current knowledge of the issues you are advocating for.
- Ask them questions about their understanding and involvement in your issues.

4. Advocacy Tools
   It is best to use these Advocacy Tools in order (A, B, C, D), and move to the next one if you are not successful.

a. Collaboration
   - Working together towards a common goal.
   - Importance: Working with other Organizations, Government Agencies and Society who have the same goals will strengthen your organization advocacy; and widen your network.
   - Example: Working with NCDA and other PWD organizations to advocate for accessible communication.

b. Negotiation
   - Discussion towards an agreement that will benefit your organization.
   - Importance: It will leads toward a solution that will benefit both your organization, Government Agencies and/or other Organizations.
   - Example: To pass the FSL Bill your organization will negotiate with the government and other organizations for a solution that is acceptable to all party.

c. Requests/Demands
   - Issues that your organization asks in order to achieve your advocacy goal.
   - Importance: Government Agencies, other Organizations, and the community, will be aware of your organization’s needs.
   - Example: To have a better education for Deaf children, your organization can request the Department of Education to use Filipino Sign Language as the mode of communication in all schools.

d. Political Pressure (Media)
   - Using media to pressure the Government to act on behalf of your organization’s issues and concern.
   - Importance: Political figures are aware of the media and would like a good image from the media, they will pay more attention you your organization’s
request when there is media attention.
• Example: TV and news interviews to advocate your organization's advocacy issues.

e. Protests
• Holding rallies and march in the streets to promote your organization's advocacy issues.
• Importance: gain the attention from the general public
• Example: FSL Bill Rally from Quezon Memorial Circle to Commission on Human Rights and Congress.

5. Activity: Brainstorming
Each of you provide your top 3 long-term goals and 5 short-term goals to improve the lives of Deaf Filipinos in your area. We will see which ones everyone agrees on. With the agreed upon list, we will all work together to develop an action plan for each of the 8 goals.

“All of you are advocates already. This training focused on your advocacy skills. Be patient, but stubborn. Change is slow and you will have setbacks, but you will keep pushing. Inequality is unacceptable!”

Howard Rosenblum
CEO, National Association of the Deaf USA

Activity:
Here is a list of current issues affecting the Filipino Deaf Community created by the members of the PFD-Sustainability Sub Committee. Think about a strategy for an administrative (short-term) advocacy and a strategy for a legislative (long-term) advocacy. Remember short-term might take a few weeks or a few months, but long-term might take several years.
• FSL – Recognition as National Language of the Deaf Filipino
• Sign Language Interpreting System – Interpreting License
• Government Access (Interpreters, Census)
• Broadcast media (Interpreters, captioning)
• Court Access
• Legal Representation – Government provide interpreter in all Legal needs
• Medical Access – Government Hospitals and Heath Care centers provide interpreter/train personnel in Sign Language on Health needs
• University Access – State University & Colleges provide interpreter/Qualified instructors and hiring of Deaf teachers
• Disaster Preparations (before, during, after)
• Prison – Government provide interpreter/train personnel for accessible communication needs
• Employment
• Education (teachers, schools, mainstream)
• Driver's License – Government provide interpreting service on Driver testing
• Public Awareness – Government create programs on Deaf Awareness
• Legal Rights (contract, will, estate, marriage)
• Mental Health services – Government Hospitals provide interpreters/train personnel in Sign Language
• Abuse/Neglect/Violence/Rape
• Cochlear Implant – competition between Cochlear Implants and sign language for language development and Deaf education
• Airplane Access
• Home Technology & Web Access – Accessible communication needs like Video Phone Network
• Relay Services

Note: It is important for your organization to focus on both the short term and the long term. The short-term efforts will allow your organization to have small victories to show the public, the government, and the Deaf community that you are making progress and your organization has influence and power. The long-term efforts will lead to systematic change, which will improve the circumstances for Deaf people for future generations.

III. DISABILITY LAW

The following are a list of current laws which have impact on the Filipino Deaf Community. Please become familiar with these laws to better understand the current advocacy work that is being done on a legislative level.

1. Local Laws
   a. Republic Act No. 7277 – Magna Carta for Disabled Persons
      • Deaf as part of the Disability group and entitled to all benefits in Education,
Employment, and Equality.


b. Republic Act No. 9442

- Revised Magna Carta for the Disabled Persons with the additional provision that entitled Persons with Disability to a 20% discount on all goods and services availed; and penalizing people who ridicule Persons with Disability.

c. Republic Act No.10524

- 1% of positions reserved for persons with disabilities for government office and NGOs.

d. Republic Act No. 10070

- An Act establishing the Persons with Disability Affairs Office to ensure implementation of programs i.e. International Disability Day and services i.e. complaints and help desk for the Persons with Disability in every province, city and municipality.

e. Republic Act No. 7610

- Anti Child Abuse law including children with disabilities.

f. Supreme Court Memo 59-2004

- Authorizing the court administrator to act on and approve requests from lower courts for the hiring of interpreters for the Deaf.

g. OCA (Office of Chief Administrator) Circular No. 104-2007

- Guidelines on the payment of the services of a hired sign language interpreter
- All court shoulders payment of Sign Language Interpreters
h. Memorandum Circular number 2011-04
   • Provision of accessible designated seats in all Public Utility Vehicles, Public Utility Jeepney, Public Utility Busses.
   • Provision of reasonable accommodation on PWD accessibility needs such as but not limited to i.e. PWD Lane, Ramps, etc. in all Terminals.
   • Granting of 20% PWD fare discount.

i. 1997 Policies and Guidelines for Special Education
   • Filipino Sign Language shall be used in the education of the Hearing Impaired.

j. Republic Act No. 10533
   • Enhanced Basic Education Act recognition and mandating the use of Filipino Sign Language in education.

k. Republic Act No. 10410
   • Early Years Act recognition and strengthening education for children with disability.

   a. The Purpose of the UNCRPD is to promote, protect and ensure the full and effective participation all Persons with Disabilities, in the society and on equal basis with others.
   c. As of February 2015 – Ratified by a total of 150 countries.
   d. Ratified by the Philippines on April 15, 2008.
   e. The UNCRPD is very relevant for the Deaf because it recognizes that the Deaf community has its own sign languages, Deaf culture and linguistic identity, and guarantees the right to get professional sign language interpreters.
   f. The UNCRPD Requires Access (full and effective participation) to:
      • Justice (Courts & Law)
g. The most important articles for Deaf people in the UNCRPD are:

1. Article 2 – Definition: “Language includes spoken and signed languages and other forms of non-spoken languages”
   - It recognizes sign languages as languages and considers them equal to spoken languages.

   - The word “communication” includes:
     - Sign language
     - Braille
     - Written
     - Audio

   - The word “language” includes:
     - Signed language
     - Spoken language

2. Article 3 – General Principles:
   (h) Respect for the evolving capacities of children with disabilities and respect the right of children with disabilities to preserve their identities.

   “There is no culture without language. There is no language without culture.”
   – Markku Jokinnen, former President, World Federation of the Deaf

   We have the right to preserve our linguistic identity, which is Filipino Sign Language.

3. Article 4 – General Obligations
   - Adopt appropriate legislative, administrative and other measures to implement UNCRPD.
• Promote new information, communication & other technologies.
• Provide accessible information.
• Government to consult with Disabled People Organizations (DPO) for counsel on issues impacting people of that community. IE: The government is to consult with PFD on issues surrounding the Filipino Deaf community.

4. Article 6 – Women with disabilities
• Government shall take all appropriate measures to ensure the full development, advancement and empowerment of women.

5. Article 7 – Children with Disabilities
• Ensure full enjoyment by children with disabilities of all human rights and freedom on equal basis with others.
• Rights to express their views on all matters affecting them.

6. Article 8 – Awareness-raising
• Government must raise awareness about abilities of PWDs (including Deaf).
• Government must do awareness-raising campaigns about rights of PWDs (including Deaf).

7. Article 9 – Accessibility:
9.2(e) Provide forms of live assistance and intermediaries, including guides, readers and professional sign language interpreters, to facilitate accessibility to buildings and other open facilities open to the public.
• Interpreters are very important to the Deaf. They ensure full access to information and communication by using our natural language the Filipino Sign Language.
• Professional sign language interpreters would mean that states have responsibilities to accredit and promote Filipino Sign Language interpreter training, degree, registration, and to facilitate and to promote access to interpreters’ services.
• Elimination of barriers in information, communication and services.
• Provides for sign language interpreters.
• Promotion of access to new technology for people with disabilities.

8. Article 11 – Disasters & Emergencies
• Government must take precautions to protect PWDs in disasters & emergencies.
9. Article 12 – Equal recognition before the law
   • Equal legal capacity – all rights are available under the law.
   • State provides “reasonable accommodation” as required in exercising their legal capacity.

10. Article 13 – Access to Justice
    • Equal access to justice – ensure effective and full access to justice on equal basis with others.
    • All rights within justice system including as witnesses – Deaf can be a witness.

11. Article 14 – Liberty & Security
    • Not deprived of liberty or security on basis of disability or without reasonable accommodation.

12. Article 15 – Freedom from torture or cruel treatment/punishment
    • No government sanctioned torture or treatment.

13. Article 16 – Freedom from exploitation, violence, or abuse
    • Government must provide services and information to prevent such violence or abuse.

14. Article 19 – Independent living
    • Government must provide services and information to ensure PWDs (including deaf people) live independently.

15. Article 21 – Freedom of expression and opinion, and access to information:
    21(e) Recognizing and promoting the use of sign languages.
    • Filipino Sign Language should be recognized either in legislation or in public policies and programs. For there are no communication barriers between the Deaf Filipinos from different regions, only communication barriers between Deaf and hearing people who have not mastered the natural language of the Filipino Deaf Community.
    • It also means Deaf people of all ages have the right to use Filipino Sign Language. Children should not be forced to change their language while growing up.
    • Provide information that is accessible – Elimination of barrier that prevents full and effective participation in the society.
• Use sign language in government interactions.
• Urge businesses to provide accessible information.
• Encourage media to provide access.
• Recognition and promotion of the use of sign language.

16. Article 22 – Respect for Privacy
• Government shall protect the privacy of all personal informations of persons with disability.

17. Article 23 – Respect for home & family
• Government must make sure PWDs (including deaf people) have information and rights to have a home and raise a family.

18. Article 24 – Education: 24 (b) facilitating the learning of sign language and the promotion of the linguistic identity of the Deaf community.
• Filipino Sign Language is the linguistic identity of the Deaf Filipino community. It should be used to facilitate learning and the development of curriculum/programs for the Deaf community wherein it is exercised.

19. Article 24 – Education: 24 (c) ensuring that the education of persons, and in particular children who are blind, Deaf or deaf-blind, is delivered in the most appropriate languages and the modes and means of communication for the individual, and in environments which maximize academic and social development.
• Education for the Deaf should be in languages and environments that guarantee maximum cognitive and social development. Thus, the learning environment, languages of instructions, and teachers’ competencies in using sign language, must match children's needs.
• Must reasonably accommodate – provide specific needs to eliminate barriers for full and effective participation in the society.

20. Article 24 – Education: 24.4 In order to help ensure the realization of this right, states parties shall take appropriate measures to employ teachers, including teachers with disabilities, who are qualified in sign language and/or Braille, and to train professionals and staff who work at all levels of education. Such training shall incorporate disability awareness and the use of appropriate augmentative and alternative modes, means and formats of communication, educational techniques and materials to support persons with disabilities.
• The states have a responsibility to accredit and promote Filipino Sign Language teachers training, degree, and registration and also to facilitate hiring of qualified Deaf instructors.

21. Article 25 – Health
  • Must ensure same level of health services.
  • Must ensure health insurance is provided.

22. Article 27 – Work and employment
  • Prohibit employment discrimination, and require reasonable accommodations.
  • Equal access to placement and training services.
  • Assistance in finding work, including vocational rehabilitation services.
  • Hire PWDs in government jobs and encourage private businesses to hire.

23. Article 28 – Adequate standard of living and social protection
  • Access to clean water and accessible services and devices.
  • Access to social and anti-poverty programs.
  • Access to public housing.
  • Access to retirement programs.

24. Article 29 – Participation in political and public life
  • Access to voting.
  • Access to running for electoral office.
  • Supporting NGO’s like PFD.

25. Article 30 – Participation in cultural life, recreation, leisure and sport: 30.4. Persons with disabilities shall be entitled, on an equal basis with others, to recognition and support of their specific cultural and linguistic identity, including sign languages and Deaf culture.
  • Deaf Filipinos have equal rights for cultural participation, recognition and support for Filipino Sign Language and Deaf culture.
  • Cultural materials in accessible formats.
  • TV and films in accessible formats.
  • Theaters, museums, tours, etc. to be accessible.
  • Support creative works and performance by deaf including in sign language and showing deaf culture.
  • Support sports involvement.
26. Article 31 – Statistics & data collection
   • Government must collect data on deaf individuals (census).

27. Article 34 – Committee
   • Government must set up Committee on the Rights of Persons with Disabilities.

28. Article 35 – Parallel Reports
   • Report on Government progress must be made to UN.
   • Non Government Organization, Disabled People Organization and Civil Society Organization can write a parallel report every 4 years.
   • The 1st Parallel report on Philippines was made and submitted in Dec 2013 by the Philippine Coalition on CRPD. Composed of national organizations from different Disabled People Organizations conducted a yearlong consultation with PWD leaders in all regions in the Philippines. The Data gathered along with research for government budget spending for PWDs were compiled and submitted to the UN. The Deaf community was represented by the Philippine Federation of the Deaf.
Chapter 7
PROGRAM DEVELOPMENT AND EVALUATION

Program development is a step by step outline that shows follows the mission, vision and values of your organization. When making or developing a program, the activities should help achieve your organization’s goals and objective. Effective program development includes planning, coordination, developing an evaluation, budget stability, and reports to help improve in the project goals of your organization.

I. GENERAL PROGRAM STRUCTURE

Do you know the difference between a program and an event?

<table>
<thead>
<tr>
<th>PROGRAM</th>
<th>EVENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Many events and activities</td>
<td>• One time happen (Activity)</td>
</tr>
<tr>
<td>• Long term (many things happen over 1-2 years)</td>
<td>• Short term (maybe 1-2 days)</td>
</tr>
<tr>
<td>• Example: Deaf Awareness Program</td>
<td>• Example:</td>
</tr>
<tr>
<td>includes all of these:</td>
<td>- International Day of the Deaf</td>
</tr>
<tr>
<td>- Present on Deaf Culture</td>
<td>- Deaf Awareness Week</td>
</tr>
<tr>
<td>- IDD event</td>
<td>- National Disability Prevention</td>
</tr>
<tr>
<td>- Other community social events</td>
<td>Rehabilitation Week</td>
</tr>
<tr>
<td>- Facebook posts on FSL and Deaf Culture facts</td>
<td>- Fun Run</td>
</tr>
<tr>
<td>- PFD Newsletter</td>
<td>- Deaf Festival</td>
</tr>
<tr>
<td>- Meeting with families to talk about Deaf</td>
<td></td>
</tr>
<tr>
<td>- Provides a good opportunity to probe and explore with questions.</td>
<td></td>
</tr>
<tr>
<td>- Participants do not need to read or write in response.</td>
<td></td>
</tr>
<tr>
<td>- Can be face-to-face or through phone or online.</td>
<td></td>
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</tbody>
</table>
ACTION PLAN

- Summary of what your organization will do to achieve your goals and objectives
- Focus to what steps are needed to take to achieve goals in a period of time

Pre-Assessment Process:
Does your organization have a mission statement and objectives/goals?
What problems has your organization encountered?
Who are your target audiences?
What are your organization’s priorities?

ACTIVITY 1: Brainstorming
- Divide participants into 2-3 groups
- 10 mins to discuss and list down Past Programs or areas of concern
- Choose 1 representative for each group to present
- Facilitators: list down and keep participants Program/area of concern for Activity 2

A. WHAT IS A PROGRAM DEVELOPMENT?
- Program Development is the systematic process of program planning to create, put into action and evaluate goals by using inputs, outputs and outcomes.
- See the sample visual in Appendix P
B. PURPOSE OF PROGRAM DEVELOPMENT

• Have a clear goal
• Guide you and your organization to make sure your project supports and promote your organization’s mission statement, goals and objectives
• Develop good program budget to manage your money wisely
• Evaluate your organization’s activities and their impact

C. SHORT TERM VS LONG TERM GOALS

You should develop your program based on your organization's goals. Your program may have both short and long term goals.

1. Short term goals
   • Achieve in near future
   • A day, a week, a few months

2. Long term goals
   • Achieve over a long period of time
   • One semester, one year, five years or twenty years

EXAMPLE: Deaf Awareness Program

Short term goals:
• Train two Deaf people to give Deaf Awareness workshops within 1 month
• Host four Deaf Awareness workshops over the next 3 months
• Survey workshop participants after each workshop

Long Term goals
• Host a minimum of 15 Deaf Awareness workshops this year
• Train at least 100 hearing people on Deaf Awareness this year
• Ultimately improve how hearing people treat Deaf people

Be sure to apply S.M.A.R.T. (specific, measurable, achievable, realistic, and time-framed) goal making principles when making both short term and long term goals. See Strategic Planning chapter 2.

GOAL PRIORITIZATION

Your organization has many goals. How do you decide which ones are most important? First, make a list of all your goals and tasks that you need to complete. Remember, be as
specific as possible and use S.M.A.R.T. Break big goals down into small tasks that will help you accomplish the big goal. Are there any tasks that overlap or are no longer important? If so, merge or delete them.

Next, decide how soon these tasks and goals must be completed. Which ones must be accomplished first? Which ones, if done now, will help you accomplish more later? Which ones are short term goals and which ones are long term goals? What can your organization realistically accomplish at this time?

Once you have rearranged these tasks and goals in the order that they must be completed, you have prioritized them. To ensure you are able to achieve each task and goal, you must develop an Action Plan.

**ACTIVITY 2 : Brainstorming**

- Divide participants into 2-3 groups
- 30 mins: Create a list of your organization’s goals and prioritize them/
- Choose 1 representative for each group and present your goals, as well as why you prioritized them the way you did.
- As one big group, make a final list of prioritized goals

**D. ACTION PLANNING**

An Action Plan is a process that helps you create your organization’s step-by-step plans, and is very important for a successful program. We use two (2) types of Action Plans, an Overview and a Specific Action Plan. Here are what they look like:

1. Overview Action Plan:
   An overview action plan is typically used when planning your activities for a long period of time, such as one year. You should always have a detailed action plan for every item in your overview action plan.
2. Detailed Action Plan

A detailed action plan must be **very specific**, and is focused on one program, not many. By ensuring that you list **every step** of your program, you can be sure that you are not forgetting anything you are supposed to do.

**FSL BILL AWARENESS CAMPAIGN IN MANILA**

<table>
<thead>
<tr>
<th>WHAT?</th>
<th>HOW?</th>
<th>WHEN?</th>
<th>WHO?</th>
</tr>
</thead>
</table>
| FSL Bill Awareness Campaign in Manila | 1. Awareness Campaign in through schools, churches  
2. Mass media advocacy (infographics)  
3. Personal testimonials | September 2014 to August 2015 | Raphy (Project Manager), Raymond (Communications)  
Mackie (Advocacy & Documentation), Henry (Finance), Yvette (Logistics), Carol, Rowella, Jet, Patrick, George (Volunteers), plus 4 workshop facilitators (TBD) |
| Other programs/activities you have planned.  
For example:  
- Livelihood training  
- Community workshops  
- Child abuse prevention  
- HIV/AIDS awareness | Brief step-by-step summary of how you will carry out each program/activity. | Timeline of each program/activity | List of who will be involved and their positions/roles in the program/activity. |
<table>
<thead>
<tr>
<th>Activity</th>
<th>Description</th>
<th>Status</th>
<th>Person(s) responsible</th>
<th>Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Recruitment of facilitators and volunteers</td>
<td>Completed</td>
<td>Raphy and Raymond</td>
<td>7 Sept. 2014</td>
</tr>
<tr>
<td></td>
<td>• Recruit 4 awareness campaign facilitators, 4 mass media campaign facilitators and 10 volunteers from Manila Area</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>• Develop campaign materials (videos, brochures and posters)</td>
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<tr>
<td></td>
<td>• Develop mass media campaign stories/messages</td>
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<tr>
<td></td>
<td>• Prepare petition and position papers</td>
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<tr>
<td></td>
<td>• Prepare letters to schools and churches to collaborate with the activities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td>Initial contacts with schools and churches</td>
<td>Completed</td>
<td>Henry</td>
<td>20 Dec. 2014</td>
</tr>
<tr>
<td></td>
<td>• Send out letters to schools and churches</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>• Schools:</td>
<td></td>
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<td></td>
<td>• Philippine School for the Deaf</td>
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<td></td>
<td>• Miriam College-Southeast Asian Institute for the Deaf</td>
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<tr>
<td></td>
<td>• Manila High School</td>
<td></td>
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<tr>
<td></td>
<td>• Philippine Institute for the Deaf</td>
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<tr>
<td></td>
<td>• Ramon Magsaysay High School</td>
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<tr>
<td></td>
<td>• De La Salle-College of Saint Benilde</td>
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<td></td>
<td>• STI College-Paco</td>
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<tr>
<td></td>
<td>• Philippine Normal University</td>
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<tr>
<td></td>
<td>• De La Salle University</td>
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<tr>
<td></td>
<td>• Polytechnic</td>
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<tr>
<td></td>
<td>• Churches</td>
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<td></td>
<td>• Paco Church</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>• Bible Baptist Church</td>
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<td></td>
<td>• Watch Tower</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>• San Andres Church</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td>Confirming with schools, churches</td>
<td>2 confirmed</td>
<td>Henry</td>
<td>15 Jan. 2015</td>
</tr>
<tr>
<td></td>
<td>• Follow up schools and churches to confirm collaboration</td>
<td>(DLS-CSB and PSD), others pending</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Meet with school and church administrators to discuss awareness campaign schedules and activities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td>Mobilization of awareness campaign</td>
<td>Pending</td>
<td>Yvette, Carol and 4 awareness campaign facilitators</td>
<td>1 March 2015</td>
</tr>
<tr>
<td>6.</td>
<td>Initiating mass media campaign</td>
<td>Pending</td>
<td>Rowella, Jet and 4 mass media campaign facilitators</td>
<td>March 2015</td>
</tr>
<tr>
<td></td>
<td>• Conduct mass media campaign</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>• Send press releases to newspapers</td>
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<tr>
<td></td>
<td>• Invite television reporters to awareness campaign activities and conducted televised interviews.</td>
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<tr>
<td></td>
<td>• Post social media announcements (Facebook, Twitter, Instagram)</td>
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<tr>
<td>7.</td>
<td>Gather feedback</td>
<td>Pending</td>
<td>Patrick and George</td>
<td>1 July – 15 August 2015</td>
</tr>
<tr>
<td></td>
<td>• Develop feedback forms</td>
<td></td>
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<tr>
<td></td>
<td>• Gather feedback from awareness and mass media campaign participants and other stakeholders</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8.</td>
<td>Summary reports</td>
<td>Pending</td>
<td>All volunteers and facilitators</td>
<td>30 August 2015</td>
</tr>
<tr>
<td></td>
<td>• Prepare reports about the awareness and mass media campaign activities.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
How to develop an Action Plan:

A. Overview Action Plan

1. Decide on what program or activities to plan. Write in the WHAT? column of the Action Plan table. You may write as many programs or activities you want but you must carefully consider how many programs or activities your organization can manage at one time.

2. In the HOW? column, write the activities that you need to do in the program.

3. In the WHEN? column, write how long the program/activities will be and when they must be accomplished by.

4. In the WHO? column, write the person(s) who are responsible to lead the program and their roles.

B. Detailed Action Plan

1. Take a program from the Overview Action Plan and make it the title of the Detailed Action Plan.

2. In the ACTIVITY column, write all of the activities that you need to do to accomplish your goals.

3. In the DESCRIPTION column, describe the activities. Make sure that each description is clear and easy to understand.

4. In the STATUS column, write the status of each activity. Below are the answer choices for this column:
   - Not started – activity has not yet been started.
   - Pending – activity has been started but not yet completed or confirmed
   - On hold – activity has been on hold because of some definite reason, such as lack of money or bad weather.
   - Completed – activity has been completed or confirmed

5. In the PERSON(S) RESPONSIBLE column, write the name of person or group of persons who are responsible to do or work on the activity.

6. In the DEADLINE column, write the exact date that you want the activity to be completed.

When developing an action plan for a program, you should always have a budget. This is explained later on in this chapter.
**ACTIVITY 3: Developing a detailed action plan**

- With the group, pick 1 goal from your prioritized goals list, and identify a current or new program that would help you accomplish this goal.
- 1 hour: Develop a step-by-step detailed action plan. Remember to be thorough and clearly explain every step. This action plan is also the road map for your program.

**DESCRIBE THE PROGRAM:**

1. **Statement of Need**
   - Known as problem statement, this answers the question ‘why your program is important’
   - Establishes the focus and rationale issues your program will address
   - Presents the facts, evidence of supporting needs of your program goal
     - Define goals
     - Reinforce an ongoing effort

**Example:**

- **Deaf Awareness: Sign Language Program**
  - *Sign Language is at the core of the Deaf everyday lives, without sign language they will be isolated and access to government services will be limited.*

2. **Expectations**
   - Creating connections among the program goals and outcomes
     - What do you want to demonstrate, represent, or produce as result?
     - Explore and establish desired outcomes that are meaningful and important
   - What do you expect to achieve and how will it impact the community?

**Example:**

- **Deaf Awareness: Sign Language Program**
  - Train and partner with:
    - 5 government agencies
    - 5 major public and private hospitals
    - 5 major public and private schools
  - Train at least 15 service providers, 15 health care providers and 15 teachers in the use of Filipino Sign Language with the goal that the participants will be able to interact in simple terms with Deaf people after the training.
3. **Roles/positions**
   - Individuals who will contribute time, energy, support, skills and knowledge
     - Individuals’ core skills
     - Who can get involved
     - Commitment
     - Organizational chart

   **Example:**
   - **Deaf Awareness: Sign Language Program**
     - Program Manager: Coordinate all staff and volunteers over see progress of the program, and leads program evaluation etc.
     - Logistic Manager: Coordinate and over see all logistic concerns and preparation like; venue, equipment, materials etc.
     - Finance Manager: Coordinate and over see all financial concerns and - budget management.
     - Facilitator: Develop curriculum and facilitate class
     - Staff: Provide assistance in program preparations

4. **Stakeholders**
   - Groups of people who are interested, involved or invested in specific goals/projects
   - Those who benefit or are impacted by your program
     a. Target audiences
     b. Impact on participants and community members
     c. Funders
     d. Supportive of your project goal

   **Example:**
   - **Deaf Awareness: Sign Language Program**
     - Deaf community – Gain Accessibility in government, school and hospitals.
     - Government Agencies/Offices – will be able to provide better service to the Deaf community.
     - Public and Private Schools – will be able to deliver accessible education.
     - Government owned Hospitals and Health Care Centers – will be able to provide better health care service
     - Donors etc. – receive recognition for the change made in the community
5. Activities/events

- Specific activities that will be used to achieve the intended results

**Example:**

- *Deaf Awareness: Sign Language Program*
  - Sensitivity Training workshop
  - Sign Language training
  - Conference on Deaf Awareness
  - International Deaf Day
  - Seminar on Sign Language etc.

6. Resources

- Anything invested in the program to accomplish the work that must be done

**Example:**

- *Deaf Awareness: Sign Language Program*
  - Staff
  - Volunteers
  - Facilities
  - Materials
  - Funds
  - Equipment
  - Supplies.
- Think about incentives to engage targeted individuals/organizations
- Dream big about your goal/impact, but be realistic with the resources you have available

7. Stages of development (Action Plan)

- A step by step outline of program design and implementation which is putting it all together
  - Process is collaborative and tentative
  - Establish plans of action; consistent with the mission/vision
  - Set a timeline (least important and most important)
  - Play a central role in setting a realistic evaluation focus

**Example:**

- *Timeline*
• Activities Schedules
• Program Plan
• Plan of Action

• Road Map
  • Step by Step plan of activities to achieve your goal

8. Context
  • What things may influence your program’s success or failure

**Example:**

• Deaf Awareness: Sign Language Program
  • Good Context: reliable interpreters; new grant funding from the government; hearing people who are motivated to learn about Deaf people; reliable weather and transportation on day of presentation; partnership with other organizations; etc.
  • Bad: poor interpreters; bad weather; strict requirements from a donor or grantmaker; etc.

9. Expected risks
  • Examining uncertain variables and recognizing possible challenges/limitations
  • Use S.W.O.T. (Strengths/Weaknesses/Opportunities/Threats) to help you plan your program (See Strategic Planning Chapter for more information on S.W.O.T.)

**Example:**
STRENGTH (Internal)  
- Sign Language Training Module already prepared  
- Committed staff and volunteers

WEAKNESS (Internal)  
- No Equipment: Laptop, Projector  
- No Office

OPPORTUNITY (External)  
I. Partnership with other NGO: Philippine National Association of Sign Language Interpreters  
II. Funding support from National Council on Disability Affairs

THREAT (External)  
- Competitor: Link Center for the Deaf offers a similar program but for SEE.

10. Competitor analysis
   • Offer benefits that are better than those offered by the competitors  
     • What makes your program unique?  
     • Always be aware of the competitors’ activities

Example:
   • Deaf Awareness: Sign Language Program

<table>
<thead>
<tr>
<th>PFD</th>
<th>OTHER NGO'S</th>
</tr>
</thead>
</table>
| - We provide a quality program that caters to the needs of the student: Learner based program  
- We have 12 years of experience  
- Focus on FSL as 1st language | - Curriculum based program  
- 5 years of experience  
- Focus on artificial communication like Signing Exact English |

Example of programs proposed by the PFD Sustainability Sub Committee for the Deaf Filipino community:
- Organizational Development Training for members and organizations
- FSL House Bill Campaign
- Interpreting standards and ethics

**FSL House Bill 450 – Promotion of FSL and Deaf Culture**

**STATEMENT OF NEED**

- At present, there is a low rate of awareness and understanding of FSL and accessibility for the Deaf. Approximately 60% of deaf children do not have access to education in a language they understand. (Note: this is a made up statistic for the example)

**RESOURCES**

- ₱ 150,000 (see budget) * Venue Volunteers
- Laptop * Pens/Paper
- LCD Projector * Meals for presenters
- Training Modules * Transport for presenter

**STAGES OF DEVELOPMENT**

- Month 1: Design PPT workshops
- Month 2: Secure resources to fund program
- Month 3: Advertise training to schools and set up schedule to deliver workshops
- Month 4-5: deliver workshops at schools
- Month 6: Evaluate Program

**CONTEXT**

FSL HB 450 was passed with the support of Cong. Tinio and is now stepped up to the preliminary. The media is promoting the bill to the hearing public and more people are aware of the importance of FSL.

**EXPECTED RISKS**

- **STRENGTH:** Strong advocacy from PFD staff; PFD have relationships with government departments
- **WEAKNESS:** No funding yet for program
- **OPPORTUNITY:** FSL Bill passes and requires change in schools; more SPED schools like to connect with PFD for advice
- **THREAT:** Lack of commitment; teachers do not want to change
PROGRAM TIMELINES (continuation of Stages of Development)

Be sure to set a specific time frame for your program and consider pre-program and post program time and activities. For example, if your program was to last 6 months total, this is how it might look:

<table>
<thead>
<tr>
<th>Month</th>
<th>What should we plan?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>I. Design PPT workshops&lt;br&gt;II. Assign who will be presenters&lt;br&gt;III. Brainstorm a list of possible schools to visit&lt;br&gt;IV. Think about sources of funding&lt;br&gt;V. Begin initiating contacts&lt;br&gt;VI. Development of awareness campaign materials</td>
</tr>
<tr>
<td>2</td>
<td>VII. Secure resources and funding for program</td>
</tr>
<tr>
<td>3</td>
<td>VIII. Begin scheduling visits to schools and confirm&lt;br&gt;IX. Hire interpreters for program&lt;br&gt;X. Initiate mass media campaign</td>
</tr>
<tr>
<td>4</td>
<td>XI. Mobilization of awareness campaign – deliver presentations to the schools&lt;br&gt;XII. Revising program development</td>
</tr>
<tr>
<td>5</td>
<td>XIII. Get feedback from staff and schools&lt;br&gt;XIV. Deliver more presentations to more schools</td>
</tr>
<tr>
<td>6</td>
<td>XV. Evaluate program and write progress reports&lt;br&gt;XVI. Presentation of reports in schools and churches</td>
</tr>
</tbody>
</table>

II. PROGRAM EVALUATION

- Is a systematic method for collecting, analyzing, and using information to answer questions about your organization programs, particularly about their effectiveness and efficiency.

- Why is program evaluation important?
- Good and bad
- Positive and negative
- Strong and weak
- Cooperative and not cooperative
- To assess program effectiveness
• To inform program planning and implementation
• To make our case to funders

• Why should we do it?
  • To help improve the program better for your good credibility
  • To avoid doing the same mistakes in the future
  • To present a good result that funders can trust and continue supporting

Program Evaluation Process:
Define goals and objectives
• What is the goal?
• What is the objective?

Design an evaluation plan
• What data do you need to collect?
• How will you collect data?
• What is your timeframe?
• What resources do you have available?

Data collection
• Please see the Data Collection Chapter for more information

Methods of evaluation

<table>
<thead>
<tr>
<th>Quantitative</th>
<th>Qualitative</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Statistics</td>
<td>• Subjective/narrative</td>
</tr>
<tr>
<td>• Pre/post test</td>
<td>• Focus groups</td>
</tr>
<tr>
<td>• Survey</td>
<td>• Observation</td>
</tr>
<tr>
<td>• Record review</td>
<td>• Personal interviews</td>
</tr>
</tbody>
</table>

Mixed Methods
Combination of both methods
How to evaluate: **QUANTITATIVE, QUALITATIVE** and **MIXED METHODS**

*Please review Chapter 1 for more information.*

**A. QUANTITATIVE METHOD** (use the statistics)

- Asking people for their opinions in a structured way, which provides a measure of what people think from a statistical and numerical point of view. Please see Data Collection chapter for more information on Quantitative Method.

**B. QUALITATIVE METHOD** (use the subjective/narrative)

- Focused on how people feel, what they think and why they make certain choices and largely led with discussion around certain concepts or ideas with open questioning. Please see Data Collection chapter for more information on Qualitative Method.

**C. MIXED METHODS** (use the combination of both methods)

- As the name says, this approach uses both Quantitative and Qualitative method. Combining these two sets of information can produce insightful results for an organization looking to learn more about their members and opinions, preferences and reactions of local Deaf community.

- Mixed method is used to cover the limitations of a single method. It can be easy to describe and to report; and it can help generalize qualitative data. But this method also needs much work from the researcher, and needs to resolve lack of information between different types of data.

- https://researchrundowns.wordpress.com/mixed/mixed-methods-research-designs/
a. Evaluation Questions

- How to develop appropriate evaluation questions?
- Bias vs. Neutral
  - A bias question is from your point of view, usually supporting it with your opinion, not facts
  - A neutral question is a matter of seeking clarification and does not include biases, judgment, or hidden agenda

Example:

<table>
<thead>
<tr>
<th>Bias (subjective)</th>
<th>Neutral (objective)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Did you think the event was organized well?</td>
<td>How was the event organized?</td>
</tr>
<tr>
<td>Do you support FSL HB 450?</td>
<td>What language do you use?</td>
</tr>
<tr>
<td><em>This is biased because it gives a hint using “well” to be answered yes.</em></td>
<td><em>This is neutral because it does not give a hint or clue whether to answer yes or no.</em></td>
</tr>
</tbody>
</table>

Closed-ended Question vs. Open-ended Question

- Closed-ended Question
  - Yes and no responses
- Open-ended Question
  - Require more than one word answers

Examples:

<table>
<thead>
<tr>
<th>Closed-ended</th>
<th>Open-ended</th>
</tr>
</thead>
<tbody>
<tr>
<td>-Did enjoy the event?</td>
<td>-What did you learn from the event?</td>
</tr>
<tr>
<td>-Would you recommend this event to your friends?</td>
<td>- How would the event benefit you?</td>
</tr>
<tr>
<td>- Will you attend next workshop?</td>
<td>- What will you do after the workshop?</td>
</tr>
</tbody>
</table>
Cultural considerations

- Recognize different cultures, regions/islands, traditions, and values
- Understand current issues, trends and ethics
- Cultural sensitivity
- Demographics (number of informants/respondents)
  - Data Sources
  - Surveys/questions
- Pre/post surveys
- Knowledge quizzes
- Attendance logs
- Observations
- Focus groups
- Interviews
- Commentaries/testimonials
  - Reflections
  - Affirmations
  - Personal stories

- A person can freely say something about the organization she/he works with
- By giving the gratitude of how the organization affects her/him

b. Data Collection/Timeline

It is important to collect data before, during, and after your program. Data collected beforehand will help you develop your program and its goals. Data collected during and after your program can be compared to the original data and used for evaluation.

Formative and Summative

- Formative
  - When making the full program, add a regular evaluation several times during the program
  - Example: One year program, evaluation every 3 months

- Summative
  - When making the full program, add evaluation once at the end of the program
  - Example: one year program, one time evaluation after all the activities.

- Short term, mid-term, long term plans (setting up a evaluation timeline)
• Is once a month too much? Enough?
• How?

c. Logic Model
• This model is known as logical framework, developing program, systematic process
• A tool used by funders, managers, and evaluators of program

Sample Logic Model:

**Statement of Need/Expectations:** The rate of awareness and understanding about FSL is low. The program aims to promote FSL to the public.

<table>
<thead>
<tr>
<th>INPUTS</th>
<th>OUTPUTS</th>
<th>OUTCOME-IMPACT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>What we invest?</strong></td>
<td><strong>Activities</strong></td>
<td><strong>Participation</strong></td>
</tr>
<tr>
<td>Staff</td>
<td>Conduct FSL awareness workshop/seminar</td>
<td>Deaf and Hearing participants</td>
</tr>
<tr>
<td>Laptop and multimedia projector</td>
<td>FSL presentations</td>
<td>Public agencies/offices</td>
</tr>
<tr>
<td>FSL brochures and posters</td>
<td>Volunteer time</td>
<td></td>
</tr>
<tr>
<td>Money</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**ASSUMPTIONS** (Why will doing this will lead to outcomes?)
- Public curious about FSL
- In line with FSL advocacy works of PFD

**EXTERNAL FACTORS** (SWOT/Context)
- Lack of funding
- Reluctance of some government agencies/offices
- Other schools already offering similar programs

**INPUTS**
• What we invest in the program?
• Resources/Materials:
  - Staff
  - Volunteers
  - Time
- Money
- Equipment
- Technology
- Partners

OUTPUTS
- What is produced through a program?
- Activities (the actual tasks you do)
  - Conduct workshops
  - Deliver services
  - Develop products or training materials
  - Provide trainings
  - Host a conference
- Participation (who do we reach?)
- Targeted groups
  - Youth
  - Senior citizens
  - Community members

OUTCOMES-IMPACT
- Outcomes are impacts/benefits/changes for participants during or after your program
- Short Term Results: Learning
  - (knowledge, skills and experience)
  - (0-6 months)
- Attitudes – do participants feel good about their skills, what they have learned, or how the program is proceeding so far?
- Awareness – are participants more aware of what they know or don’t know related to a specific topic? Do they seem more familiar with the program topic overall?
- Motivations – are participants excited to learn more, or excited to apply what they have learned?
- Medium Term Results: Action
  - (behaviors)
  - (3-9 months)
• Decisions – have participants made decisions based on what they have learned? Has their learning made their decision-making easier?
• Policies – have participants implemented any new policies?
• Social action – have participants volunteered their time or helped their community with their new learning from your program?
• Long Term Results: Conditions
  - (values and status)
  - (6-12 months)
• Social – have participants’ day-to-day lives improved? Are they better able to interact with and receive support from community members, the government, the media, hospitals or other areas/groups? Are participants more involved in their community?
• Economic – have participants or their organizations earned more money as a result of your program?
• Environmental – have the people in your participants’ communities changed? Have laws, policies, or practices changed? Are there any changes you can see with your own eyes, like more people working at a livelihood shop, a new building, or more accessible hospital materials?

d. Outcome-based evaluation plan
• This is a result where the program goal of your organization is as planned.
  - Example:
    - What program does your organization want to do and evaluate during the planning?
    - Program name: Community Workshop

Program name: FSL Awareness Training

<table>
<thead>
<tr>
<th>Outcomes</th>
<th>Evaluation Questions</th>
<th>Indicator(s)</th>
<th>Source of data (use of data)</th>
<th>Method to collect data</th>
<th>Who collects data</th>
<th>When to collect data</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Increased awareness of the stakeholders</td>
<td>What have you learned from the training?</td>
<td>15 participants attended</td>
<td>Evaluation results</td>
<td>Qualitative (written interview)</td>
<td>Organizers</td>
<td>One day</td>
</tr>
<tr>
<td>2. Production of basic FSL vocabulary</td>
<td>Do you know the sign for _____? What about _____?</td>
<td>9/15 participants were able to demonstrate a 50% increase in sign vocabulary</td>
<td>Testing scores</td>
<td>Quantitative (survey)</td>
<td>Instructors</td>
<td>One week</td>
</tr>
<tr>
<td>3. Positive attitudes toward the use of FSL in the Deaf Community</td>
<td>What changed your attitude toward the use of FSL in the Deaf community?</td>
<td>10/15 participants made positive comments</td>
<td>Videos</td>
<td>Qualitative (interview)</td>
<td>Evaluators</td>
<td>One month</td>
</tr>
</tbody>
</table>
• Outcomes
  - What program does your organization wants/plans to evaluate?
  - What expectation does your organization have?
  - Recruit two representatives from each organization members who will attend the organizational development workshop training to improve their knowledge and skills.

• Evaluation Questions
  - The questions should be given from the expectation of an outcome
  - The value of the program goal to the answers
  - What are you hoping to accomplish by the end of the training workshop?
  - What are the three things you want to learn from the representatives?

• Indicators
  - These are measurements that demonstrate whether a goal has been achieved
  - In an evaluation context - these provide the information needed to answer the evaluation questions
  - Reflect targeted numbers within stated goals
  - Examples:
    - Number of satisfied participants
    - Number of press releases
    - Attendance at a campaign event
    - Percentage of activities completed within planned timeline

• Why do you need the data collected from the program that your organization is planning to asses?
  - Example: DATA COLLECTION on COMMUNITY WORKSHOP
**Method to collect data**

| Preliminary evaluation (qualitative) | Videotapes | Evaluator | One day |
| Observation (qualitative) | Videotapes and written notes | Evaluator/program coordinator and point of contact to review | 2 months |
| Overall evaluation (mixed method) | Testimonials and surveys | Evaluator/person to contact | 5 months |

**e. Findings/reports**

- Before doing an evaluation, always make sure to have your evaluation plan reviewed by your board members and staff.

**Always analyze**

- Add up ratings, rankings, and yes/no answers
- Organize comments into similar categories or common themes
- Identify relationships, associations, patterns

**Report evaluation results**

- Level and scope of information in report depends for whom the report is intended (funders, board, staff, partners)
- Be sure employees/board members have a chance to carefully review and discuss the report before sent out
- Funders will likely require a report that includes executive summary- the summary should highlight key points from the evaluation

- After doing the evaluation, the report must be finalized and reviewed before complete submission

**Finalize evaluation report**

- Title page
- Table of Contents
- Executive Summary
- Purpose of the Report
- Background about organization/program that is being evaluated
ACTIVITY 4: Brainstorming and planning

- Divide participants into 2-3 groups
- Using your program action plan in Activity 3, have each group develop evaluation questions for each method: Qualitative, Quantitative, Mixed Methods: 30mins
- 1 presenter will be chosen from each group
- Budget helps you to make a realistic plan of your program.

III. BUDGETING

- Budget is an amount of money available for spending that is based on a plan for how it will be spent.
- It is important to make and follow a plan for spending your money – not lost and confuse.
- Budget helps you to make a realistic plan of your program.

Pre-Assessment:
Do you have a program budget?
Do you know how to create the income and expense report?
Did your organization pay for the BIR Registration fee?

ACTIVITY 5: Brainstorming

- Divide participants into 2-3 groups
- 15 mins: Ask each group to brainstorm items in the following categories. Be as specific as possible.

1. Make a list of all possible income that your organization does or could receive:
   Example: Donations (from who?), grants (from who?), what else?

2. Make a list of all possible expenses that:
   Example: Supplies (what kind?), equipment (what kind?), what else?
• Choose one presenter from each group and share your lists.

**PLANNING YOUR PROGRAM BUDGET**

**WORTH TIME - MONEY**

**DECIDE COST SHARE**

• **What is budgeting?**
  Budgeting is the process of **creating a plan to spend your money**.

  *Creating this spending plan allows you to determine in advance whether you will have enough money to do the things you need to do or would like to do.*

• **Why create a budget?** *(reference of Davin Searls and David Justice)*
  • Your organization's funds are limited! Use them wisely!
  • Keep your accountants, BIR and grant makers happy!
  • It is the Board’s responsibility to make sure your organization does not go into debt.
  • Reduce risk of surprises – and personal payment for organization programs
  • Help measure how big of an impact you can have with how much money.

• **Planning your program budget**
  • When planning your program......
    - Always create a budget, even if you think the program won’t cost much.
    - Whether it is a 500,000 pesos program or 500 pesos program
    - Your budget must always include expenses and income!
    - Ask yourself, what expenses do you expect?
    - Ask yourself, what income do you expect?
• **Your time – Money!**
  • It is important to consider cost share (in-kind) contributions to the program
  • Cost share applies to BOTH expenses and income and could include:
    - Volunteer time
    - Free use of equipment, venues, supplies, etc.
    - Expenses paid for by your organization, not by the funder
    - Out of pocket expenses paid by you for transportation, meals, internet, etc.

• **Determining Cost Share**
  • To put a value on your cost share and document it:
    - Track your volunteer time and multiply it by your hourly rate, or find the average pay for the work you are doing.
    - Request invoices for use of equipment, venues, supplies, etc..
    - Track and record expenses paid for by your organization / yourself.
  • Ensure your records clearly show what is/ is not cost share.

• **How budget should be created?**

• Your budget should be **balanced**.
  - Income – expenses = 0
  - Funders do not want you to have extra or leftover money at the end of the program.

• If you have extra funds left over, does this mean your program did not have as big an impact as it could have?
  - Many funders allow for a 10% contingency fund, but you must be prepared to explain why you spent more or less than your original budget.
  - **IMPORTANT**: Be Conservative!
• Always over estimate your expenses.
• Always under estimate your income.
• By doing so, you are less likely to risk running out of money.

**Tips for effective budgeting**

*Image of a diagram with circles labeled realistic, flexible, watchful, and achievable.*

**Budget Development Process**

1. Determine Period of Time Covered
2. Review Short/Term Strategies and Goals
3. Develop Revenue Estimates
4. Develop Expense Estimates
5. Create a Budget Document

• Why is it very important?

Since budgeting allows you to create a spending plan for your money, **it ensures that you will always have enough money for the things you need** and the things that are important to you. Following a budget or spending plan will also keep you out of debt or help you work your way out of debt if you are currently in debt.

• What are the difference between fixed expenses and variable expenses?

  a. **Fixed expenses** have set peso amounts and are the exact amount every time. *For Example: Rent or car payment*
  
  b. **Variable expenses** can change, which means you have more control over them. For example: What you spend on car gas or entertainment

• **Purpose of Budgeting**

  a. A forecast of income and expenditure
  
  b. A means to monitor program performance
Budgeting Principles

a. Be conservative, not optimistic.
   Budget for less income and more expenses than you think you will have. If you plan your budget on what you hope to spend or earn rather than what you realistically will spend or earn, you will lose money.

b. Team work and consultation
   One of the most important principles of budgeting is that it requires teamwork. Ask everyone to help you predict what and how much income you will earn, and what and how much expenses you will have.

c. Allow plenty of time
   Don't create your program budget at the last minute! A budget should be carefully developed, then reviewed and shared with others several times before it is finalized.

d. Excellence in documentation
   Keep track of everything you do. Make it easy for you or your team members to review your documents, if needed. Label everything clearly.

Example of labeling:

<table>
<thead>
<tr>
<th>Income</th>
<th>Players</th>
<th>Price/ea.</th>
<th>Ext</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registration Fee</td>
<td>32</td>
<td>$100.00</td>
<td>$3,200.00</td>
</tr>
<tr>
<td>Program Administration Fee</td>
<td>32</td>
<td>$30.00</td>
<td>$960.00</td>
</tr>
<tr>
<td>Coaching Levy</td>
<td>32</td>
<td>$80.00</td>
<td>$2,560.00</td>
</tr>
<tr>
<td>Match Fees</td>
<td>32</td>
<td>$250.00</td>
<td>$8,000.00</td>
</tr>
<tr>
<td>Clothing and Bag</td>
<td>32</td>
<td>$250.00</td>
<td>$8,000.00</td>
</tr>
<tr>
<td><strong>Total Planned Income</strong></td>
<td></td>
<td></td>
<td><strong>$22,720.00</strong></td>
</tr>
</tbody>
</table>


e. Provide Training
   Train other people on your team so that they are familiar with the budget and budgeting process.

f. Get Approval

**ACTIVITY 6: Brainstorming and planning**

- Divide participants into 2-3 groups
- From the list of program income and expense in the Activity 5, each group develop a program budget: 30mins
- Choose 1 presenter from each group
Chapter 8
OUTREACH, PUBLIC RELATIONS AND MARKETING

I. WHAT IS OUTREACH?

Outreach, Marketing and Public Relations are the three main elements of communication needs for your organization to be recognized by your general audience. In other words, you may use outreach, marketing and public relations strategies to sustain your organization to gather your general audience to support your organization.

The purpose of this chapter is to create tools and strategies for your organization’s system on outreach, marketing and public relations and to enable your organization to build trust and credibility with your targeted audiences.

A. Outreach – reach out to individuals and groups as target audiences

B. Marketing – create clear and encouraging messages to get attention from your target audiences

C. Public Relations – develop communication tools to communicate with your target audiences

II. OUTREACH STRATEGIES

Importance:

• Build relationships with your stakeholders to promote your organization’s programs, advocacy and goals
• Builds your organization’s reputation

A. Identify your stakeholders/target audience

Stakeholders/Target Audiences

A person, group or organization that has interest or concern in an organization. This does not include your Board or day-to-day staff, but instead, members and others who are outside of your organization that receive benefits or are affected by your organization’s actions, objectives and policies.

Each stakeholder/target audience is different. Therefore, you must make sure
that your outreach, marketing, and public relations efforts are customized to each stakeholder. For example, your members will understand what you mean by “Deaf culture” and “Filipino Sign Language,” but your town mayor who is hearing might not.

**Example:**

**Organizations:** Pinoy Deaf Rainbow, Catholic Ministry to Deaf People, Deaf Boholanos Society

**Partners:** World Federation of the Deaf, Discovering Deaf Worlds, Philippine National Association of the Sign Language Interpreters

**Institutions:** De La Salle-College of Saint Benilde, Manila Christian College Institute for the Deaf

**Donors:** United States Agency for International Development, Australia Agency for International Development, Nippon Foundation

Your organization should list several stakeholders you think can support, benefit from, or become involved with your organization. Your organization's board may want to prioritize its focus on only a few stakeholders at a time, depending on your organization's current needs and goals.

**Example:**

Deaf Boholanos Society (DBS)

**List several stakeholders:**

- **Current Members**
- **Potential Members:** Deaf Youth and Adults in Bohol
- **Partners:** Teachers at Schools for the Deaf, City Hall-Person with Disability Affairs Office, Barangay Hall in Bohol
- **Donors/Supporters:** Mayor Baba Yap, other government departments, hearing community in Bohol DBS might choose to prioritize these three stakeholders:
  - **Members:** Deaf Youth = why? Because DBS wants more members to join
  - **Partners:** Teachers at Schools for the Deaf = why? Because it is easy to reach many Deaf youth at once through schools for the Deaf.
  - **Donors/Supporters:** Government representatives in Bohol = why? Because they can give DBS venue rental for free or make small grants to support DBS programs.

B. Develop Objectives and Schedule

**Objectives** – set objectives for various target audiences

**Schedule** – set appropriate schedule with target audiences
C. Appropriate Outreach Activities

1. One on one briefing = present your organization project to a donor
2. Online Survey = develop an online survey and send it to target audiences
3. Presentations to specific groups = present your organization project to the school for the Deaf
4. Setting up a booth at a popular community event = Set up a booth at the Regional Sports for the Deaf to encourage Deaf youth to join and become members of DBS
5. Personal invitations to public outreach activities = meet and talk with Deaf youth at public outreach activities
6. Roundtable discussions = participate in roundtable discussions with Deaf youth and get a chance to encourage them to join and become members of DBS

D. Develop clear and consistent messages that align with your organization values

Personalize talking points for discussions with different audiences (governments, schools, etc.) by thinking about what your audiences knows or doesn't know, why they would be interested in supporting or becoming involved in your organization, and what you would like to get from them. For example, your members will understand the concept of Filipino Sign Language and Deaf culture, but hearing parents of Deaf children might not understand how FSL is different from SEE.

Examples:

<table>
<thead>
<tr>
<th>Stakeholders</th>
<th>Objectives</th>
<th>Talking Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deaf youth</td>
<td>Encourage Deaf youth to become members of your organization</td>
<td>If you become a member of our organization, you will make many friends with Deaf youth in the Philippines. You will also become a role model for Deaf children.</td>
</tr>
<tr>
<td>Teachers at schools for the</td>
<td>Inform teachers about your organization's activities so they will encourage</td>
<td>If your students become members of our organization they will gain confidence and independence.</td>
</tr>
<tr>
<td>Deaf</td>
<td>Deaf youth to become involved.</td>
<td></td>
</tr>
<tr>
<td>Government representatives</td>
<td>Make them aware of the importance of your work so</td>
<td>Deaf people do not have access to knowledge, training, and skills. Our organization provides this, enabling Deaf people to participate in society and become taxpayers.</td>
</tr>
<tr>
<td>in your area</td>
<td>that the government will support your activities</td>
<td></td>
</tr>
</tbody>
</table>

E. Evaluate and gather feedback from your network:

Example:
Your organization develops evaluation forms and asks Deaf community members to fill out evaluation forms. Both positive and negative feedback will help your organization to improve its services.

Judge Your Message

Once you have a draft message, check it against this list. Be an objective judge and ask yourself:

• Are the core values clear?
• Is the message encouraging and convincing?
• Is the solution simple and “common sense”?
• Is the language “plain English” (easy to understand)? Is the message simple enough for a 13-year old to easily and quickly understand?
• Are the spokespeople (spokesman/speaker) credible?
• Is the language compelling (force) without being shrill (frank)?
• Is the message about results, not process?

III. Marketing

Marketing means to create clear and encouraging messages to get attention from your target audiences

11. Importance of Marketing:

• Improves the reputation of your organization.
• Communicates your message to gain allies, advocates, supporters, etc. in the community.
• Demonstrates to funding agencies that your organization is making a difference and actually have results

RECRUIT MORE SKATEHOLDERS TO SUPPORT YOUR ORGANIZATION

STEP 1: Goal-setting (your organization’s mission statement and objectives)

STEP 2: Analyzing the current situation (SWOT: see Chapter 2 Strategic Planning)
STEP 3: Creating a marketing strategy (please see marketing strategies)

STEP 4: Allocating marketing resources and monitoring (Marketing budget and Detailed Action Plan)

a. Key Marketing Strategies

Listen & Understand  Analyze  Engage & Interact

- Understand the networks
- Benchmark/Initial Data (comparison)
- What are they saying about us?
- Identify key stakeholders
- What gets their attention?
- Attract attention from networks:
  - Awareness
  - Advocacy

IV. Public Relations

Public Relations means to develop communication tools to communicate with your target audiences.

A. Need for Public Relations

Communication (same message)  New Information (update)  Mutual Understanding (both clear communication)

B. Importance

- Use appropriate communication tools to disseminate your message about your organization programs and activities to your target audience
- Use communication tools as much as you can, more people will recognize and familiar with your organization’s mission and vision
- Frequently send updates through communication channels in order to earn trust from your stakeholders

C. Tools of Public Relations

1. Press Conferences/Press Releases (free of charge)
2. Lobbying  
3. Peer to Peer  
4. Social Media (Facebook, Twitter, Instagram)  
5. Attendance at public events  
6. Newsletters  
7. VLOG  
8. Blogging  
9. Brochures and Catalogues  
10. Sponsorship or Partnerships  

V. Other Important Concepts

*In Outreach, Public Relations and Marketing*

A. Branding is the process of creating a unique name and image for an organization, service, or product, using consistent themes, words, and images, such as an organization's name, logo, tagline, colors, etc.

Your organization should create your own brand and it is important for your audience to familiar with, which you do not need to explain. Your audience understands what your organization works.

*For Example:*

*Many people recognize the Starbucks’ brand. They know that Starbucks is good, strong coffee and not cheap. Many people who want to drink good coffee or want to look like they are high society will go to Starbucks for this reason – because of Starbucks’ brand.*

How about your organization’s brand? What do you want people to think about your organization? Active and committed, or lazy and do-nothing? Always creating new ideas or always the same? Honest and trustworthy or suspicious and corrupt? Deaf identity and FSL or deaf as disability? Your organization must create a brand that communicates your values and will be recognizable to stakeholders.

In summary, a brand:

1. Delivers the message clearly  
2. Confirms your credibility (reputation or image)  
3. Connects your target stakeholders emotionally  
4. Motivates your stakeholders  
5. Solidifies stakeholders loyalty
B. AARRR Tips

*(Tips from Ms. Noemi M. Pamintuan-Jara)*

i. **ATTRACTION**
   - Marketing opportunity
   - Awareness/first encounter
   - Research
   - Conversations

Why is attracting your target audience (customer/donor) a challenge?

**Truth #1 Tsunami** - Our world has too much information- newspaper, TV, Facebook, Twitter, Instagram, etc. which makes it hard for people to stay focused on one thing at a time.

**Truth #2 No Time** - Because there is too much information, time is limited. Also, other people will prioritize what is important for them (work, family, hobby, etc.), over your product, message or service.

**Truth #3 It’s More Complicated** - The process of attracting audience or people is very hard and complicated: getting attention + interesting conversation + explaining the “WHERE”, “WHEN”, and “HOW” that people WANT.

*For Example:*

You must explain WHERE your organization works, WHEN you have activities, and HOW you do your work in a way that people WANT to listen to. If your message is boring, they will not want to listen to you!

**Dilemma**

It is very hard to convince people if you want them to care about what you feel is important but they have no time.

**Audience and Experiences**

It is important to understand your audience (customer/donor). You must research the following:

- What matters to them? – Get to know what your most stakeholders need or want from your organization
- What is their value? – Get information from your stakeholders about what they mostly use
- How do they behave? – Check if they are satisfied with your organization’s services or programs
ii. **ACTIVATE/ACQUIRE**

In this stage the prospective customer/donor begins to become aware and to form a picture of you – it is not clear at first, then becomes more clear after they discover and experience.

They are having conversations among themselves online and in social media. They ask around, they look around.

How to be involved in conversations?

- Listen
- Ask questions
- Establish trust
- Let your audience see you always, such as attending activities that your audience is involved in.

iii. **RETAIN**

In this stage, you are now conversing or talking with your audience, what will you do next?

- Deepen the relationship
- Teach and Train: solve their needs
- Support and serve
- Sense of community

Also in this stage, you provide goods, services, ideas, and experiences that satisfy individual and organizational goals/needs/wants; You develop a sense of loyalty and trust between you and your audience. You also provide quality service, and value.

iv. **REFERRAL**

In the referral stage, your supporter/donor/member becomes your advocate. They tell other people good things about your organization, what you do, and your passion for your cause. They give positive reviews, referrals, and help recruit new supporters.

v. **REVENUE**

This is the stage when your advocates bring in the “revenue” – in other words, you “earn” the support you want. Perhaps a Deaf community member joins your organization, a hearing person becomes involved in your FSL class, or a person donates money to your organization. After you build trust with your supporter/donor and they tell their friends and other people, they revenues will come in the form of donations, support, and/or involvement. Having revenues is proof that you have built relationships with these people.
Reframing messages: This is a way to change what people say about your organizations, and make your messages clear to the different stakeholders depending on your objectives. Reframing messages is the process of changing your organization’s image that other people or organization see.

For Example:

Your organization may be sending messages that you are not aware of, such as when you don’t post programs or activities in your website or Facebook page, other people will say that your organization is inactive and doing nothing. You can reframe this situation so that people will begin saying that your organization is active.

To reframe your message do the following:

• Consider what other people think about your organization (do a survey or interview people, see Data Collection Chapter).
• If the image of your organization is negative, solve the issue. If the image of your organization is positive, reinforce or improve the image.
• The result of what you have done to solve the issue or enforce improve the image is your reframed message.
### Example:

<table>
<thead>
<tr>
<th>Messages from outside (outreach)</th>
<th>Way to change people's minds (marketing &amp; PR)</th>
<th>Your goal for a reframed message</th>
</tr>
</thead>
</table>
| Some members feel your organization does not share enough information and news and lacks activities. | Your organization has a lot of information, and conducts many activities. How will you advertise this to your members?  
Marketing: Develop communication plan / gather into strategic plan; identify ways to improve communication and make your messages interesting to your audiences  
PR: Deliver messages via newsletter, video blog, Facebook, Twitter, IG, Viber, Glide, SMS; change written English documents to FSL; send emails to target people; invite media to your organization events; distribute posters and tickets for events. | Members now say your organization keeps people informed with up-to-date information about its activities and programs. |
| Your members say that your organization lacks clear roles and responsibilities | Your organization is working to improve its roles and responsibilities system. How will you advertise this to your members?  
Marketing: Develop organizational chart with detailed responsibilities  
PR: Explain chart in in FSL video and deliver to members through Facebook, email, etc. | Members now say that your organization's roles and responsibilities system is clear. |
| The local government says they don't understand why FSL should be prioritized over SEE. | Your organization and its members believe strongly in FSL but the government is not aware. How will you advertise the importance of FSL to the local government?  
Marketing: Find statistics and research supporting FSL; conduct petition in support of FSL; get testimonials from Deaf people, hearing parents of Deaf children, and others who support FSL.  
PR: Develop written report that includes statistics, research, and petition results and deliver to government; create short film of testimonials and send DVDs to government representatives. | The local government says they understand why FSL is important and support it over SEE. |
C. Internal Communication Policies

These policies help you communicate successfully with the Board, staff, and volunteers within your organization. It is important for your organization to have Internal Communications Policies because these policies will ensure there is no miscommunication among your board, staff and volunteers.

You must discuss with your Board members and decide how frequently you want to communicate about different things. Here are samples of PFD’s internal communication policies. Discuss them with your Board members, and change the underlined words to fit your organization. For example, maybe your Board prefers to do all its communication through video and not email, or will give the Secretary two weeks to develop and send the minutes instead of one week.

**Communication with Committee, Staff and volunteers**

The Board shall be responsible for communication with committee, staff and volunteers for programs and activities.

The Board shall also explain all policies applicable to programs and activities to ensure that committee, staff and events implement and follow such policies.

The Board shall also explain duties and responsibilities of committee, staff and volunteers related to programs and activities.

**PFD Board Communication**

1. **Minutes of Board Meetings**
   Minutes of Board Meetings must be distributed by Secretary one week after the meeting via email. Notification of distribution will be sent through SMS. Board members are expected to confirm receipt within one week after distribution via email.

2. **Board Agenda**
   Agenda for Board meetings will be distributed by the President 1-2 weeks before meeting via email. Notification of distribution will be sent through SMS. Board members are expected to read and ask questions / offer feedback at least 3 days before meeting. Responses/feedback received less than 3 days or 72 hours before the meeting will not be entertained.

3. **Votes on policy changes/updates outside of Board meetings**
   Changes or updates can be made to policies as needed. Proposal for changes or updates will be sent by any member of the Board to the President. The President will inform the other members of the Board about the proposal for changes or update to the policies.
In case the President is the one proposing the changes or update to the policies, he/she will inform the Board via email and send notifications via SMS. The President may seek explanations for the proposed changes or updates and will call a Board meeting to discuss the proposed changes or updates. Changes or updates to policies will be accepted and taken into effect after a majority vote (5 out of 7) of the Board. The President may opt to gather changes or updates to different policies for convenience.

iv. Financial reports
Financial reports will be distributed to the Board by Treasurer one week after the end of each month via email. Notification of distribution will be sent through SMS. Board members are expected to confirm receipt, read and ask questions/offer feedback within a week of distribution.

v. SEC/BIR, legal, government regulations, and other critical information
As needed / answer ASAP Communication exchanges about SEC, BIR, legal, government regulations and laws, and other critical or important information must be made as needed. Responses/answers from all members of the Board must be sent back as soon as possible (ASAP).

If something has been submitted for processing (ex: BIR forms), the Board must be informed within a week by the Secretary. The Treasurer is responsible for processing required financial documents/reports and the Secretary submits the documents/reports to respective offices and/or agencies.

vi. Regional Board Representatives
Board representatives from Luzon, Visayas and Mindanao must submit monthly reports of their region one week after the end of each month via email or video (YouTube, Vimeo, Glide). Monthly reports will be reviewed, transcribed (if needed) recorded and filed by the Secretary.

vii. Emergency situations
During emergency situations, all members of the Board must keep in contact in all possible ways: email, video (YouTube, Vimeo, Glide), SMS, Facebook messaging and/or video chat (Skype, Viber).

All members of the Board are expected to respond/answer as soon as possible (ASAP).

viii. Board Meeting Scheduling
The Secretary is responsible for scheduling Board meetings. The Secretary will send to all Board members call for meeting via email and notifications of distribution will be sent through SMS. All other Board members must respond/answer the call for meeting within one (1) week from date of distribution.
In case not all Boards members have responded/answered the call for meeting one (1) week after notification, the Secretary will again reschedule the meeting.

ix. Confidentiality

All communications, information and documents exchanges between the members of the Board must be kept confidential to all extent possible unless said communication, information and documents are approved for submission and/or release to respective government/non-government agencies and the general public.

External Communication Policies

These policies help you communicate successfully with general members, partners, donors, and others that are not directly involved in your organization on an everyday level. It is important for your organization to have External Communications Policies because these policies will ensure everyone in your organization is sharing the correct message(s) with the public and others outside your organization.

Be sure to ask your Board, staff, volunteers, members, and partners about how they want to communicate before finalizing your policies. The Board may consider appointing a Communications Officer or the Secretary to handle the correspondence and communications. These policies should allow the Board enough time to review and approve information/communications when needed. When developing these policies, the Board should discuss and decide on the following:

- Who communicates with the government representatives?
- Who communicates with donors?
- Who communicates with potential partners?
- What action/approval are needed prior to doing so?

Here are samples of PFD’s external communication policies:

i. Communication with Organization and Network Members

The Board shall communicate with network or affiliate members and other organizations with utmost care and confidentiality. Program and activity reports, and financial reports must be sent only to respective network or affiliate members and organizations, making sure that no communication, information and/or documents are sent to the wrong network or affiliate member and/or organization.

Programs and activity reports must be submitted to sponsors and grant providers, and shared with organization members, network or affiliate members and other organizations.

Appropriate financial reports must be submitted to sponsors and grant providers,
auditors, and government agencies such as the Bureau of Internal Revenue (BIR) and Securities and Exchanges Commission (SEC).

Person-to-person communication must be kept confidential unless such information is deemed for public knowledge. Person-to-person communication includes, but not limited to, email, SMS, online messaging and video chat.

ii. Communication with General Public
Accomplishment reports (programs and activities) and annual reports (programs, activities and finance) appropriate for the general public shall be posted in the Federation's website and shall be provided to organizations and external agencies when requested.

Person-to-person communication must be kept confidential unless such information is deemed for public knowledge. Person-to-person communication includes, but not limited to, email, SMS, online messaging and video chat.

D. Facebook Analysis

Analyzing your organization's Facebook page's audience (who likes your page), content (posts) and engaging trends (posts that engage your audience to talk about your organization) will help you understand your audience and plan your next activities to post in your page.

Effective analysis and planning of your Facebook page will improve your organization's Facebook page's online visibility and thus affecting your audience's and/or your member's image of what your organization is and does.

Please see Appendix R (pg.244) for a step by step setup of your Facebook page and how to analyze your page.

E. Using an interpreter and recruiting hearing people to take interest in your organization's cause

i. Set an appointment with FSL interpreter you understand and feel comfortable with.

ii. Send the meeting details to your interpreter in order for your interpreter to be ready for your meeting.

iii. Explain to your interpreter how you want your meeting to work.
Why? The number of hearing people is higher than the number of Deaf people, so your organization needs to establish a partnership with hearing people to support your organization's goals

• Stand or sit beside hearing client.
• Maintain eye contact with both interpreter and client sometimes while interpreter translates.
• Maintain eye contact with client while you signing.
• Speak your mind, not your interpreter.
• Tell your interpreter not to offer their own opinions- because if they are joining the conversation, who is interpreting? The interpreter must remain professional in their role.
• Introduce yourself and “our” interpreter before starting. “OUR” emphasizes that not only need but your client also needs.

VI. REFERENCES

• Resource Media (2010 September). How to Frame Your Campaign to Win
APPENDIX

APPENDIX A

TEMPLATE: Letter of Notifications/Permissions

[Your organization’s letterhead here]

DATE

NAME

POSITION

ADDRESS 1

ADDRESS 2

Dear NAME:

Greetings! We are more than pleased to inform you that ORGANIZATION is now conducting research on TOPIC with the intention of YOUR GOAL.

Members of our organization would like to visit your OFFICE/SCHOOL/BUSINESS/ORGANIZATION to conduct interviews and focus group discussions in order to collect information about TOPIC. In this regard, we would be most appreciative if our members could visit OFFICE/SCHOOL/BUSINESS/ORGANIZATION on DATE from START TIME to END TIME as an opportunity to interview ______________, ______________, and ______________ about these topics.

For more inquiries, you may contact us at ______EMAIL______ or SMS/call ______CELL______. We look forward to hearing from you.

Thank you for considering this request, and we look forward to your favorable reply.

Sincerely,

YOUR NAME

YOUR POSITION

YOUR ORGANIZATION
APPENDIX B
FOR REFERENCE: Waiver/Consent Form

Project Title: _____________________________________________________________

Researcher/Interviewer: ___________________________________________________

Interviewee: ______________________________________________ Date: ___________

Consent for Participation in Interview Research

I, the undersigned, confirm that:

• My participation in this research project is voluntary. I understand that I will not be paid for my participation.

• I may withdraw and discontinue participation any time without penalty. If I decline to participate or withdraw from the research, I will not be held liable of anything.

• If I feel uncomfortable, in any way, during the interview, I have the right if I don't want to answer the question or to end the interview.

• I am aware that the research will be video recorded and notes will be written confidential. If I don't want to be video recorded, I can't participate in the research interview.

• I give permission to the researcher to use the video and notes for 3 years, after which it will be disposed of or erased.

• I understand that the research will not identify me by name in any reports using information obtained from this research interview, and that my confidentiality as a participant in this research will remain secure. Subsequent uses of my video records and data from this research must be secured with permission from me before actual use.

• I have read and understood the explanation given to me. I have had all my questions answered to my satisfaction, and I voluntarily agree to participate in this research.

• I have been given a copy of this consent form.

Interviewee: __________________________ Date: ___________
APPENDIX C
SAMPLE: Video Transcription

FOLDER: DDW PHASE 3 PRETEST AND EVALUATION A
VIDEO #: PHASE II POST PROGRAM SURVEY REY
SITE: MANILA
INTERVIEWER: RAPHY DOMINGO
INTERVIEWEE: REY ALFRED LEE

TRANSCRIPT:
1) What did you learn and/or achieve from the training on Financial Management with Sally Atkins?
1:16 Rey: I learned about Spreadsheets. Listing and inputting important information. I also learned how to calculate them and also to make monthly records. I also learned how to keep records well arranged to make it easier to find needed documents and avoid messing up or losing documents.

2) What did you learn and/or achieve from this training on Fundraising & Fund Development with Mencie Hairston?
2:32 Rey: I learned about fund raising and how to look for sponsors. I also learned how to ask for donations from friends, and networking with other people. I also learned that if we ask for donations, it must be connected to what a project that we are trying to get funded. We can’t raise funds for just about anything. We must have a goal for the activity, whether it be a seminar, project, etc. so that if we are asked what the donation is for, we can answer them.
3:45 Rey: I also learned that if we are trying to ask for donations, we need to be confident about our projects and be able to answer questions well. I also learned that if we have older donors, we should keep them updated, minimal explanations are needed because they already know our goal. It is different for new companies/donors, we have to clearly explain our goals and why we want them to donate to us. We must also maintain ties with all our donors so that we will have long term donors.

3) Since the trainings with Ms. Sally Atkins and Ms. Mencie Hairston, how have you applied what you have learned about Financial Management, Fundraising & Fund Development to your work or volunteer efforts?
5:12 Rey: So far, from Ms. Sally, I have used what I learned about the spreadsheets, managing receipts and filing information.

5:36 Rey: From Ms. Mencie, I have not applied anything from her lectures yet, only Rowella Tanjusay did. But I have already asked for donations in cash, in-kind for activities before.

5:54 Raphy: That was for the previous IDD event. But from March until now, have you done something?

6:00 Rey: Presently, no, because I have passed the responsibility to the overall chair. If you ask me if I have asked for donations during that time, no I haven’t.

4) How has Financial Management, Fundraising & Fund Development helped make PFD become a more sustainable organization?

6:55 Rey: As of now, I can't see it benefitting different organizations yet but for PFD, we have tried to give lectures to different organizations based on the topics that we have learned here. For now, there are no significant improvements yet from other organizations; it is still too early to say.

7:10 Raphy: Setting aside improvements in member organizations, how can you help PFD be sustainable?

7:25 Rey: I can see PFD improving in its operations specially in record keeping. It is important to secure the files/documents properly and avoid being cluttered. Record keeping and reporting must be monitored and improved.

7:49 Davin: [Asked question off camera]

7:56 Rey: We have also created policies with the help of PFD-SSC and has been approved by the board. But these are still in development and not yet implemented.

5) How has PFD’s system for managing finances improved? Please provide examples.

8:50 Rey: We made improvements in our bank records. We changed the signatures, opened a checking account, acquired an ATM card. We were also able to process our SEC and BIR forms.

6) How has PFD’s system for fund development and fundraising improved? Please provide examples.

10:03 Rey: Rowella is responsible for that area. She has taken over responsibilities in informing and relaying information through email. I try to follow up and remind everyone about their responsibilities.
APPENDIX D
FOR REFERENCE: Philippine Federation of the Deaf Constitution and By-laws

THE PHILIPPINE FEDERATION OF THE DEAF, INC.

CONSTITUTION AND BY-LAWS
CHAPTER 1 - ORGANIZATION

Article I: Name of Organization
The name of the organization shall be The Philippine Federation of the Deaf (PFD), hereinafter referred to as the Federation.

Article II: Location
The Federation will have its principal office and address in Quezon City, Philippines.

Article III: Language
The official language of the Federation is Filipino Sign Language. The language of the agendas and minutes of meetings, announcements and pertinent documents will be in English.

CHAPTER 2 - AIMS

Article IV: Objectives
To serve the Filipino Deaf community regardless of their religion, socio-economic class, sexual orientation, age, and/or ethnic background.

To promote the following:

Section 1: Filipino Sign Language (FSL) as the preferred language of the Filipino Deaf people and to support its research and development programs/projects.

Section 2: Equal opportunities in inclusive education, access to health, employment, communication, interpreting service and mass media.

Section 3: Deaf awareness in the Philippine society and support efforts towards its propagation and ensure that equal human, legal, linguistic and cultural rights are enjoyed by Deaf Filipino community.

Section 4: Develop capacity building training to empower the Deaf Filipino community.

CHAPTER 3 - MEMBERSHIP

Article V: Membership Categories
The federation will consist of the following categories, which will be eligible to:

Section 1: Regular Organization Membership. Any organization organized and controlled by Deaf members can be admitted as a Regular Organization member and shall have the right to vote.
Section 2: Affiliate Organization Membership. Any organization supporting Deaf people (Non-Government Organization, People Organization, Enterprise, Institution and Religious) can be admitted as an Affiliate Organization Member and shall not have the right to vote but may ask for the floor at the General Assembly.

Section 3: Individual Membership. Any individual member, Deaf or hearing, which support Deaf people can be admitted as an individual member and shall not have the right to vote but may ask for the floor at the General Assembly.

CHAPTER 4 - GENERAL ASSEMBLY

Article VI: Functions
The functions of the General Assembly shall be:

Section 1: Review, evaluate and approve annual report on activities of the current administration

Section 2: Annually review, evaluate and approve accounts on income and expenditure together with a balance sheet on the past accounting period.

Section 3: Review and approve submitted proposals for plans of action for the succeeding administration.

Section 4: Review and approve the membership fees for the various membership categories.

Section 5: Elect Executive Office and board members with its designated positions

Section 6: Propose and approve amendments to the Constitutions and By-laws.

Article VII: Quorum
The General Assembly must be attended by 50% +1 of the Regular Organization Members to be able to confer and make decisions for the Federation.

Article VIII: Meeting
Section 1: The supreme decision making body of the Federation is the General Assembly. Each Regular Organization Members are allowed to send up to two (2) official delegates to the General Assembly. Delegates other than the official delegates may only observe during the assembly but cannot vote.
Section 2: The assembly is held once every four (4) years in the month of May and is to be announced by the Executive Board at least one (1) year prior to the next assembly.

Section 3: The extraordinary meeting shall be convened by the President at the request of more than 60% of the Regular Organization Membership from the General Assembly. Such meeting shall be convened three (3) months in advance or depending on the situation.

Section 4: Each Regular Organization Membership has one (1) vote by secret ballot at the General Assembly

**Article IX: Events**

Section 1: The PFD Congress is held once every four (4) years and shall undertake before the General Assembly.

Section 2: The celebration of International Deaf Day (IDD) will be held once every year in the month of September. The Executive Board shall disseminate information to promote and encourage its observance among its member organization.

**CHAPTER 5 - EXECUTIVE BOARD**

**Article X: Election of the Executive Board**

Section 1: Any members can be nominated and elected for President, Vice-President, Secretary and Treasurer.

Section 2: Three (3) board members shall be elected to represent Luzon Visayas and Mindanao. Nominees for the said positions must come from the respective areas.

Section 3: Two (2) board members shall be appointed by the Executive Board depending on the needs of the organization.

Section 4: The majority of the Executive Board members must be Deaf or Hard of Hearing.

Section 5: All board representatives shall be elected during the General Assembly and will serve a term of 4 years until the next assembly. Any non-nomination or absence of voted nominee in any Board representative position will be declared vacant and the new board will appoint capable individuals to fill up the position in a rotating basis of 2 years term.
**Article XI: Meeting**

Section 1: The Executive Board meeting shall be convened once a year or as needed upon agreement by Executive Committee members.

Section 2: The agendas and minutes shall be sent to each Executive Board member at least 2 weeks prior to the meeting.

Section 3: A special meeting may be called by the President or at the request of more than 50% of the Executive Board members.

**Article XIV: Functions**

Section 1: Planning, implementing and monitoring the activities of the federation according to this constitution and according the decisions made by the General Assembly.

Section 2: Appointing various committees to carry out special tasks.

Section 3: Recruits, supervises and dismisses paid and non-paid staff.

Section 4: Preparing all the stipulated documents to be discussed at the General Meeting.

Section 5: Ensuring the Federation's good financial standing by effectively and efficiently overseeing financial transactions, accounting and taking care of all properties of the Federation.

Section 6: Representing the Federation in court proceedings.

Section 7: Formulation of the guidelines, policies and procedures; and the annual plan and report for acceptance by the General Assembly.

Section 8: Implementing the purposes and objectives of the Federation as provided under the Constitution and By-laws.

Section 9: Representing the interests of members of the Federation and is accountable to its members.

Section 10: Fund-raising and represents the federation before the public and for the management activities of the federation including financial liability.

Section 11: Review and approve submitted proposal for a budget for the next period.

Section 12: Consider and decide upon any proposals submitted by members.
Article XV: Committee

The Advisory council shall be determined at the first Executive Board after the election of the new Executive Board members and shall be co-terminus with the Executive Board.

Article XVI: Vacancies and Successions

Section 1: In the event of resignation, removal from office or permanent incapability of the President the Vice-President shall automatically become the President and shall serve the unexpired portion of the term.

Section 2: In the event of resignation, removal from office or permanent incapability of the Secretary or Treasurer, the Executive Board shall confer and appoint the succeeding Secretary or Treasurer from the remaining Executive Board members.

Section 3: In the event of resignation, removal from office or permanent incapability of members of the Executive Board, the remaining Executive Board members and members of the Federation shall elect a successor and shall serve until the next General Assembly and shall assume all responsibilities of the Executive Board member he/she has succeeded.

CHAPTER 6 - FINANCES

Article XVII: Accounts

The name of all accounts shall be “The Philippine Federation of the Deaf.” All financial transactions shall be signed by President and Secretary.

CHAPTER 7 - AMENDMENTS

This constitutions and by-laws shall be altered and amended by the majority of the votes at the General Assembly. A proposal for any amendments to the constitutions and by-laws shall be submitted to the Executive Board at least six (6) months before the General Assembly.

CHAPTER 8 - DISSOLUTION

The dissolution of liabilities and assets of the federation shall be decided by the absolute majority of the votes at the General Assembly.
APPENDIX E
SAMPLE: Basic By-laws

(Name of Organization) BY-LAWS

Article I: Name
The name of this Organization shall be (the organization's formal name).

Article II: Purpose
(The organization's formal name), serving the Deaf community of (location), is committed to (purpose of organization). The organization accomplishes its mission by (list objectives).

Article III: Membership
A. Members:
   1. The members of this organization shall be currently living in (location).
   2. They become members by (application).

B. Privileges and Responsibilities of Membership:
   1. Voting: Each member is entitled to one vote.
   2. Privileges: Each member shall be entitled to all services of the organization.
   3. Participation: Each member shall be entitled to participate in all organizational events.
   4. Responsibilities: Each member shall (list responsibilities of members).

Article IV: Membership Meetings
A. The business meetings of the membership will be held (annually, weekly, or other). Notification of this meeting shall be made (how many days) prior to said meeting.

B. The President/Chairperson/Captain of the organization may call other meetings.

C. Quorum: At all meetings of the organization, a quorum shall consist of the members. (quorum = one half + 1)
Article V: Officers

A. Titles:

(The organization's formal name) shall have the following officers elected from the current membership:

1. President/Chairperson/Captain
2. Vice-President
3. Secretary
4. Treasurer
5. Advisor/Coach
6. Miscellaneous Officers (ex. Board of Elections Chair)

B. Qualifications:

1. The President/Chairperson/Captain shall be (elected/appointed/self selected) to the organization and serve a term of (how long)
2. The other officers must be current members of the organization.

C. Duties of Officers:

1. The President/Chairperson/Captain shall preside at all meetings and be responsible for appointing all standing, special, and ad-hoc committees and shall perform such other duties as usually required of this office. The President/Chairperson/Captain of the organization shall be an ex-officio member of all committees.
2. The Vice-President shall act in the absence of the President/Chairperson/Captain in all capacities as listed above and shall assist in conducting the business of the organization.
3. The Secretary shall (list responsibilities).
4. The Treasurer shall (list responsibilities).
5. The Advisor/Coach shall (list responsibilities).

D. Terms of Office:

1. Officers shall be elected (annually or every 2-3 years period) by the members at one of the regular meetings. Elections shall be by ballot and a majority of the votes cast shall elect.
2. Each officer shall take office (date), and serve a (one-year term or 2-3 years term) and may be re-elected consecutively to the same office for an additional (one-year term or 2-3 years term).

E. Vacancies and Removal:

1. A vacancy in the office of the President/Chairperson/Captain shall be filled by the Vice-President unless he or she is unable to serve, at which time the vacancy shall be filled by election of the members by a majority of votes cast. A vacancy in the office of the Vice-President shall be left vacant with the President/Chairperson/Captain delegating the duties of that position.

2. Any officer, including the President/Chairperson/Captain, may be removed from office or suspended from office by a vote of two-thirds of the members at a regular meeting. Removal or suspension may be with or without cause. The person under consideration shall be given an opportunity to be heard at the meeting with sufficient notice of the proposed removal or suspension, the person under consideration shall not be counted in determining the presence of a quorum not whether the required two-thirds vote has been obtained. Upon a vote of removal or suspension of the President/Chairperson/Captain, the Vice-President shall preside at the meeting.

Article VI: Committees

The President/Chairperson/Captain, subject to the approval of the organization, shall appoint such standing, special, or ad hoc committees as may be required by the bylaws, as he or she finds necessary. Committee Chairpersons shall be appointed by and responsible to the President/Chairperson/Captain.

A vacancy in a Committee Chairperson position shall be filled by appointment of the President/Chairperson/Captain of the organization with input from the outgoing Committee Chairperson.

Article VII: Amendments

These by-laws may be amended by a vote of two-thirds of the members of the organization present at any regular meeting or at a special meeting called for that purpose. The membership shall be notified of adopted bylaw amendments by the most feasible means.
APPENDIX F
FOR REFERENCE: PFD Bank Authority and General Signatory Policy

BANK AUTHORITY AND GENERAL SIGNATORY POLICY

1. Purpose of Policy. The purpose of this policy is to establish guidelines, procedures and restrictions for the Philippine Federation of the Deaf, Inc. hereinafter referred to as the Organization, for writing and issuing checks, maintaining, depositing and withdrawing funds from the bank account(s) of the Organization.

2. Principles. The following principles shall be adhered to in writing and issuing checks, maintaining, depositing and withdrawing funds from the bank account(s) of the Organization.

   2.1. Separation of Duties.
   No individual shall be allowed to process all financial transactions. Financial duties shall be segregated between the Organization's Board, staff and /or volunteers. (See Section 3)

   2.2. Transparency/Financial Disclosure
   a. The Organization is obliged to issue an Audited Financial Statement (AFS), certified by an independent external auditor, to the public, upon request, and its general membership. An AFS is composed the following:
      a.1. Balance Sheet,
      a.2. Statement of Receipts and Disbursements,
      a.3. Statement of Fund Balance,
      a.4. Statement of Cash Flows and
      a.5. Notes to Financial Statements
   b. The AFS and all financial documents and reports shall be available to all members of the Board and all staff with financial duties. The Organization's Board will share financial information with its members annually and is prohibited to withhold such information.

   2.3. Collective Accountability.
   The Organization's Board shall have a collective, shared responsibility for the financial health, stability, and management of the organization's funds.
3. Separation of Duties. Duties shall be distributed as follows:

3.1. Transaction Approval
   a. For transactions of Php 5,000 or less, the President (Rey Alfred Lee) shall have the sole discretion to approve.
   b. For transactions between Php 5,001 and Php 10,000, both President (Rey Alfred Lee) and Secretary (George Lintag) approval is required.
   c. For transactions of Php 10,001 or more, approval of the President and full Board is required.
   d. All approval must be documented in writing.

3.2. Bank Deposit Transactions / Cash Receipts
   a. All cash receipts shall be received by the Board Treasurer, or in his/her absence, by the Board Adviser. All other Board members shall refer cash receipts to the person/s stated herein.
   b. All cash receipts from donations, fundraising and other cash inflow, should be deposited intact in the next banking day.
   c. Cash receipts must not be added into the Petty Cash Fund without being deposited.

3.3. Bank Withdrawal Transactions/ Check Signatories
   a. General Organization Fund – the PFD Advisor and/or the Fund Development Director shall be responsible in withdrawing money from the bank for general organization expenses and expense reimbursement.
   b. For withdrawals, checks, or reimbursements in the amount of 5,001 Php or more, two signatories, namely, the PFD Advisor and the Fund Development Director will be required to sign. Please note this is in addition to the approval signatures of the PFD President and General Secretary. For expenses less than 5,000 Php or less, one signatory (PFD Advisor) will be accepted along with the PFD President approval.

3.4. Cash on Hand
   a. General Organization Fund – the PFD Advisor and/or the Fund Development Director shall be responsible in keeping cash on hand / petty cash fund.
3.5. Cash Advance

a. Cash advances will be administered to PFD staff/volunteers who have had their projects pre-approved by PFD’s Board.

b. A contingency fund of 10% of total budget for project may be made available upon request.

c. Any staff member requesting such additional contingency funds should submit a liquidation report of cash advances and claim for reimbursement for the excess PHP for review and approval by the Treasurer and the President (See PFD Segregation of Duties and Petty Cash Fund Controls).

3.6. Recordkeeping

a. General Organization Fund – the Treasurer shall be responsible in recordkeeping for general organization fund transactions.

b. Project-Specific Fund – for project-specific funds, the individual in the project or activity assigned to finance, such as the Bookkeeper or Financial Coordinator, shall be responsible for recordkeeping of that project, and ensure such records will be delivered to the Board Treasurer in a timely manner.

4. Grievances. The Organization’s Board, Members, and/or Volunteer(s) may raise grievances regarding violations of this policy to the President. In case that the individual being complained is the President, grievances may be raised to the Vice-President or another member of the Board.

The Board Member who has received the grievance shall inform the other members of the Board not including the individual being complained about and shall assemble a committee to investigate the grievance.

5. Violations. Any suspected misuse or misappropriation of funds will be investigated by the Board to reach a solution on how to respond to the incident. Solutions may include additional training for those members handling money, a review of the effectiveness of current policies, removal of the person responsible from all future PFD financial management involvement, etc.

Adopted by the Philippine Federation of the Deaf, Inc. on this 22nd day of March, 2015.
TRAVEL AND EXPENSE REIMBURSEMENT POLICY

1. Purpose of Policy. The purpose of this policy is to establish procedures, guidelines and restrictions for the Philippine Federation of the Deaf, Inc. hereinafter referred to as the Organization, for the reimbursement of travel and official expenses of the Organization.

2. Principles. The following principles shall be adhered to in the reimbursement of travel and other official expenses of the organization:

2.1. Valid Organizational Business. The Organization pays for business and travel expenses incurred in connection with official organization-related business that are appropriately documented. All expenses must have a valid business purpose. The Organization will not reimburse or pay for expenses that are inherently personal in nature. (See “Allowable and Unallowable Expenses Policy” for full list of reimbursable expenses).

2.2. Zero Loss or Profit. The basic premise governing travel and official expenses is that an individual should neither gain nor lose funds in the course of conducting official business.

2.3. Reasonability. Because it is impossible to anticipate all of the circumstances that individuals may encounter in conducting official business, it is expected that those requesting reimbursement or incurring business or travel expenses and individuals preparing and approving expenses for payment will follow this Policy in a manner that keeps expenses to a minimum and fairly assigns the expenses of business-related activities to the Organization.

2.4. Organizational Accountability. The Organization shall be held accountable to the Organization’s members for any reimbursement involving the use of organizational funds that have been approved by the proper Board Member authorities.

3. Procedures. The following procedures shall be adhered to in the reimbursement of travel and other official expenses of the organization.
3.1. Prior to incurring the expenses, the Organization must first be informed of the reason or purpose to make purchases, obtain services or incur expenses and any such expenses must be approved by the Board according to the “General Signatory and Bank Authority Policy” before the expense is made.

3.2. The Board member, staff or volunteer who has incurred the expenses, shall prepare an expense report to be submitted no later than 2 weeks after the expenses have been made.

3.3. For travel expense reimbursements where cash advances were not provided prior to travel, the individual must:
   a. Follow the “Petty Cash Fund Management Process” (see attachment).
   b. Attach all original (or copies, if originals are unavailable) receipts/tickets.
   c. Submit all documents to proper authorities (Please see General Signatory and Bank Authority Policy for more information on expense amount approval procedures).

3.4. For planned travel expenses with allowance/cash advance, the individual is encouraged to follow budgeted expenses. In case the allowance provided comes short, the individual may request reimbursement for additional expenses incurred up to 10% of the approved budget.
   a. Follow the “Petty Cash Fund Management Process” (see attachment).
   b. Attach all original receipts/tickets.
   c. Submit all documents to proper authorities (Please see General Signatory and Bank Authority Policy for more information on expense amount approval procedures).

3.5. For expenses where receipts were lost and no copies are available, a written explanation is required with the following details:
   a. Date and time
   b. Total amount of expense
   c. VAT/Tax amount of the expense (if known)
   d. Description of expense
   e. Explanation why there are no receipts or reason for loss of receipts.
   f. For lost receipts of expenses worth Php 5,000.00 or more, the individual must submit to PFD’s President; for Php 5,001.00 to 10,000.00 to the President and General Secretary; and for Php 10,000.00 or more to PFD’s Board the following information:
f.1. An incident report (either written or submitted by video in sign language) together with an affidavit of loss to explain what happened.

f.2. An analysis of the expense or comparable cost (IE: look up the price for the item online or in the store by taking a photo, or for air/bus/ferry fare, compare the price for similar routes).

f.3. If necessary, the Board President will then select three people to serve as a temporary committee to investigate the situation and recommend their approval or disapproval to the board for resolution -- Approval will follow the criteria set forth in the “Bank Authority and General Signatory Policy”.

3.6. For expenses without receipts such as, but not limited to, Jeep and LRT/MRT fares, the individual must write the expenses in Petty Cash Voucher (PCV) and prepare a liquidation report. See Appendix A for Petty Cash Voucher template.

4. Approval. See “Bank Signatory and Bank Authority Policy” approval process.

Adopted by the Philippine Federation of the Deaf, Inc. on this 22nd day of March, 2015.
APPENDIX H
FOR REFERENCE: PFD Allowable and Unallowable Expenses Policy

ALLOWABLE AND UNALLOWABLE EXPENSES

1. **Purpose of Policy.** The purpose of this policy is to ensure that all expenses of the Philippine Federation of the Deaf, Inc. hereinafter referred to as the Organization, are in line with its projects and activities and that such expenses are reasonable, real, allocable and allowable.

2. **Principles.** The following principles shall be adhered to in deciding whether an expense is allowable or unallowable.

   2.1. **Reasonable.** An expense is considered reasonable if both nature of the goods or services acquired or applied, and the amount of the expense reflect the action that a prudent person would have taken under the circumstances prevailing at the time of the decision to incur the cost.

   2.2. **Real.** An expense should be real in the sense that the goods actually delivered or services actually rendered.

   2.3. **Allocable.** An expense must be allocable to a particular expense budget (i.e. a specific project, sponsored activity or organization program).

   2.4. **Allowable.** An expense must be compliant to local laws, rules, and regulations of the government and/or sponsor.

3. **Allowable Expenses.** The following expenses are considered allowable, but not limited to:

   3.1. Digital Devices and Equipment - Personal computers (PC), laptops, LCD projectors, printers, and tablets (such as Apple iPad) can be purchased provided that such expense(s) have been approved by their corresponding authority (see General Signatory and Bank Authority Policy).

   3.2. Office Furniture – tables, chairs, desks, shelves, etc. for PFD office.

   3.3. Hotel Accommodation - Hotel accommodation may be provided if such expense is necessary for the completion of a particular organization-related activity.

   3.4. Meals - A standard one meal per person per day is allowed for organizational activities unless said activities require extended work hours for which reasonable budget for meals may be allocated.
3.5. Telecommunications - This includes internet, mobile phone load and fax.

3.6. Website Development and Maintenance Fees, including and web hosting fees.

3.7. Transportation Fare. This includes air, bus, ship/boat, taxi cab, jeepney, and mass transit (MRT/LRT) fares to and from PFD-related activities.

3.8. Office Supplies and Fees necessary to conduct PFD business. Including but not limited to printing, photo copying, postage, paper, pens, books, etc.)

3.9. PFD Equipment Repairs and Maintenance Fees.

3.10. Accounting and Tax Filing Fees.

3.11. Legal and Contracting Fees.

3.12. Medical/First Aid for PFD related programs depending on the contract of the volunteer/staff member working for PFD.

3.13. Travel Insurance for PFD representative travel under PFD programs depending on the contract of the volunteer/staff member working for PFD.

3.14. PFD Organizational memberships for World Federation of the Deaf, Asia-Pacific Region, and other affiliation fees for government related recognitions as approved by PFD Board.

4. Unallowable Expenses. The following expenses are considered unallowable, but not limited to:

4.1. Alcoholic Beverages and Cigarettes

4.2. Damaged items or used items. Some exceptions may apply for large expenses that are bought used at a discount such as equipment or digital devices pending approval of the Board.

4.3. Entertainment and Recreation Activities

4.4. Fines and Penalty Fee for late payments. Such fees will be made liable to the person who was designated to make those payments on time.

4.5. Medical fees – personal cause

4.6. Membership and subscription fees – personal memberships

4.7. Personal items and services. This includes, but not limited to: clothes, personal hygiene and toiletries, massage, haircuts, groceries, etc.

5. Exceptions. Some unallowable expense(s) may be allowed provided that such expense(s) have been proposed to and approved by the Federation’s Board.

Adopted by the Philippine Federation of the Deaf, Inc. on this 22nd day of March, 2015.
APPENDIX I
FOR REFERENCE: PFD Procurement Policy

PROCUREMENT POLICY

1. **Purpose of Procurement Policy.** The purpose of this policy is to establish procedures, guidelines and restrictions for the Philippine Federation of the Deaf, Inc. hereinafter referred to as the Organization, for the procurement of supplies, equipment, services and other expendable and non-expendable properties.

2. **Principles.** The following principles shall be adhered to in the procurement of supplies, equipment and services for the Organization:

   A. **Fair Competition**
   The Organization shall treat all vendors, bidders and service providers with fairness and ensure that they are given the same level of information when soliciting quotations or tenders.

   B. **Cost-Effectiveness**
   Quotations and tenders shall be evaluated not only on competitiveness in pricing but also on factors such as the quality of the products/services and track records of the bidders.

   C. **Conflict of Interest**
   No board member, staff, or volunteer of the Organization shall participate in the procurement, selection or administration of a contract if a real or apparent conflict of interest would be involved. Such a conflict would arise when the board member, staff, volunteer, and any member of his or her immediate family, his or her partner, or an organization which employs or about to employ any of the parties indicated herein, has a financial or other interest in the vendor or service provider for a purchase of contract. In situations of conflict of interests between the Organization and vendors, bidders and/or service providers, the business shall be raised to the Organization’s Board and decided whether to resolve conflict or transfer business to other vendors, bidders and/or service providers.

   D. **Transparency**
   To ensure transparency, tender documents shall provide all the necessary information to facilitate submission of appropriate and competitive tenders.
E. Organizational Accountability

The Organization shall be held accountable to the Organization’s members for any procurement involving the use of organizational funds.

3. Types and Procedures of Procurement.

A. Small Purchases/Expenses.

Purchases and/or expenses Php 5,000 or less shall be categorized as Small Purchases/Expenses. Purchases/expenses in this category shall not require quotations for supplies, equipment or services to be purchased, The PFD Board President shall have the authority to approve purchases/expenses in this category.

B. Medium Purchases/Expenses.

Purchases and/or expenses worth Php 5,001 up to Php 10,000 shall be categorized as Medium Purchases/Expenses. Purchases/expenses in this category shall require at least three (3) or more quotations for supplies, equipment or services to be purchased, submitted by the vendors or service providers after request for such information has been made by either a member of the Organization’s board or project staff. For purchases by the Organization, the President and General Secretary will decide on which quotation, vendor or service provider to choose. For project related purchases, the project team will prepare a procurement report justifying their choice for the purchase and submit to the President and General Secretary for approval.

C. Large Purchases/Expenses.

Purchases and/or expenses worth Php 10,001 or more shall be categorized as Large Purchases/Expenses. Purchases/expenses in this category will require at least five (5) or more quotations for supplies, equipment or services to be purchased, submitted by the vendors or service providers after request for such information has been made by either a member of the Organization’s Board or Project Staff. For purchases by the Organization, a full Board vote will decide on which quotation, vendor or service provider to choose. For project related purchases, the project team will prepare a procurement report justifying their choice for the purchase and submit to the full Board for approval.


The Organization Board shall sign a Contract of Agreement with all vendors and service providers delivering service to the Organization. The proposal or contract should clearly state the terms agreed and the Organization should only pay for what is agreed upon and delivered by the vendor or service provider as stated in the Contract of Agreement.
The Organization should not pay anything more than what is stated and agreed in the contract or proposal.

5. **Documentation and Record Retention.**
Procurement records and files for Medium and Large Purchases/Expenses shall include the (a) tendered quotations from vendors and/or service providers, (b) justification [or narrative] report for the price and quality of the awarded tender/bid/service, and (c) and the following information:

- A. Product/Service Price
- B. Product specifications/details (IE: computer RAM, Hard Drive Storage, etc.)
- C. Product/Service Reviews/Feedback from public
- D. Warranty Information (if applicable)
- E. Delivery time and cost (if applicable)
- F. Accept different method of payment (IE: accept credit cards)
- G. Store Location (if applicable)
- H. History of vendor, seller and/or service provider with PFD
- I. Other notes is applicable and necessary

6. **Acceptance of Gratuities.**
No Board member, project staff, or volunteer of the Organization shall solicit or accept gratuities, favors or anything of monetary value from vendors, bidders or service providers in exchange for the purchase of supplies, equipment or services.

7. **Penalties.**
Any Board member, project staff or volunteer of the Organization who knowingly and deliberately violates the provisions of this policy will be questioned by the Organization’s Board, be required to explain his/her actions. The Organization’s Board reserves the right to penalize those who violate this provision such as, but not limited to, requiring the violator to reimburse the full cost of the supplies, equipment or service purchased.

Any vendor or service provider who made a mistake and unknowingly violated this policy shall be asked to submit an explanation and may be asked to refund any funds received for services/products provided that were misleading.

Any vendor, bidder or service provider who knowingly and deliberately violates this policy will be barred from future transactions with the Organization.

Adopted by the Philippine Federation of the Deaf, Inc. on this 22nd day of March, 2015.
DOCUMENT RETENTION POLICY

1. Purpose of Policy. The purpose of this policy is to ensure that necessary records and documents of the Philippine Federation of the Deaf, Inc. (PFD) are protected and maintained, and to ensure that records that are no longer needed or are of no value are discarded at the correct time. This policy can also be used to help PFD's Board, staff and volunteers, in understanding their obligations in retaining electronic documents – including email, Web files, text files, photograph and movie files, PDF documents and all electronic data related to PFD.

2. Administration.

2.1. Responsibilities of the Administrator. PFD's President and General Secretary, shall be the Administrators in charge of the administration and implementation of this policy. The Administrators shall:

   a. Ensure that the Record Retention Schedule (see Appendix 1) is followed.
   b. Review and make any necessary modifications to the Record Retention Schedule once a year to ensure that it is in compliance with local, regional and national laws and includes the appropriate document and record categories for PFD;
   c. Monitor local, regional and national laws affecting record retention;
   d. Monitor PFD's compliance with this policy;
   e. The Administrators shall report to PFD's Board, which maintains the superior approval for policy revisions and direction of management for record retention implementation.

2.2. Responsibilities of Constituents. PFD's Board, staff and volunteers shall be the Constituents of this policy with respect to maintaining and implementing document retention and destruction of PFD's documents.

   a. The constituents shall be familiar with this policy, act in accordance herewith, and shall assist the Administrators in implementing it.
   b. In case PFD has or had an activity or project in which a constituent is or has been involved, it shall be the responsibility of the Constituent to inform the
Administrators whatever documents the constituents have worked on and retained, and to surrender documents requested by the Administrators for retention.

3. Suspension of Record Disposal in Event of Litigation or Claims. In the event PFD is served with any subpoena or request for documents or any employee becomes aware of a governmental investigation or audit concerning PFD or the commencement of any litigation against or concerning PFD, such employee shall inform the Administrators and any further disposal of documents shall be suspended until the Administrators, with the advice of counsel, determines otherwise.

The Administrators shall take such steps as is necessary to promptly inform all staff of any suspension in the further disposal of documents.

Adopted by the Philippine Federation of the Deaf, Inc. on this 22nd day of March, 2015.
BIR Revenue Regulations No. 17-2013 requires all Companies to comply with the requirement of mandatory preservation of books of accounts and other accounting records for ten (10) years. The term “other accounting records” includes the corresponding invoices, receipts, vouchers and returns, and other source documents supporting the entries in the book of accounts.

Except for the AFS which is a public document, all other documents of the Organization are considered classified and do not need to be shared with the public. Accounting and financial records could only be examined by the BIR if a Letter of Authority is issued by the BIR.

1. Accounting and Finance

<table>
<thead>
<tr>
<th>Record Type</th>
<th>Retention Period</th>
</tr>
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<tbody>
<tr>
<td>Accounts Payable ledgers and schedules</td>
<td>10 years</td>
</tr>
<tr>
<td>Accounts Receivable ledgers and schedules</td>
<td>10 years</td>
</tr>
<tr>
<td>Annual Audit Reports and Financial Statements</td>
<td>Permanent</td>
</tr>
<tr>
<td>Annual Audit Records, including work papers and</td>
<td>10 years after completion of audit</td>
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<tr>
<td>other documents that relate to the audit</td>
<td></td>
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<tr>
<td>Annual Plans and Budgets</td>
<td>10 years</td>
</tr>
<tr>
<td>Bank Statements and Cancelled Checks</td>
<td>10 years</td>
</tr>
<tr>
<td>Employee Expense Reports</td>
<td>10 years</td>
</tr>
<tr>
<td>General Ledgers</td>
<td>Permanent</td>
</tr>
<tr>
<td>Other Books of Accounts</td>
<td>Permanent</td>
</tr>
<tr>
<td>Tax Receipts Books</td>
<td>Permanent</td>
</tr>
<tr>
<td>Disbursements Books</td>
<td>Permanent</td>
</tr>
<tr>
<td>Journal Books</td>
<td>Permanent</td>
</tr>
</tbody>
</table>
### 2. Contracts

<table>
<thead>
<tr>
<th>Record Type</th>
<th>Retention Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contracts and Related Correspondence (including any proposal that resulted in the contract and all other supportive documentation)</td>
<td>10 years after expiration or termination</td>
</tr>
</tbody>
</table>

### 3. Electronic Documentation Retention

#### 3.1. Electronic Mail (Email)

- a. Not all email needs to be retained, depending on the subject matter.
- b. All organizational-related email – from internal or external sources – are to be archived after 12 months.
- c. All archived emails are to be deleted after 6 months unless there are issues that arise related to the email for which the email may be archived for another 6 months.
- d. PFD's Board, staff and volunteers must take care not to send confidential/proprietary information about PFD to outside sources or entities.
- e. Any email that PFD's Board, staff or volunteers deem vital to the performance of their job should be copied electronically to a specific location in their computer, personal or PFD-owned, and printed and stored in PFD's office or any other safe place.

#### 3.2. Electronic Documents

- a. Electronic documents refer to files created using Microsoft Office or any equivalent software/applications, PDF documents, pictures and video files and other electronic files not classified as email.
b. All important electronic documents created using a Microsoft Office or any equivalent software/applications, such as a contract, proposal, project activities/reports or any related documents deemed final, executory or in-effect should be saved in protected document format (PDF) to preserve its content and avoid changes to the document.

c. The length of time that an electronic document should be retained based on the content of the file and the category under the various sections of this policy. Any electronic document that PFD’s Board, staff or volunteers deem vital to the performance of their job should be copied electronically to a specific location in their computer, personal or PFD - owned, and printed and stored in PFD’s office or any other safe place.

4. Grants Records

<table>
<thead>
<tr>
<th>Record Type</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Original Grant Proposal</td>
<td>Permanent</td>
</tr>
<tr>
<td>Grant Agreement and subsequent modifications, if applicable</td>
<td>Permanent</td>
</tr>
<tr>
<td>Final grantee reports, both financial and narrative</td>
<td>Permanent</td>
</tr>
<tr>
<td>Financial reports as required in the grant</td>
<td>Permanent</td>
</tr>
<tr>
<td>All pertinent formal grant-related correspondence</td>
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</table>

5. Organizational Records

<table>
<thead>
<tr>
<th>Record Type</th>
<th>Retention Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organizational Records including, but not limited to, Articles of Incorporation, Bylaws, etc.</td>
<td>Permanent</td>
</tr>
<tr>
<td>Tax Registration</td>
<td>Permanent</td>
</tr>
<tr>
<td>Licenses and Permits</td>
<td>Permanent</td>
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<tr>
<td>Minutes of Board Meetings</td>
<td>Permanent</td>
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6. Payroll Documents

<table>
<thead>
<tr>
<th>Record Type</th>
<th>Retention Period</th>
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</thead>
<tbody>
<tr>
<td>Benefits (SSS, Philhealth, Pagibig/HDMF)</td>
<td>Permanent</td>
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<tr>
<td>Pay slips</td>
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7. Personnel Records

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<thead>
<tr>
<th>Record Type</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Curriculum Vitae/Resumes</td>
<td>5 years</td>
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8. Procurement Records

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<th>Record Type</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Procurement Records</td>
<td>5 years</td>
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9. Projects And Services Records

<table>
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<tr>
<th>Record Type</th>
<th>Retention Period</th>
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</thead>
<tbody>
<tr>
<td>Project Records</td>
<td>10 years</td>
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</tbody>
</table>

10. Tax Records

<table>
<thead>
<tr>
<th>Record Type</th>
<th>Retention Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tax Exemption Certificates</td>
<td>Permanent</td>
</tr>
<tr>
<td>Tax Records</td>
<td>Permanent</td>
</tr>
</tbody>
</table>
11. Sponsorship Records

<table>
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<tr>
<th>Record Type</th>
<th>Retention Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Endorsements</td>
<td>Permanent</td>
</tr>
</tbody>
</table>
APPENDIX K
FOR REFERENCE: PFD Donations Received Policy

DONATIONS RECEIVED POLICY

1. Purpose of Policy. The purpose of this policy is to establish procedures, guidelines and restrictions for the Philippine Federation of the Deaf, Inc. hereinafter referred to as the Organization, for acceptance of gifts and donations to the Organization.

2. Procedures:

INTERNAL CONTROL FEATURES

A. There must be pre-numbered Official Receipts.

B. Voided or cancelled Official Receipts must be properly marked “CANCELLED”.

C. Cash receipts should be deposited into PFD’s bank account no later than the next banking day. Receipts not immediately deposited should be kept in a cash box, which should be made separate from the Petty Cash box and should not be used to cover any disbursements.

D. The PFD Advisor, or in his absence the Fund Development Director, will issue and sign Official Receipts.

• The functions of receiving cash and issuing Official Receipts should be assigned to a person other than the Bookkeeper or accountant, such as the PFD Advisor and Fund Development Director.

E. All representatives of PFD conducting PFD business who may receive a donation to PFD for services rendered, sale of PFD goods, or as an outright gift will carry an “Acknowledgement Receipt Form”.

• This form will include the date, amount, donor name, contact, and address, and particulars/description, and will be signed by both the PFD representative receiving the donation and the donor.

• The PFD representative should deliver the donation to the PFD Advisor as soon as possible no later than one week from returning to NCR. The PFD representative may also scan and email the signed “Acknowledgement Receipt Form” to the PFD Advisor.
• The PFD Advisor will then issue an OR and mail the OR to the donor within one week. Note: The date on the OR will reflect the date that the PFD Advisor receives the donation, not the date the PFD representative receives the donation.

F. If there is a bank fee or deduction to the donation upon deposit, such details will be written in the OR. (IE: if a wire transfer donation of 1,000 PHP is made to PFD but a bank fee of 100 PHP is charged, the OR will be written for the balance of the actual donation 9,900PHP with an explanation of the charges against the donation).

G. Bank reconciliation will be completed monthly by a person other than the cashier responsible for the Petty Cash Fund. This duty of bank reconciliation should be done by the PFD Treasurer or bookkeeper.

RECEIVING
A. Upon receipt of cash and/or checks, the collecting officer (PFD Advisor) will prepare an Official Receipt (OR) in duplicate copy indicating the following:
  • Date of donation
  • Name of customer
  • Address
  • Particulars/Description of income (IE: donation, presenter honoraria, restricted funds donation for IDD, event sponsor, etc.)
  • Amount
  • Details of the check received (name and address of bank, check number, etc.)

B. In case of cash receipts received through wire transfers, especially in circumstances which require a FOREX between currencies, the bank credit advice from the donor should be compared to the amount actually cleared the bank and this is the basis for the preparation of an Official Receipt (OR).

C. The original copy of Official Receipt (OR) will be given to the donor and the other copy will be retained on the booklet.

D. PFD shall issue a Certificate of Donation (BIR Form 2322) to the donor.
DEPOSIT AND POSTING

A. Donations (cash or check) and gifts accepted by the Organization must be deposited to the bank account/s of, and used by the Organization. No cash or checks should be deposited in any personal account for any reason.

B. The PFD Advisor will prepare a bank deposit slip and will deposit the cash to the company’s authorized bank. Upon deposit with the bank, the PFD Advisor obtains a bank validated deposit slip.

C. The PFD Advisor will give the deposit slip to the PFD Treasurer/Bookkeeper to file chronologically.

D. The PFD Treasurer / Bookkeeper will record the Official Receipt (OR) in the Cash Receipts Book (CRB).

E. In-kind Donations are donations given that are not in monetary form such as equipment or service for free without money exchanged.
   1. The Organization shall issue a Certificate of Donation (BIR Form 2322) to the donor.
   2. In-kind donations must be recorded in the assets list of the Organization. Donated equipment should be tagged and numbered by the treasurer/bookkeeper.

F. Violations. Any suspected misuse or diversion of donations, both cash and in-kind, for purposes other than that of the Organization’s shall be investigated. The Board shall set up a committee, not including the person responsible, to investigate the violation and decide on actions to take based on the result/s.

Adopted by the Philippine Federation of the Deaf, Inc. on this 22nd day of March, 2015.
PFD PETTY CASH FUND MANAGEMENT PROCESS

### Approval of Funds

<table>
<thead>
<tr>
<th>Amount</th>
<th>Designation</th>
<th>Name of Approver</th>
</tr>
</thead>
<tbody>
<tr>
<td>5,000 and below</td>
<td>President</td>
<td>Rey</td>
</tr>
<tr>
<td>5,001 – 10,000</td>
<td>President</td>
<td>Rey</td>
</tr>
<tr>
<td></td>
<td>Gen. Secretary</td>
<td>George</td>
</tr>
<tr>
<td>10,001 – above</td>
<td>Full Board</td>
<td>Full Board</td>
</tr>
</tbody>
</table>

### Duties and Responsibilities

1. **Money handler**
   - Designation: PFD Advisor
   - Name of Personnel: Raphy
   - Can withdraw money (up to 5,000 PHP each) and write checks

   - Designation: Fund Developer
   - Name of Personnel: Rowella

2. **Recorder**
   - Treasurer: Ronito
   - Advisor: Jose

3. **Volunteer**
   - Volunteer: Volunteer or staff

### Petty Cash Fund (PCF) Control

1. The PCF will be set up in the amount of and not to exceed P5,000.00.
2. The PFD Advisor shall maintain control of the cash box and all petty cash transactions.
3. PCF is maintained with one person responsible for the fund.
4. PCF should not mix with other receipts or funds at any time for any reason.
5. PCF disbursements are evidenced by approved pre-numbered petty cash voucher (PCV) prepared in ink. Supporting documents/receipts are checked and stamped “PAID” at the time the fund is reimbursed. Any discarded receipts should be stamped “CANCELED” and filed appropriately.
6. Advances or reimbursements will be limited to amounts of P500.00 or less. If an employee requires funds in a greater amount, they should request for a company check.

7. Frequent and surprise counts of funds are made by internal audit or other authorized independent personnel. This means any member of PFD’s Board can ask the PFD Advisor to verify the PCF balance at any time.

8. For a list of particular expenses that can be disbursed through the PCF, please see the Allowable and Unallowable Expenses Policy

**NOTE:** All expenses should be duly receipted for and in the name of PFD and directly related to the operation of PFD.

**PETTY CASH FUND MANAGEMENT**

**Petty cash** represents a small amount of disbursements in the form of cash used for expenditures. It must be kept in a safe cash drawer or cash box. A main key to the drawer or box must be maintained by the petty cash custodian (PFD Advisor).

1. **STEP ONE:** Volunteer goes to Treasurer to get Petty Cash Voucher (PCV) form. Volunteer fills out PCV and signs it in the “Prepared by____” portion.
   **NOTE:** From this point, you will start new series of numbers. You can buy booklet of PCVs from National Bookstore for less than 100 PHP.

2. **STEP TWO:** Treasurer checks Volunteer’s expense reimbursement form, PCV and receipts. If they are accurate, Treasurer will sign the PCV in the “Checked by/Approved by _____” portion of the PCV. This shows Treasurer’s “endorsement/for approval of Volunteer’s report” for the amount of reimbursement to be forwarded to PFD Advisor. If the PCV and receipts are not accurate, Treasurer will give it back to Volunteer for correction. **TREASURER SHOULD NOT RECORD IN THE BOOKS ANYTHING AT THIS TIME.**

3. **STEP THREE:** Volunteer brings checked PCV and expense receipts to PFD Advisor.

4. **STEP FOUR:** PFD Advisor will check Treasurer’s verification signature on the PCV. If duly signed by Treasurer, PFD Advisor will now issue cash to Volunteer and will request her to sign in the “Received by ______” portion after she receives her cash reimbursement.

5. **STEP FIVE:** PFD Advisor will record the transaction in a log book. The information he records should include: 1) PCV number; 2) Date; 3) Amount of Payment; 4) “Signed by ____ (Volunteer Name)”. Volunteer also signs the log book. The logbook will help
PFD Advisor to monitor the remaining balance of Petty Cash Fund at any given time.

6. **STEP SIX:** PFD Advisor prepares a summary of Volunteer’s PCV as well as any other PCVs that have occurred from the current petty cash fund. **PFD Advisor will continue to collect PCV’s until the petty cash fund is at least 1,000 PHP and needs replenishment back to 5,000 PHP.** (Next will be the replenishment of Petty Cash Fund)

**REPLENISHMENT OF PETTY CASH FUND PROCESS**

1. **STEP ONE:** PFD Advisor fills out and signs the Request for Payment Voucher (RPV) in the “prepared by _____” portion of the form for an amount of petty cash to be replenished and gives the summary report, original PCVs and all supporting documentation (receipts and expense logs) to Treasurer.
   **NOTE:** Petty Cash on hand total cannot exceed 5,000 PHP.

2. **STEP TWO:** Treasurer checks PFD Advisor’s summary report to make sure it is accurate with the supporting documentation. If it is accurate, Treasurer will sign the RPV in the “checked by/approved by _____” portion of the RPV. This shows Treasurer’s “endorsement/support for approval” to move forward. (If it is not accurate, Treasurer gives the summary report and supporting documentation back to PFD Advisor for correction).

3. **STEP THREE:** Treasurer prepares the Cash Voucher (CV).
   **NOTE:** Treasurer holds all the Cash Vouchers.

4. **STEP FOUR:** PFD Advisor brings CV to President.

5. **STEP FIVE:** President checks CV and its attachments. If accurate, President will sign the CV in the “approved by _____” portion as well as sign the withdrawal slip. If it is not accurate, President will return the CV and its attachments to PFD Advisor for correction. Then forward it to Treasurer for checking and verification. Please note that BPI requires both the President and General Secretary to sign all withdrawal slips even if the amount is below 5,000 PHP.
   **NOTE:** Withdrawal slips to be held by President or PFD Advisor

6. **STEP SIX:** PFD Advisor gets the signed withdrawal slip from President and General Secretary and will go to the bank to withdraw money.

7. **STEP SEVEN:** PFD Advisor puts money in Petty Cash Fund. (Total should never exceed 5,000 PHP cash on hand).

8. **STEP EIGHT:** Upon receipt of the amount withdrawn from the bank, PFD Advisor will forward to Treasurer the duplicate copy of validated withdrawal slip and CV, RPV,
PCV and attachments.

9. **STEP NINE:** Treasurer/Bookkeeper enters the Cash Voucher (CV) into PFD’s books.

10. **STEP TEN:** Treasurer will file all PCVs with supporting document in PFD’s file cabinet.

**EXPENDITURES EXCEEDING PETTY CASH FUND**

1. **STEP ONE:** PFD Advisor fills out and sign the RPV in the “prepared by _____” portion of the form for an amount of expenditures in excess of petty cash fund with the supporting document (various receipts and invoices).

2. **STEP TWO:** Treasurer checks PFD Advisor’s RPV with the supporting documentation. If it is correct, Treasurer will sign the RPV in the “checked by/approved by _____” portion of the RPV. This represents Treasurer’s “endorsement/support for approval.” (If it is not accurate, Treasurer will return to PFD Advisor the RPV and supporting documentation to correct and have it checked by Treasurer).

3. **STEP THREE:** Treasurer prepares the Cash Voucher (CV).

4. **STEP FOUR:** PFD Advisor brings CV to President and General Secretary for approval if the amount is from P5,001 to 10,000; and to full board if P10,001 and above.

5. **STEP FIVE:** President and General Secretary checks CV and its attachments. If no errors encountered, President and General Secretary will sign the CV in the “approved by _____” portion as well as sign the withdrawal slip.

6. **STEP SIX:** PFD Advisor goes to the bank with signed withdrawal slip from President and General Secretary to withdraw money.

7. **STEP SEVEN:** Upon receipt of the amount requested in excess of petty cash, PFD Advisor will forward to Treasurer the duplicate copy of validated withdrawal slip, CV and RPV.

8. **STEP EIGHT:** Treasurer/Bookkeeper enters the Cash Voucher (CV) into PFD’s books.

9. **STEP NINE:** Treasurer will file all CV and attachments in PFD’s file cabinet.

Adopted by the Philippine Federation of the Deaf, Inc. on this 22nd day of March, 2015.
<table>
<thead>
<tr>
<th>Country</th>
<th>Address</th>
<th>Email</th>
<th>Phone (voice/text)</th>
<th>Notes/Recent Interaction</th>
<th>Suggested Amount to Ask</th>
<th>PFD Connection to Person</th>
<th>Notes on this Person’s Connection to PFD</th>
<th>Suggested Amount to Ask</th>
<th>Notes/Recent Interaction</th>
<th>Suggested Amount to Ask</th>
<th>Notes/Recent Interaction</th>
<th>Suggested Amount to Ask</th>
<th>Notes/Recent Interaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>New York Rochelle</td>
<td>-</td>
<td>23125-0822</td>
<td>December 12, 2015</td>
<td>USD 500</td>
<td>Former PFD project staff</td>
<td>De La Salle College of Saint Benilde</td>
<td>USD 500</td>
<td>Former PFD project staff</td>
<td>USD 500</td>
<td>Former PFD project staff</td>
<td>USD 500</td>
<td>Former PFD project staff</td>
</tr>
<tr>
<td>Philippines</td>
<td>Caloocan City</td>
<td>0998.123.9576</td>
<td>0998.123.9576</td>
<td>December 25, 2015</td>
<td>USD 1000</td>
<td>Former PFD project staff</td>
<td>De La Salle College of Saint Benilde</td>
<td>USD 1000</td>
<td>Former PFD project staff</td>
<td>USD 1000</td>
<td>Former PFD project staff</td>
<td>USD 1000</td>
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</table>

Sample Completed Template

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<tr>
<th>Title</th>
<th>First Name</th>
<th>Last Name</th>
<th>Company</th>
<th>Email</th>
<th>Phone</th>
<th>Address</th>
<th>Notes/Recent Interaction</th>
<th>Suggested Amount to Ask</th>
<th>Notes/Recent Interaction</th>
<th>Suggested Amount to Ask</th>
<th>Notes/Recent Interaction</th>
<th>Suggested Amount to Ask</th>
<th>Notes/Recent Interaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mr.</td>
<td>Patrick</td>
<td>Bryan Ablaza</td>
<td>De La Salle College of Saint Benilde</td>
<td><a href="mailto:patrick@phildec.org">patrick@phildec.org</a></td>
<td>0998.123.4567</td>
<td>Caloocan City, Philippines</td>
<td>December 29, 2015 – Meeting with PFD volunteers regarding future PFD projects</td>
<td>USD 10,000</td>
<td>Former PFD project staff</td>
<td>USD 10,000</td>
<td>Former PFD project staff</td>
<td>USD 10,000</td>
<td>Former PFD project staff</td>
</tr>
<tr>
<td>Mr.</td>
<td>Davin</td>
<td>Searls</td>
<td>Discovering Deaf Worlds</td>
<td><a href="mailto:davin@ddw.org">davin@ddw.org</a></td>
<td>-</td>
<td>Rochester, New York USA</td>
<td>December 25, 2015 – Video chat to greet for Christmas</td>
<td>USD 500</td>
<td>Former PFD project staff</td>
<td>USD 500</td>
<td>Former PFD project staff</td>
<td>USD 500</td>
<td>Former PFD project staff</td>
</tr>
</tbody>
</table>
APPENDIX N

<table>
<thead>
<tr>
<th>County</th>
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<th>Email</th>
<th>Date</th>
<th>Amount</th>
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</table>

Sample Completed Template

<table>
<thead>
<tr>
<th>County</th>
<th>Address</th>
<th>Email</th>
<th>Date</th>
<th>Amount</th>
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<tbody>
<tr>
<td></td>
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<td></td>
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</table>

Template: Donor List
APPENDIX O
SAMPLE: PFD Position Paper

Position Statement on House Bill 450:

An Act Declaring Filipino Sign Language as the National Sign Language of the Deaf and the Official Language of Government in All Transactions Involving the Deaf, and Mandating Its Use in Schools, Broadcast Media and Workplaces or the Filipino Sign Language Act

We the undersigned, fully support the House Bill: 450 The Filipino Sign Language Act and call on the Philippine government (House of Representatives and the Senate) for its support and immediate passage.

We demand the fundamental human right to language, culture, participation and self-determination for all Deaf Filipinos, in accordance with the Magna Carta for Persons with Disability, the Salamanca Statement and Framework for Action on Special Needs Education, the United Nations Declaration of Human Rights, and the United Nations Convention on the Rights of Persons with Disabilities.

We assert that the State as duty-bearer has the obligation to respect, protect and fulfill the rights of Deaf Filipinos as part of its commitment to national and international law, and as signatory to the United Nations Convention on the Rights of Persons with Disabilities (UNCRPD);

We acknowledge that Filipino Sign Language is the unique visual language of the Filipino Deaf community and their interpreters. FSL has a rich cultural heritage that dates back to the 16th century, and continues to be a vibrant, dynamic language to the present;

We recognize that the Filipino Deaf community is a linguistic and cultural minority with a right to choose and use Filipino Sign Language as its native sign language that it knows, understands, and identifies with the most.

We affirm that Deaf Filipinos have the right to preserve and promote the linguistic identity their own community and culture; and

We declare that the Filipino Deaf community has the right to full and effective participation, and should be included in the consultation and decision-making processes regarding sign language policies and programs, especially on all matters involving the Deaf.
We ask the State through the Department of Education, while it has already prescribed in their Special Education policy that Filipino Sign Language shall be the medium of instruction, this policy has yet to be carried out.

We call upon the State to enact barrier-free national policies that address the information and communication needs of Deaf people:

- Through the establishment of a nationally mandated and coordinated sign language interpreting system;
- At all levels of education, including considerations for training and evaluation of teachers, and employing affirmative action in the hiring of Deaf teachers;
- In access to the entire legal and judicial systems at both the national and local levels;
- In all public health facilities;
- In all public transactions, facilities and services; and
- Broadcast media.

We stand by the Filipino Sign Language Act and your vote to pass the Bill into law will be solidify our country's commitment to diversity, equality, and the Convention on the Rights of Persons with Disability.

Signatories ----

Organizations and schools --------
APPENDIX Q
FOR REFERENCE: How to Set Up Your Facebook Page

1. From your personal Facebook page, click on the arrow at the upper right corner then click “Create Page”.

2. On the “Create a Page” page, choose Company, Organization or Institution.

3. In the Company, Organization or Institution box, choose Non-Profit Organization and type your organization’s name, then click Get Started.
4. In the next pages, you will be asked to fill information about your organization and upload pictures.

5. After setting up your organization's Facebook page, you can now start posting on the page and inviting members, partners and other people to like your page.
APPENDIX R
FOR REFERENCE: Facebook Analysis

How to analyze your organization’s Facebook page using Page Insights

Page Insights is a feature included in Facebook that can help improve the way you reach to the people who like your Page (your fans). It helps analyze page posts and help in planning their next step to maximize page reach and visibility, thus increasing views and opportunities for other people to discuss your page and consequently, your organization.

Page Insights show:

- How many people like your Page and the number of new likes.
- How many people have seen your Page and your posts.
- How many people have clicked, liked, commented on or shared your Page or posts.

A. Parts of Page Insights

1. **Likes** – shows you where Page likes come from so that you can keep building your community.
   - Shows how many likes your page have
   - Shows how many people liked and unlike your page in a certain time period
   - Shows if like came from people who are already connected (likes your page) to your page
2. **Reach** - shows you how many people have seen your posts; how many liked, commented on or shared posts; and whether you reached them through advertisements or not.

- See how many people see your posts
- See how many people are engaged with your posts
- See the total reach of your page

In the **Post Reach** graph, you’ll see how many people saw your posts over a week, month or in a quarter (3 months). You can also select start and end dates to view how your reach has changed over time.

The **Likes, Comments and Shares** graph shows how many people engaged with your posts. Engagement means that someone clicked, liked, commented on or shared your post. When you click on the graph, you’ll see the post that
people engaged with. When you know which posts interest your audience, you can create more like them. Have a look at posts that have a lot of likes and comments, and post something similar. For example, a great way to get people talking is by asking questions such as “What’s your favorite dish on our menu?” or “Is anyone travelling during the holidays? We can deliver packages to where you’re going.”

The Total Reach graph shows the total number of unique people who saw any activity on your Page. When you know how many people you’ve reached and that your posts get people to like, comment and share, you can create better posts to make the people who like your Page more active.

3. Visits - helps you understand what people like about your Page, if they’ve talked about your business on Facebook and how they arrive at your Page.
   - Page and Tab Visits
   - External Referrals
In the **Page and Tab Visits** graph, you can view visitor activity over a week, month or in a quarter. You can also select start and end dates to view how much your reach has changed over time. This graph shows you how many times people visit your Page sections. If you see that some sections – such as your Timeline or Photos – aren't getting many visits, you can use that information to add content that people might find interesting.

The **External Referrers** graph shows how people find your Page from outside Facebook. When you have a Page on Facebook, someone can enter your business’ name or other info into a search engine, and they can find you just like any other website. This graph helps you to understand how a Facebook Page gives you a great online presence. Your Page, the business info you add to it and all of your content and posts are searchable on the web and help people to find your business.

4. **Posts** - helps you learn when the people who like your Page are online, what type of posts they respond to and what other successful Pages do to reach their customers.
   - When your fans are online
   - Types of Posts
   - Top posts from Pages you watch
   - All posts published
In the **When Your Fans Are Online** tab, you get a week’s view of when people who like your Page are on Facebook. Click any part of the graph to see the number of people and the time, so you can plan your posts when your audience is most likely to be on Facebook.

In the **Post Types** tab, you can see the types of posts you create, how many people your posts reach and how they respond, so you'll know what type of posts work best with your customers.
In the **Top Posts From Pages You Watch** tab, you can see post performance from other Pages you follow. Looking at the successful posts of businesses similar to your own can give you great ideas when creating new posts.

![All Posts Published](image)

**All Posts Published** shows your Page posts in chronological order, including the type of post, the audiences you targeted, how many people the post reached and post engagement. If you feel that a post didn't get enough engagement, just click the Boost Post button to reach more people. There's also a See Results button that summarizes a boosted post's performance.

**What does it mean?** Understanding when your audience is on Facebook and what Pages similar to yours are posting can help you to plan what you'll share with your audience. For example, if you see that your audience generally checks Facebook in the morning, you can schedule posts to appear during that time. And if you see that a similar Page is having success with posts that include photos or videos, you can create similar posts.

5. **People** - gives you information on your audience and the people you reach by gender, location and even language, so you can see the type of people who are engaged with your Page and where they come from.
   - Learn about people who like and view your page
The **Your Fans** tab helps you to understand the people who like your Page by age, gender, geography and language. The People Reached and People Engaged tabs show who has seen and engaged with your posts by the same demographics. And the Check-ins tab helps you to learn more about the people who have checked in to your business.

**What does it mean?** When you understand who your audience is, you can create content just for them. For example, if you have a business that sells to both men and women, but see that women engage with your posts more often, you can focus on the audience that’s actively engaging with you on Facebook.

Source: [www.facebook.com](http://www.facebook.com)
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