2025 Sponsorship Manual Revisions

2.2.4 Board Composition

Purpose: To clarify parameters of service for project staff members who serve on boards.

Given the nature of a shared responsibility to honor shared commitments to sponsored families and sponsors, where allowed by local law, Unbound headquarters generally recommends some international representation on the local project board. These representatives may be Unbound headquarters representatives, members of other project boards or teams, or other members of the Unbound international community. Current staff members should not be eligible for participation in the board of their own project entity. When possible, members of the sponsored community or former beneficiaries should be considered as part of the board composition. The count of Unbound headquarters representatives shall not constitute a majority of the local project board. Where there are 5 board member positions, Unbound headquarters will typically request 2 representatives. Where there are 7 board member positions, Unbound headquarters will typically request 3 representatives. The goal of the board composition is to provide adequate representation of the global Unbound community. The spirit of Unbound headquarters participation is to provide adequate representation, while not exercising control over board activities or decisions.

4.2.7 Henry Perez Professional Development Scholarship (new section)

Purpose: The new section describes the scholarship fund for project staff members.

The Henry Perez Professional Development Scholarship is intended to support the education and professional development of staff members at Unbound projects. The purpose of these funds is that they be used to invest in the professional development of project staff members. Each project is responsible for determining a fair selection process that includes diverse staff representation. The intention of the scholarship is not to replace the inclusion of staff development and training initiatives as part of the project budget and workplan.

Henry Perez was a project staff member in Peru who had a lifelong commitment to learning to continually improve his skills and made a positive impact on the world. These scholarships are intended to honor his memory and uphold his spirit as an active presence in Unbound communities around the world.

5.2.4.3 One Sponsored Member per Household (new section)

Purpose: To make the sponsorship program accessible to more families

Projects should not enroll more than one person in a household except in extraordinary circumstances. Sponsorship benefits and services should help the entire household, and limiting enrollment to one person per household allows the program to reach as many families as possible. Families with additional ongoing needs are also eligible for complementary programs. Exceptions can be made for special circumstances.

Please notify the Unbound headquarters regional team about people who are identified as special cases requiring an exception before submitting the records. Any exceptions should be reviewed regularly to ensure the household still qualifies for more than one sponsorship in the household.

5.2.5 Active Participation

Purpose: To prohibit withholding of sponsorship funds as punishment for non-participation. Sponsored families who do not participate may be retired, but they should not be kept in the program with funds held for non-participation.

Project teams should have regular interactions with sponsored members and their families to be certain that sponsored members are present, receiving benefits, and active in the program. Projects should retire a sponsored member if a sponsored member and/or family representative of the sponsored member have not participated in the program for more than 90 days. Any exceptions should be communicated to the Unbound headquarters regional team. Projects should not withhold sponsorship funds from families to promote active participation.

6.2.1 Communications between Sponsors and Project Staff

Purpose: To clarify that only direct communication with sponsors about program-related topics requires coordination with Unbound.

All project staff shall follow a professional code of conduct concerning their behavior or communications with an Unbound sponsor. ~~Project staff should not communicate directly with a sponsor except in special situations to arrange an individual sponsor visit (ISV).~~ In order to maintain good coordination and transparency, project staff and sponsors/donors should not make personal requests, interfere with the sponsorship program, or communicate directly about Unbound programs and business. In special situations or for emergency during ISVs, Unbound staff may provide contact information for a sponsor for a limited time of use. Communications between sponsors and project staff about Unbound programs and business must be sent through Unbound headquarters.

Reason for revision: Experience Integration now works with ISVs

6.4- Individual Sponsor Visit Policies

If the project encounters any situation in the planning or conducting of an ISV visit which the following policies and guidelines do not adequately account for, please be in contact with Integration ISV coordinators or regional team for consultation.

Reason for revision: Extending required timeline

6.4.3 Standard ISV Timeline

Sponsors are required to complete an ISV application at least 60-90 days before the proposed ISV date and submit to a background check (this is a search to attempt to reveal any criminal history and serves as a tool to assess whether a person should travel with Unbound).

6.4.3 Standard ISV Timeline

Unbound now charges a fee for all ISVs. This amount is assessed based on the number of sponsored friends and visitors joining the visit.

6.4.5.3 Possible Individual Visit Participants

Only approved visitors should be allowed to participate in a visit. Notify ISV coordinators by email or whatsapp if an unapproved visitor is brought to the ISV location.

6.4.5.4 Location & Transportation

The location of an ISV should be close enough to the sponsored family's home so the family can travel to the visit location, enjoy time with their sponsor and return home by nightfall. This places the burden of travel on the sponsor requesting the visit. ISVs are one day visits and should not require a sponsored family or staff to spend the night away from home.

6.4.5.5 Location of an ISV

ISVs should occur at a local project office. A meal or snack appropriate for the time of the visit should be included in the speed letter response. It is appropriate to go to a nearby restaurant as part of the visit.

It is not permitted that the visit take place at a hotel or sponsor's place of lodging.

6.4.5.7 Length of Visit

We recommend that visits start no earlier than 9am local time and are no longer than 6 hours.

2025 Financial Policies Manual Revisions

3.2.2 Donations from Sponsors Received by Project Office

Reason for revision: Checks do not need to be sent to Unbound Headquarters

- **For checks received, report them on the Portal and destroy them immediately.**
- **Refer to the correspondence manual for more information on how to register checks in the Portal.**

4.1.3 Program Expenses

Reason for revision: Adding Indirect Expenses

Program expenses refer to those expenses that are incurred in the direct and **indirect** delivery of benefits to sponsored members, the funds that are transferred to individual beneficiary bank accounts, and the costs of any benefits purchased directly by the project.

4.2.3.1 Petty Cash

Reason for revision: Expanding the amount in petty cash expenses and one approval instead of two

Petty cash refers to a small amount of money held for administrative expenses **between USD 20 and USD50**; replenished monthly by the amount spent and documented with receipts. The amount held in the project or subproject offices for petty cash purposes should be capped at **USD 300.**

If a higher cap should be necessary, the project must secure approval from Unbound-Headquarters. Approval should be renewed annually during the budget approval process.

All withdrawals from the petty cash account must be approved by **an authorized staff member** prior to the withdrawal and tracked in a cash log on a daily basis. Approved expenses from petty cash are typically intended for administrative purchases.

7.3 Authorizations

Reason for revision: Approval of administrative and program expenditures

- All assets or **program** and administrative expenditures that exceed a total purchase of USD 1,000 must be documented on the purchase authorization form and approved by the Unbound-Headquarters office.
- **If the size of the project is 5,000 beneficiaries and above and USD 1,000 implies a lot of requests of approvals, the project could ask the Unbound Head Quarters offices an increase of this amount, according to their real needs**.

7.6.2 Records Retention

Reason for revision: To increase internal control for employees' files

- **It is recommended that employment information be archived permanently.**

7.7 Local Financial Manual

Reason for revision: New policy to require a Local Financial Manual.

A local financial manual is essential because it provides a standardized set of guidelines and procedures for managing finances at the local level, often within government entities, nonprofit organizations, or small businesses.

Each project is required to have their Local Financial Manual, considering the Kansas Financial Manual guidelines and their own policies. The project must update their manual at least once a year.

2.4 Processing at Unbound-Headquarters

Reason for revision: Change in Unbound Headquarters annual photo process.

Once the photos have been submitted to Unbound headquarters, facial recognition software is used to review all photos and will notify the Child Services team if the photo is a duplicate of a previous photo, or if it does not appear to be the same person. Then a member of the team reviews the photo to approve it or decline it.

A substantial portion of photos will not undergo manual review by a headquarters staff member. Given these considerations, it is important that project staff review photos before submission for certain aspects of photo content, such as clothing featuring profanity or inappropriate imagery, identifying information, or attire considered inappropriate and ensure that photos meeting these criteria are not submitted.

3.4.2 Content Requirements

Reason for revision: Change in language guidelines for video messages

1.1.1.1 Language preferences

Sponsored members are encouraged to speak in the language in which they are most comfortable. If the sponsored member/guardian does not speak English, the following options are available:

Interpretation: an interpreter may appear in the video. The sponsored member or guardian should speak a few sentences in their local language, then the interpreter should alternate speaking in way throughout the video as opposed to having the sponsored member/guardian share their entire message at one time, followed by the entire interpretation in English.

Subtitle translation: The sponsored member/guardian may record the entire video in their local language. Once the video is uploaded to Portal, the subtitles can be edited to English. (See Portal User Guide for more information about editing subtitles.)

1.1.2   6.2.2 Youth in Change of Sponsor

Reason for revision: process change for updating future retirement dates on exit pages that have already been submitted to Unbound headquarters.

 To indicate Option 2, please submit an exit page through Portal and change the retirement date to indicate the future date that the youth will complete their education. Please make sure that future retirement dates are set before the 15th of the month, to support Unbound headquarters processing.

 If the future retirement date needs to change after the exit page has been submitted, please email your Regional Project Specialist with the new retirement date.

2.3.1Individual Community Service Plans

Reason for revision: Added the sentence for clarification regarding community service plans done outside the sponsored community.

Community Service plans that will take place outside of the sponsored community should be with another confirmed organization or institution that can sufficiently supervise participants.

5.7 ANNUAL PROGRAM REPORT – PAGE 2

Reason for revision: Addition to the reporting. New column for Number of years the scholars have been in the Scholarship Program.

	Sub	Scholar's Name	Gender M/F	Child ID	Country	Level of Education	Course of Study	Number of Years in Scholarship Program	Actual Amount Received USD
1									
2									
3									

1.4.1 Program Reserve

Reason for revision: Added the policy to provide guidance for extra AC funds, errors in transfers or cases of non-viable initiatives.

If a funded Agents of Change initiative is unable to be implemented or no longer requires the AC grant received from Unbound, the project must notify the Regional project director immediately for instructions. If advised to retain the fund, the project may accumulate a program reserve designated for Agents of Change. This should be accounted for and tracked on the Cash Reserve Report. These funds may be utilized as needed to supplement funds of other Agents of Change initiatives that due to inflation, cost of materials/labor changes, or failed local fundraising, are facing financial barriers to completing an already approved initiative. These funds are not to be used for other programs. Finally, Agents of Change Program reserve shall not be used to pre-fund initiatives submitted to KS, or to fund additional initiatives without authorization of the selection committee and Regional project director.

4.1 Timeline

Reason for revision: Addition of the timeline on outcomes reporting to provide greater organization and accountability for monitoring of initiatives and ensure timely feedback to donors.

Outcome reporting will **only** be requested on initiatives that were funded directly by individual or group donors. Portal will indicate which initiatives will require outcome reporting. When an initiative is marked as funded, an estimated end date for reporting is calculated based on the estimated time needed to complete it provided in the Basic Info section.

For example, if an initiative is funded on 1 April and the estimated time needed to complete in days is 60, the estimated end date is 1 June, or 60 days after 1 April. On the estimated end date, if the initiative is in Funded or Initiative in Progress status and the initiative was funded by an individual grantor (not from the general Agents of Change Fund in Kansas, which is funded from smaller AC donations), it will automatically change to Final Outcomes Requested to indicate that the final outcomes are due. Outcomes Report Estimated Due Date should be used as a guide that allows 60 days after estimated completion of the initiative. Prompt reporting will help to make sure that group accomplishments are captured and donors receive timely feedback. Final outcomes are not required for initiatives funded from the general AC fund, but they can be managed locally if the project would like to complete them for their own records or project level reporting.

2025 Vocations Manual

There were no significant revisions this year.

2025 Awareness Trip Manual Revisions

Reason for revision: Clarified sponsored member protection policies and procedures during ATs.
4.1.1 - Protection of Sponsored Friends during Visits with Sponsors Updated the policy to specify the presence of Unbound staff and family representatives during all sponsor-sponsored friend interactions, emphasizing the two-adult rule and outlining situations requiring immediate intervention. Addition: Have sponsors travel on one bus, while sponsored friends and their families travel in another. Having separate modes of transportation will eliminate the need to supervise the interactions of sponsor and sponsored friends while on the road.
Reason for revision: Enhanced details for planning and managing itineraries to prioritize traveler well-being.
4.2.2 - Time Management Added guidelines on accommodating travelers' physical needs, including time for rest, restroom breaks, and managing altitude-related challenges.
Reason for revision: Updated process
4.2.4 Materials for the Trip Participants *Sponsors who live outside of the United States will receive a digital packet and will not have their nametag leaving the airport. The traveling staff from headquarters will bring it with them.
Reason for revision: Orientation Guide was added to the Appendix for easier reference
4.2.5 Orientation for the Trip Participants Participants must receive orientation before meeting sponsored members and visiting communities. Schedule it early in the trip to ensure maximum attendance, such as on the day of arrival or during the first group meal. Staff should review the orientation individually with those who miss the group session. Refer to the Appendix for the Orientation Guide.
Reason for revision: Updated Section
4.5.2 Hygiene before meals **Encourage travelers to regularly wash their hands with soap and water for at least 20 seconds, especially after being in a public place or after blowing their nose, coughing, sneezing or before eating. or use alcohol-based hand sanitizers, especially before eating.** Provide alcohol-based hand sanitizer and/or soap and water throughout the trip and especially before meals.

Washing hands with soap and water is best. We suggest designating someone on staff to remind travelers to wash their hands before meals or to circulate the group offering hand sanitizer prior to eating.

Reason for revision: Clarify policy

4.8 Gifts for the trip participants

The total amount spent on gifts for an awareness trip should **not exceed twenty dollars ($20 USD) per traveler**, for trips that involve more than one project speak to a trip coordinator