



UNBOUND®

# **Unbound Correspondence Manual**

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# Introduction

Within the Unbound program, “correspondence” refers to those aspects that relate to the relationship between a sponsored member and their sponsor. These relationships are central to the mission of Unbound.

*“A relationship of mutual respect between sponsor and sponsored person is central to Unbound’s mission. Relationships of mutual respect require acceptance of the equality of all persons. Equality of all persons comes from their essential dignity and is reflected in relationships that are without religious or other prejudice, that are multicultural, reciprocal and empowering.”* (Core Value 4 – Respectful Relationships)

*“As a result of Unbound, there will be a prophetic community of compassion in which people commit to personal relationships that bridge national, cultural and economic divides... Unbound’s highest priority is the personal relationship between sponsored persons and sponsors who are committed to a one-to-one relationship of mutual respect and support.”* (Unbound Ends Statements)

Authentic, responsive correspondence helps to strengthen relationships between sponsored members and sponsors and impacts **sponsor retention** and growth of new sponsorships.

This correspondence manual details the policies and procedures surrounding correspondence in Unbound. It is essential for staff who work with correspondence to be familiar with these policies and procedures, as well as with the appropriate functionality in Portal (described in the Portal User Guide).

# **1 Family Records**

A family record is an individual record for each Unbound member that is entered and maintained in Portal. Family records serve two purposes:

1. Unbound headquarters uses this information to create profiles to share with potential and existing sponsors.
2. Projects can use family records for their own record-keeping purposes.

## **1.1 Family Record Use**

### **1.1.1 Unbound Headquarters Use**

Projects must submit a family record to Unbound headquarters for each person available for sponsorship. The family record is used to create a story that provides potential and current sponsors with basic information about the individual, their family and life. The story formed from the family record is the first step in introducing the sponsor to their sponsored friend and forming their sponsorship relationship. Please see the appendix for an example of this story compared with a family record as submitted in Portal.

The profile developed from the family record is often the only information that a potential sponsor sees when making the decision to sponsor an individual. Potential sponsors have many profiles from all over the world to select from and they use the information in the family record story to make their final decision. It remains the only information a new sponsor has until regular correspondence is established.

It is essential, therefore, that the family record provides a complete, detailed description of the child or elder, his or her life situation, personal qualities, future plans, etc.

### **1.1.2 Project Use**

The family record can serve as a tool for projects to track information for sponsored members. In addition to the standard fields that are available, projects can create custom fields based on their needs.

***Please see the Portal User Guide for more information about creating and updating family records in Portal.***

## 1.2 Records Allotments and Submission

### When should a record be created?

Family records should be created and submitted to Unbound headquarters when submitting new individuals as candidates for sponsorship (replacement or growth records).

### When should a record be updated?

Unbound headquarters may request that a record be updated if new information is needed for a current beneficiary (update requests). Projects may also update records as needed whenever updated information for beneficiaries is available.

### 1.2.1 Replacement/Growth Records

- Unbound headquarters allocate replacement and/or growth records to each project for a six-month period (January-June and July-December). These allocations will be communicated to projects prior to the six-month period.
  - **“Replacement”** records refer to records that may be submitted for beneficiaries who are retired within the time period. Projects may not send replacement records for non-compliance retirements (retirements initiated by Unbound headquarters for no message, no photo, or no update request).
  - **“Growth”** records refer to records that may be submitted in addition to the number of individuals that are retired.
  - **“Adjustment”** records refer to records that were transferred from those allotted during previous semesters but not submitted during that time period due to external or unexpected circumstances. An adjustment can also be negative if it is necessary for a project to submit fewer replacement records than the number of retirements that are processed in each six-month period. Adjustments can also be made (with the guidance and approval of the Regional Team) for projects who can benefit from receiving records prior to large numbers of retirements.
- Replacement and growth records may be submitted for the following (contact your Regional Project Specialist for exceptions to the age requirements in special circumstances):
  - **Children** 0-12 years of age
  - **Elders** aged 60 or older.
- Central office project staff should regularly monitor the records allotments information in Portal to know how many records can be submitted for the 6-month period at any given time (see the Portal User Guide for more information).
  - Records should be submitted gradually throughout the semester as they are completed and as records become available. This allows Unbound headquarters to process records efficiently and to present potential sponsors with records from all geographic regions, ages and genders at sponsorship campaigns.

## 1.2.2 Record types

There are three types of family records in Portal: Child, Youth, and Elder. Please see the guidelines below to determine which type should be used:

<b>Beneficiary Category</b>	<b>Family Record Type</b>
Children 0-12 years	Child Family Record
Youths 13 years and older	Youth Family Record
Elders age 60 or older	Elder Family Record

### Special needs

An individual with special needs is defined by Unbound headquarters as someone who will not be able to care for him- or herself long-term. Projects are welcome to submit records for these individuals as long as the individuals are within the normal age range for a new child or elder. Exceptions can be made for special cases; however, these exceptions will be considered based on whether sponsorship will help the individual achieve a specific goal. Having special needs alone does not constitute a reason for an exception.

When updating the record for a sponsored member with special needs, it is required to include updated goals for the sponsored member.

<b>Beneficiary Category</b>	<b>Family Record Type</b>
Special needs children Ages 0-21 years	Child Family Record
Special needs elders Ages 21 years or older	Elder Family Record

## 1.2.3 Record Details

### 1.2.3.1 Entering Names in the Family Record

The name that is entered on the family record should be the complete name of the individual. The following instructions explain how names should be entered on family records to help the sponsors understand the name of their sponsored friend.

#### **First Name**

This is the first given name of the person.

Example 1: Nelson Rolihlahla Mandela  
(first) (middle) (last/surname)

Example 2: Bala Likhitha Chandana Gopu  
(first) (middle) (last/surname)

Please, do not use an initial (ex. N. Mandela) for the first name.

### **Middle Name**

Not everyone has a middle name, and it is acceptable to leave this space empty if the person does not have a middle name. If the person has a middle name, please type their complete middle name and not an initial.

### **Surname / Last Name / Family Name**

Most sponsored members have at least one surname (also known as a last name or family name), though some may have more than one surname or no surname. In any case, it is important that the last name of the child or elder appears correctly on the family record. **Please do not abbreviate or use an initial for a surname.**

Example 1: **A person with one surname.**

Nelson Rolihlahla Mandela  
(first) (middle) (last/surname)

Example 2: **A person with two surnames.**

Bala Likhitha Chandana Gopu  
(first) (middle) (last/surname)

Example 3: **A child with no surname.**

John  
(first) (middle) (last/surname)

The names of sponsored members appear in the Unbound headquarters database and in Portal as they are entered on the family record. Surnames are used for record-keeping purposes only and will not be shared with the sponsors. On Portal reports, the names are sorted and alphabetized by the surname. If the person does not have a surname, he/she appears on the list according to his/her first name. If the sponsored member has two surnames (for example, Chandana Gopu), his/her name will be alphabetized by the first surname.

### **Likes to be called**

This field should only be completed if the person has a nickname that he/she is commonly called by many people, even outside of the family; for example, if Francisco goes by Paco or if Mohammed Sadam is commonly called Sadam. The “likes to be called” name is printed on the record and photo that are shared with new sponsors (for example, “Francisco (Paco)”), so we request that you not include names that are only used by the family (for example, “Skinny” or “Little princess”).



If the person is always called by the first name listed on the record, the “likes to be called” field should be left blank. Listing the first name in this field will cause a duplicated name to display on the photo and family record that sponsors see; for example, “Angela (Angela).”

### 1.2.3.2 Photos submitted with Family Records

A current photo must be included with every new family record. Photos should adhere to the guidelines found in the “Annual Photos” section of this manual and should be no more than three months old at the time of record submission.

### 1.2.3.3 Additional Details

The family record is designed to tell a story. The spaces provided for additional information about the individual are important and should be filled in completely with as much detail as possible (within the character limit of the field). Unbound headquarters uses the information provided to create paragraphs for potential sponsors to read. If there is not enough unique information about the individual, all the stories seem the same.

Please pay careful attention to the fields described below. These fields allow the story of the individual to be told and for the sponsor to learn about his/her unique interests and personality.

**“Additional information (personality etc.)”:** This field should be used to describe what makes the individual unique. Some ideas of things that could be shared for each age group are:

- Babies and toddlers: For infants and very young children, share observations about their emerging personality and behavior provided by their caretakers.
  - What skills are they currently developing?
  - How do they interact with others?
  - Are they outgoing or shy?
  - Are they relaxed or energetic?
  - What makes them smile?
  - What calms them when they are upset?
- School-aged children: For children who can respond to questions, allow them to share their interests and personality directly. If the child is shy or otherwise unwilling to share, observations provided by caretakers are acceptable.
  - What are their favorite qualities about themselves?
  - Are they outgoing or shy?
  - Are they relaxed or energetic?
  - What games do they enjoy playing?
  - What do they like to do when spending time with friends or family?
- Youth: Teenagers should provide their own response to questions related to their personality and interests.
  - What adjectives would they use to describe themselves?
  - How do they enjoy spending free time?
  - What do they like to do when spending time with friends or family?
  - What is their favorite thing about themselves?
  - What are their dreams for the future?

- Elders: Elders should provide their own responses to questions related to their personality and interests.
  - Are they single, married, widowed?
  - Do they have any children? If yes, how many sons and/or daughters?
  - Do they have any grandchildren? If yes, how many?
  - Were they able to pursue an education?
  - What makes them proud?
  - What lessons have they learned over the years that they would like to share with others?
  - What challenges have they faced and/or overcome?
  - Do they have opportunities to socialize with friends and family? If so, what do they enjoy doing together? What is their favorite meal to prepare or eat?

**Education:**

- Child (12 or younger): Focus on the child's academic and non-academic interests. A child is not expected to have an established career path in mind, but if they have any hopes for the future, please include them. Additional valuable information might include the child's social experience (For example, do they play with friends at recess? Do they help their teacher collect papers?) Or a description of the schooling environment (such as the building's condition, the curriculum quality, etc.).
- Youth (13 and older): Focus on the youth's higher education plans and/or career goals. If the youth is not currently attending school, please explain why and when they plan to return. Even if a youth is out of school at the time, please share favorite subjects, career goals, and other education information as applicable.

**Health:**

This field should describe the applicant's overall health. If the health of the applicant is listed as good, there is no requirement to write in the health comments section. There is no need to include common illnesses such the cold, flu, cough, wearing glasses, etc. If the health of the applicant is fair, provide a description of his/her ailments and how they are managed. For example: "The child has asthma and uses an inhaler" or "The elder is diagnosed with diabetes and high blood pressure". If the health of the applicant is poor, please be specific when providing details about his/her ailments or disabilities. For example: "He has cancer and is receiving chemotherapy."

**Special needs records:** If the health of the applicant is classified as special needs, then it is important to include detailed responses to the following questions in Portal in the initial record and in any subsequent updated records:

- Does this person have any limitations that will prevent them from fully caring for themselves long-term?
- How would you describe the specific limitations and challenges he/she has according to the professional psychological report or medical diagnosis?
- Has the family considered an educational plan or occupational therapy that will help this person to become self-sufficient? If so, what is the plan?
- How is this person and family going to benefit from the sponsorship program?

## Examples of high-quality special needs information:

### Special needs

Does this person have any physical or mental limitations that will prevent him/her from fully caring for him/herself long-term?

Yes  No

Describe specific limitations or challenges

The child is having loco motor disability. She has limitations in mobility. She gets pain if she walks or stands for a long time. She is dependent on her mother for any assistance. She is lacking in gross motor skills.

Have you considered an educational plan or occupational therapy that will help him/her to become more self-sufficient? If so, describe the plan.

The child needs physiotherapy to improve her gross motor skills and occupational therapy to improve her fine motor skills. Special equipment is suggested for her mobility purpose.

How will this person and family benefit from the sponsorship program?

The child can able to get special aids and therapies through the sponsorship program.

### Special needs

Does this person have any physical or mental limitations that will prevent him/her from fully caring for him/herself long-term?

Yes  No

Describe specific limitations or challenges

The child was born with muscular dystrophy, which prevents him from moving, does not walk, does not speak.

Have you considered an educational plan or occupational therapy that will help him/her to become more self-sufficient? If so, descri

The mother takes him each month to the Telethon where he receives therapy.

How will this person and family benefit from the sponsorship program?

The contribution can be used for transportation payments because the clinic is far from Ocotepaque

## Special needs

Does this person have any physical or mental limitations that will prevent him/her from fully caring for him/herself long-term?

Yes  No

Describe specific limitations or challenges

Due to the left lateral hemiparesis, she has problems to bathe, get dressed, move quickly and talk

Have you considered an educational plan or occupational therapy that will help him/her to become more self-sufficient? If so, describe the plan.

She is currently in physical, audition and occupational therapy with a physiotherapy specialist

How will this person and family benefit from the sponsorship program?

It would be an aid for the displacement to the therapies in terms of financial aid (health expenditures), orient for the development of school skills

**Examples of Special Needs Information that Needs Improvement.** They do not provide much or any information about what long-term challenges the individual will have or how their conditions are present in their daily life.

## Special needs

Does this person have any physical or mental limitations that will prevent him/her from fully caring for him/herself long-term?

Yes  No

Describe specific limitations or challenges

Child with Down Syndrome

Have you considered an educational plan or occupational therapy that will help him/her to become more self-sufficient? If so, describe the plan.

He needs therapies

How will this person and family benefit from the sponsorship program?

Therapies and nourishment

## Special needs

Does this person have any physical or mental limitations that will prevent him/her from fully caring for him/herself long-term?

Yes  No

Describe specific limitations or challenges

The girl was diagnosed with mild mental retardation and multiple genetic malformations.

Have you considered an educational plan or occupational therapy that will help him/her to become more self-sufficient? If so, describe the plan.

The girl takes physical rehabilitation therapies.

How will this person and family benefit from the sponsorship program?

For the passages of the mobility for the hospital, to pay the expenses of the therapies and medicines.

**“What makes this family unique?”:** This field should be used to describe what makes this family unique. Some ideas of things that could be shared are:

- Traditions:
  - Do they observe any religious, cultural, or familial traditions?
  - How are birthdays and holidays acknowledged in the home?
  - Do they worship or pray as a family?
  - Do they prepare certain meals for special events?
- Values:
  - What positive character traits or behaviors are displayed and/or encouraged in the home?
  - What expectations have the parents or guardians set for their children?
- Daily life:
  - How does the family divide household labor?
  - Are there any tasks that they perform together (such as gathering firewood)?
  - What is their typical routine?
  - Do the parents or guardians help the children with their homework?
  - Do older siblings or other family members assist with childcare?
  - Do they share leisure time? If so, what activities do they enjoy as a family?
- Relationships:
  - How do the family members relate to each other?
  - Do they communicate openly?
  - Do they treat each other with kindness and respect?
  - How do they manage conflict when it arises?
  - Are they close with extended family, such as grandparents or cousins?

**Source of income:** Some example questions and occupations are included below:

- Is the type of job permanent, temporary or contractual?
- Is the income fixed or varied?
- What are the typical tasks completed for work?

Farmer/~~Peasant~~ Small-scale farmer:

- What types of crops do they cultivate?
- Are they self-employed farmers, or are they employed by someone else?
- Do they own the land or rent the land?

Day Laborer:

- What type of labor work is done? Provide details about the daily work that they do.
- Are they self-employed, or are they employed by someone else?

**Living Conditions drop-down menus:** This section provides a pre-generated word or phrase that best describes the applicant's living situation. It is important to use these drop-down menus in the following sections:

- Walls
- Floor
- Roof
- Cooking
- Sleeping

**Water supply: please provide more than a Yes or No response.** For example, provide more details like, “They get water from a local aqueduct.”

**“Additional information about the living situation and/or community”:** This field should be used to describe what makes their situation unique. Some ideas that could be shared:

- Home:
  - Is the home rented or owned?
  - Do they live with extended family? If so, does the family have a separate living space? Are expenses like food and utilities shared?
  - Does the home have sufficient space for everyone that lives there?
  - Do they have separate spaces for sleeping and cooking?
  - Are the furnishings adequate?
  - Is the home structurally sound?
  - Are there issues due to poor insulation or ventilation?
  - Do they have access to a latrine?
- Community:
  - What is the quality of the infrastructure, such as roads, utility services, etc.?
  - How far is the community from the nearest healthcare provider or market?
  - How many schools are in the area, and how many grade levels can be completed without traveling to another community for school?
  - How do they travel into or out of the community? Is public transportation accessible?
  - How do neighbors typically interact with each other?
  - Does the community have communal spaces like parks?
  - Are there any festivals or traditions observed in the area?
  - Does the family feel safe in their community?
  - Are there many employment opportunities available? What types of work are most common in this area?
  - What is the typical climate? Does it affect the family's daily life or economic opportunities?
  - Is the family from the area? If not, what brought them to their current community?

**“Child/Youth's Unbound goal” and “Family's Unbound goal”:** These fields should be used to describe the goals that the sponsored member and his/her family will work to accomplish through their participation in the sponsorship program. Goals should be defined in a way that is:

- Specific- The goal should be clearly defined.
- Measurable- Progress towards the goal should be able to be monitored.
- Attainable- The child/youth or family should be able to set small steps or achieve progress towards the goal, even if the final goal may not be immediately achievable.

Goals can change over time, and it is fine if the final goal of the sponsored member/ family does not match the original goal.

## 1.2.4 Consent

Sponsored families must have a choice on whether their images and stories appear in Unbound publications and promotional materials, including the Unbound website and other channels. The Unbound website is used in both communication efforts to current sponsors and invitations for sponsorship with new sponsors.

It is important that each family understand how their information may be presented and document their consent choice on the consent form. All new sponsored families joining the program must have this consent documented.

If a family gives consent, we will be able to include their photograph or story in Unbound materials in print and online for communication and promotional purposes concerning the program. For those available for sponsorship, the consent of a family will allow us to make their photograph (a head and shoulders image of the sponsored member) and a description available on the Internet for new sponsors to choose from.



Child ID: 1038877

### Meet Emma

Ems finds satisfaction in performing household chores. Despite the adversity she has faced, including the loss of her husband in an accident last year and her son seven years ago, her determination to lift her family out of poverty remains unwavering. Ems is in good health and lives with her three children, all of whom have their own families.

Goes By: **Ems**

Age: **64 years old**

Country: **Philippines**

Birthday: **October 21st**

Language Spoken: **Filipino, Tagalog and English**

Time Waiting: **9-12 months**

[Sponsor Me](#)

[About Me](#) ▾

[About My Home](#) ▾

These descriptions are not intended to serve as an online relationship-building mechanism. Unbound prohibits direct communication between sponsor and sponsored. Also, when a family gives us their consent, it is not a guarantee that they will be featured on the Unbound website. Only a selection of available children, youth, or elderly people will be available online at a given time.

Unbound will also use traditional sponsorship acquisition efforts, such as church appeals, for those who give consent.

The descriptions exclude surnames and the village or community where the individual lives. The descriptions seek to share the family in a dignified way and avoid saying anything that might make a youth or family feel exploited. Unbound headquarters will attempt to exclude anything that could cause harm to the dignity of the child, youth or their family.

Each family is free to decline consent for inclusion in publications, promotional materials, or online acquisition efforts. This does not impact the eligibility of the family for sponsorship. When a family declines consent, Unbound will not post the profile online but will continue to use their photo and family profile in traditional in-person sponsor invitation efforts.

Each family awaiting sponsorship must be given the opportunity to provide or decline their consent, and this choice should be documented on the family record in Portal and on a consent form (see Appendix) to be kept at the project. If a family chooses to give consent, they should sign the consent form. If a family chooses to decline consent, they are not required to sign the consent form. However, in either case, the Unbound staff member needs to sign the consent form and note the family's choice on the family record in Portal.

### 1.2.5 Declined records

Projects should regularly monitor the report "Family records declined by Kansas" to see if any records submitted to Kansas were declined. These records need to be reviewed and submitted back to Kansas before they can become sponsored.

## 1.3 Reinstatements

If a project would like to reinstate a sponsored member who was previously retired from the program, they must submit the following by email to the Regional Project Specialist:

- **Child/elder reinstatement request form:** This form can be found in the appendix and on Portal and should explain the reason the sponsored individual was retired and why the individual should be reinstated.
- **Updated family record:** This must be in Microsoft Word or PDF format and cannot be submitted through Portal (templates can be found on the Portal home page).
- **Updated photo:** This should meet the photo guidelines described in the Annual Photos section of this manual.

The reinstatement form verifies that the returning individual satisfies all the eligibility requirements of the sponsorship program, is capable and ready to participate in the project and subproject and can fulfill all necessary correspondence responsibilities.



## 2 Annual Photos

Photos are an essential component of sponsorship relationships. Annual photos allow sponsors to see their sponsored friends as they mature and allow the sponsors to “know” their sponsored friend in a way that cannot be expressed through messages. The annual photo is also one of the ways that Unbound can verify that sponsored individuals are still in the program.

The initial photo of an individual is often the first thing that a potential sponsor sees when considering sponsorship. High-quality photos that show an individual’s personality play a role in whether an individual will be chosen for sponsorship.

### 2.1 Annual Photo Requirements

All individuals (sponsored, change of sponsor, and available) are required to submit an updated photo every year. Only beneficiaries in “Benefits through” status are not required to submit an annual photo.

Annual photos must be submitted to Unbound headquarters within 3 months of the date that they were taken.

**Please do not submit more than one photo per year for an individual.** This increases processing time and costs.

The following tools in Portal can help you to manage when photos are due for each beneficiary:

- **“Next Photo Due”:** this can be found on the Search page and on the Beneficiary List report and indicates the date that the next photo is due for each beneficiary. This date is calculated based on the following:
  - For all beneficiaries and available persons, the “Next Photo Due” date is calculated by adding 12 months to the date the most recent photo was received.
    - For example, if the last photo received date was 2 September 2024, the “Next Photo Due” date is 2 September 2025.
  - If a photo is declined by Kansas, the “Next Photo Due” date is calculated by adding 4 months to the date the photo was declined.
    - For example, if the last photo received was 2 September 2024 and the photo was declined on 10 September 2024, the “Next Photo Due” date is 10 January 2025.
  - If the first photo is declined and a subsequent photo is uploaded and declined by Kansas, the next photo due date will remain as the date the first photo was declined + 4 months.
    - For example, if a photo is declined on 10 January 2025 the photo due date would become 10 May. If a new photo is uploaded and declined on 3 February, the next photo due date will remain as 10 May 2025 until a photo is uploaded and accepted by Kansas.

**Photo Timeline**

0	1	2	3	4	5	6	7	8	9
Photo Received									
10	11	12	13	14	15	16			
	Photo Due	Photo Due	Late Photo	Retirement Warning	Retirement	Appears on Retired List			

- Photo Reminders:** Beneficiaries and available persons who have not submitted a photo in 11 or 12 months will appear on the Photo Reminders report under the “Next Photo Due” category. The sponsored member will appear in “Late Photo” after 13 months, and in “Retirement Warning” after 14 months. After 15 months, the person will be retired from the sponsorship program for ‘no photo.’ It is important to review this information regularly.

## 2.2 Annual Photo Guidelines

### Photo guidelines:

- Photographs may include the individual’s entire body **OR** can be from the waist-up (head, shoulders and torso): whichever is more natural and shows the individual’s personality.



**OR**





OR



- Photos must be taken in a portrait (vertical) orientation, not landscape (horizontal).



- Encourage sponsored members to smile whenever possible. Smiling in photos is common where many sponsors live. If a sponsored individual does not have a pleasant expression or a smile, some sponsors may become concerned that the individual might be ill or unhappy.
- Backgrounds that show the area where the sponsored member lives are preferred. Photos taken in a studio are not permitted.
- Photos should not have borders.
- Digitally modified photos will not be accepted.
- If it is necessary to crop a photo, be sure to maintain the original dimensions or the photo may appear altered.
- Each photo should show only the sponsored individual. If a sponsored child, youth or elderly person is unable to appear alone in a photo due to age or special needs, a family member or another caregiver may appear in the photo.
- The individual should be modestly dressed without offensive words, pictures, signs or gestures in the photo.



- Hand gestures can have different meanings in different cultures. The only acceptable hand gestures are the peace sign (with the palm of the hand facing the camera only), thumbs up or heart hands, as shown here.



- The individual in the photo should have their eyes open and should not wear sunglasses (except for individuals who are blind).
- Please omit seasonal items, such as Christmas trees, or sponsor gifts from the photo because these photos may be used to find new sponsors when necessary. It is acceptable, however, for an individual to hold items such as flowers, fruit or vegetables, pets, etc.
- Photos should be taken at the same level as the individual. The photographer should not be at an elevated or lower ground than the individual.
- An individual's face should be clearly visible. When taking photos, please be sure their faces are not covered by shadows. In the photos below, it is difficult to see the faces of the children:



- Photos should not include identifying information such as an individual's full name, the name of their hometown or the name of their school (such as certificate, diplomas or nametags).
- If it is not possible to capture a dignified photo of an individual due to health issues, please consult with your regional specialist to determine whether an alternative photo can be accepted.

## 2.3 Annual Photo Submission

### 2.3.1 Required Parameters for photos uploaded by project

The digital photo processing system at Unbound- Headquarters is highly automated to allow a small number of staff members to process many digital photos each year. Families can upload their own photos directly through a link sent from Portal or projects can take and upload the photos. The following instructions apply to photos uploaded by project staff members. Photos must comply with the following parameters to upload successfully to Portal.

<b>File Format:</b>	.jpg
<b>Image size/dimensions:</b>	480 X 640 (width of 480 pixels; height of 640 pixels)
<b>File size:</b>	Each photo file should be between 80 - 200 KB (approximate)
<b>Orientation:</b>	Photos must be taken using a portrait (vertical) orientation, not landscape (horizontal)
<b>File name:</b>	For photos uploaded directly to Portal, the file name must be the CH ID number only, for example, 123456.jpg
<b>CH ID:</b>	The CH ID in the file name must belong to the subproject selected when uploading the batch of photos
<b>Last photo received:</b>	The CH ID must not have had another photo uploaded and accepted in the last 90 days

#### PLEASE NOTE:

- If using a camera, please pre-set the image size/dimension of the camera to 480 x 640 pixels before taking photos (some cameras may refer to the image size as dimensions or resolution). Presetting the camera's image size before taking photos prevents the need to resize and/or crop photos manually using computer software. Each camera is different, so please refer to the camera's user manual or contact Unbound- Headquarters if you have questions.
  - Test the settings by taking 10-20 test photos per camera. After downloading these test photos to your computer, review the image size/dimensions and file size of these test photos in Windows Explorer. Adjust the settings on the digital camera(s) to ensure they meet the required parameters above.
- Make sure the "Date and/or time stamp" feature is turned OFF before taking photos.

### 2.3.2 Beneficiary Identification

Each photo submitted by staff must be saved as a .jpg file and named according to the CH ID number of the individual in the photo. For example, a photo file would be called 123456.jpg when it is a photo of a beneficiary with a CH ID number of 123456. If a photo file is named incorrectly, the photo will be rejected.

### 2.3.3 Creating a batch of photos in a zip file

After the photos are taken, downloaded to the computer, identified with the CH ID, and resized or cropped as needed, they must be made into zip files to simplify processing. Place a maximum of 200 photos in each zip file.

#### **Naming protocol for zip files:**

The zip file must begin with 'Photo,' then the name of the Project, subproject (if applicable) and date. Please also include a unique group number if submitting more than one zip file from a subproject on the same date.

For example, the **first** batch of photos from Unbound Manila Project and subproject AJB that was sent to Unbound-Kansas on January 8, 2025, would be called Photo\_Manila\_AJB\_20250108\_01.zip. The second batch from that same project and subproject sent on the same day would be called Photo\_Manila\_AJB\_20250108\_02.zip.

Digital photo batches for new or replacement vocation records should be named with “new” at the end of the batch name, for example, “Photo\_Guatemala\_A\_20251104\_New.zip”. This is only applicable to vocation records since the initial photo for new and replacement records for children, youth and elders are uploaded to the family record and not sent through the Photos page.

### 2.3.4 Sending photos to Unbound-Headquarters

All annual photos for beneficiaries and available persons should be uploaded through the Photos page on Portal or from the mobile phones of families if they receive a notification sent from Portal. Photos for new records should be submitted through the Records page in Portal. Please refer to the Portal User Guide for more information on all ways to submit photos.

## 2.4 Processing at Unbound-Headquarters

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.

### 2.4.1 Responding to Declined Photos

Photos that are declined by Kansas will appear on the Photos Declined by Kansas report. To send a corrected photo to Unbound headquarters, please upload it through the Photos page of Portal. Once the photo is reviewed and approved by the project, it will no longer appear on the current month report within one hour.

If a photo was declined in error, please send an email to **CSUpdateRequests@unbound.org** with the CH ID to explain that the photo is accurate (a separate email must be sent for each case).

- If the photo was declined for being the “incorrect person” and the photo is the correct person, please state this and, if necessary, explain the change in appearance that may have caused the photo team to determine that it was not the same person as the previous year’s photo.
- If the previous photo was incorrect, please identify who is pictured in the previous photo. This will allow us to contact the sponsor to explain what has happened.
- If the photo is declined for “Does not match family record,” please review the record in Portal and make any changes if necessary (incorrect gender, year of birth, etc.) and include in your email what changes have been made. (If it is not possible to modify the record, please request the corrections in the email).

## 3 Messages

Letters and videos (here on referred to as “messages”) from sponsored friends are the most important communication Unbound sends to sponsors. Messages allow sponsors to connect with their sponsored friends and to better understand their realities. While some sponsors may not write to their sponsored friends, all sponsors appreciate the messages their sponsored friends send.

Messages from sponsored friends that are authentic, responsive and informative strengthen the relationship between sponsors and sponsored. Sponsors want to learn what the life of their sponsored friend is like. This human connection is essential to the Unbound mission of fostering relationships of mutual respect, understanding and support.

Messages also help to improve Unbound’s credibility and increase sponsors’ commitment to the program. A sponsor who receives infrequent, inauthentic or poor-quality correspondence may or may not continue to sponsor, and it is possible that this sponsor will not encourage other people to become sponsors.

Unbound believes we all gain from knowing and sharing life’s struggles and successes together. Together, we can nurture the continued development of relationships among sponsors and sponsored, which is the primary building block of Unbound’s worldwide community of compassion.

Unbound requires two messages each year from each sponsored member. This section details the guidelines and requirements for the different types of messages that the sponsored members send to their sponsors.

### 3.1 Types of Messages

#### 3.1.1 Welcome Messages

The welcome message is the first communication from a newly sponsored member to their new sponsor. Through the welcome message, the sponsored member acknowledges to the sponsor that they are aware of the new relationship. The message should contain general information about the sponsored member, their family, and the goal(s) being pursued through sponsorship. If a beneficiary becomes sponsored by a new individual, they will be required to send a welcome message to the new sponsor.

#### Welcome Message Timeline

0	1	2	3	4	5
Sponsorship Begins-Letter Due	Letter Due	Late Letter	Retirement Warning	Retirement	Appears on Retired List



Projects will be notified of each new sponsorship via the Welcome List report in Portal (the “Current Month” version of this report is updated hourly Monday through Friday between 8:00a.m. and 5:00p.m. CST). The project should collect a welcome message from the newly sponsored member as soon as possible. All welcome messages should be submitted within 60 days after the sponsorship has begun. If a welcome message has not been received within four months of the notification of the new relationship, Unbound headquarters will retire the sponsored member for non-compliance. For this reason, staff should regularly review the current month versions of the Welcome List and Welcome Letters Reminders reports.

### 3.1.2 Messages

Every Unbound beneficiary with a sponsor should send a message (letter or video) at least every six months. (Messages are not required for individuals who are in “Change of Sponsor” or “Benefits Through” status.)

If a sponsored member receives mail from their sponsor, the primary goal of messages is to continue a conversation with the sponsor. Sponsored members should reply to the sponsor’s most recent letter(s) and should respond to any content or questions from the sponsor.

Messages should also share updates about the sponsored member’s life. This might include information about their goals, progress in school, family, interests, community, culture, daily life, extracurricular activities, general health status, hobbies, or any other updates they would like to share with their sponsor. Sponsored members who do not receive mail from their sponsors can engage the sponsor by asking questions about the sponsor’s life.

If the sponsor sends a Sponsored Family Need contribution of less than \$100 USD, the sponsored member should acknowledge receipt of these funds and explain how they were used the next time they send a message to the sponsor. Acknowledgement letter requests are not sent for contributions under \$100 USD.

**Regular Message Timeline**

0	1	2	3	4	5	6	7	8	9	10	11	12
Letter Received						Letter Due	Letter Due	Late Letter	Late Letter	Retirement Warning	Retirement	Appears on Retired List

Sponsored members should submit a message no longer than six or seven months from the date that the previous communication was logged, at which point they will appear on the Regular Letter Reminders report under the ‘Letters Due’ category. If a message is not received during that time, they will appear under the ‘Late Letters’ category in the eighth and ninth months, under ‘Retirement Warning’ in the tenth month, and under ‘Retirement’ in the eleventh month. At that time the sponsored member will be retired for no messages (see timeline above). Relevant staff should regularly review the Regular Letter Reminders report to ensure that messages are submitted when they are due. Correspondence should be submitted as soon as possible after the family creates it. It will be declined if it is submitted more than three months from creation.

## 3.2 General Message Requirements

### 3.2.1 Responding to sponsor letters

For sponsored members who receive letters from their sponsors, the highest priority of messages is to continue a conversation with the sponsor. Messages that respond to sponsor letters should be marked as a “Reply” in Portal (see Portal User Guide for more information).

If a sponsored member is scheduled to send a message, check the “Mail with No Reply Letter Sent” report in Portal to see if the sponsor has sent a letter recently that still needs a reply. If there is a letter that needs a reply, the sponsored member should respond to the letter(s) from the sponsor in his/her message.

If the sponsor writes frequently, the sponsored member may respond to multiple sponsor letters in one message; it is not necessary to reply individually to each letter the sponsor sends. If you have concerns about the frequency of letters from a certain sponsor, please contact your Regional Project Specialist.

### 3.2.2 Message Content

Messages should not follow a prescribed, standard format. The best messages are those in which the sponsored member shares freely with their sponsor about what is happening in their life.

Please keep in mind, however, the following guidelines:

- Messages should be written by/feature the sponsored member themselves whenever possible. If a letter is written on behalf of a sponsored member, the author must identify themselves, state their relationship to the sponsored friend, and explain the reason the sponsored member is unable to write.
  - If the same person writes on behalf of a sponsored member who will never be able to write (for example, a member with special needs, or an elder who is not able to read and write), or for a younger child who is not yet able to write, they only need to identify themselves one time in the welcome letter.
  - Sponsored members must address the message directly to their sponsor, using the sponsor’s first name (or group name). Messages addressed to “Dear Sponsor” are not permitted.
- For child protection purposes, sponsored members should not include their full names/surnames (family names) in the message. This decreases the likelihood that sponsors can contact them directly on social media.
- Please do not include the full name of anyone in a message. Examples might include, but are not limited to Unbound staff members, family members, teachers, etc.
- Sponsored members must not include their address or any other personal contact information, nor request this type of information from sponsors.
- Sponsored members should not include any usernames, nicknames or names used in social media that could help identify the child.

- Please do not include the name of the sponsored member’s school in messages (this also includes in photos and on clothing).
- “Form letters” (in which content is identical from letter to letter) are not permitted. Likewise, topics, updates, and questions for the sponsor should not be the exact same from letter to letter.
- Sponsored members should not request any type of additional financial assistance or support from the sponsor.
- Please do not mention specific dollar or other currency amounts of benefits or special gifts received from sponsors.

## **3.3 Letters**

### **3.3.1 Length and Style of a Letter**

- There is no specific length required for a letter, but letters should be sufficiently long to engage in conversation with the sponsor and to share updates on the sponsored member’s life and goals.
- All letters should include the date that the letter was written. Letters should be dated using the date, month, and year and with the name of the month written instead of numbered (For example: “22 January 2025” not “22/1/25”).

### **3.3.2 Handwritten/Scanned Letters**

- Handwriting on letters should be legible. Letters written in dark-colored ink are strongly preferred, as pencil is usually too light to read on scans.
- All parts of the letter (name, date, sponsor’s name and body) should be written by the sponsored member/author of the letter in the same handwriting style throughout.
- Letters should have a neat, clean appearance and not have smudges or torn edges.
- Colored paper should not be used for stationery or translations due to the cost of printing digital letters with entire pages of colored ink. Only white paper should be used.
- Scanned hand-written letters should include the CH ID number at the top of each page of the letter. The CH ID is automatically added to letters typed directly in Portal.

### **3.3.3 Typed Letters**

- If a letter is submitted in a typed format, photos should be included as often as possible.
- Photos included with typed letters are not reviewed in Kansas like annual photos are. Please make sure to review all photos, and if you are unsure if anything is inappropriate (such as hand gestures or writing in English on a t-shirt), please ask your Regional Project Specialist for guidance.

Photocopies, electronic copies or summaries of letters sent to the sponsor should be kept in the sponsored member’s individual member file. Digital copies, including digital letters in Portal, meet this requirement.

## 3.4 Video Messages

Sponsored friends may send a video message to communicate with their sponsor. The use of this feature is optional and is only available for those individuals whose sponsors are able to receive video messages. Video messages can be sent for Welcome and Regular messages.

Currently, sponsors are unable to send reply video messages to sponsored members.

### 3.4.1 Content Guidelines

Every sponsored person has a different way of expressing and sharing their experience, and no two video messages will be alike. An advantage of video messages is allowing a sponsored friend's personality to show. A strong video message will include some of the following elements.

**Sponsored member's life:** Messages should share updates about the sponsored member's life. This might include information about their goals, progress in school, family, interests, community, culture, daily life, extracurricular activities, general health status, hobbies, or any other updates they would like to share with their sponsor.

**Engagement:** Video messages should continue a conversation with the sponsor, when applicable, by replying to questions or comments from a sponsor's letter. If the sponsor does not write, they may engage the sponsor by asking questions about the sponsor's life.

**Direct Involvement of Sponsored Friend:** Sponsored members should appear in the video and speak, if possible. If they are unable to speak, a guardian or family member may speak on their behalf. We encourage sponsored members to at least share a brief greeting and then the guardian can share the rest of the message. If someone appears in each video with a sponsored member who cannot speak (for instance, a member with special needs, an elder, or a young child) they will only need to identify themselves one time at the beginning of the video in which they appear.

**Family and Staff:** Family members, guardians, and other program representatives can appear in the video with the sponsored member and share about their experience in the program. Anyone listed can speak a brief greeting or appear on the screen, however, since the length of the video message is limited, the **primary content** should be the sponsored member and/or guardian sharing the main message.

### 3.4.2 Content Requirements

#### 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.)

### 3.4.2.1 Child and Elder Protection:

- The background should be appropriate and avoid any landmarks or identifying markers that point to the location where the video is recorded, such as a school name.
- Sponsored members should not share their address or any other personal contact information, nor request this type of information from sponsors.
- Individuals appearing in the video should not hold certificates or diplomas.
- Avoid wearing clothing/name tags that include identifying information such as the individual's full name, the name of their hometown, or the name of their school.
- Sponsored members should not include any identifying username, nicknames or names used in social media.

**Identify All Who Appear:** All individuals who appear should identify themselves, explaining their relationship to the sponsored member.

**First Names Only (Sponsor):** Sponsored members should address sponsors by their first name(s) unless it is a group name or another situation where only the surname of a sponsor is available. In some cultures, they may use the prefix Mr. or Mrs. together with their first name.

**First Names Only (Sponsored):** Sponsored members should share only their first names or “likes to be called” and optionally their middle name. Full names should not be used for anyone who is mentioned or appears in a video. This will help decrease the likelihood that sponsors can contact sponsored members and/or their family members directly on social media.

**No Requests for Additional Support:** Sponsored members should not request any type of additional financial assistance or support from sponsors. Please do not mention specific dollar or other currency amounts of benefits or special gifts received from sponsors.

**Appropriateness:** All individuals appearing in the video should wear appropriate clothing. Similar to annual photo guidelines, avoid offensive words, pictures, signs, or gestures during the video. Examples:



**Hand gestures:** Hand gestures can have different meanings in different cultures. The only acceptable hand gestures are the peace sign (with the palm of the hand facing the camera only), thumbs up or heart hands, as shown here.

**Review:** Project staff are responsible for reviewing each video to make videos have appropriate content before submitting them to Unbound headquarters, including the content of the spoken message and the visual aspects. If you are unsure if content is inappropriate (such as hand gestures or English phrases on a t-shirt), please ask your Regional Project Specialist for guidance.

### 3.4.3 Technical guidelines and requirements:

- Video messages should be less than 3 minutes long and in .mp4 format. The video file cannot be more than 100MB in size.
- Videos must be recorded in horizontal (landscape) orientation, not vertical (portrait)
- Wipe off the lens of the recording device to clean it before recording. Turn off any music, television or radio that is playing in the background that could affect the sound. We recommend recording a short test video first to watch and listen to make sure the speaker(s) can be clearly seen and heard before recording the entire video.
- Individuals must speak loudly enough and be close to the recording device so that the voice(s) are recorded clearly. After recording, if a video has weak audio, it is acceptable to use software to enhance the audio. However, please do not add music or visual effects like graphics and text.
- Recordings should be done in a space with good lighting, with the light source in front of the person(s) speaking so they can be clearly seen. Examples:



- Be sure not to record in front of a bright window or background. It will make the person hard to see on camera. Examples:



- Project staff should compare the video to the annual photo of the sponsored member and verify it is the same person before submitting it to Unbound headquarters. The annual photo appears on the video review page.
- Project staff are responsible for reviewing subtitles on the video for accuracy and correct timing prior to submitting video to Unbound headquarters.

## 3.5 Message Reviews

### 3.5.1 Project Reviews

Every message must be reviewed in Portal before it is submitted to Unbound headquarters. It is necessary to identify any issues with messages during this review step because it is often the only point of review before they will be sent to sponsors. The majority of messages **will not** be reviewed for technical quality or content by Unbound headquarters. It is the project's responsibility to identify and reject unacceptable or duplicate messages.

It is the responsibility of the staff to review and submit batches in a timely manner to ensure members' program compliance. Letter and video batches must be submitted to Unbound headquarters within two months of the date they are uploaded/created, otherwise they may be declined with a request for an updated message.

#### 3.5.1.1 Declining Messages

If a reviewer determines that a message needs to be rewritten, re-scanned, or re-recorded before it can be submitted to Kansas and sent to the sponsor, the reviewer should **decline** the message.

The following are examples of when a message should be declined:

- **Accuracy of information**
  - The name of the sponsored member shared in the message does not match the name of the sponsored member on the review screen (it is not necessary to decline a letter if the spelling is slightly incorrect).
  - A letter does not include the date that the letter was written.
  - The surname of the sponsored member or sponsor is included (a letter can be re-uploaded if the last name is covered by a sticker or whited out).
  - The message does not address the sponsor by name
  - The author of the message is not identified.
  
- **Message contents**
  - The message does not respond to or acknowledge a sponsor's letter.
  - There is a duplicate message in the Correspondence History section of the review screen (either the exact same message or a different draft) and the duplicate is NOT declined/declined by Kansas.
  - A school name is mentioned
  - A sponsored member has included their contact information or has requested this information from sponsors.
  - The message includes direct or indirect requests for financial assistance or support from the sponsor.
  - The letter mentions a photo, but it is not attached.
  - The photo(s) attached are inappropriate.
  - The translation is unclear (when applicable) or does not communicate the emotion and personality of the original letter.
  - Video subtitles are unclear, or timing is inaccurate
  - The video ends abruptly before the speaker has finished
  
- **Letter Scan quality** (when applicable).
  - The scan is unclear, crooked, or shows visible borders or edges.
  - The scan is not in color.
  - The page(s) of the letter are missing.
  - There are multiple letters combined into one because Portal could not read the barcode or a barcode was missing.

### 3.5.1.2 Feedback Comments

If there are areas for improvement (but the message can still be sent to the sponsor), the reviewer can enter a **feedback** comment, which will appear on the “Letter and Video Feedback” report in Portal. (Feedback comments can also be used to share positive feedback.)

Below are some reasons that a reviewer might enter a feedback comment:

- **Accuracy of information**
  - The sponsor's name is spelled incorrectly but is obviously the correct sponsor (e.g. Marry vs. Mary or John vs. Jon).



- **Message Contents**
  - To share positive feedback if a message is very detailed or responsive.
  - The sponsored member responds to the sponsor’s letter but does not include any personal updates or additional details.
  - The sponsored member acknowledges receiving the sponsor’s letter but does not respond to the content/questions in the sponsor’s letter.
  - Message does not include many details. Messages should include specific updates about the sponsored member’s life such as school/education progress, family situation, etc.
  - The message replies to one or more sponsor letters, but the “Mark as reply” button is not selected.
  - The message does *not* reply to one or more sponsor letters, but the “Mark as reply” button is selected.
  - A message is sent very soon after the previous message, but the sponsor has not written in the meantime.
  
- **Scan Quality** (when applicable)
  - Scan has slight imperfections.

The lists above are not inclusive of all reasons reviewers may decide to decline a message or provide feedback and are only provided as a reference. Projects are welcome to develop internal criteria and add to these lists as necessary.

### 3.5.2 Unbound Headquarters Reviews

Unbound headquarters staff may review a small percentage of messages after they have been submitted to headquarters and will enter feedback comments as necessary. Project staff should regularly review the “Letter and Video Feedback” report in Portal to view comments from both project and Unbound headquarters reviewers. The “Letters and Videos Declined” report in Portal should also be regularly reviewed to view any messages that have been declined to determine appropriate next steps.

## 3.6 Translation of Messages

Sponsored members are welcome to submit messages in any language, but an English translation is required if a letter is not written in English. Each project should monitor the quality of translations on a regular basis to ensure a high quality of translation.

Translators should remember that for the sponsor who does not know the language of the original letter, the translation itself is the only letter they understand. Translations should carry the same meaning and sense of the original letter. A poor translation may have the same meaning or basic message as the original but fails to clearly express the sentiments of the author. The following examples illustrate the difference between a summarized Swahili-English translation and

summarized Hindi-English translation and one that conveys the true content of the original message.

Original Letter	Poor Translation	Good Translation
<p>Nina mbwa mdogo mzuri sana ambaye ni mchangafu mno na mwenye upendo mzuri. Tunapenda kucheza, kukimbia na kukimbilia mpira mkubwa. Nina vipindi dasarani mida ya asubuhi, mchana na hata jioni. Ninapokuwa sipo darasani, ninamsaidia mama yangu na shughuli za nyumbani au kucheza na wadogo zangu. Ningependa sana kupokea picha yako, na familia yako ili walau niweze kukujua wewe kupitia picha</p>	<p>I have a dog. We like to play with a ball. I have classes all day. I help my mother or play with my siblings. Send me a photo.</p>	<p>I have a beautiful little dog that is very active and affectionate. We love to play, running and chasing a large ball. I have classes in the mornings, in the afternoon and even in the evenings. When I am not in classes, I am helping my mother in the house or playing with my younger siblings. I would really like to receive a photo of you and your family so that I can at least know you from a picture.</p>

Original Letter	Poor Translation	Good Translation
<p>मेरे पास एक सुंदर छोटा कुत्ता है जो बहुत खेलता है और बहुत स्नेही है। हम खेलना पसंद करते हैं। हम एक बड़ी गेंद चलाते हैं और पीछा करते हैं। मैं सुबह, दोपहर, और शाम को कक्षा में जाता हूँ। जब मैं कक्षाओं में नहीं हूँ, तो मैं घर में अपनी माँ की मदद करता हूँ या अपने छोटे भाई-बहनों के साथ खेलता हूँ। मैं वास्तव में आपको और आपके परिवार की एक तस्वीर प्राप्त करना चाहता हूँ ताकि मैं आपको कम से कम एक तस्वीर से जान सकूँ।</p>	<p>I have a dog. We like to play with a ball. I have classes all day. I help my mother or play with my siblings. Send me a photo.</p>	<p>I have a beautiful little dog that is very active and affectionate. We love to play, running and chasing a large ball. I have classes in the mornings, in the afternoon and even in the evenings. When I am not in classes, I am helping my mother in the house or playing with my younger siblings. I would really like to receive a photo of you and your family so that I can at least know you from a picture.</p>

If a computer translation is used, it must be reviewed by a local translator for accuracy. In some cases, a mistranslation may cause confusion or doubt in the mind of the sponsor about the credibility of the sponsorship program.

For projects who do not use the Translation Module, please follow these guidelines when providing translations:

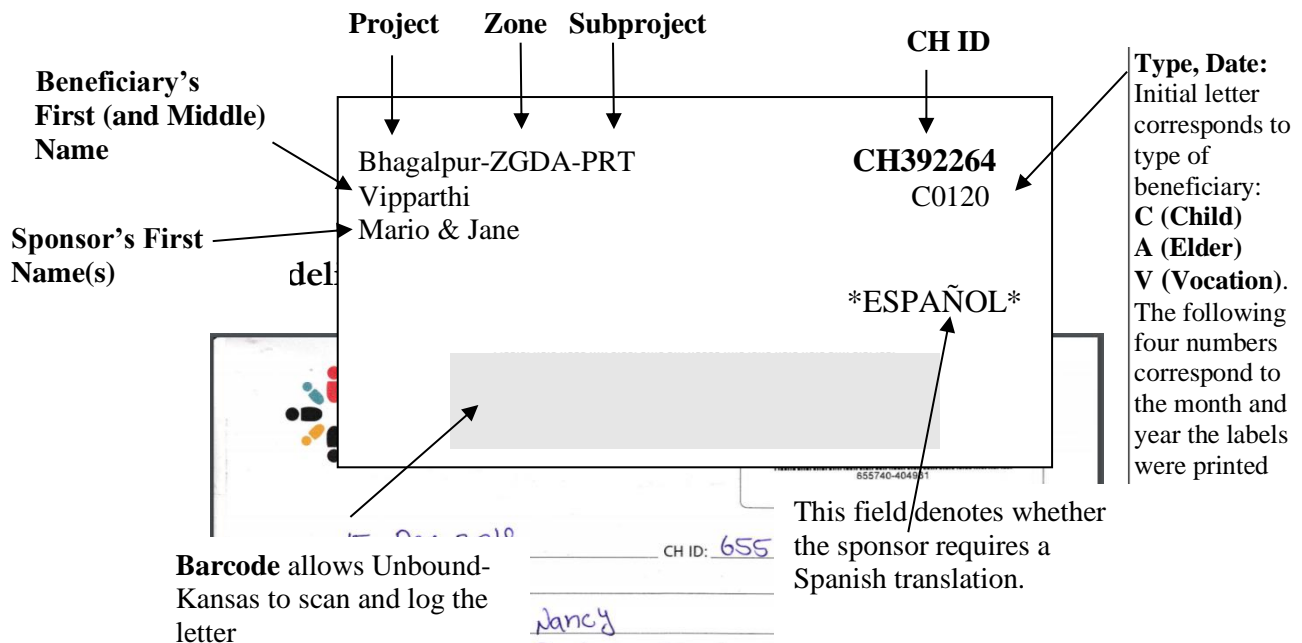
All translations should include the first name of the translator and optionally, the middle name at the bottom of the translation to honor the work of the translators and to give feedback to individual

translators. Please include the name of the translator using the following phrase, for example, “This letter was translated by María Angélica.”

The appearance of the translation is as important as the appearance of the original letter. The best translations should appear similar in size and layout to the original letter. We recommend that translations be typed (using a simple font in size 12 or greater). If it is not possible to type the translations, the handwriting must be legible. The reverse side of the original letter may be used for the translation as long as the ink does not bleed through the other side.

### 3.7 Labels for handwritten letters

Special labels are used to ensure that handwritten letters are separated by Portal and recorded in the Unbound headquarters database. The project and subproject name, sponsored member’s name and ID number, and sponsor’s name(s) are included on the label. The label also includes a bar code that is used to quickly scan the letters so that sponsored members receive credit for their letters.



#### Placement:

- Place the label in the top right-hand corner of the letter.

#### Application:

- Ensure that all information on the label is visible/not covered (especially the bar code)
- The entire label should be on the sheet of paper (sticky edges should not hang off the edge)

**Accuracy:**

- Please ensure that the correct label is used and that the beneficiary name/ID on the label match the letter.
- Check to make sure that the sponsor's name on the label is current (this information can be found in Portal). If the sponsor's name is not current, please print a new label to use.

### **3.7.2 Printing Labels**

Below are instructions for printing labels from Portal:

- Labels can be generated for individuals or for entire subprojects.
- The labels can be formatted for a **letter-sized** (8½ in X 11 in, or 21.6 X 28 cm; Avery labels # 5260), **A4 size** (8.27 in X 11.69 in, or 21 cm X 29.7 cm) page of labels with three columns and ten rows or A4 size with three columns and 8 rows.

Additional instructions to print labels in Portal can be found in the Labels section of the Portal User Guide.

## 4 Special letters

### 4.1 Farewell Letters

The retirement of a sponsored member from the program is a critical moment in sponsor satisfaction and retention. The sponsor's experience of retirement impacts the likelihood that the sponsor will continue with a new sponsorship. Quality farewell letters are a key part of this experience.

*Please note: The contents of this section specifically address farewell letters. For more information about retirement of sponsored members, see the "Retirement from the Sponsorship Program" section of the Sponsorship Manual.*

#### 4.1.1 When is a Farewell Letter Required?

All beneficiaries who are in Sponsored status at the time of retirement should submit a farewell letter when an Exit Page is created in Portal, except for cases in which sponsorships end in under 60 days. Beneficiaries who are in Change of Sponsor, Benefits Through, or Available statuses are not required to submit a farewell letter when creating an Exit Page. Video messages may not be sent for farewell messages.

When a sponsored member passes away, an Exit Page must be submitted in Portal within 30 days of the member's passing that explains the circumstances of the death in detail, even if a farewell letter is not yet available. This allows us to quickly communicate this news to sponsors. After the retirement is processed, farewell letters for these sponsored members can be uploaded for up to 90 days.

If a response to an Update Request indicates that an individual should be retired, a farewell letter is required for any individual that has a sponsor.

#### 4.1.2 Content

There are many ways to write a good farewell letter. No two letters will be the same. Farewell letters should follow the same criteria as other correspondence, including any replies to sponsor correspondence. Good farewell letters will usually contain the following characteristics:

**Written by Sponsored Member** – The sponsored member should write the farewell letter whenever possible to respectfully end the relationship. If the sponsored member or a family member is unable or unwilling to write a respectful letter in a timely fashion, however, a staff member who works closely with the sponsored member should write the farewell letter on their behalf to ensure that the exit page is submitted promptly. The author of the letter should identify themselves by name and relationship to the sponsored member.

**Positive Attitude** – Even if a sponsored member has not met their goal, it is likely that the sponsorship has still had a positive effect on the individual. Therefore, the message contained in the farewell letter should be positive. Celebrate accomplishments whenever possible. When applicable, state the level of education that the sponsored member was able to attain.

A farewell letter with a negative tone may cause a sponsor to have a negative feeling towards the value of sponsorship, which may cause them to not choose to sponsor again. Avoid using words or phrases that portray a negative feeling or judgment against the child or family such as “failure,” “disappointment” or “unfortunately.”

If a sponsored member or the family is no longer participating or complying with program policies, try to focus the letter on the accomplishments achieved during the time sponsored (such as educational attainment or improvements in the family’s situation) and describe any additional factors that might explain why the child/family is no longer participating. If the family has moved out of the area or their economic situation has improved, for example, it is understandable that they are no longer going to be active in the program, and the letter should focus more on the reasons they are not active in the program than on the fact that they are not participating.

**Detailed Retirement Reason** – Since sponsors only hear from their sponsored friends occasionally, retirements can often come as a surprise. Be sure to include details that help to explain the reason for retirement.

If the retirement is happening for unexpected reasons, sponsors appreciate a brief description of the steps taken by the project prior to choosing retirement. However, please avoid including details about program specifics and/or policies that may be unfamiliar to sponsors.

If a sponsored member is leaving the program to move to the USA, please do not include this specific information in the farewell letter. Unbound strives to keep both sponsored members and sponsors safe and sharing this information may increase the likelihood that the sponsor will try to contact them.

**Outcomes from Sponsorship** – The farewell letter should answer the questions ‘how is the individual’s life different as a result of sponsorship?’ or ‘what opportunities has sponsorship provided that might otherwise not have been available to the individual?’ Outcomes from sponsorship are both tangible and intangible. While it might be easy to list items that a sponsored member received as benefits, remember the intangible benefits have a great value as well.

**Appreciation** – Since a farewell letter often represents the end of a significant relationship, it is appropriate for a sponsored member to express appreciation to his/her sponsor for their support.

**Personalization** – Personalization is more than a name on the top of the page. While the name is certainly important, the contents of the letter should also be personalized. Avoid form letters. Include details specific to that sponsored member and sponsorship relationship. If someone is writing on behalf of the sponsored member, refer to the sponsored member in a personal way and not by last name or his/her identification number.

Please do not include the number of years the sponsored member has been in the program. It is difficult to find the correct number of years they have been sponsored by their current sponsor. Unbound headquarters is unable to send farewell letters that have an incorrect number of years.

**Date** – Please include the date that the farewell letter was written.

**Appropriateness** – While the author of a farewell letter may encourage a sponsor to consider sponsoring again, it is not appropriate to request that a specific individual be sponsored. It is also important that farewell letters do not encourage ongoing contact or communication following retirement.

**Timeliness** – Farewell letters should be submitted as soon as possible after being written. Exit pages should be submitted to Unbound Kansas no more than 30 days after the farewell letter is written.

### 4.1.3 Farewell letters for a subproject closing

Occasionally it is necessary to close a subproject. Farewell letters for a subproject closing are different from Farewell letters in other circumstances.

Sponsored members/families should avoid trying to explain the closing in the farewell letters – the letters should focus on thanking the sponsor and sharing the sponsored family’s accomplishments during their time in the program. Unbound headquarters sends a special letter to the sponsors explaining the reasons for each subproject closure.

Farewell Letter content should include:

- A description of the benefits received and achievements during the sponsorship.
- Gratitude for the sponsor's support / encouragement.
- The sponsored friend is welcome to say goodbye.
- If the farewell letters will be written more than 60 days in advance, please do not date the letters.

Please contact your Regional Project Specialist if you would like to see an example subproject closure letter and/or an example of the letter sent from Unbound headquarters for subproject closures.

### 4.1.4 Exit Pages

Exit pages in Portal should always be kept up to date to ensure that Farewell Letters are submitted in a timely manner to request retirements. Please review the grid of exit pages in Portal regularly, including for these specific details:

- Sort the grid in descending order by the Retire On column. If an exit page exists that has a Retire On date in the past, submit the exit page to Kansas as soon as possible to proceed with the retirement, if appropriate. If the person will remain in the sponsorship program, delete the exit page to remove it from the grid.
- Review all exit pages with Retire On dates in future. Make sure the Retire On date is correct and adjust it if necessary. Make sure the retirement reason is accurate. If the reason is “No Longer Studying,” make sure the educational information like Completed/Did not complete educational goal and the last grade passed are accurate. “Other” should rarely be used as a reason for exiting the program. If the person is in benefits through status, “No Longer

Studying” should be selected as the reason and additional educational information should be provided. This information can be updated as the RetireOn date approaches to ensure its accuracy.

- Ensure that an exit page has been created for every Farewell Letter created in Portal. A good practice is to create the exit page as soon as the Farewell Letter is created so that an exit page exists for every Farewell Letter and can be submitted as soon as possible after the Farewell Letter is ready.

## 4.2 Acknowledgement Letters

Unbound headquarters will request an acknowledgment letter via the Communications page in Portal in most cases when a sponsor sends a contribution of \$100 or more. It is required to review and respond to these requests. If the sponsor sends \$100 or more on a monthly or frequent basis, an acknowledgment letter request will only be sent approximately every 6 months, so the acknowledgment of the frequent contributions can be consolidated into one letter. Project staff should guide the family to inform the sponsor about the progress and utilization of funds as soon as possible after the acknowledgment letter request is sent. The acknowledgment letter request can be fulfilled in one of the following ways:

1. The sponsored member submits an acknowledgment letter after the funds have been used. The letter will share how the funds were spent. If this is not possible, proceed to the second option:
2. If the sponsored member will not be able to use the funds in the next 60 days but has a plan for how the funds will be used, please have the sponsored member submit an acknowledgment letter to explain the future use of the funds. If this is not possible, proceed to the third option:
3. If there is a problem and/or it will not be possible to utilize the funds or determine a plan for their use in the next 60 days, the project should reply to the request with an approximate timeline for utilizing the funds. When the speed letter team receives this timeline, they will close the initial request. The speed letter team will then monitor the timeline and send a new request for an acknowledgment letter at the time that the timeline indicates the family is going to use the funds. Unbound headquarters will update the sponsor on the progress until an acknowledgment letter is submitted.

To respond to the acknowledgment letter communication, please submit a letter in Portal and use the Acknowledgement Letter type (vs. Regular letter type). When uploading the letter, please mark the acknowledgment letter request as answered during the review process. Video messages are not an option for the Acknowledgement request process.

Please do not mention specific dollar or other currency amounts. This type of letter counts as a regular message and should also include additional, personalized information about the sponsored member. The sponsored member should also reply to any sponsor letters that are still pending a reply.

If there is no acknowledgment letter communication request in Portal, an acknowledgment letter should not be sent. Instead, the sponsored member may choose to acknowledge receipt of the funds through their next message.



## **5 Letters and Items Received from Sponsors**

Unbound headquarters encourages sponsors to send letters and photos to their sponsored friend. Sponsors can send correspondence either through the mail or through the Unbound website or app.

### **5.1 Logging and processing correspondence from sponsors**

#### **5.1.1 Postal mail**

Some sponsors will send correspondence via postal mail using mailing labels supplied by Unbound headquarters. All mail from sponsors must be reviewed, logged on the Correspondence page in Portal and distributed to sponsored individuals in a timely fashion. Mail from sponsors must be logged in Portal within one month of arrival (see Portal user guide for instructions on logging sponsor mail).

#### **5.1.2 eLetters**

Sponsors may choose to send a message (eLetter) via the Unbound website or app. eLetters are automatically logged on the Portal Correspondence page for each sponsored member, and the PDF attachments can also be viewed there.

eLetters can be delivered to sponsored members in two ways:

- Printing them from the eLetters page in Portal. Please be sure to use the “print” button in Portal so that the date printed on is captured.
- Sending them to the family’s mobile phone. (See the Portal User Guide for instructions)

#### **5.1.3 Responding to sponsor correspondence**

If a sponsor writes, it is very important that the sponsored member continue a conversation with the sponsor in their letters/video messages. Subsequent messages should respond to the sponsor’s letter and should be marked as “reply” on the Review Batch screen in Portal. The “Mail with No Reply Letter Sent” report should be used to monitor sponsor mail that is still pending a reply.

#### **5.1.4 Issues with sponsor mail**

All correspondence from sponsors must be reviewed before it is delivered to sponsored members to ensure that it is appropriate. If a reviewer encounters an issue, it should be reported in the Correspondence page of Portal so Unbound headquarters can contact the sponsor. Below is a list of the different issue types that can be reported in Portal.

### **Contact information given**

If a sponsor shares their address or contact information in a letter, this information should be removed before the letter is given to the sponsored member, and this should also be reported as an issue when logging the mail in Portal. When reporting the issue, it is very helpful to attach a photo or digital copy of the letter that includes the contact information (unless the letter is an eLetter).

If a sponsor includes their address on an envelope or if contact information is printed on stationery, it is not necessary to report this as an issue in Portal, as this is common practice in the United States. However, please do remove or black out the address or contact information before delivering the letter to the sponsored member.

### **Money sent (cash)/(check)**

Sometimes sponsors may try to include money for their sponsored friends in letters. When the project receives any cash, checks or other types of money, the project should report this as an issue and should handle these funds according to the policy for “Donations from Sponsors Received by Project Office” in the Financial Policies Manual. The returned funds form can be found in the Financial Policies Manual.

If a sponsor mentions sending additional funds to their sponsored friend in a letter, but no special needs contributions for the sponsored member are listed on the Financial Detail report, please report this as an issue.

### **Package sent**

Sponsors should not send packages (items other than letters, photos or greeting cards) to their sponsored friends. If a package is received, please report this as an issue in the Correspondence page in Portal and mark the package as not deliverable. Projects should not deliver packages to sponsored members.

Projects should not pay customs or other charges to redeem or obtain possession of a package from a sponsor. Project teams have the discretion to donate or use for project activities the contents of any packages received from sponsors.

### **Requested to visit sponsored member**

If the sponsor requests to visit the sponsored member in a letter, please report this as an issue so Unbound headquarters can contact the sponsor to discuss visit options.

It is not necessary to report as issue in Portal when a sponsor expresses an interest to visit a sponsored friend during an Awareness Trip.

### **Other**

Please use “Other” to share any other issues that need to be reported to Unbound headquarters.

### **Inappropriate content**

If the content of a sponsor letter seems inappropriate, project staff should not deliver the letter to the sponsored member and should contact their Regional Project Specialist for follow up with the sponsor. Unbound depends on the project's judgment to determine which letters are appropriate to forward to the sponsored member.

### **Excessive displays of affection**

Sponsors and sponsored friends share a special bond through Unbound's program. As a result, it is normal for sponsors to express their affection in letters. It is acceptable to express affection in moderation. For example, it is appropriate to say "Love, your sponsor" as a farewell. It is also appropriate for a sponsor to express they "love getting letters" or hearing from their sponsored friend.

If a reviewer believes that any part of a sponsor letter is inappropriate or excessively affectionate, please report this to your Regional Project Specialist and explain what is considered inappropriate (in addition to logging the issue in Portal). This will help our Unbound headquarters team determine the appropriate intervention with the sponsor.

### **Sponsor Surnames**

If a sponsor includes their surname in a letter or eLetter to their sponsored friend, please remove or black out this information before delivering the letter to the sponsored member. **Please do not report this as an issue on the Correspondence page in Portal.**

# 6 Internal Communications

## 6.1 Speed Letters

Speed letters are requests for information that originate from a sponsor question or contribution. The following are some examples of reasons that Unbound headquarters may send a speed letter:

- The sponsor would like to know more about the sponsored child’s academic status or future plans (this may include inquiries about tuition or school fees).
- The sponsor would like to know more about the urgent needs of a sponsored member or family
- The sponsor has special questions or concerns that cannot adequately be addressed without help from the project.
- The sponsored member mentioned in a letter that they have been sick, and the sponsor would like to receive more information and/or send extra funds for medical care.
- To inform the sponsored member about their sponsor’s passing and inform if another individual will continue with the sponsorship.
- The sponsor will be traveling to the area and would like to visit the sponsored member.

The project should evaluate the needs and goals of the sponsored member and their family before responding to the speed letter. For example, if the sponsor would like to send additional funds to the family, the project must first assess the current situation of the family to see if this would be appropriate and if there are current needs that could be met with additional funds.

### **When replying to Speed Letters:**

- When responding to a speed letter, please reply by email to the original speed letter message and attach any requested documentation. This ensures that the SL number is included in the subject or body of the email.
- Please prioritize speed letters marked “urgent.”
- If a speed letter requests a letter from the sponsored member, please submit a letter via Portal and reply to the speed letter to indicate the batch number OR attach a high-quality scanned color copy of the letter and translation (if necessary) to the email response. Please do not include the words “speed letter” in letters from the sponsored member. This is an internal Unbound term that is not used with sponsors.
- A copy of the speed letter response should be kept for project records.
- If a speed letter response coincides with the retirement of a sponsored member, an Exit Page must be submitted to close the speed letter and process the retirement.
- If a speed letter requires that the family record be updated, always select the speed letter number that starts with “SL” from the SL/UR drop-down menu on the Records page in Portal.

**Response time expectations:** Speed letter responses should be sent within 60 days of receipt. After 60 days, Unbound headquarters will send a second request. Unbound headquarters will continue to send reminders every 30 days after the second request is sent until the response is received.

Project teams should regularly review the Pending Speed Letters in Portal to ensure that speed letter responses are sent in a timely manner. If a speed letter that has been answered continues to appear as “Pending Project Action” after 7 business working days, please notify your Regional Project Specialist.

## 6.2 Update Requests

Update requests are sent by email from Unbound headquarters and are intended to help clarify, update, or correct information on a family record.

Common examples for update requests are:

- To update a record that is outdated or no longer age-appropriate.
- To submit a youth family record for a child who is now 13 years or older.
- To update a youth family record where the latest date to complete studies is in the past or within 24 months.

**Response time expectations:** Update request responses should be sent within 90 days. After 90 days, Unbound headquarters will send a second request. After 180 days, the individual will be retired.

Project teams should regularly review the Pending Update Requests in Portal to ensure that update request responses are sent in a timely manner. If an update request that has been answered continues to appear on the report after 4 business days, please notify your Regional Project Specialist.

### 6.2.1 Replies to Update Requests

In most cases, an update request response can be submitted by updating the applicable record in Portal and selecting the update request number from the SL/UR drop-down menu. It is not necessary to reply to the update request email.

For youth update requests, you may submit either an updated family record or an exit page through Portal, depending on the option selected (see below).

For projects with vocations, please submit updated record forms to Unbound headquarters by email. Please see the Vocations manual for more information.

### 6.2.2 Youth in Change of Sponsor

A youth update request is sent for youths 13 and older in change of sponsor status. This update request requires a project to indicate how Unbound headquarters should handle the youth’s case. The project must indicate one of the following three options:

- **OPTION 1: Retire the youth now.**

This option means one of the following is true:

1. The youth does not need continued sponsorship benefits.
2. The project cannot supervise additional benefits.
3. The youth is not participating in the sponsorship program.
4. The youth is no longer in school or technical training and does not have plans to return.

To indicate Option 1, please submit an exit page through Portal, leaving the retirement date as today's date.

- **OPTION 2: Keep youth in change of sponsor on the beneficiary list until a specific date** (this will appear as "BENEFITS THROUGH [date]"). This date is required and is the date Unbound headquarters will retire the student.

1. This option should be chosen for youth who will be leaving the program within 24 months.
2. As with all individuals on the beneficiary list in change of sponsor, the project will continue to provide a 'Benefits through' youth with benefits until Unbound headquarters retires the youth on the date specified.

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 15<sup>th</sup> 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.

- **OPTION 3: Request Unbound- headquarters to find a new sponsor for this youth.** This option should be chosen when a youth wishes to pursue his/her education and has more than 24 months to completion. If the youth has less than 24 months remaining to complete their education, they will automatically enter 'Benefits Through' status.

To indicate Option 3, please update the family record in Portal, select the Update Request number on the record and submit the record to Kansas. If an annual photo is due within the next 2 months, please submit an annual photo as usual through the Photos page of Portal.

**Sponsorship is not guaranteed.** Please remember that the profile generated from the family record is the only information a sponsor sees about a youth available for sponsorship. The explanation of the youth's goals and family situation should be complete and compelling. 'Option 3' youth will remain on the beneficiary list in change of sponsor until a sponsor is found. As with all beneficiaries, please continue to deliver benefits while Unbound headquarters looks for a new sponsor. If the youth completes or discontinues his/her studies before a sponsor is found, the project should immediately create an exit page in Portal to retire the youth. If a sponsor is not found and the youth is within 24 months of their anticipated date of completion of studies, the youth will be put in "Benefits Through" based on the education completion date provided.

## 7 Appendix

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## 7.1 Consent Form

### Consent for Communications

Unbound and \_\_\_\_\_ (project name) would like to share stories of sponsored members and their families in order to educate and inform current and potential sponsors, and the general public.

By signing this consent, you agree to allow Unbound to share your family's story and describe your participation in the sponsorship program through information, stories, photographs, video and audio recordings, in printed publications, promotional materials, on the Internet and through any media format published by Unbound or authorized for use by Unbound.

The Internet option will include posting profiles of children, youth and elders waiting to be sponsored. However, this is not intended to serve as an online relationship building mechanism. No direct communications via the Internet will be allowed between sponsor and sponsored.

Unbound will only present information about your family in a dignified way that will respect your privacy. Your decision whether or not to participate will not affect your sponsorship in any way.

Sponsored Member's Name (Print): \_\_\_\_\_

Signature: \_\_\_\_\_

Parent/Guardian (If child under 18 years): \_\_\_\_\_

Date: \_\_\_\_\_

I verify that the above signed has been informed properly before signing this consent.

Name of Unbound Staff (Print): \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

*For Unbound use only*



## 7.2 Family Record

Below is an example of a family record entered in Portal. Following it is an example of how this data is transformed and presented to sponsors.

### Basic Information

Record ID 100421	CH ID 207281	Type Youth	Child status Sponsored	Record Status In Progress
Project - Zone - Sub Guayaquil - 207281 - 001			SL/UR number	
Area		Community group	Staff responsible	
First name / Middle name / Last name Byron / <del>Guillermo</del> Rodriguez <del>Blanco</del>				Likes to be called
Gender Male	Date of birth 28 April 1999	Estimated? <input type="checkbox"/>	Age 22	Consent Yes

### Background

Address Barrío Flores, calle Pío Barrios, Antioquia, Colombia El Estero,	Languages spoken Spanish
Village / town / neighborhood Barrío Flores, avenida calle del Barrios	Religion Catholic
Jobs at home Byron likes to tidy his room, have his tasks in order	Health status Good
What is your favorite thing to do (Activities, talents, pastimes)? Byron likes to help children in the community to do homework, likes to play football, likes to read, especially Law and History books.	Health comments He only gets sick when the weather changes.
Additional information (personality etc.) He is a good student, he has always obtained the best grades, currently, he is in the sixth semester of Law, obtaining honor roll.	

## Family

Mother	Father	Guardian
First name Leticia	First name Ruben	First name
Middle name Margareta	Middle name Eduardo	Middle name
Last name Rodriguez Flores	Last name Rodriguez Flores	Last name
Occupation Housewife	Occupation Public Worker- Secretary	Occupation
Does the child/youth live with her or under her supervision? Yes	Does the child/youth live with him or under his supervision? Yes	Does the child/youth live with him/her or under his/her supervision? No
Is the mother present? Yes	Is the father present? Yes	Guardian's relationship to child/youth
If not present, why?	If not present, why?	
Number of brothers 1	Number of sisters 0	
What makes this family unique? It is a stable home. Four people live there and they have good communication. They are responsible, not rebellious, help in what they can to their parents.		
Child/Youth's Unbound goal It is to graduate of Lawyer, to reward my parents, and very grateful of the Foundation, for all the help necessary for my studies, and especially for my family.		
Family's Unbound goal That our children excel, and we will always be grateful to the Unbound Foundation, with all the values they have taught us, we have managed to be well as a family.		

## Living conditions

Walls Cement and cane	Sleeping Wooden bed	<input checked="" type="checkbox"/> Blanket
Floor Cement and earth	<input checked="" type="checkbox"/> Mattress	<input type="checkbox"/> Mat
Roof Fiber cement	Number of people living at home 4	<input type="checkbox"/> Shared
Cooking Gas	Approximate monthly household income (in dollars) 150	
Electricity Yes	Describe source(s) of income The father works in a public company, is not insured, the mother helps by selling school supplies at home, with a small business.	
Water supply No meter		
Additional information about the living conditions and/or community In my community I get along with all, I have managed to win the friendship of the neighbors. The sector has no water, no sewer.		

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**Education**

Attends School? Yes	Name of school University/College (Specify) Faculty of Dentistry	
If not attending school, why?	Approx. distance of current school from home 30 minutes	
Current grade in school University - Year 3	Mode of transportation to school Bus	
Favorite subject(s) Criminal Law, Civil Law	Additional education information He lives with a cousin, survives on \$30 per week, is a good student, he earned a merit award. After graduation, he did not study for 6 months due to matters of the Ministry of Education.	
Course of study Law	Career/Educational goal To complete my career as a lawyer, to exercise it and especially to help the children of the Unbound Family, as part of my appreciation of all their support, for my education.	
Anticipated completion date		
Pre-primary February 2001	Secondary February 2013	University March 2020
Primary February 2007	Informal education	Other education
Post-primary February 2010	Technical school	Describe other education

## Meet Byron

Name: Byron  
Gender: Male  
Language: Spanish  
Country: Ecuador  
Project: Guayaquil  
Birthdate: [REDACTED] Age: 22  
Career Plan: Law

Byron studies at a university approximately 30 minutes from home. He rides the bus there. He likes to study criminal law and civil law. Byron is a good student, and he has earned a merit award. He graduated from high school and began his higher education six months later. He has always obtained the best qualifications, and he is studying to become a lawyer.

Byron loves to read law and history books. He helps children in the community with their homework. His jobs at home are tidying his room and helping with household chores. He enjoys playing football. His health is good.

### Byron's Living Conditions

There are four people living in the home. The walls of the home are constructed of concrete and cane, the roof is made of fiber cement, and the floor is concrete and dirt. It has electricity and they use gas for cooking. They do not have a water meter at home. Byron sleeps on a wooden bed with a mattress and blankets. He has managed to win the friendship of his neighbors. His community has no water or sewer.

### Byron's Family

Mother: Leticia  
Occupation: Housewife

Father: Ruben  
Occupation: Public worker

Byron lives under the supervision of his mother and father. He has one brother. He lives in a stable home. The family members are responsible people who communicate well. The children are not rebellious, and they help their parents.

His father works as a secretary for a public company, and his mother helps by selling school supplies from their home.

## 7.3 Correspondence Timelines

### Regular Message Timeline

0	1	2	3	4	5	6	7	8	9	10	11	12
Message Received						Message Due	Message Due	Late Message	Late Message	Retirement Warning	Retirement	Appears on Retired List

### Welcome Message Timeline

0	1	2	3	4	5
Sponsorship Begins-Message Due	Message Due	Late Message	Retirement Warning	Retirement	Appears on Retired List

### Photo Timeline

0	1	2	3	4	5	6	7	8	9	10	11	12	13
Photo Received											Photo Due	Photo Due	Late Photo

14	15	16
Retirement Warning	Retirement	Appears on Retired List

## 7.4 Model Annual Photos



## 7.5 Child/Elder Reinstatement Request Form

### CHILD/ELDER REINSTATEMENT REQUEST FORM

DATE: \_\_\_\_\_

PROJECT: \_\_\_\_\_ SUB: \_\_\_\_\_

NAME of individual: \_\_\_\_\_

CH ID: \_\_\_\_\_

Reason the individual was retired:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please explain why this individual should be reinstated:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please also include the following:

- Updated family record in PDF or Word format (see Correspondence Manual section 1 to determine the correct form)
- Updated photo

Please send this form, the family record and the photo for each reinstatement request you may have to your Regional Project Specialist by email.

Thank you for your hard work and cooperation.



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## 7.6 ‘Family Record – Child’ Frequently Asked Questions

The family record is designed to tell a story. Unbound headquarters uses the information provided to create paragraphs for potential sponsors to read. If there is not enough unique information about the individual, all the stories seem the same.

### **What is your favorite thing to do (Activities, talents, pastimes)?**

- What games does the child enjoy playing?
- What does the child like to do when spending time with friends or family?

### **Additional information (personality etc.):**

Babies and toddlers: For infants and very young children, share observations about their emerging personality and behavior provided by their caretakers.

- What skills are they currently developing?
- How do they interact with others?
- Are they calm or energetic?
- What makes them smile?
- What calms them when they are upset?

School-aged children: For children who can respond to questions, allow them to share their interests and personality directly. If the child is shy or otherwise unwilling to share, observations provided by caretakers are acceptable.

- What are your favorite qualities about yourself?
- What characteristics do they show?
- Is their personality outgoing or reserved?
- How do they interact with others?

Adolescents: Teenagers should provide their own response to questions related to their personality and interests.

- What adjectives would they use to describe themselves?
- How do they enjoy spending free time?
- What do they like to do when spending time with friends or family?
- What is their favorite thing about themselves?
- What are their dreams for the future?

### **What makes this family unique?**

- What activities does the family enjoy in their free time?
  - Do they participate in any community activities?
  - Do they observe any religious, cultural, or familial traditions?
  - Do they worship or pray as a family?
  - Do they prepare certain meals for special events?
- How do the family members relate to each other?
  - Are there any additional relatives living in the family home? If yes, who?
  - Do they communicate openly?
  - How do they manage conflict when it arises?
  - Are they close with extended family, such as grandparents or cousins?
- What positive character traits or behaviors are displayed and/or encouraged in the home?

- o What expectations have the parents set for their children?
- What is the family’s typical routine?
  - o How does the family divide household labor? Are there any household tasks that they perform together?
  - o Do the parents help the children with their homework?
  - o Do older siblings or other family assist with childcare?

**Describe source(s) of income:**

This field is used to share detailed sentences about the parents’ employment and earnings.

- Is the job permanent or temporary?
- Do they earn a fixed or unsteady income?

Example Occupations and Questions:

<b>Farmer/Peasant farmer</b>	<b>Day laborer</b>
• What types of crops do they cultivate?	• What types of labor work do they do?
• Do they work independently, or do they work for someone else?	• Do they work independently, or do they work for someone else?
• Do they own or rent the land?	
<b>Weaver/Seamstress/Tailor</b>	
• What types of garments do they make?	
• Do they work independently, or do they work for someone else?	

**Additional information about the living situation and/or community:**

This field should be used to describe what makes their situation unique. Some ideas that could be shared:

Home:

- Is the home rented or owned?
- Is the home structurally sound? Are there issues due to poor insulation or ventilation?
- Do they live with extended family? If so, does the family have a separate living space? Are expenses like food and utilities shared?
- Does the home have sufficient space for everyone that lives there?
- Do they have separate spaces for sleeping and cooking?
- Are the furnishings adequate?
- Do they have access to a latrine?

Community:

- Are they located in an urban or rural community?
- What is the quality of the infrastructure, such as roads, utility services, etc.?
- Do they have access to public transportation? How do they travel into or out of the community?
- How far is the community from the nearest healthcare provider or market?
- How many schools are in the area? How many grade levels can be completed without traveling to another community for school?
- How do the neighbors typically interact with each other?
- Does the community have communal spaces like parks?
- Are there any festivals or traditions observed in the area?
- Does the family feel safe in their community?

- Are there many employment opportunities available? What types of work are most common in this area?
- What is the typical climate? Does it affect the family's daily life or economic opportunities?
- Is the family from the area? If not, what brought them to their current community?

**Additional education information**

Focus on the child's academic and extracurricular interests. A child is not expected to have an established career path in mind, but do provide their aspirations for the future if they are shared.

- What is the child's social experience like?
- What extracurricular activities do they participate in?
- Do they play with friends at recess?
- Do they help their teacher collect papers?
- What is the schooling environment like? (such as the condition of the building, the quality of the curriculum, etc.)

Youth (13 and older): Focus on the youth's higher education plans and/or career goals. If the youth is not currently attending school, an explanation should be provided along with a plan for when they will return. Even if a youth is out of school at the time, please share favorite subjects, career goals, and other education information as applicable.

## 7.7 ‘Family Record – Elder’ Frequently Asked Questions

The family record is designed to tell a story. The spaces provided for additional information about the individual are important and should be filled in completely with as much detail as possible (within the character limit of the field). Unbound headquarters uses the information provided to create paragraphs for potential sponsors to read. If there is not enough unique information about the individual, all the stories seem the same.

### What would you like to share about yourself?

- Are they single, married, widowed?
- Do they have any children? If yes, how many sons and/or daughters?
- Do they have any grandchildren? If yes, how many?
- Were they able to achieve an education?
- What makes them proud?
- What lessons they have learned over the years that they would like to share with others?
- What challenges have they faced and/or overcome?

### What is your favorite thing to do (Activities, talents, pastimes)?

Highlight their passions, talents or favorite things they used to do when they were younger. Avoid only talking about doing basic household chores

- How do they enjoy spending free time?
- Do they have opportunities to socialize with friends and family? If so, what do they enjoy doing together?
- What is their favorite meal to prepare or eat?

### Additional information (personality etc.):

This field is used to describe what makes the individual unique. Elders should provide their own responses to questions related to their personality and interests.

- What characteristics do they show? Is their personality outgoing or reserved?
- What are your favorite qualities about yourself?
- What adjectives would you use to describe yourself?

### Describe source(s) of income:

This field is used to share detailed sentences about their current employment and earnings.

- Is the job permanent or temporary?
- Do they earn a fixed or unsteady income?

### Example Occupations and Questions:

Farmer/peasant farmer	Day laborer
<ul style="list-style-type: none"> <li>• What types of crops do they cultivate?</li> </ul>	<ul style="list-style-type: none"> <li>• What types of labor work do they do?</li> </ul>

<ul style="list-style-type: none"> <li>Do they work independently, or do they work for someone else?</li> </ul>	<ul style="list-style-type: none"> <li>Do they work independently, or do they work for someone else?</li> </ul>
<ul style="list-style-type: none"> <li>Do they own or rent the land?</li> </ul>	
<b>Weaver/Seamstress/Tailor</b>	
<ul style="list-style-type: none"> <li>What types of garments do they make?</li> </ul>	
<ul style="list-style-type: none"> <li>Do they work independently, or do they work for someone else?</li> </ul>	

**Additional information about the living situation and/or community:**

- Is the home rented or owned?
- Is the home structurally sound? Are there issues due to poor insulation or ventilation?
- Do they live with extended family? If yes, does the family have a separate living space? Are expenses, like food and utilities, shared?
- Does the home have sufficient space for everyone that lives there?
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- How do the neighbors typically interact with each other?
- Does the community have communal spaces like parks?
- Are there any festivals or traditions observed in the area?
- Does the family feel safe in their community?
- Are there many employment opportunities available? What types of work are most common in this area?
- What is the typical climate? Does it affect the family's daily life or economic opportunities?
- Is the family from the area? If not, what brought them to their current community?

**Health:**

If the health of the applicant is not good, please be as specific as possible when providing details about why his/her health is fair or poor.

**SPECIAL NEEDS:** Does this person have any physical or mental limitations that will prevent him/her from fully caring for him/herself long term?

**\*\*An elder is not considered special needs if the health conditions are consistent with natural aging**