

2026 Sponsorship Manual Revisions

General changes

Updated language on sponsors to include donors and updated titles and structure for various headquarters teams and International Programs roles.

3.1.8 Reporting for additional programs (new policy)

Reason for policy addition: Provide guidance for the growing number of non-sponsorship funds and programs.

To ensure effective implementation, accountability, and learning across Unbound's additional programs, the project coordinator is responsible for maintaining robust communication and reporting mechanisms required by Unbound Headquarters for each program.

5.1.1 Program characteristics

Reason for revision: Express the connection of the Unbound program characteristics to Unbound's current strategic plan and program pillars. All characteristics remain the same.

Unbound's sponsorship program has nine program characteristics, which are the global framework that guides program development decisions as projects interpret the characteristics into the local context. The central impact of these program characteristics is communicated in the program pillars of Unbound's current strategic plan: Eliminate Poverty, Empower Women, Advance Education, Build Community, and Promote Well-being of All Ages. This alignment ensures that programs respond holistically to the realities of families, strengthening their capacity for transformation and fostering sustainable development from the local level to the global stage.

5.2.4 Enrollment in the Sponsorship Program

Reason for revision: Reminder to make enrollment criteria public, part of orientation, and a standard for re-evaluation.

Sponsored members are selected based on economic need, participatory attitude, and involvement in their community. Families should have economic need and desire to overcome poverty to qualify for the program, but it is not the sole criteria for entry into the program. Only children 12 years old or younger should be enrolled in the child sponsorship program. Only older adults 60 years old or older should be enrolled in the elder sponsorship program. Exceptions can be made for special circumstances. Please notify the Unbound headquarters regional team about people who are identified as special cases requiring an exception before submitting the records.

The coordinating unit must develop guidelines for selecting sponsored members for the Unbound sponsorship program. Each project is required to document a detailed local selection policy and ensure that

all project staff are familiar with it. Additionally, these guidelines must be clearly communicated to the communities where we are present, ensuring transparency in communication and fostering trust in the selection process. A copy must be kept at the coordinating unit office and be available for review by families and Unbound representatives at any time.

In order to determine the eligibility to participate, the project is required to perform a socioeconomic evaluation of each potential sponsored person and assess the interest and commitment of the family to change their socioeconomic conditions. The socioeconomic evaluation must include an initial home visit to verify the family's financial situation and overall eligibility for the sponsorship program. Each sponsored individual's assessment must be maintained in their individual files. Individuals should not be submitted for sponsorship before a thorough assessment, including a visit to their home, has been conducted.

Sponsored members should be non-transient and accessible geographically. Geographic accessibility permits efficient provision of services and benefits and allows project staff members to have frequent and regular contact with all sponsored members, and better facilitation of community-building activities. Generally, programs for transient families, street children, temporary refugee populations or acute medical/nutritional support programs, where persons are present for only a short time, are not compatible with Unbound sponsorship. Projects that create virtual subprojects should coordinate with their regional team to create appropriate guidelines.

An orientation to Unbound sponsorship should be provided to all sponsored members upon entry into the program and setting their goals. This orientation should explain the policies, expectations, and the requirements of the program. Sponsored members and their families must be re-evaluated regularly to determine if they still meet the project's selection criteria. Additionally, it is recommended to carry out periodic engagement with families on the waiting list for sponsorship and ensuring they remain eligible and interested in participating in Unbound. If any inconsistency is detected that would prevent a family from being sponsored, it must be reported immediately to the Unbound headquarters and their social record must be removed from the Portal to prevent a sponsor from being assigned.

5.2.4.1 Prohibition against duplicate sponsorship

Reason for revision: Clarify that Unbound sponsorship is designed to be a support to the household, reduce potential confusion and maximize the number of families that can benefit from sponsorship.

Unbound does not permit any sponsored family to have a duplicate sponsorship, including individual sponsorship, by another organization in the same household. Sponsored members and their families are free to choose which sponsorship program they want to belong to, but no Unbound household may be sponsored by two sponsorship organizations.

5.2.6 Poverty Stoplight

Reason for policy addition: Emphasize that a life map is a tool and primary guide for families in planning their goals and benefits.

Poverty Stoplight is both a self-assessment survey for sponsored families and an intervention model that enables families to develop practical solutions to overcome their specific challenges. Project teams collaborate with representatives of sponsored families to identify relevant indicators and create definitions for extreme poverty (red), poverty (yellow), and no poverty (green) for each indicator. This survey and

methodology are a direct application of Goal Orientation tools to achieve all Unbound 9 Program Characteristics.

The survey includes three sections. The first section is socioeconomic data about the family. The second section is the family's self-assessment for the locally selected indicators. The third section is where each family selects priorities and develops action plans to improve their status on the selected indicators. Project teams work with sponsored families to establish SMART goals and create strategies to provide guidance, support, and monitoring of their progress between each application. Unbound's goal is that all sponsored families see the Poverty Stoplight as a tool for them to use in setting and achieving their family goals. Best practice of this is for sponsored families to update their responses to the second and third sections (indicators and priorities) of the survey at least once per year and have access to their current life map.

5.2.10.1 Fixed-term sponsorship (new policy)

Reason for policy addition: Include policy guidance on program evolution to a stronger focus on household goals and program phases to support family self-sufficiency.

Unbound sponsorship is designed to support families on their journey toward self-sufficiency and a flourishing life beyond the program. While sponsorship is impactful, it is not intended to be permanent. Instead, it should serve as a time-bound support that empowers families to reach their goals and eventually thrive without program assistance.

Projects are not required to adopt a fixed-term sponsorship model. However, those that choose to do so should define their own policies and timeframes based on local context, family needs, and program goals. These policies should be developed with the headquarters regional team and include: duration of sponsorship, programmatic phases, indicators for completion, and family situations that qualify for an individual extension to the term-limit.

Projects that implement fixed-term sponsorship should enter estimated retirement dates in Portal. To minimize the impact of large groups of retirements, replacement records for fixed term retirements may be advanced a year before the planned retirements.

2026 Financial Policies Manual Revisions

1.1.1

Reason for revision:

Reason for revision:

2026 Correspondence Manual Revisions

1.2.1 Replacement/Growth Records

Reason for revision: to clarify that there is no longer a Headquarters-imposed deadline to submit records by the end of each semester.

- Central office project staff should regularly monitor the records allotments information in Portal to know how many records can be submitted at any given time (see the Portal User Guide for more information). There is currently not a deadline to submit records, but the project should submit records in a timely manner to maintain the size of the project.

1.3 Reinstatements

Reason for revision: Reinstatement requests can now be submitted via Portal.

If a project would like to reinstate a sponsored member who was previously retired from the program, they must submit the following in Portal:

- Updated family record: Claim the retired record in Portal and make at least one update to each section of the record.
- Updated photo: Upload an updated photo to the record. This should meet the photo guidelines described in the Annual Photos section of this manual.
- **Child/elder reinstatement request form:** This form (found in the appendix and on Portal) should explain the reason the sponsored individual was retired and why the individual should be reinstated. This document should be attached to the family record, and the name of the document must begin with “Reinstatement.”

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.

Once the record is in Ready to Submit status, contact your Operations Specialist to have them submit the record.

3.1.2 Messages

Reason for revision: the threshold for sending Acknowledgement Letter requests has risen to \$1000.

If the sponsor sends a Sponsored Family Need contribution of less than \$1000 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 \$1000 USD.

3.2.2 Message Content

Reason for revision: usage of AI in composing messages is prohibited.

- Messages should not be written using Artificial Intelligence (AI).

3.3 Letters

Reason for revision: To ensure that sponsors can receive the original versions of letters composed by sponsored members.

Letters are submitted via Portal and may be handwritten or typed, depending on the skill level and resources available to the sponsored member. Regardless of the method used, the letter that is submitted must be the original version composed by the sponsored member.

4.2 Acknowledgement Letters

Reason for revision: the threshold for sending Acknowledgement Letter requests has risen to \$1000.

Unbound headquarters will request an acknowledgment when a sponsor sends a contribution of \$1000 or more. These requests will appear on the Communications page in Portal. If the sponsor sends \$1000 or more on a monthly or frequent basis, an acknowledgement letter request will only be sent approximately every 6 months, so the acknowledgement of the frequent contributions can be consolidated into one letter.

2026 Scholarship Manual Revisions

2.2.1 Minimum requirements for Scholars

Reason for revision: Change in required documentation for scholars

The minimum requirements for a scholar who is awarded an Unbound scholarship are:

1. Submit an application to be considered for the program.
2. Create an individual community service plan, reviewed by Unbound project staff.
3. Provide regular reporting and verification of enrollment and performance in school, including the submission of grade cards.
4. Maintain passing grades
5. Fulfill individual community service plan.
6. Maintain a signed consent form for each scholar.

3 Required Reporting

Reason for revision: End of year reporting is now maintained and sent to Unbound headquarters through Portal

3.1 Reporting before program implementation

Projects must submit the scholarship program plan for the upcoming academic year to Unbound headquarters each year for approval before awarding Unbound scholarships

3.3 Reporting after program implementation

Projects must submit the Annual Program Report and the list of scholars who participated in the scholarship program to Unbound headquarters at the end of each academic year. These annual reports must be submitted to receive scholarship funds for the next academic year.

3.3.2 Building the Scholar List

A list of the scholars who participated in the scholarship program is required along with the Annual Program Report and Program Plan.

New scholars should be entered into Portal at the beginning of every new scholarship program year and updated throughout the year to reflect scholar retirements and replacements

5 Appendix

Reason for revision: Addition of a Scholar Consent form

5.1 CONSENT FORM

2026 Vocations Manual

There are no significant changes in 2026