# UNBOUND

# Unbound Sponsorship Manual

# TABLE OF CONTENTS

# <u>Foreword</u>

The late primatologist and conservationist, Dr. Jane Goodall, said this of hope: *"Hope is often misunderstood. People tend to think that it is simply passive wishful thinking: I hope something will happen but I'm not going to do anything about it. This is indeed the opposite of real hope, which requires action and engagement."*

Dr. Goodall, who inspired me to first work in Africa, passed away on October 1, 2025. I was on my way to visit the Unbound Bolivia project and then onward to meet up with some of the Unbound U.S. Board members in El Salvador. While in Bolivia, along with hundreds of Unbound families, I participated in a memorial celebration in honor of Bob Hentzen and the other Unbound founders. Jane Goodall and Bob Hentzen – both are examples of people who put hope into action and inspired generations upon generations to do the same. I believe there is nothing that embodies hope more than the work and people of Unbound: from our sponsors and donors, our headquarters staff, our Unbound Board members, **you – our project teams**, **and most especially the Unbound families**. Together, our hope is not passive wishful thinking but, indeed, it is about bold action and worldwide engagement.

Today, our hope is expressed in the Unbound 2030 strategic plan, *Hope in Every Step: A Radical Journey to End Poverty* which we launched in January of 2025. As set forth in our plan, by 2030 we have two big goals: (1) to increase the number of households we support to 400,000 families in more than 500 communities in Latin America, Asia and Africa and (2) to expand our geographical reach by opening an additional program country where our presence is most needed. Our impact during this period will be measured along five programmatic pillars: Eliminate Poverty, Empower Women, Advance Education, Build Community and Promote Well-Being of All Ages. To achieve this impact, we must acquire over 150,000 new sponsorships and raise approximately $150 million USD in non-sponsorship donations by 2030.

At Unbound headquarters, we are making investments in our growth in sponsorships and non-sponsorship donations which we will continue to put us on a path towards reaching these goals. In 2025, we are projecting to end the year with approximately 17,500 new sponsorships, an almost 43% increase in total sponsorship acquisition from year end 2024. This year we have added more members to our Catholic outreach team and 13 new Catholic Priests joined our preaching team. Together this team will have completed 500 Weekend Appeals in 2025, a number that has not been achieved since 2017. While our Weekend Appeals sponsorship channel will continue to be the lifeblood of Unbound sponsorships, we are investing in growing in other areas as well, such as Ecumenical, digital/media, canvassing (third-party vendors who solicit sponsorships at high-traffic areas such as shopping centers) and concerts in order to accelerate our growth.

Likewise, we are building our philanthropy team who are responsible for growing relationships with major donors, writing grant proposals and increasing estate giving, as part of non-sponsorship giving by our sponsors and other donors. In 2025 we are projecting to increase non-sponsorship

donations by over $2 million.  These donations are helping to fuel scholarships, Agents of Change, Critical Needs, small business grants and innovations throughout the projects.  In 2026 the philanthropy team will be launching a fundraising campaign – the Hope in Every Step Campaign – to raise the support needed to fulfill our strategic plan targets over the next five years.

The foundation of all this projected growth will be our ability to "tell the Unbound story" and report on the impact you are achieving every day with families in our projects around the world.  We must continue to "get the word out," as Bob Hentzen said, and demonstrate how poverty can be eliminated, family by family, through the support provided by our generous Unbound sponsors and donors.  Bob Hentzen talked of the "globalization of hope."  Over our 44-year history, Unbound has built and is building a community that truly brings hope around the world.  From our sponsors and donors to our project teams and our families, we will work *actively* together with commitment, passion and love in 2026 and years to come to grow this global community of hope.  Thank you for all you do to make all of this possible.

Ashley Hufft, President & CEO
December 2025

# Introduction

## Welcome

Welcome to the Unbound community. You have joined a very special movement in our world today. Unbound strives to build a very unique experience for sponsored members and families, sponsors and Unbound co-workers. For sponsored families, we try to nurture a system of human development where marginalized people can direct their own path. Unbound provides a tranquil presence in their lives, establishing sustainable programs of direct benefit to improve their welfare, and providing more choices to help them create both economic self-sufficiency and a supporting community. For sponsors and donors, we offer a trustworthy means to build a more compassionate and tolerant world. We offer a way for one person to participate in solidarity with another person in the world. For Unbound staff, we see doing the work of Unbound as an honor, privilege, and gift. In all three groups we strive to foster community through personal responsibility and friendship formed in the spirit of shared struggle.

### Unbound Manual Set

This set of Unbound manuals is the official interpretation of the Unbound board policies for Unbound headquarters and all Unbound projects and subprojects. Unbound's core values and objectives reflect our history and experience working together with project staff in the countries where Unbound works. Unbound project coordinators, subproject coordinators, boards of directors, staff, and other project partners are expected to make project decisions consistent with the values, principles, guidelines, and restrictions put forth in the set of Unbound manuals.

## Unbound History and Evolution

- On November 20, 1981, Unbound was founded as the Christian Foundation for Children (CFC) through the visionary leadership of the Hentzen brothers Jim, Bud and Bob; their sister Nadine Pearce and friend Jerry Tolle.
- In 1982, CFC established its first sponsorship programs in Colombia and Honduras. The sponsorship program expanded first throughout Latin America.
- In 1984 the elder program is established based on expressed need from local programs and CFC becomes Christian Foundation for Children and Aging.
- In 1985 the sponsorship program expanded to Asia and Africa.
- Guatemala received the first Awareness Trip in 1988.
- In 1996 Bob Hentzen walked 6,400 km from Kansas City, USA to Guatemala to demonstrate his love for people living in poverty.
- The Scholarship Program is established in 1998.
- In 2001, CFCA established mothers groups in India. Work through small mothers groups of 15 – 30 spread around the world slowly as the primary way that families participate and receive support.

- Individual bank accounts began being used in India in 2001 to transfer sponsorship funds and ensure sponsored friends and their families had direct control over their benefit resources.
- On December 29, 2009, Bob began a second pilgrimage walk from Guatemala to Chile, sharing many of the 12,875 kms with sponsored families on the trek called Walk2gether.
- In 2010 CFCA launched its 9 program characteristics as a framework developed through a synthesis of local project best practices. These 9 characteristics including Goal Orientation, Capacity Building, Empowerment, among others, continue to serve as the guideposts for program monitoring and development across all projects.
- Unbound becomes the new name of CFCA in 2014 to more accurately reflect the organization's history, mission and role in the world.
- In 2017 Unbound launches Agents of Change community grants to resource local development projects directed by mothers groups or other Unbound solidarity groups to impact their local communities and inspire empowered leaders.
- In 2019, Unbound opened office in Rwanda for the first time, sponsoring the first group of children there beginning in January of 2020.
- By 2020, cash transfers became the dominant model of benefit delivery, providing families direct control over their sponsorship resources.
- In 2023 the Poverty Stoplight became the primary model for family goal setting in Unbound.
- In 2025 Unbound headquarters launched a 2030 Strategic Plan with ambitious goals for new growth and revenue centered around 5 Program pillars of impact: Eliminate Poverty, Empower Women, Advance Education, Build Community and Promote well-being of all ages.
- In 2025 the Program Innovation Fund was launched to support project initiatives selected by international committee of mothers in new communities and new areas of need.

# Unbound Co-founders

## Bernard "Bud" Hentzen
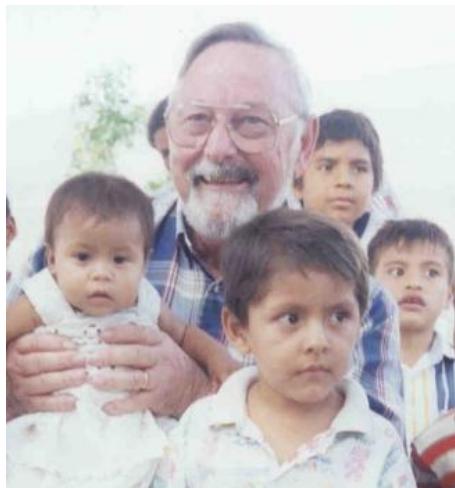
Bud Hentzen was born on the 2nd of January, 1928. He passed away on the 30th of November, 2011. He was the 6th child born in the family of 14 Hentzen children. He graduated from Redemptorist High School in Kansas City, Missouri in the United States. After high school, he joined the Navy and served two years as a seaman in California and Florida. He attended the University of Kansas in 1947, graduating in 1951 with an industrial management certificate. He also served as a second lieutenant in the Air Force, stationed in England for several years and discharged in 1953.

Bud returned to Wichita after completing his military service and started Hentzen Contractors Inc.
Bud also served as a Sedgwick County commissioner from 1985 to 1992.

He married Joanne Wilkes in 1949 at Redemptorist Church. The two had met in high school. They had 10 children and 52 grandchildren and great-grandchildren.

Of CFCA, Bud said, "I'm convinced that we hit on an idea, a thing we do in our positions as Catholic lay people. We are convinced it is an integral part of the Catholic social doctrine." He was committed to living the Catholic Church's social teachings through solidarity with those living in poverty.

## Catherine "Nadine" Pearce

Nadine Pearce was born on the 23rd of December, 1924 and passed away on the 30th of January, 2012. She was the 4th child born in the family of 14 Hentzen children. Nadine's childhood was spent with the love and support of caring, faith-filled parents.

In a 2002 interview, Nadine said she and her siblings were influenced by the religious values of her parents and other relatives. Six of her aunts were nuns. "Even though we had a big family, my mother was always doing something for people who needed help more than we did," Nadine said.

This caring environment cultivated a nurturing character in Nadine. "For as far back as I can remember, my sister Nadine has been watching over me and taking care of me," Bob Hentzen said. "Over the rocks and fields of our little farm at Kenny Heights, Kan., she taught me to walk and I haven't stopped since."

The family prayed the rosary daily, a devotion Nadine continued through her life. She prayed the rosary every day of Walk2gether to show love and support to sponsored members and their families.

Nadine attended Redemptorist School and graduated from Loretto Academy, both in Kansas City, Mo. She met her husband, the late Horace "Hoppy" Pearce, at a community dance at the Pla-mor ballroom in Kansas City and the two married July 20, 1946. They began their married life in Kansas City, Missouri, and raised 8 children. She had 44 grandchildren and great-grandchildren.

When she heard her siblings Bob, Bud and Jim, along with a friend, Jerry Tolle, had an idea to start a nonprofit foundation to help children and families in poverty by connecting them with caring people in the U.S., she immediately offered her support.

"They had this bright idea," she said. "They didn't know it was a bright idea at the time, that maybe, just maybe, they could ask people to send money to them to help a child in a Third World country."

The idea became a reality and in November 1981, CFCA was incorporated.

In the early years, her home was often the gathering place for CFCA meetings and a storage area for files and supplies. She always welcomed visitors, including project staff members and preachers, with a warm smile and a warm meal.

Nadine was always available to assist with weekend parish presentations or administrative projects. She carried brochures and handed them out to people she met.

She said she and the other Hentzen co-founders — Bob, Bud and Jim — were close as siblings. Their closeness encouraged mutual support for the idea of CFCA and laid the foundation for its success.

"I think it kind of proved that if you work together, the goal you have set can be completed," Nadine said.

Scott Wasserman said of Nadine, "She was the face of tough maternal care for CFCA. CFCA has tremendous respect for mothers, for their nurturing and for their toughness. Like a mother, Nadine kept us in line. Anytime we became too self-absorbed or abstract, she brought us down to earth and reminded us of our core values."

Nadine's unconditional love and steadfast support is missed by all in the CFCA community around the world.

## Jim Hentzen

Bob Hentzen said of his brother, Jim, "The legacy of Jim might be rough-cut, but it is simple deep love for God's people. This clear option often put him at odds with the commercial ethic in which he found himself. He had the talent and the courage to leave it behind time after time, in search of a better way to serve. When the Lord opened the space for CFCA, he and we jumped in all-fours, and here we are today…still jumping. Let us all celebrate this on-going leap of faith."

Jim was single-minded of purpose and full of passion in serving those living in poverty.

Jim's efforts led to the CFCA ministry of preaching in Catholic parishes, where we inform, inspire and invite folks to participate with CFCA in the Gospel call to directly serve those in need by connecting with a child, youth or elder and their families.  Jim was "on fire" to invite others on this journey.  He was always reading, talking and taking notes on yellow pads about new ways to reach out and new possibilities for CFCA.  He stretched our imagination and he fed our hunger for community.

Jim Hentzen passed away on the 14th of September, 1993.

## Jerry Tolle

Jerry Tolle was born on the 10th of June, 1934.  He was killed in a car accident while visiting the CFCA Spain office on the 17th of May, 1995.
Since his days as a Jesuit missionary in Belize and Honduras, he had a very special place in his heart for poor children and elders.  He was often called the "nuts and bolts" man in CFCA.  He was in charge of relationships with projects and managed many of the details of the organization.  Blessed with a fantastic memory, he knew the names and dates of a large part of the history of CFCA.

Jerry took great joy in the growth of CFCA, but he never lost the personal touch. He always had time to answer a question or to commend someone for a job well done.

Jerry said of CFCA, "We feel that CFCA is a dynamic, growing, interacting family of workers, sponsors, volunteers, missionaries, poor children and aging. All are contributing to the co-creation of CFCA, an experience of sharing, of getting to know and love and serve the Lord's little ones. Each new staff person, volunteer, missionary collaborator, sponsor and supporter is seen and given the opportunity of co-creating our mission."

Jerry brought many, many gifts and talents to the founding of CFCA. Yet his love for the children and the elderly and the changes that they made in his life would have to be central.

## Bob Hentzen
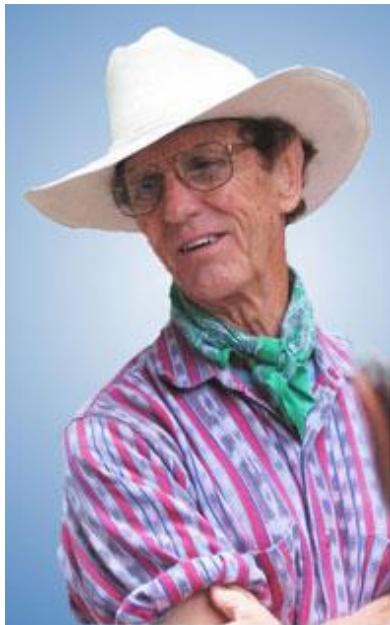


Robert K. "Bob" Hentzen, the visionary president and co-founder of CFCA, died on the 8th of October, 2013, in Guatemala. He was 77 years old.

Although he led one of the top 200 nonprofits in the U.S., Bob was a humble man who lived on a small farm in Guatemala with his wife, Cristina.

"At CFCA, we know families living in poverty can sometimes feel forgotten by the rest of the world," Bob said. "By walking with them, we are saying, 'You are not alone. We are listening to you and learning from you.'"

### Hearing the call

Born March 29, 1936, in the small farming community of Kenny Heights, Kansas, Bob was one of 14 children. From an early age, his parents instilled in him and in his siblings a deep faith and spirit of caring for others. These lessons were reinforced by the Sisters of St. Joseph of Carondelet, who staffed the parish school, and later by the Christian Brothers, his teachers at De La Salle High School in Kansas City.

After high school, Bob entered La Salle Institute, a house of formation for the Christian Brothers in Glencoe, Missouri, and in 1957 graduated from a Christian Brothers College, Saint Mary's in Winona, Minnesota. That same year he began teaching at a Catholic high school in Chicago, Illinois.
His call to serve became his life's work — walking with and learning from poor and marginalized families. He began his life of service as a Christian Brother in Colombia, South America, from 1959 to 1963, and he served in Guatemala from 1967 to 1973.



"For Bob, it wasn't theoretical," Paul Pearce, former director of global strategy said. "He fell in love with the poor through personal encounters. He could never be the same after that."

After leaving the Christian Brothers, the families he met during his time in Guatemala and Colombia continued to live in his heart. He wanted to introduce others to the families who inspired him, which led to his decision to leave teaching and begin a new journey.

### A new beginning

In 1981, Bob was working at a charitable organization with Jerry Tolle, a former Jesuit priest who had served in Honduras. Their common histories serving the marginalized communities in Latin America gave birth to a shared dream. They made a bold choice to step out on their own and began planting the seeds of a relationship-centered sponsorship program, which allowed people to connect with families like those Bob and Jerry had come to know and love. Their grassroots approach began with a carefully crafted letter to their personal Christmas card lists asking their friends and family to support their work.
"CFCA was born in the heart of each of us," Bob said, "and in the hearts of the poor whom we are called to serve."

### Wisdom of mothers

Under Bob's leadership, CFCA has evolved a highly personalized sponsorship model into a movement that is creating transformation, empowerment and opportunity for families in the program.

"One of Bob's greatest legacies was his gentle, balanced leadership, and the example he gave to CFCA staff all over the world," Laney Haake, former director of U.S. Outreach said. "He didn't just talk about it, he lived it."



Bob believed in the wisdom of mothers living in poverty. He had seen firsthand the creativity and initiative of women living on the margins.

Mothers groups started in CFCA's India projects and expanded to other countries around the CFCA world. The innovative and successful approach of bringing small groups of mothers together to support one another and help their children and their communities revolutionized CFCA's model of sponsorship. It unlocked the potential of children and families to create their own paths to a better life.

"Through Bob's effort and example," Paul said, "more than 700,000 people on the margins of society believe in themselves."

### Living the dream

In September 2013, Bob traveled to New York for CFCA's "Rise and Dream" documentary film tour.

At each event Bob spoke to those who had gathered. He pulled a folded, hand-addressed envelope out of his shirt pocket and read a letter to the crowd.

The letter was a message from one of his seven sponsored children, 14-year-old Shaima. She described a math competition in which she had participated with some of the most gifted children in the Philippines. She wanted to let him know she had received high marks and placed high in the competition and won a full college scholarship.

Shaima's success was Bob's joy.

**An example for us all**

Bob was a non-traditional president. His office was the road. The home of a sponsored child and family was his boardroom. His office attire was a well-worn shirt and pair of sandals. He walked the walk each and every day. He got to know people as individuals and genuinely cared about them.

"Bob helped everyone experience a different definition of wealth," Paul said. "He went to the field to teach and became the student."

Bob often said that CFCA begins where the road ends. He encouraged each and every staff member at CFCA to get out of the office and make the daily walk into the homes and hearts of the families in the CFCA program.

"Bob loved the marginalized. He inspired more than 1,500 staff from around the world to follow in his footsteps," Paul said. "He is alive in our continued commitment."

# 1  Unbound Core Values & Program Objectives

Core values are defined as the core beliefs or principles which guide the decisions within an organization.  Unbound's core values are documented as official board policies and set in motion Unbound's objectives (ends statements) and activities.

## 1.1  Mission

Support families and communities worldwide on their self-directed paths out of poverty.

## 1.2  Vision

Build a world free from poverty where all people have access to resources, community support and the ability to make decisions that improve their lives and uphold human dignity.

## 1.3  Core Values

### 1.3.1  Respectful

We recognize the God-given dignity and equality of all people and foster relationships based on mutual respect and understanding.

### 1.3.2  Authentic

We work with honesty, transparency, integrity and accountability.

### 1.3.3  Innovative

We advance groundbreaking ideas and methods, humbly listening to and learning from the marginalized and vulnerable and putting their needs first.

### 1.3.4  Optimistic

We believe in the transformative power of community and that, together, we will build a world where everyone can participate in society and reach their full potential.

## 1.4  Our motivation

Unbound is an international nonprofit organization founded in 1981 by Catholic laypeople acting on Gospel values of love, compassion and justice, as well as principles of Catholic social teaching, including the dignity of the human person, solidarity, working for the common good and ensuring

decisions are made by those most affected by them. These values and principles shape our programs and the way we work with families and our broader community. Unbound partners with all people of goodwill from all faith traditions and backgrounds to create a worldwide community of compassion and service.

# 1.5  Unbound Identity

What distinguishes Unbound from other sponsorship organizations or groups?  Personal attention and outreach to each sponsored person in support of realizing their goals and our commitment to the dignity of each person.  Unbound is also identified by mobilization of Unbound staff to homes and surrounding communities of sponsored children, elders and families.

Unbound is not interested in praise or banners recognizing Unbound.  Rather, Unbound is interested in the sponsored members knowing that they are part of an international movement called Unbound, knowing the names of their Unbound sponsors and receiving services and benefits as tangible symbols of their sponsors' love for them.  Each month, sponsors send Unbound contributions to pay for these benefits.

## 1.5.1  Unbound Name, Logo and Core Values

The Unbound logo design is a graphical representation of the Unbound core values and beliefs. It can be interpreted in various ways, but our essence in the present and the future is:

**People united in a circle:** Unbound represents community; a family of people that from their individuality meet to work towards a common objective.  The different sizes show that Unbound is dedicated to serving girls, boys, youth, elders, parents and their children, as well as sponsors; simulating through it a circle of friends.

**Space in the center**: This represents the essence where wishes are brought together, dreams and common goals where each one is jointly responsible for the other, a space where no one feels alone. The open space also represents the platform where ideas, initiatives, interests, talents, and life-projects of sponsored members are born and nurtured.

**The cross:** In the heart of our logo is a cross formed by human figures.  It represents our beginnings and our belief in the dignity of each person.  Unbound has its roots in the call to free people from the bonds of poverty, oppression and isolation.  We honor the journeys of faith of all people and cultivate together a society of love, service and learning.

**Four cardinal points**: The cardinal points are the four directions that represent and remind us of the countries where we work, dreaming of a world without borders, where we all feel like members of a global community of compassion without limits, or bonds of poverty.

**Footprints:** The figures also represent footprints.  In Unbound we say that we walk with the poor. Walking is not only an ordinary human activity, for them it has a deep significance in their lives because their survival depends on their daily walk.  Bob Hentzen, our cofounder, completed two pilgrimages of faith in 1996 from Kansas to Guatemala and in 2009 from Guatemala to Chile, walking a total of 12,000 miles.

**Colors:** The colors of the logo represent the diversity and individuality of all participants, just like the diversity of the communities we serve. They also represent nature in all its splendor.

**Balance and Dynamism:** The colors are not distributed equally, yet the geometry is in balance. Unbound strives to restore balance, to restore equilibrium in individuals, in relationships among people in community, and within the natural world. The dynamism is Unbound's continual learning, evolution and progress. Unbound is stable, well-grounded, but not static. Unbound is humble, under construction, and we work with balance and vision.

**Meaning of Unbound**
Unbound is a word in English that means without restraint or limits, emphasizing freedom.

**Freedom:** True freedom means responsibility for what we are called to do with responsibility and to seek excellence in our work every day, with mutual respect prevailing among diverse cultures.

**With freedom to make decisions:** The families that we serve have the primary voice in selecting their benefits with active participation in decision-making to reach their integral development.

We offer this description as a base understanding and the intended meanings of the Unbound logo. You may see other meanings in the logo. As an expression of art, it is meant to be in conversation with each person. For example, someone sees the logo representing a star, signifying a personal goal, a guide in the darkness. We welcome the additional discoveries of Unbound's identity to be made within.

## How Unbound's name and logo express its value OPTIMISTIC and INNOVATIVE:

We hope to represent in our logo the transformative power of community, a willingness to share and live in solidarity with others for a better world. These personal encounters enrich each of us. We honor the individual journeysof all people, humbly listening and learning so that we might break down the barriers of poverty in new and innovative way for a society where all reach their potential.

## How Unbound's name and logo express its value AUTHENTIC:

True freedom includes accountability. Human beings are not free in isolation. Our freedom is manifested through our relationships with each other. Living out our freedom should not limit the freedom of others. The figures in the logo are arranged in a circle to demonstrate that they are in relationship with one another. They are not a random collection of people. They are organized. They are a diverse yet unified group of individuals who have chosen to come together to express their individual freedom and to free one another. Each is accountable for the freedom of the others.

## How Unbound's name and logo express its value RESPECTFUL:

The diversity of colors of the figures in the logo suggests Unbound's belief in the dignity of each person. Each person deserves to have his/her dignity respected because each person is a unique expression of life. Unbound recognizes the inherent dignity of each person and seeks a world where each person has the freedom to live a dignified life. The colors of the Unbound logo are taken from the fabrics of indigenous cultures in countries where we work. These color choices symbolize Unbound's belief in the dignity and viability of indigenous cultures.

The figures in the logo are all in relationship with one another, but there is no visible hierarchy between them. This diverse group of people has organized itself in the shape of a circle that signifies their equality. Also, the earth colors of green, blue and brown continue from our current logo to indicate the relationship, interdependence and responsibility we have in caring for creation and the environment.  The additional colors convey a celebration of art and culture.

# 1.6  Unbound's Self-directed Program

The purpose of Unbound is to create a worldwide community of compassion through personal outreach

Two things that most distinguish the Unbound sponsorship program are the **personally directed nature of the program** and the **high level of personalization**. These reinforce the simple but powerful message to sponsored families that is at the core of the Unbound movement: "I believe in you."

## 1.6.1  Outcomes with Sponsored Persons

Unbound builds holistic programs with sponsored members and their families.  Unbound's programs provide the opportunity for sponsored persons and their families to live with dignity.  A dignified life includes dignified living conditions, opportunities to develop one's desired potential and active participation in his or her local community.  Unbound creates a sense of belonging. Sponsored persons belong to a local, caring Unbound community and the larger worldwide Unbound community of compassion.  Sponsored persons have a role to play in their local Unbound communities, and they also build the community of compassion with sponsors by sharing their lives with their sponsors through correspondence.

**1.6.1.1**

### Self-directed Programs

The Unbound program belongs to the sponsored families. Staff in the Unbound movement will be successful in their work only to the extent that they believe in the wisdom of sponsored families. Each staff member must consider herself to be a student of the sponsored families. Each of us must seek to follow the leadership of the sponsored families on a daily basis. To the extent possible, program funds and decisions are placed directly in the hands of the sponsored families. The role of staff members is to support, rather than direct, the decisions and efforts of sponsored families.

**1.6.1.2**

### Highly Personalized Programs

Benefits are highly personalized in the sense that each family chooses the services and benefits that most closely meet their needs and will lead to achieving their goals. Each sponsored member and sponsored family has clear personal goals that guide their program decisions.

The spirit of the Unbound program depends on a deep commitment to personal outreach. Project staff reach out to sponsored families in a personal and individual way through home visits and other one-to-one methods of listening and support. The goal of the program is to respond to the changing

needs of the sponsored families through regular and consistent visits and dialogue with sponsored members and their families. Unbound expects each project team to be in direct and regular contact with the sponsored families. Setting personalized goals, providing ongoing follow-up to encourage progress and achievement, sponsored member control over their benefits, and personalized communication between the sponsored members and their sponsors is what sets Unbound's program apart from other sponsorship organizations.

### Relationship

1.6.1.3 Unbound honors the very real and personal relationships formed between a sponsored child/elder and his or her sponsor by honoring commitments to both as persons, and with personal communications. Sponsors begin on a journey from power to love through letter writing, digital messaging, and the exchange of photos and progress information. The role of sponsors is to encourage and support sponsored members and their families. It is not the role of sponsors to control or guide sponsored family decisions. Unbound's role is to guide sponsors on a journey from power to love with respect, compassion, firmness, and clarity of vision.

### Creating a Worldwide Community of Compassion

1.6.1.4 Small groups of sponsored members, their families and the local project staff members make up Unbound *small communities of compassion*. The word community means more than a group of people living in the same locality. For Unbound, community means a group of persons with common interests and a common commitment to the Unbound core values and objectives. Unbound promotes a participatory approach to the holistic development of sponsored members, their families, and communities. The Unbound community requires shared responsibility from all participants along with communication that is open, honest, authentic and transparent.

Compassion is an expression of love that moves us to work toward a dignified life for each member in the Unbound community.
The Unbound community of compassion is being built every day through the efforts of Unbound projects around the world. Compassionate community extends to sponsored members, their families, and the communities in which they live. It also encompasses program development, sponsors, co-workers, volunteers, and partners. By nurturing these relationships, Unbound strengthens its impact and deepens its commitment to dignity, inclusion, and mutual support.

## 1.6.2 Our Promise to Donors

Unbound offers a practical way for sponsors, donors, and volunteers to make a personal and direct impact as partners in our global community. Through walking with a child and family, youth, elder, or community on their path out of poverty, our supporters have an opportunity to expand their worldviews, to be part of creative solutions to poverty, and to walk a journey from power to love. We believe that walking with, working with and directly serving people in poverty is a gift, honor and privilege.

Unbound endeavors to share with the sponsorsthe reality, beauty, gifts and potential of people living in poverty. Unbound sponsors experience a developing solidarity with their sponsored friends. Through detailed and personalized communication between sponsored members to their sponsors,

sponsors grow in their understanding and care for their sponsored friends.  Unbound strongly encourages sponsors to write to their sponsored friends to encourage them in their efforts. Unbound cannot require sponsors to write, but Unbound continues to remind sponsors how important it is to their sponsored children and elders to receive news, photos, etc. from the sponsors.

Unbound is a popular movement of humble people connecting with humble people. Unbound's view of the world is that we are all equal, that we each have the same inherent dignity. Unbound believes we all gain from knowing and sharing life's struggles and successes together. Unbound sponsors come from varied economic statuses.  In fact, the majority of Unbound sponsors are working-class persons with a love for and belief in their fellow human beings. Unbound treats sponsors as participants in the program and not as economic units or funding sources. Projects are strictly prohibited from soliciting sponsors for additional donations.

### 1.6.3  Unbound co-workers, volunteers and partners

Unbound deeply appreciates the people who dedicate their time, efforts, and professional careers to this worldwide movement of love. Unbound's culture and community are based on a leadership style called Gentle Balanced Leadership (GBL). GBL is a style that defines each member of this movement as a leader. It asks each of us to actively assume leadership roles in ways that embody Unbound's core values. GBL challenges many deeply ingrained beliefs about hierarchy and power. It respects cultural diversity but seeks to liberate both leaders and the people they lead from the destructive tendencies of leaders to seek their own benefit rather than humbly serving the needs of the people they are called to lead. In that sense, GBL is a path to freedom from domination for everyone.

A more complete description of GBL is included later in this manual.

## 1.7  Unbound Decision Value Map

Unbound's highest fidelity is to sponsored persons.  Unbound program and financial decisions, policies and plans will be made with the following criteria in this order.

1. How the decision affects sponsored children, youth, and elders, families, and the local Unbound community of compassion, including front-line project co-workers.
2. How the decision affects sponsors and donors.
3. How the decision affects Unbound headquarters teams, volunteers and partners.

This 'decision value map' is used to make both program and financial decisions.  For example, if a special request by a sponsor puts his or her sponsored child at risk or has a net negative effect on his or her sponsored child, the request should be denied.

Helping sponsored families to live with dignity means to invite them to be co-authors of their own development, participating in decision making in the project.  Project teams are expected to enter a sincere and balanced dialog with sponsored members and their families regarding benefits and policies of the program.

Unbound views all financial resources under its responsibility as being owned by and for the benefit of the Unbound sponsored members. Unbound management and staff (both in Kansas and the projects) will attempt to make program and financial decisions as if informed Unbound sponsored children, youth and elders and their families were voting regarding the decision or policy.

# 2   <u>Global Structure</u>

Unbound requires well-defined structures for the sustainability of its sponsorship program.  These structures include the proper legal entities and procedures to operate in each country.  This chapter addresses guidelines for Unbound project structures.  This chapter also discusses Unbound's relationship with partner groups.

## 2.1  Guiding Principles

### 2.1.1   Unbound Identity

Unbound identity is defined by its core values and mission.  The Unbound identity is a highly personalized (decentralized) approach to development, a program that emphasizes the dignity of all stakeholders, and a personally directed approach to development.

### 2.1.2   Affiliate Legal Entity

The Unbound program needs to operate within a legal entity within each country or area.

## 2.2  Project Legal Structure

### 2.2.1   Affiliate Legal Entity

The shared purpose of Unbound headquarters and all project affiliate organizations is to create a worldwide community of compassion and service through personal outreach. Unbound sponsorship is a reciprocal relationship of mutual respect and support between sponsored members and their families being served directly by the affiliate and their sponsors being recruited and served directly by Unbound headquarters.

There is a unique relationship between Unbound headquarters and a local affiliate. Unbound headquarters receives contributions from sponsors and donors and makes certain commitments to those sponsors and our own governing authorities. An affiliate is in direct contact with sponsored members and communities and receives revenue from Unbound headquarters for the program articulated in the Unbound Sponsorship Manual set. All parties share responsibility to honor commitments to sponsored members, communities, sponsors, and donors.

Sponsored members and their families are the essential and ultimate "owners" of the Unbound movement. Unbound has clear financial policies and clear program policies and honors commitments made to sponsors and contributors. Therefore, we are accountable to both groups for organizational performance.

The Unbound Sponsorship Manual set is the official articulation of the Unbound headquarters policies for all Unbound project entities . This manual is written with consultation between Unbound headquarters International Programs and in-country project staff teams and project coordinators.

Unbound headquarters will work with the local affiliate board for coordinated and complementary monitoring of a project's activities in an effort to support the shared mission of the Unbound sponsorship program.

## 2.2.2  Affiliate Boards of Directors

A *project affiliate* is a legal entity that hosts the Unbound program. The entity is a member of an international community of organizations promoting a common international mission of the Unbound program.

Unbound headquarters asks a project board of trustees to concentrate its primary efforts on the local legal compliance and financial accountability of the local project. Project boards should ensure that the program is effective and the staff are treated with dignity, but the board should refrain from enacting specific program initiatives.  Project boards should operate with high ethical standards and according to Unbound's expectations for Gentle Balanced Leadership.

A summary of the purpose of the local project board of trustees:
- Provide a legal operating entity "in good order" to host the Unbound international sponsorship program in the given locality.
  - "In good order" refers to
    - legal compliance,
    - effective project staff leadership,
    - financial accountability and transparency, and
    - internal controls and fraud detection.
- Monitor the local compliance of legal requirements of the entity.
- Monitor the entity's financial practices to ensure sound business practices and avoid misappropriation of funds by the organization or individuals.
- Evaluate, select, and hire a credible local financial audit of the project according to local law. Ideally, this local financial audit will have a fraud-detection component.
- The board is one of support, counsel, and responsible oversight for the project.
- Ensure the effectiveness of the local program in accomplishing the Unbound program characteristics but refrain from micro-managing the project coordinator or initiating board-conceived program activities.
- Ensure effective local leadership of the Unbound program (Project Coordinator) and take necessary action in response to, and in coordination with, feedback from Unbound headquarters or non-compliance with coordinator accountabilities outlined in the program manuals.

Affiliate board should speak with one voice. They should make decisions according to the decision-making practices outlined in the bylaws and in harmony with Unbound Core Values.

### 2.2.3  Affiliate Agreement

Each legal entity affiliated with Unbound must have a **signed Affiliation Agreement** with Unbound headquarters. This agreement formalizes the relationship between Unbound and its affiliated entities and is essential to ensure compliance with international regulations regarding the flow of funds. In a context of increasing scrutiny over international money transfers—including laws aimed at preventing the financing of terrorism, rising cases of identity theft, corporate scandals, and heightened oversight of nonprofit activities related to tax codes—the Affiliation Agreement provides a legal and operational framework for mutual protection of both parties.

The agreement also safeguards Unbound's brand identity, intellectual property, and physical assets such as properties, buildings, offices, and centers built with Unbound funds. For more details on the requirements and provisions of the agreement, please refer to a copy of the **Affiliation Agreement**.

### 2.2.4  Board Composition

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

### 2.2.5  Calendar of reports to affiliate boards

Below is a list of reports that are provided to affiliate board members to keep them informed about the affiliate's performance and legal compliance. Samples of the Annual Board Report formats can be found in the References section of the manual.

| Board monitors | AA ref | Report provided to board* | Frequency | Responsible |
|---|---|---|---|---|
| **Legal compliance** | 1.1,1.5c 1.5a 1.1 | Local Financial Audit Annual Board Report: Accounting & Govt Compliance | As required by law | Project Board Accountant |

| Internal Controls / Fraud Detection | 1.1<br>1.1 | Local Financial Audit<br>Unbound Financial Audit | As above<br>2 Years | Project Board<br>Unbound HQ |
|---|---|---|---|---|
| Field Manual Financial Policies | 1.1 | Unbound Financial Audit | 2 Years | Unbound HQ |
| Financial Reports | 1.4b,c,d | Financial Statements | Annual | Accountant |
| Insurance | 3.1 | Annual Board Report: Risk Management | Annual | Coordinator |
| Anti-terrorism | 1.5b | Annual Board Report: Risk Management | Annual | Coordinator |
| Data Protection & Intellectual Property | 1.3 | Annual Board Report: Risk Management | Annual | Coordinator |
| Coordinator Performance | 1.2 | Self Assessment<br>Performance Assessment | Annual<br>1-2 Years | Coordinator<br>Unbound HQ |
| Staff Engagement & Treatment | | Staff Engagement Survey Results<br>Annual Board Report: Human Resources | Annual<br>Annual | Unbound HQ<br>Coordinator |
| Sponsorship Manual Policies | 1.1, 4.2 | Organizational Audit Report | 3 Years | Unbound HQ |
| Program Outcomes | 4.2 | Program Evaluation Reports<br>Global Evaluation Report | 2 Per Year<br>Annual | Coordinator<br>Unbound HQ |

\* some reports may require signature of board for legal compliance.

# 2.3 Project Administrative Structure

## 2.3.1 Project

Project is a term given to identify Unbound's work in a particular geographic area. The project will consist of an affiliate legal entity, a coordinating unit and a group of subprojects. Typically Unbound prefers that a project serves at least 3,000 sponsored members in order to achieve a good level of administrative efficiency.

## 2.3.2 Coordinating Unit

The coordinating unit is the central office or center that manages a group of Unbound zones or subprojects. The coordinating unit reports directly to Unbound headquarters for accountability and responsibility for the adherence of Unbound policies and overall program quality at the project and subproject levels. The Unbound project coordinator is responsible for the management of the coordinating unit.

## 2.3.3 Zone

A zone is a group of subprojects. Zones are accountable to the Unbound coordinating unit. This is an optional category. Not all projects operate with zones.

## 2.3.4 Subproject

An Unbound subproject is a group of Unbound sponsored persons with either a geographic or other organizing feature. An Unbound subproject is the foundation for the formation of small communities of Unbound sponsored families working together through project and community

activities. Unbound subprojects are managed by a coordinating unit and are accountable to that coordinating unit for direct implementation of the program in compliance with Unbound policies.

### 2.3.5  Community

An Unbound community is a grouping of families who live in close proximity. This is an optional category that can be used to identify individual small groups or a collection of small groups from the same subproject.

### 2.3.6  Approving New Subprojects

Over time projects may determine the need to open a new subproject to offer sponsorship in new communities. Projects may open a new subproject to accommodate growth when a project's existing subprojects have reached a sustainable size and are performing well. Alternately, even without growth, new subprojects may be opened to help a project to shift its support to new families and communities, responding to changing economic need, geographic consolidation, completion of a sponsorship cycle or other strategic factor. Unbound favors subprojects and structures where sponsored families have regular, ongoing contact with multiple members of staff to promote program quality, administrative cost considerations and adequate child protection.

To create a new subproject, the project must submit a proposal using the format found on Portal and receive approval to open a new subproject from the Unbound headquarters program director before registering any children for sponsorship.

### 2.3.7  Closing a Subproject or Zone

If a subproject or zone is outside the service area and cannot be served well by the project team, if the economic conditions in the community have improved to the extent that sponsorship is no longer appropriate for the community, or if there are difficulties with the subproject that cannot be resolved, it may be advisable to close the subproject.

To close a subproject, the project coordinator should submit a proposal through the format found on Portal at least six months before the desired date to close the subproject. The decision to close a subproject or zone is made by the project coordinator in consultation with Unbound headquarters and receiving input from Unbound headquarters regarding the closure. All subproject closures must receive prior approval from Unbound headquarters before proceeding with the closure. Projects should notify Unbound headquarters of a subproject or zone closing at least six months prior to closing when possible.

### 2.3.8  Project Growth

The number of children and elders allowed to be added each year to a project depends on several factors, including Unbound's ability to find new sponsors, global growth priorities and strategy, external factors present in the country where the program operates, the project's history of adherence to Unbound policies, and the project's past fulfillment of allocated growth.

The Unbound headquarters International Programs department works with each project to allocate the allowable project growth on an annual basis. These allocations and projections are subject to change throughout the year based on both project performance and sponsorship acquisition efforts.

### No replacements for non-compliance retirements

2.3.8.1 Projects are not allowed to send replacement records for beneficiaries who are retired from the sponsorship program for no letter, no annual photo, or no response to an Update Request. These non-compliance retirements will be deducted from the overall number of records the project can submit.

### Project Hold Status

2.3.8.2 Unbound headquarters may suspend a project's ability to submit family records and/or suspend sponsorships for children in change of sponsorship. Unbound headquarters regional team will communicate with the project regarding any changes in hold status.

### Subproject Hold Status

2.3.8.3 A project may request to have a specific subproject or subprojects placed on hold status. Requests to place a subproject on hold can be made by the project coordinator and must be approved by Unbound headquarters before a hold will be initiated or lifted.

## 2.4 Unbound headquarters

Unbound headquarters. The Unbound headquarters team and specifically the International Programs department, along with the president and CEO of Unbound, are responsible for communicating and monitoring Unbound policy in Unbound projects. Unbound projects are accountable to and supported by the International Programs department.

Unbound headquarters has the following organizational structure and departments:
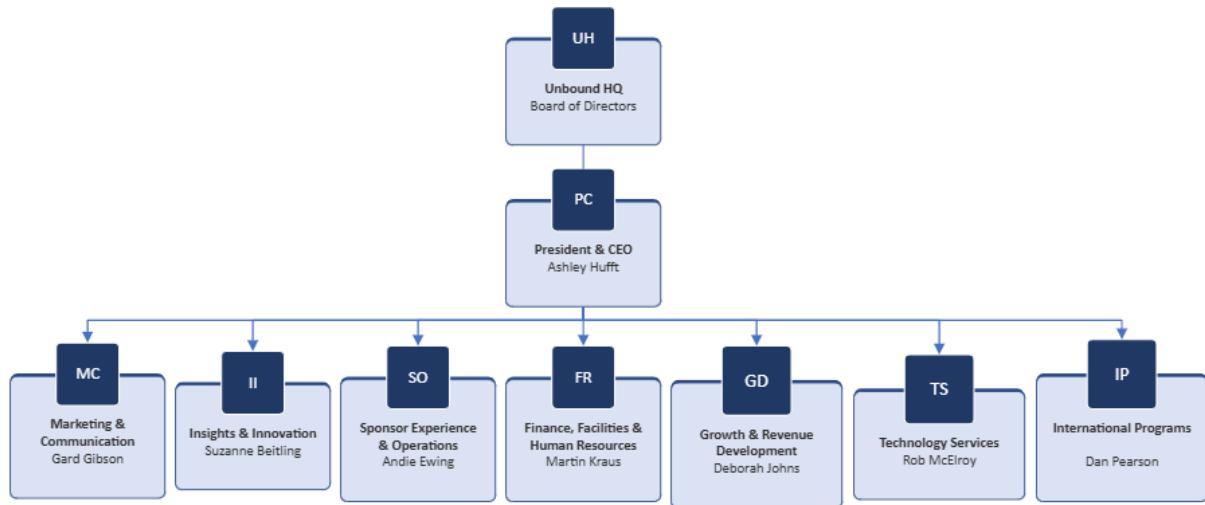
### 2.4.1 Marketing and Communications

Marketing and communications develops specific campaigns to build awareness, generate interest, and nurture commitment to the mission of Unbound. They gather, curate and distribute relevant and timely content (stories, images, video, infographics, updates, etc.) to engage audiences across multiple media and channels (Church, School, Base, Digital, Workplace).

### 2.4.2 Insights & Innovations Lab

Insights and innovations lab uses research, innovation and data analytics to develop: (1) product insights, (2) donor/sponsor insights and (3) business insights.

### 2.4.3 Growth and Revenue Development

The Growth and Revenue Development (GRD) department is responsible for helping Unbound reach and maintain a sustained level of revenue growth in the U.S. They work to develop long-term relationships with groups and individual donors so they will participate as full members of the Unbound community.

### 2.4.4 Sponsor Experience & Operations

The Sponsor Experience and Operations department at Unbound deepens sponsor engagement and ensures the integrity of our systems and services to sponsors. This department includes Program Record services that processes family records, photos, agents of change and other program requirements, as well as Experience Integration that coordinates group, individual and virtual visits.

### 2.4.5 Finance, Facilities & People Experience

The Finance department provides strategic and financial leadership to Unbound, responsible for all headquarters finances and conducts project financial audits.

The Facilities team ensures that the Unbound headquarters office is a safe and well-maintained for carrying out our work. We strive for this space to be an inviting environment for employees and visitors.

People Experience Team (PEX) is what other organizations call Human Resources (HR). This department is responsible for recruiting, hiring, onboarding, training, performance management, benefits, wellness, engagement, employee relations, succession planning and employee transitions.

## 2.4.6  Technology Services

The Technology Services department exists to serve the technology needs of the Unbound headquarters office including both equipment infrastructure as well as software development such as CASA, Portal, Translation Module and maintianing Unbound.org.

## 2.4.7  International Programs

The International Programs department is the implementing arm of the president and CEO regarding Unbound international policy and operations. Policy announcements, clarifications and requirements are only communicated through the International Programs department and not through any other staff member or department at Unbound headquarters. The department communicates Unbound policy through the manuals, policy memos, e-mail, telephone, conferences, Yammer, Portal, monthly Criss Cross publication and other communications with the projects.

The department serves as an advocate for projects at Unbound headquarters. If project staff members have questions about a communication they receive, they may direct the question to the International Programs department. The department is made up of the chief officer, vice presidents, Regional program directors, program accountants, program operations specialists, and a program evaluation team with program data analyst, program evaluator and evaluation specialist roles.

2.4.7.1

### Chief International Program Officer

The chief international program officer is responsible for the oversight of the department staff. The chief officer makes frequent visits to projects in order to evaluate the activities of the projects and subprojects.  The chief officer is responsible for documenting and clarifying Unbound policy. The chief officer may authorize corrective actions for projects not meeting expectations with Unbound policy. The chief officer reports to the President/CEO.

2.4.7.2

### Vice President of Program Evaluation and Learning

The Vice President of Learning & Evaluation leads the evaluation strategy and team that evaluates Unbound's programs around the world, ensuring high-quality evaluation at the global, project, and individual level that advance program impact at all levels. They lead Unbound's core program pillar of eliminating poverty, guiding and representing Unbound's anti-poverty work both internally and externally. They provide strategic leadership for Unbound's use of the Poverty Stoplight methodology. They lead organizational learning initiatives related to Unbound's program and

leadership style at all levels of the organization and lead the international programs department in the absence of the chief international programs officer.

### Vice President of Program Development

2.4.7.3 The Vice President of Program Development leads the implementation and development of Unbound's programs around the world, ensuring that the programs create positive impact and support families and communities on their self-directed path out of poverty. They lead three functional teams who are collectively tasked with building the capacity and organizational health of Unbound's projects. They lead Unbound's program pillar of empowering women, guiding and representing Unbound's gender equity work both internally and externally. They curate Unbound's global policies & global framework in collaboration with the other members of the international programs department leadership team, and they actively leverage organizational opportunities and resolve organizational challenges as a member of Unbound's executive leadership team.

### 2.4.5.3 Program Directors

The program directors are responsible for a group of projects within a specific region as assigned by the department director. Program directors make recommendations, provide formation and offer support to project staff in order to build sustainable and credible projects and guarantee maximum benefits to the sponsored members.  Program directors may facilitate or conduct organizational audits and make decisions or recommendations about project policies, procedures and structures. They may also oversee or carry out restructuring of projects.  Program directors will be responsible for assessing the performance of the coordinating unit and project coordinator in coordination with the affiliate board of directors.

Projects should consult with their program director for clarification of policies, assessment and decision-making for out-of-the-ordinary situations, and general support in carrying out the requirements of the sponsorship program.

### 2.4.5.4 Program Accountants

The program accountants work closely with the program directors and are responsible for carrying out financial reviews and assessments of the financial compliance and integrity of all Unbound projects, as well as supporting the projects in their use of the Abila accounting software. The project coordinator and/or project accountant may consult with the responsible program accountant in order to clarify any financial/accounting policies. Members from this team may assist in audits of the projects and are also responsible for  monitoring complete responses to the post-audit implementation plan.

### 2.4.5.5 Program Operations Specialists

The program operations specialists work closely with the program directors on various aspects of the sponsorship program. Program operations specialists monitor letters, videos, speed letters, update requests, family records and other program documentation. Program operations specialists will be in daily or weekly contact with the projects to provide feedback on correspondence issues and are available to provide support in most program-related components. . Program operations

specialists also provide support and guidance on the Unbound scholarship program and related policies.

### 2.4.5.6 Evaluation team

The Unbound headquarters evaluation team, through regional evaluation specialists, supports project staff and program participants in defining and measuring key program outcomes as part of a culture of learning. The evaluation team is responsible for conducting direct training, coordinating learning efforts around the Unbound international world, and providing technical support to project teams for locally directed evaluations. The evaluation team works in collaboration with Unbound headquarters regional teams to guide evaluation use.

In addition, the Kansas evaluation team designs and implements periodic global program outcome evaluations across all regions to understand program impacts across locations and contexts and report to the Unbound board of directors.

Unbound headquarters program data analyst also supports the implementation of the Poverty Stoplight methodology, providing tools and technical support that ensure that the PS methodology helps sponsored families manage their path out of poverty, guides project teams as they make program decisions, provides program insights for Unbound HQ staff, and communicates impact to sponsors and other donors.

## 2.4.8 Unbound Branch Offices

Unbound branch offices are located outside of the United States but are structurally part of Unbound headquarters. These offices employ members of the Unbound headquarters team and staff report to different Unbound headquarters departments according to their roles and responsibilities.

**Unbound Colombia** is located in Medellín, Colombia and includes members of the International Programs, Finance, Marketing & Communications, and Sponsor experience & operations teams.

**Unbound Philippines** is located in Metro Manila, Philippines and employs members of the International Programs, Finance, Marketing & Communications teams, and Sponsor Support teams.

# 2.5 Organizational Audits

An organizational audit is a reflection and structured process that involves individual conversations with project staff members, observation of program activities, home visits to randomly selected sponsored families and review of key documentation. The role of the auditors is to listen deeply and summarize the findings through a report.

The organizational audit has four objectives.

- Listen to sponsored families' experience of the nine program characteristics in order to support improvements in quality of the program.

- Learn about significant challenges and realities of the project so that Unbound headquarters can support the work of the project and understand more deeply any weaknesses that may exist in Unbound's policies.

- Confirm the adequate implementation of Unbound policies so that the project is strengthened.

- Understand project organizational structure, daily operations, work environment, and the effectiveness of project leadership so that Unbound headquarters can offer coaching and support to the project coordinator.

The auditors will send an organizational audit report and coordinator performance feedback within 30 days of the audit's completion. The organizational audit report may be shared with the entire project team. The coordinator performance feedback will be shared with the coordinator and the project board only.

The auditors will work with the project coordinator to develop a tentative schedule for the audit. The schedule will include times for individual conversations at the central office and times for visits to pre-selected subprojects. The purpose of the schedule is to help the auditors to gather the necessary information while causing as little disruption as possible for the project.  It is important to note that the audit schedule is always tentative, and it is sometimes necessary to make changes to the schedule in order to make sure that the audit's objectives will be fulfilled.

The project coordinator sends an acknowledgement of receipt within 15 days of receipt of these documents and has 30 days to respond with any rebuttals, corrections, or observations. The auditors and the project coordinator are expected to finalize these documents within 60 days from the end of the audit. The regional program director will follow up with the project coordinator on the progress of the specific recommendations on the implementation plan over a 6-month period. The project coordinator and program director will collaborate to establish the implementation plan, timeline, and individual(s) responsible for of each point. If the project will elect not to implement a recommendation, the implementation plan should detail the justification for the decision.

The implementation plan should be completed within six months of the date it is submitted to the audit team, and will represent a collaboration of the project and the regional team. The regional program director will monitor and log implementation of each point. During the implementation period, the regional program director will conduct monthly monitoring to track the progress. Upon completion, the regional program director will notify the audit and leadership personnel in Kansas.  The organizational audit report may be shared with the entire project team. The coordinator performance report is shared with the coordinator and the project board only.

Typically the auditors will sit with the project coordinator on the first morning of the audit to develop a tentative schedule for the audit.  The schedule will include times for interviews at the central office and times for visits to pre-selected subprojects.  The purpose of the schedule is to help the auditor to gather the necessary information while causing as little disruption as possible for the project. It is important to note that the audit schedule is always tentative, and it is sometimes necessary to make changes to the schedule in order to make sure that the audit's objectives will be fulfilled.

Project teams are asked not to plan any special welcome activities during the audit since the purpose of the visit is to better understand the operation of the project under normal circumstances.

In preparation for the audit, projects may be asked send the following documents before the audit takes place:

- A list of e-mail addresses for all staff
- List of zones/subprojects with travelling time from coordinating office (and simple map, if possible)
- Organizational chart that shows supervisory relationships in the project
- Current copy of the project's HR policies manual
- Current copy of the project's financial policies manual
- Current copy of the project's complementary child protection policies
- Current copy of the project's gender equity policy
- Enrollment criteria & selection process the project uses for selecting children and older adults for sponsorship
- Retirement criteria
- Description of how the various sponsorship funds are delivered to the families in the project, including frequency of transfers and internal controls during the different phases of the process
- Internal correspondence manual, including the steps the project follows to gather welcome letters, regular letters, annual photos, speed letter replies and update request replies and the steps to distribute sponsor mail and special gifts
- Guidelines for virtual subprojects (if applicable)
- Project coordinator self-assessment reflection sheet
- Current copy of the internal/complementary policy manual for the scholarship program
- Manual or description that documents the structure and processes developed with mothers groups, sponsored children, and complementary social programs
- Updated list of current members of the board of directors of the affiliate legal entity
- Calendar of program activities scheduled for the month of the audit

# 3 Project Coordinator

The following responsibilities and executive limitations for the project coordinator outline the principles of prudence and ethics to guide project decision making, activities, and procedures.

The project coordinator is authorized to make decisions, take actions, establish practices and develop activities within the guidelines of the policies and executive limitations set forth in this manual. The project coordinator is expected to use reasonable interpretation of these policies.

## 3.1 Project Coordinator Roles & Responsibilities

The project coordinator is the project's primary and official connection to Unbound headquarters. The project coordinator is responsible for coordination of the affiliate entity board and the implementation of Unbound policies in a prudent and ethical manner and will communicate with the assigned Unbound program director on a regular basis regarding project issues and plans. The project coordinator is responsible for the quality and timely compliance of all subprojects. Maintaining credibility would be impossible for Unbound without the animation, support, training and supervision of the project team by the coordinating office, under the direction of the project coordinator and with the collaboration of his or her team. For this reason, Unbound headquarters remains in frequent contact with the project coordinator and entrusts the project coordinator to accomplish Unbound's mission.

A full description of the project coordinator's responsibilities and accountabilities is found in the reference section of this manual.

### 3.1.1 Local Legal Compliance

In coordination with the project's board of directors, the project coordinator must ensure that the project complies with all local legal requirements, including labor regulations, governmental registrations and tax compliance.

### 3.1.2 Project Management and Administration

The project coordinator is responsible for the effective administration of Unbound programs in the project. The project coordinator is required to adhere to all Unbound policies and ensure that their staff members and volunteers do so as well. The project coordinator provides vision and leadership and instills the values and spirit of Unbound in the project and subproject staff and partners.

The project coordinator is responsible for the overall management of the project staff and volunteers. The project coordinator defines job descriptions for each staff member, proposes appropriate salaries, ensures annual assessments of each staff member's work and provides training and formation to all staff members and volunteers.

Unbound does not favor over-concentration of power in one person. Unbound requires project coordinators to work in collaboration with their respective teams and especially sponsored families

in designing services and benefits of the program. Unbound encourages coordinators to staff their teams with strong, capable leaders and prepare them for leadership positions within the program.

To effectively plan for and protect the organization from sudden loss of the project coordinator's services, the project coordinator should have no fewer than two other staff members trained in all Unbound's policies, procedures, legal compliance, and management.

### 3.1.3   Financial Accountability & Transparency

The project coordinator is accountable for the financial policy compliance and financial integrity of the project.

The project coordinator must ensure that the project and any third-party service providers provide quality services and benefits in a timely manner that promote the decision-making of families and support the needs and goals of each sponsored member and reflect the program characteristics. The project coordinator shall ensure that the project has ready intervention structures to help resolve issues encountered by the families and/or the project with third-party service providers.

Unbound promotes appropriate checks and balances and internal controls for financial transactions. The project coordinator must ensure that the project complies with the requirements found in the accurate and complete accounting section of the code of conduct in this manual.

The project coordinator is responsible for ensuring that the project follows the fund restrictions and guidelines for all funds provided by Unbound as outlined in the Unbound Financial Policies Manual and in this manual.

The project coordinator is required to submit an annual administrative budget to the Unbound headquarters office for authorization. The budget should include projected costs of the coordinating unit and associated expenses with management and monitoring of the subprojects. Unbound allows for modest and fair administrative budgets, but the maximum amount of funds should be given in services and benefits to the sponsored members. The project coordinator may also need to submit the budget to the local board of directors for formal adoption of the budget as local legal statutes may require.

 The Project Coordinator is responsible for ensuring that all relevant materials are properly prepared and readily accessible for audits initiated by Unbound headquarters. The Coordinator must also ensure that all project staff fully cooperate throughout the audit process.

The project coordinator must comply with all local legal statutes. If local laws require an audit, the project coordinator in coordination with the project board of directors must ensure that the required project-initiated audit occurs on schedule and send a copy of the auditor's summarized results to the Unbound headquarters program director as soon as it is available.

The project coordinator is responsible for ensuring that the project submits or makes available financial reports to Unbound headquarters in a timely fashion.

The project coordinator shall not cause or allow the development of reputational, financial or legal threat in the project legal entity.  Financial planning or expenditures for any fiscal year or any part of

a fiscal year shall not deviate materially from Unbound's core values and policies as established in this manual.

### 3.1.4 Personal Outreach

The project coordinator ensures that sponsored members and their families are actively involved in the design of program services and benefits in their subproject. The project coordinator should also ensure that the subproject staff provides the individual attention necessary to support families in their goal setting and attainment.  This primarily involves in-person visits and meetings with sponsored families and may also include outreach via phone or virtual communication with sponsored families for additional support or in the case of virtual subprojects.

### 3.1.5 Management of Zones and Subprojects

The project coordinator is ultimately accountable for zonal and subproject performance.  The project coordinator monitors zonal and subproject compliance with Unbound policies and operating guidelines. The project coordinator should ensure that any problems are resolved as quickly as possible. In cases of underperforming subprojects, the project coordinator will develop and implement a plan for improvement, including the voice of the families, the project staff and in communication with the International Programs regional team.

### 3.1.6 Program requirements and reporting

The project coordinator and his or her staff should ensure that all sponsored members submit letters, photos, and digital messages in a timely manner to avoid undue retirement.  This not only helps prevent unnecessary retirements but also strengthens the relationship between sponsors and sponsored friends. The project team maintains the quality of correspondence through consistent monitoring and support.

The project coordinator offers guidance and training to the staff and volunteers regarding Unbound standards of correspondence quality, timeliness and appropriateness.  It is also the role of the coordinating office to ensure that effective procedures are in place to monitor all letters from sponsors for appropriateness.

The coordinating office is also expected to ensure a high quality of translation for correspondence written in languages other than English.

### 3.1.7 Communication with Unbound headquarters

The project coordinator is responsible for clear and transparent reporting of all project operations to the Unbound regional program director. This responsibility requires that the project coordinator be in regular contact with Unbound headquarters. The project coordinator is required to:

- Provide an official mechanism for communication between Unbound headquarters and the project coordinator or, in his or her absence, a designated representative;
- Submit monitoring data and information required by Unbound headquarters in a timely, accurate and understandable fashion, directly addressing provisions of the policies being monitored;

- Keep Unbound headquarters informed about on-going activities, relevant trends, anticipated adverse media coverage, significant litigation and material external and internal changes to staff, internal policies and benefits;
- Advise regional program director or vice president of program development of Unbound headquarters staff behavior that is detrimental to the working relationship between Unbound headquarters and the project coordinator and/or his or her staff.
- Gather as many staff, sponsored members/families or external points of view, issues and opinions as needed to fully inform Unbound headquarters regarding specific requested information; and
- Report in a timely manner an actual or anticipated non-compliance with any policy laid out by Unbound headquarters.

### 3.1.8  Reporting for additional 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.

# 3.2  Executive Limitations of Project Coordinator

The project coordinator and/or his or her designated representative shall not cause or allow any practice, activity, decision or organizational circumstance that is either unlawful, imprudent or in violation of commonly accepted business practices and professional ethics, or that could potentially damage anyone's trust of Unbound if everything were immediately, fully and publicly known.  In addition, the project coordinator shall not deviate from Unbound policies without written authorization from Unbound headquarters.

The project coordinator may not operate outside of the human resources policies outlined in this manual. The project coordinator must clarify all personnel rules (both local and from Unbound headquarters) for staff, provide for effective handling of grievances, and protect against wrongful conditions such as nepotism and preferential treatment for personal reasons. The project coordinator shall not:

- Discriminate against any employee based on religious belief, race, ethnicity, gender, political belief or physical or mental ability;
- Show favoritism to some employees over others
- Mistreat any employee;
- Promise or imply permanent or guaranteed employment to any person;
- Prevent employees from grieving to a local board or Unbound headquarters in situations where an issue cannot be resolved internally;
- Discriminate or retaliate against any employee for expressing dissent in a professional manner or in a manner that is not in conflict with the project's written grievance procedures; or;
- Withhold information necessary for employees to carry out their job responsibilities.

# 4  Mission with Project Teams

Unbound creates sustainable communities of compassion among co-workers and partners, in solidarity with the sponsored and sponsors. Through a common commitment to service and excellence and a spirit of collaboration, Unbound develops sustainability and solidarity in its programs.

## 4.1  Guiding Principles

### 4.1.1  Respectful and cooperative relationships

Project employees are expected to conduct themselves in a respectful, honest and cooperative manner. All are expected to make a positive effort to enhance a healthy working environment. Behavior that is dishonest, illegal or detracts from the cooperative, harmonious work environment Unbound strives to promote will be assessed, and appropriate action will be taken.

### 4.1.2  Use of resources

Project teams, partners and staff should use Unbound resources and other property solely for the benefit of sponsored members, their families and communities. Unbound's solidarity with the sponsored families emphasizes the need for efficient use of resources. Unbound's preferential option for those living in poverty implies that the sponsored members have priority in relative allocation of financial resources.

### 4.1.3  Honesty and transparency

Honesty and transparency at all levels are necessary to operate an efficient and effective organization.

### 4.1.4  Gender equity

Unbound promotes gender equity in the workplace, meaning fair treatment for men and women according to their respective needs. This may include equal treatment or treatment that is different but which is considered equivalent in terms of rights, benefits, obligations, and opportunities.

### 4.1.5  Gentle, Balanced Leadership

Every member of the Unbound community is a leader, including sponsored families and project staff. Unbound promotes a gentle, balanced style of leadership for all leaders.

A gentle, balanced leader is characterized by his/her view of self and others, personal traits, decision-making and approach to outcomes.

- **Self-Awareness-** I am self-aware and comfortable with self-examination. I see my formation as continual and on-going. I do not personally dominate, nor draw attention to myself. I specifically expose myself to feedback. I am in healthy relationship with myself, with others, and with the world.

- **Authenticity -** I am personal and authentic. I am transparent and work with integrity. I seek out knowledge and awareness of the health of relationships among work teams and among staff and families. I am dedicated to building relationships.

- **Humble View of Role -** I am part of something larger. I do not drive a personal agenda. I see myself as more than my role, that is, I do not get all of my identity from my role. I strive to create obsolescence in my own role, helping others to develop to perform my current role. I am open to change and do not see my role as a lifetime appointment. I will step aside for the organization's sake to grow the potential of the movement. I will leave the organization with a clear group of potential leaders.

- **Student of Families -** I believe in our families. I remain a learner and humble companion of families. I seek out to learn and be formed through visits in sponsored family homes. I seek creative ways to learn about the realities, gifts, and strength of our families and other marginalized people.

- **Belief in Others** *(Generosity of Spirit)* **-** I am not only concerned with 'what' I do, but 'how' I do it. I view everyone as a leader in their own role. I see all others as agents of change. I believe wholeheartedly that families can be the primary agents of change. I am available to relate with sponsored members and families as individuals. I take time to relate personally with sponsored families.

- **From Power to Love** (*Global Perspective / Adventure of Downward Mobility*): I recognize the historic power imbalance in the world. I believe power can injure or free. I work diligently to understand power dynamics among and within cultures and between roles and individuals. I believe building community will counterbalance the process of poverty and isolation. I work creatively to unlock the 'culture of silence' in which lives or is sought refuge by a 'dominated group', whether that dominated group may be my close colleagues, staff at-large, staff in other countries, or sponsored members. I commit to building vision and related objectives that are mutually established with the Unbound global community. I work diligently to ensure that power is not centralized in one person or small group. I avoid and limit pressure 'from the top'.

- **Informed, Inclusive and Transparent Decisions -** Application of GBL in Decision Making
    - Voice of Families in Decisions: At all levels of the organization, we must ask ourselves if we truly share power with the families in our decisions.
    - Subsidiarity: The principle of subsidiarity requires that decisions will be made closest to where the impact of those decisions will be felt.
    - Input-based Decisions: I seek input from all levels of the organization on the most important decisions or directions. I test my beliefs against reality, listening to others, specifically bringing in voices to decisions which are missing, voices which may be ordinarily ignored.
    - Data-based Decisions: I prudently use data and research to inform decisions.

- Feel the Decision: I make decisions from the heart. I feel for the person(s) on the hurting end of my decisions. I sense the impact of my decisions.
- Transparent Decisions: I am open, always free, and my hallmark is transparency in decisions.
- Communication of Decisions: I respectfully communicate decisions.

- **Accountability for Excellence** - I shine in the excellence of my work. I hold myself accountable and expect myself to be held accountable. I hold others accountable in a thoughtful and balanced way according to GBL principles. I do not ask of others what I do not demand of myself. I am well prepared for my respective responsibilities. I do my homework. I focus on behaviors, skill sets, structures, and talent development with myself and others to reach objectives.

- **Balance Reflection and Action** - I am future-oriented yet also fulfill current responsibilities. I am patient, careful, compassionate, courageous, and honest. I am committed to responsibly take action after careful consideration and application of principles of Gentle Balanced Leadership. I am able to be quiet and listen. When I listen, I really try to understand what I am hearing. I consistently and purposely renew my energy and spirit so that I do not burn out or resort to styles of leadership that are personally taxing to an extreme or harmful to others around me. I am kind to others even in the midst of conflict.

- **Courage to Innovate** *(Spirit of Just Beginning)* I contribute to and help create an atmosphere of learning, prudent risk taking and innovation. I contribute to and help create an environment that encourages experimentation and use of new knowledge.

- **Future Orientation** *(We are all Co-creators)* - I believe Unbound is under construction. It is not completely built. I help make it more resilient and reliable for the long journey ahead. It is not static, but always in movement, formation and growth. I will be proactive. I help prevent and do not condone or tolerate unjust or intolerable situations. I am able to identify and address current situations which may be holding the organization back from living out its core values and proceeding forward with its stated objectives. I surround myself and help choose and retain other good and humble leaders. I have an optimistic view of an exciting future. I am co-creating Unbound.

*"With this form of leadership, we believe the pilgrim family of Unbound will continue at a sustainable pace to be a liberating force of love in our world today."*     ~ Co-founder Bob Hentzen

# 4.2 Project Human Resource Policies

Each project is held accountable for its human resources practices, in accordance with local labor laws and the values of Unbound. As the size of a project staff grows, so does the need to document human resources policies. Projects should develop written and regularly updated human resources policies that are specific to the project, are communicated to staff, and do not contradict the policies stated in this manual.

A project's written human resources policies should include the following topics:

- Size of staff & hiring policies – staff size and positions should be appropriate to the number of sponsored members and consistent with the approved annual budget
- Staff salaries – must be appropriate, a living yet modest wage, periodically reviewed for appropriateness in the market and maximum support to program.
- Payroll requirements – must be in compliance with all governmental regulations
- Staff benefits – must meet what is required by law; should be usual and customary, not excessive
- Leave & paid time off policy – should be written and communicated to staff
- Salary adjustment, awards, and merit policy and procedures
- Personnel Files: Each project must maintain an individual personnel file for every employee. At a minimum, this file should include:
    - Employee contract
    - Policy agreements (child protection, data privacy, etc.)
    - annual performance reviews
    - The contents should be adapted to the local legal and administrative context, as requirements may vary by country or region.
    - To ensure completeness, it is recommended to use a standardized checklist that includes items such as employment contract, identification documents, training certificates, and other relevant records.

- Equal employment opportunity/non-discrimination policy
- Job descriptions – projects should have written job descriptions for each staff member
- System of documented performance feedback for all staff
- Code or standards of conduct and discipline – for all project/subproject staff
- Policy for use of project resources (telephones, computers, vehicles, etc.) – not for personal use
- Non-harassment policy – each project should develop procedures for reporting, investigating and resolving complaints
- Non-fraternization policy
- Child and older adult protection policy
- Sexual misconduct policy – each project should develop procedures for reporting, investigating and resolving complaints
- Grievance policy & procedures - projects must have written policy; must be communicated to all staff
- Non-retaliation policy
- Voluntary staff separation / retirement policy and procedures
- Involuntary termination of staff – appropriate procedures for terminating staff.

## 4.2.1  Local Employment Laws

The project is required to comply with all host country's legal requirements for employment contracts, payroll administration, including the requirements for the withholding and payment of payroll taxes, funding retirement benefits and any other benefits required by law. The project

coordinator should work with the project board of directors to ensure and demonstrate compliance with local labor laws.

## 4.2.2  Salary Adjustments

Staff salary adjustments are generally part of the annual budgeting process. The project coordinator must submit salary adjustment budgets to the Unbound headquarters program director for review. Salary adjustments should be proposed within the context of Unbound core values, paying a living yet modest wage, and a desire to balance administrative costs with the program value and impact for sponsored families in a sustainable way.

## 4.2.3  Notification of Project Staff Changes

Project coordinators must promptly notify their Unbound headquarters regional team at any time a project staff member voluntarily or involuntarily ends employment. A brief description of the reason should be included in an email notification. In addition, coordinators should also notify the Unbound headquarters regional team when a new staff member begins employment. These notifications will help ensure that Kansas databases are up to date and any relevant email or password changes made.

## 4.2.4  Terminating Employment of the Project Accountant

In the interest of continuity and integrity of financial reporting, project coordinators must consult with Unbound on decisions to employ or terminate the employment of the head accountant. Unbound headquarters intends to support its project coordinators while implementing sound checks and balances on key personnel decisions.  If the project coordinator finds cause for termination, he/she should present well-documented evidence to Unbound headquarters indicating why the individual should be terminated.

## 4.2.5  Prohibition against Sponsorship or Scholarships for Dependents of Full-time Staff

Unbound prohibits sponsorship or scholarships for children or older adults under the guardianship of full-time contractors and staff members of Unbound, an Unbound project or subproject. This policy should be implemented in conjunction with the 'Conflicts of Interest' policy.

## 4.2.6  Prohibition against Loans and Salary Advances to Project Staff

Unbound project funds may not be used to provide personal loans or salary advances to project or subproject staff.  In extreme circumstances the project coordinator may contact the program director at Unbound headquarters to determine if an exception is possible.

## 4.2.7  Henry Perez Professional Development Scholarship

The Henry Perez Professional Development Scholarship is intended to support the education and professional development of staff members at Unbound projects. The purpose of these funds is that

they be used to invest in the professional development of project staff members. Each project is responsible for determining a fair selection process that includes diverse staff representation. The intention of the scholarship is not to replace the inclusion of staff development and training initiatives as part of the project budget and workplan.

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

# 4.3 Code of Conduct Policies

Each project team should follow a code of conduct which includes behavior expected of all project employees, including, but not limited to, professional integrity, accurate and complete accounting, confidentiality, conflicts of interest, bribes and kickbacks, commissions, use of project property, and use of information technology.

## 4.3.1 Professional Integrity

Staff should conduct all business dealings and relationships with integrity, honesty and respect for others. Staff will not interject or exercise personal interests contrary to Unbound decisions or interests. Staff members should not engage in personal business activities that contradict the mission and values of the Unbound program.

Relationships with vendors and suppliers of benefits are to be based on fair dealing, on fair competition in quality, price and service and in compliance with applicable laws and regulations.

## 4.3.2 Accurate and Complete Accounting

All transactions must be lawful and consistent with policies and procedures provided by Unbound.

Transactions, including all purchases and the distribution of benefits, shall be clearly authorized and properly and promptly recorded.

No unrecorded use of funds, reserves, assets or special accounts shall be set up or maintained for any purpose. No use of funds for advance payments for future delivery of services and benefits to sponsored members.

No false or fictitious entries shall be made in the financial records or in any Unbound communications, for any reason.

Internal controls must be maintained in accordance with the Unbound Financial Policies Manual.

### 4.3.3 Confidentiality

Staff shall maintain the confidentiality of all sponsor and sponsored member information, including contact information, both during employment and after separation from the Unbound sponsorship program.  Misuse of sponsor or sponsored member contact information by any project staff member is a serious violation of the trust sponsors and families have placed in Unbound and may be grounds for dismissal. Lists of contact information for sponsors cannot be collected, saved or stored by the project or by any individual.  It is strictly prohibited to send a solicitation of funds or any solicitation materials directly to Unbound sponsors or former sponsors.

### 4.3.4 Non Retaliation

Project staff may not retaliate. Retaliation refers to any negative, intimidating or retaliatory action against any employee for reporting or inquiring about alleged improper or wrongful activity. Examples of materially adverse actions that could constitute retaliation include, but are not limited to:

- reducing one's salary;
- giving an unfair negative performance evaluation;
- adverse decisions relating to one's work assignments, vacation, or promotion or advancement opportunities;
- terminating employment;
- engaging in harassing conduct that is sufficiently severe, pervasive, and/or persistent to create a hostile environment; for this purpose, the existence of a hostile environment is to be judged both objectively (meaning a reasonable person would find the environment hostile) and subjectively (meaning the affected individual felt the environment was hostile); or
- threats to engage in any of the actions listed above.

Projects should have a policy or process to investigate and take corrective action in cases of retaliation.

### 4.3.5 Conflicts of Interest

Project staff members may not use their positions in a manner that may create a conflict between the staff member's personal interests and those of Unbound.

Project staff members should not have a financial or personal interest in any buyer, supplier, vendor or provider of goods or services for Unbound programs.

Project staff members should not use their relationship with sponsored families or communities as a tool of self-promotion for business or political interest.

Project staff members should not enter shared business ownership/partnership with program beneficiaries or employ program beneficiaries, including employment for childcare or domestic help roles. Such dual relationships represent a potential conflict of interest that compromises the integrity of the Unbound program.

It is the responsibility of the project staff member to inform his or her project coordinator or supervisor of any relationship that may present a real or apparent conflict of interest or threaten the harmonious functioning of the project.

### 4.3.6  Bribes, Kickbacks, Commissions, Discounts and Rebates from Vendors

Projects and project staff members may not accept anything of value from vendors for personal use. Acceptance of gifts or commissions for use by staff is considered by Unbound as the equivalent of accepting a bribe.

Any discount, donation or rebate provided by a vendor should be clearly receipted and immediately reintegrated into the funds of the project for the benefit of the sponsored members. All discounts and rebates must be reported to Unbound headquarters.

### 4.3.7  Hiring Family Members or Romantic Partners

Project and subproject coordinators may not hire family members or romantic partners without prior notification to Unbound headquarters (this includes project staff, subproject staff, board of directors or advisory committee family members). Project coordinators are required to disclose all current staff family and romantic partner relationships to the Unbound headquarters office.

In order to maintain appropriate financial controls and transparency, the project and subproject coordinators, in absolute, cannot be related to or romantically involved with the project or subproject accountants or other key financial staff members.

### 4.3.8  Doing Business with Family Members or Romantic Partners

All agreements to purchase goods or services using Unbound funds should be made in an environment that is free from conflicts of interest. No Unbound staff member, Unbound board member, or relatives of either should benefit personally from purchasing decisions.

The project and subproject staff, including temporary or part-time employees, may not enter into any contract for goods or services with any person with whom they share family or financial interest. This may include, but is not limited to, family members, romantic partners, or partners in other business ventures. The definition extends to the purchase of goods and services from businesses owned by relatives and renting buildings or equipment from businesses owned by relatives.

If a project coordinator believes that an exception should be made, detailed information must be provided to Unbound headquarters, including detailed descriptions of the services or goods to be purchased, statements as to why this is the best choice for the project, and full documentation of the bidding process.  Approval must be received from Unbound headquarters before a project is allowed to do business with any party with whom they share financial interest, such as a family member, romantic partner, or business partner.

### 4.3.9  Non-Fraternization Policy

While Unbound does not wish to interfere with the off-duty and personal conduct of project staff members, to prevent unwarranted sexual harassment claims, uncomfortable working relationships, morale problems among other employees and even the appearance of impropriety, employees who direct or coordinate the work of others are strongly discouraged from engaging in consensual romantic or sexual relationships with any employee or volunteer of Unbound.

Project staff are forbidden to be in a romantic relationship with any Unbound sponsored member, scholarship student, parent/guardian of a sponsored child, sponsors, or person representing the child in the program. Projects should create internal policies to discourage former project staff from engaging in romantic relationships with Unbound sponsored members.

Project coordinators and head accountants are forbidden to enter a romantic relationship, co-habitation or close emotional relationship with any Unbound staff member, sponsored member, family member of sponsored member, scholarship student, board member, sponsor, volunteer or other Unbound visitor to avoid real or perceived bias in decision-making or treatment

### 4.3.10 Non-Harassment Policy

Unbound holds every person associated with Unbound in an official capacity accountable for maintaining the integrity of all professional relationships. Any time project employees, while exercising their duties, engage in the harassment of clients, employees, co-workers or volunteers, they involve themselves in unethical and potentially unlawful acts.  Unbound will not tolerate any form of age, disability, sexual, racial, ethnic, national origin or religion harassment.  Unbound will not tolerate retaliation against any employee or volunteer for refusing harassing overtures, for reporting instances of harassment, or for providing statements or evidence related to an alleged harassment.

Harassment is defined as any behavior, unduly abusive or vulgar language or unwanted touch that has the purpose or effect of altering the terms or conditions of an employee's working environment.

Sexual harassment is any unwelcome and inappropriate sexual advance, request for sexual favors, and other verbal or physical conduct of a sexual nature when submission to or rejection of such conduct is used as the basis for employment decisions, or such conduct has the purpose or effect of unreasonable interference with an employee's work performance or creating an intimidating, hostile or offensive working environment. Sexual harassment does not refer to behavior or compliments of a socially acceptable nature. It refers to behavior that, to a reasonable person, is unwelcome, that is personally offensive, lowers morale and consequently interferes with work effectiveness.  It can be verbal, non-verbal or physical.  Unbound prohibits sexual harassment by or of anyone while performing work, whether paid or volunteer, for Unbound.

### 4.3.11 Sexual Misconduct Policy

Unbound believes that sexual misconduct by its personnel is contrary to our values and principles and is outside the scope of the duties and employment of all personnel of the project/subproject. The seriousness of such misconduct is compounded when it occurs while performing the work of

Unbound.  It is therefore strictly prohibited. All personnel must comply: (1) with this policy, and (2) with applicable local laws regarding incidents of actual or suspected sexual misconduct.

Sexual misconduct means any sexual conduct of project/subproject personnel and another individual that:
- Involves children (see child protection policy in chapter on Mission with Sponsored Members), or
- Involves a program beneficiary, including sponsored children and elders, scholarship student, or family member of a sponsored member or scholarship student, or
- Causes mental or physical injury to another

Types of reporting for harassment or sexual misconduct:

- <u>Internal reporting</u> requires notifying Unbound officials of suspected instances of harassment or sexual misconduct.
- <u>External reporting</u> provides for notice to local law enforcement or local department of social services of suspected instances of child or elder abuse or neglect.  When the alleged sexual misconduct involves a minor, all project/subproject personnel must immediately report any suspected instances of child abuse to Unbound and to the appropriate local civil authorities.
- All project/subproject personnel must report promptly allegations of harassment or sexual misconduct involving a child and project/subproject personnel in strict confidence with the local law and in conformity with this policy.  Oral reports should be followed by a written report to the local department of social services or the local law enforcement (external) and to Unbound (internal).
- Allegations of harassment or sexual misconduct by staff, volunteers, partners or sponsors should be reported to Unbound headquarters.

## 4.3.12 Prohibition against Political Affiliation

Unbound does not endorse or imply endorsement of political candidates or campaigns or claim any affiliation or allegiance to political parties. Unbound public events should not feature elected politicians or political candidates.  Unbound's name may not be used in any way in exchange for political favors or contributions to Unbound programs.

Unbound does not intend to limit or interfere with the civil and political rights of staff and families. However, project staff members cannot run for, campaign for, or hold partisan political office during their service with Unbound. Employees may not use Unbound's name, logo or identity, apparel, physical or email address, telephone number, website or letterhead in any politically related activities, advertisements or literature.

Parents of sponsored children who hold partisan political office should not hold leadership roles in the Unbound sponsorship program at the same time. A partisan political office is any political office for which a candidate is nominated or elected by representing a political party.

## 4.3.13 Use of Computers, Networks, Internet and Email

Unbound project computers, networks, email privileges and the use of the Internet are considered project resources and intended to be used by project employees for business purposes only. All computer programs, data and information related to Unbound (including Unbound files or programs stored on personal computers) are the property of Unbound, and unauthorized use is strictly forbidden. Project staff members leaving employment at the project or subproject must return all Unbound files and programs before their departure and may not delete any Unbound programs or files.

Each project must have an information technology and data management policy and communicate that policy to all staff. The policy should include the following topics:

- Use of computers
- Data security and backup plan
- Data privacy of sponsored member, sponsor, and staff information
- Security of computers and other electronic equipment owned by the project
- Child protection in electronic communications

Project staff must follow standard security measures including unique usernames and passwords to protect data, documents, equipment and other resources from unauthorized access or loss. Passwords should not be shared or used by more than one person. To limit exposure to serious problems such as viruses and unauthorized access of Unbound's systems, all project employees agree not to use the Internet or email on project computers for personal reasons at any time without prior approval from the project coordinator.

All Unbound staff members are required to take and pass internet security training at least once a year.

Privacy in email communication, Internet usage and computer usage on project computers cannot be guaranteed. Use of computers, networks, Internet and email may be monitored by the project coordinator or his or her designee or by Unbound headquarters staff.

Projects are required to regularly back up the data stored on project computers (preferably once per week) and store the backup data using an online storage service, such as Microsoft OneDrive or Google Drive, or physical storage at an offsite location.

All software licenses, including for Microsoft Windows, must be legal and still supported by the manufacturer. Employees should not use their personal email addresses for their work at Unbound. A separate email address should be used for Unbound purposes only. Email addresses for Unbound staff should be administered by the project and should be able to be deactivated by the project to keep information secure. Examples of emails that can be administered by the project are intl.unbound.org email addresses. Examples of emails that cannot be administered by the project for use as an Unbound work account are addresses that end in hotmail.com or gmail.com. Email accounts ending in intl.unbound.org are available from Unbound Kansas if additional email accounts are needed. All employees are required to have an individual intl.unbound.org email

account, which is needed to access the annual security training and, depending on the employee's role, other Unbound systems.

For more generic email addresses, such as AccountingSubprojectABC@intl.unbound.org, if this account is ever transferred from one employee to another, the password should always be changed when the new employee gains access to the account.

All systems accounts, such as: Portal, Abila, , Poverty Stoplight, Survey Monkey and Yammer should be specific to one user and should not be shared by multiple users.  Passwords for these accounts should only be known by the user to whom they belong and should not be shared with others. Additional accounts are always available from Unbound headquarters if additional people need access to these systems.

Email accounts that are shared by more than one employee should not be entered as an employee's email address when registering for Unbound data systems and partner/vendors as above.  Email accounts entered for each user for these websites should be specific to the individual.

If an email address for an Abila user changes, Kansas should be notified immediately so the email can be changed in Abila.  Email addresses associated with Portal or Poverty Stoplight accounts should be updated by each user or the project administrator if any changes are made.

Upon separation of employment of an employee from Unbound, the Kansas regional team should be notified immediately. The individual work email of the departing employee should be inactivated immediately by the project, or the password should be changed so that it can no longer be accessed by the former employee.

If the departing employee had access to a more generic email address used by multiple people, such as ProjectCorrespondence@intl.unbound.org, the password to this email should be changed immediately upon the employee's departure from Unbound.

The Portal Project Admin should remove the roles of the departing employee's Portal account immediately.

### 4.3.14 Use of Project Assets & Vehicle

An employee shall not use the project's time or property for personal use. This includes property that is owned or rented by the project, including vehicles, offices, equipment, etc. Travel for personal reasons should be done outside of work-related trips. Project vehicles should be kept at a project or subproject office when not in use. If secure parking facilities are not available at the appropriate project or subproject office, the vehicle should be kept at a secure parking facility and not at a personal residence. All use of the project vehicles should be documented on a vehicle use log that indicates the purpose and distance of each journey.

## 4.4 Gender Policy – Staff

Unbound promotes gender equity in the workplace, meaning fair treatment for men and women according to their respective needs. This may include equal treatment or treatment that is different but which is considered equivalent in terms of rights, benefits, obligations, and opportunities.

Unbound is dedicated to deconstructing the intersecting discriminations that people face and to address the ways in which women/girls typically, and men/boys in some situations, experience discrimination on the grounds of their gender, in addition to other forms of discrimination that they may experience.

Unbound believes it is each person's responsibility to build a more just world by questioning our own assumptions and challenging ourselves and our colleagues to deconstruct unjust systems and beliefs and build instead a world of gender equity. Project staff members are encouraged to develop gender awareness skills and create decision making processes where the interests and voices of girls and women are proactively voiced and included where they have typically been marginalized.

Project teams should address existing power imbalances and promote gender equity within the project through complementary gender policies that reflect local realities.

## 4.4.1  Equal Remuneration

Unbound promotes equal opportunity in the workplace for job advancement, training and equal pay for women and men.

# 5 <u>Mission with Sponsored Members</u>

Unbound sponsorship provides opportunities for sponsored members and their families to live a dignified life and have opportunities to develop their desired potential and active participation in their local communities.

## 5.1 Guiding Principles

The cycle of poverty can be broken by removing obstacles that obstruct a person's pursuit of survival and development. Poverty is not just a lack of economic resources; poverty is also a lack of choices. Unbound seeks to unlock the potential of human relationships and solidarity to create more choices and freedom for everyone. By working together, participants in the Unbound sponsorship program (sponsored members, sponsors and co-workers) can learn from each other, growing in grace, humility, trust, knowledge, faith, understanding, tolerance, love, generosity and effort.

Unbound approaches people living in poverty as individuals and communities with unique realities, needs, hopes, gifts and potentials. Unbound's sponsorship program should be structured and designed to provide this personalized attention by supporting their goals.

The sponsored member's family is an integral part of the Unbound program. Unbound offers sponsored members a way to be full members and active participants in the Unbound movement. In addition to economic benefit delivery, Unbound programs provide a variety of services designed to support the holistic development of families, such as educational workshops, psychosocial support, income-generating initiatives, and community activities. Unbound expects programs to adopt a reliable model for delivering both benefits and services, empowering families to choose what best meets their needs and helps them achieve their goals. This requires the ability to truly listen to the individual and understand the reality of each family's life situation.

Our vision is to build a world free from poverty where all people have access to resources, community support and the ability to make decisions that improve their lives and uphold human dignity.

### 5.1.1 Program characteristics

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.

The sponsorship program aims to achieve these following characteristics in partnership with sponsored families in the communities we serve:

- **World View** - Sponsored families are agents of positive change in their local communities. Sponsored families see themselves as part of a world-wide movement with responsibilities and opportunities to share their lives with their sponsors. Sponsored families know there are others who are walking the journey with them.

- **Empowerment** - Program initiatives establish spaces where marginalized groups are empowered to create equality, justice and unity in their communities. Existing power imbalances are addressed with an enduring commitment to creative non-violence, dignity and long-term change.

- **Decentralized decision-making** - Sponsored families have the primary voice in selection of personalized benefits and services as well as other key program decisions within a solid framework of staff support and internal controls.

- **Capacity building** - Primary focus of program is creating opportunities for families to develop their own capacity for personal and economic growth rather than a focus on the distribution of material goods.

- **Mutual accountability and suppor**t - Sponsored families form a support network within which families encourage and are accountable to one other.

- **Goal orientation** - Sponsored members and their families have clear personal goals and realistic plans to achieve those goals.

- **Culture of learning** - Sponsored families, in conjunction with project staff, balance reflection and action, define and measure outcomes and utilize results for continuous program improvements and adaptation to changes in the world around them.

- **Economic self-sufficiency** - Sponsored members and their families meet their basic needs through a combination of their own income generating activities, access to capital and sponsorship benefits. Over time, families rely less on Unbound benefits and more on their own income generation activities to meet their basic needs.

- **Sustainability** - Sponsored families are the primary agents in their own development, taking initiative and assuming responsibility for the sponsorship program and eventually self-managing many aspects of the program with project staff serving as support resources. The community is eventually able to develop key programs independent of Unbound.

### 5.1.2 Personal Attention & Personalization of Benefits

Sponsored children, youth and older adult are present, accounted for, visited and valued. Individual sponsored members and their families have the decision-making power over their sponsorship benefits and services. Project staff members dedicate time to be connected to family and community realities to listen to their needs, ideas, and goals. Project staff work with sponsored families to promptly address any concerns encountered in the service delivery model. This primarily involves in-person visits in homes and at meetings with sponsored families and may also include outreach via phone or virtual communication with sponsored families for additional support or in the case of virtual subprojects.

# 5.2 Program Policies

## 5.2.1 Non-discrimination

Participation in Unbound sponsorship shall not be based on religious belief, race, ethnicity, gender, political belief or physical or mental ability. Equality of all persons comes from their essential and inherent dignity and is reflected in relationships that are without prejudice. Unbound projects should be a place for unity among families of multiple faith traditions and different ethnicities or political ideologies, particularly during times of ethnic or political tension.

Unbound projects should proactively work to provide opportunities for empowerment of women and girls, which may challenge beliefs and practices that marginalize women and have a negative impact on societies.

The Unbound community should be a place where people of different physical and mental abilities are cherished and provided with opportunities for personal growth.

## 5.2.2 Highly Personalized Direct Benefits to Sponsored Families

Unbound's sponsorship emphasizes a highly personalized approach to development. Sponsored families have the primary voice in the selection of personalized benefits and services as well as other key program decisions within a solid framework of staff support and internal controls. Personalized benefits should be selected based on the clear personal goals of each sponsored family and their realistic plans to achieve those goals. Projects should prioritize direct benefits to sponsored members and their families. Unbound sponsorship does not permit significant expenditures on non-sponsored families. The program is not permitted for the general support of institutions.

Highly personalized benefits may be delivered to beneficiaries through transfers to individual beneficiary bank accounts or mobile money transfers, which maximizes the sponsored family role in selection of benefits. Program staff must assist the families to understand the bank's policy for child accounts to mitigate bank charges. The project must instruct families to immediately report if they have not received the funds in their account, or if they detect any irregularity related to the transfer or use of the resources. Timely communication allows the project to take swift action, ensure transparency in the process, and protect the rights of the beneficiary families.

Alternatives may include, but are not limited to, a vouchering system with local vendors, or coordinated bulk purchase of benefits selected by families and purchased by the project. Vouchering arrangements and bulk purchases require the use of internal controls, including purchasing committees reviewing the selection of vendors providing goods or vouchering agreements. Unbound headquarters does not require collection of receipts from families receiving transfers to individual bank accounts. Projects may develop internal policies regarding receipts that comply with local laws and the project's internal needs. Unbound expects projects, in coordination with sponsored families, to periodically confirm that the methods and vendors used for child account transfers remain reliable and credible.

### 5.2.3  Equitable Benefits

Sponsored members in the same community shall receive the same amount of support from the monthly per-beneficiary sponsorship budget (for example: child account transfers). Sponsorship funds can be used for additional benefits or targeted programming as long as they do not significantly reduce the approved per-beneficiary sponsorship budget.

### 5.2.4  Enrollment in the Sponsorship Program

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.

**Prohibition against Duplicate Sponsorship**

5.2.4.1 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.

**Conflict of Interest in Selection of Sponsored Members**

5.2.4.2 Coordinating units must take great care to avoid real or perceived conflicts of interest or preferential treatment in the selection of sponsored members.  These conflicts of interest or preferential treatment include family relationships, tribal group affiliation, home-village affiliations and any other institutional or personal bias.

**One Sponsored Member per Household**

5.2.4.3 Projects should not enroll more than one person in a household except in extraordinary circumstances. Sponsorship benefits and services should help the entire household, and limiting enrollment to one person per household allows the program to reach as many families as possible. Families with additional ongoing needs are also eligible for complementary programs. Exceptions can be made for special circumstances. Please notify the Unbound headquarters regional team about people who are identified as special cases requiring an exception before submitting the records. Any exceptions should be reviewed regularly to ensure the household still qualifies for more than one sponsorship in the household.

## 5.2.5   Fixed-term sponsorship

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.

### 5.2.6  Active Participation

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

### 5.2.7  Poverty Stoplight

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 toupdate 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.

### 5.2.8  Education Programs

Education is a requirement for ongoing participation in the sponsorship program. Unbound families build their capacities to support their child's educational goals throughout their time in the program.

Unbound sponsors are also interested in contributing to the educational goals of the sponsored and understand that their sponsored friends will have educational opportunities as part of a holistic development effort.

Some sponsors want to provide additional funding for their sponsored children's future education needs.  Unbound allows sponsors to contribute money to education accounts for their sponsored children and will hold these funds at Unbound headquarters until needed for the child's education. The intention of education accounts is educational assistance - whether formal, non-formal or technical skills training.

Projects are notified through the monthly Education Account Balance & Disbursement Report which sponsored children have education accounts and in what amount.  Projects are required to submit an Education Account Disbursement Request form (see Financial Policies Manual) to

Unbound headquarters to request distribution of all or a portion of the education account when the child is in need of additional educational assistance.

The project must monitor and account for the use of these additional funds in order for them to be disbursed.   The youth receiving extra educational assistance must provide updates on their educational progress and future plans with every letter to their sponsors.

When a child leaves the sponsorship program with money remaining in his or her education account held at Unbound headquarters, sponsors will be allowed to transfer any remaining amount to another child they sponsor. If the sponsor does not choose to transfer the remaining funds to another sponsored child, any remaining money will be automatically transferred to the global Unbound -scholarship fund.

### 5.2.9  Livelihood Programs

Economic self-sufficiency programs should help sponsored families generate sustainable income for themselves. During the cycle of sponsorship, sponsored families should rely on sponsorship benefits less over time and more on their own income generating activities such as entrepreneurship or gainful employment.

For families interested in entrepreneurship, project teams should create platforms based on the interests and skills of sponsored families in which sponsored families have access to capital to pursue self-employment and access to expertise to develop their business plans and market their products. For families interested in gainful employment, project teams should provide access to skills training to qualify for formal employment.

Participation in economic self-sufficiency programs should not be required for participation in the sponsorship program.

### 5.2.10 Values Formation Programs

Unbound seeks to balance the importance of spirituality in the lives of sponsored families with appreciation for the variety of religious faiths and traditions that exist in sponsored communities. Any programs or activities with a religious or spiritual element should follow Unbound's non-discrimination policy. Special attention should be made to ensure that all sponsored members feel welcomed and supported regardless of their religious or spiritual beliefs. Christian or other religious formation shall not be a requirement for participation in Unbound's sponsorship program.

### 5.2.11 Retirement from the Sponsorship Program

Each project shall document a local sponsored member retirement policy and ensure that all project staff members and sponsored families are aware of the policy.  Project coordinators must evaluate subprojects on a regular basis to assess their ability to continue serving sponsored persons.

Unbound hopes to continue sponsoring sponsored members as long as they meet the project selection criteria, are receiving significant benefits from the program, are positively and actively participating in the program, enrolled in formal or alternative schooling, and are complying with all

requirements and policies of the sponsorship program. However, all sponsored members will eventually leave the program, and managing the retirement process effectively is very important for the sponsored member, the sponsor, the project, and Unbound.

Following are possible reasons for the retirement of sponsored members:

- Sponsored member has achieved their educational goal
- The family has completed a fixed-term sponsorship
- Sponsored member has employment that inhibits or prevents the attainment of their educational goals
- Economic situation of the family has improved enough as to no longer meet the criteria for sponsorship
- Sponsored member has discontinued studies and is not enrolled in a skill development course
- The sponsored member has moved out of the area, and the project and family does not have the capacity to continue providing benefits and monitoring eligibility. Additionally, they do not meet the established criteria to be transferred to a virtual subproject where available.
- Sponsored member or family no longer wishes to participate in the program or is not meeting the requirements of the program, such as:
    a) not meeting communication requirements
    b) not attending required meetings and activities
    c) not adhering to Unbound policies
    d) general lack of cooperation with the project team
- Sponsored member passed away
- Other reasons as determined by the project (contact Unbound headquarters)

Gender equity should be carefully considered in project retirement policies and decisions. Retirement of a child or youth solely due to marriage or pregnancy is prohibited.

It is a serious infraction of Unbound policy for projects to accept sponsorship money for a sponsored member if the member is not receiving benefits. The project must retire sponsored members from the sponsorship program if the project is not able to contact the sponsored member or his/her program representative. Unbound considers it a serious situation requiring immediate resolution if the project does not retire a sponsored member in such situations. The project should have a clear system and procedure in place to identify and resolve these situations when they occur.

Unbound projects have the right and responsibility to discontinue participation in the sponsorship program for families or sponsored members who have taken an adversarial position with regard to the program and/or organization. It is important to remember that Unbound sponsorship is not a guarantee for perpetual help. Unbound and its projects reserve the right to retire a given sponsorship for documented reasons.

When a sponsored member is retired by a project, the project must either send a detailed farewell letter written by the sponsored member, a family member, or a farewell letter written by a staff member familiar with the sponsored member, which explains the circumstances of the retirement (see Correspondence Manual).

If a project does not submit a farewell letter, or the required letters, photos, or answer to an Update Request within the expected timeframe, Unbound Kansas will retire the sponsored member for non-compliance. All projects should strive for zero non-compliance retirements. Please refer to the Correspondence Manual to review the expected timeframes for each requirement.

### Policy prohibiting retirement for Marriage or Pregnancy

5.2.11.1 Retirement of a child or youth solely due to marriage or pregnancy is prohibited.  If a married youth, or girl or boy involved in a pregnancy continues to meet the selection criteria in developing his or her desired potential, the youth may continue in the sponsorship program even after he or she is married or becomes a parent. Retirement from sponsorship should not be used to punish or discriminate. Instead, projects are encouraged to create or enhance long-term solutions to address risk factors and root causes of teenage pregnancy, gender-based violence and/or other local barriers youth face in achieving their desired program and educational goals.

### Policy for Older Youth Not Attending School

5.2.11.2 Unbound's intention is to continue sponsoring older youth as long as the youth is actively pursuing his or her education or job skills development.  The youth must also regularly participate in program activities and the project must monitor his or her progress.

Some sponsored youth may need to work or perform required civil service for a period of time in order to help support their families and/or save money for higher education. In addition, institutions of higher education in some countries have very limited space and may require a youth who has been accepted into the institution to wait for a period of time before enrolling for classes.

Youth who become pregnant or father a child, may also experience a disruption in their education. If a sponsored youth (male or female) in this situation is willing and able to continue participating in the sponsorship program, projects are encouraged to continue her/his sponsorship while following the policy below.

Sponsored youth who are not enrolled in school may receive a one-time retirement exemption and continue to be sponsored for a period of up to **one year** as long as the sponsored youth can fulfill **ALL** of the following conditions:

- The sponsored member has a definite intention of returning to school and clear plans to realize that intention.
- The sponsored member has demonstrated the ability and initiative to succeed in school.
- Writes to the sponsor explaining the situation and his/her plans and timeframe for returning to school.
- Works with the project or subproject staff to develop a benefit plan for the time the sponsored youth is out of school, including a determination of how much of the monthly benefits will be accrued for future education benefits. If the child is not living in the project's service area and away from home, it is not appropriate to direct all of the sponsored child's benefits to the family instead.

- Continues to participate in the sponsorship program. If the sponsored youth remains in the project's service area, he/she should provide some volunteer service to the local community. If the sponsored youth leaves the area, the family is expected to participate in the activities of sponsorship program on the behalf of the sponsored youth through the regular family participation requirements.
- In these cases, both the project and the sponsored youth/family must accept the responsibility of maintaining clear and regular communication with the sponsor regarding the sponsored youth's status. The project is required to monitor the status of the sponsored youth to ensure that the youth will be returning to school, and the sponsored youth/family is required to keep the sponsor informed about the sponsored youth's plans during the months that the sponsored youth is out of school.

A student is only allowed one out of school exemption. Exceptions for situations in which sponsored youth are out of school for more than one year must receive prior approval from the region's program director at Unbound headquarters.

### Students in Change of Sponsor

5.2.11 This policy applies to students 18 and older in change of sponsor, students 13 and over in change of sponsor with less than 2 years of school remaining, and students with an undetermined number of years remaining to complete their education.

The project will receive a special Older Student Update Request (UROS) for youth in these categories, requesting information from the project to indicate how the youth's situation should be handled. Please see the Correspondence Manual for more information about the UROS form.

## 5.2.12 Program Area Funds

Unbound receives a limited amount of donations intended to support sponsored members during times of crisis.

The Critical Needs Fund provides essential support to sponsored members and families during times of crisis. The Critical Needs Fund provides relief in situations such as crises emerging as a result of natural disasters, health crises, family crises resulting in loss of shelter, income, or other critical needs.  Projects wishing to receive this type of funding should contact their Unbound headquarters regional team to apply for Critical Needs Fund support outside of global disbursements.

# 5.3  Child and Elder Protection Policy

Unbound is fully committed to protect the safety, security, privacy and dignity of all program beneficiaries, and particularly children and vulnerable adults (elders and special needs individuals). Unbound requires each project to create a child and elder protection policy consistent with the legal requirements of the country, international law and the mission and core values of Unbound.  A child and elder protection policy should include the following points:

The policy is applicable to all staff (paid, voluntary, permanent or casual), sponsored members, board members, consultants, sponsors, Unbound volunteers (including service scholars), partnering organizations and any other people who represent Unbound in any manner and who come in contact with both sponsored and non-sponsored children and elders.

The following statements reflect Unbound principles and beliefs regarding the inherent dignity of all children and elders:

- All children, youth and elders have equal rights to protection from abuse and exploitation.
- All children, youth and elders should be encouraged to fulfill their potential and assert their rights.
- Unbound – staff, sponsored families, board members, consultants, sponsors and partners – has a responsibility and commitment to support the care and protection of children and elders with whom Unbound works.

## 5.3.1  Definitions of Abuse

**Physical abuse**:  Physical abuse occurs when a person purposefully injures or threatens to injure a child or elder.  This may include but is not limited to slapping, punching, shaking, burning, shoving or grabbing.

**Sexual abuse**:  Sexual abuse is any act that involves sexual molestation or exploitation of a child or elder regardless of whether physical injuries are sustained.  Child or elder sexual abuse is a physical violation of a person's body through any sort of sexual contact or psychological violation of the child's or elder's space through verbal or visual sexual behavior. This includes virtual abuse such as the sharing of images or language of a sexual nature through electronic means, social media or messaging applications.

**Emotional abuse:**  Emotional abuse is a chronic attack on a child's or elder's self-esteem.  It can take the form of name-calling, threatening, ridiculing, bullying, shaming, intimidating, cyber-bullying, or isolating the child or elder.

## 5.3.2  Recruitment and Deployment of Staff

Hiring of staff for Unbound projects and subprojects should include appropriate procedures for screening out those individuals who have a history of child or elder abuse or are otherwise unsuitable for working with children or elders.

## 5.3.3  Annual Training

All project and subproject staff members and volunteers must be trained in Unbound's global child protection policy and complementary project policies on an annual basis. Each staff member and volunteer should also sign a child protection commitment form. This includes scholarship students and parents of sponsored children who assist with Unbound activities. Unbound headquarters provides an online video training in Portal that projects can use for this training. All staff members should pass the quiz at the end of the training each year to complete the training.

### 5.3.4  Privacy

Sponsored members and their families should be assured that Unbound is protecting the integrity, accuracy and dignity of information about them (including photographs) that is shared with the public.  Privacy also demands that children, elders, their families and communities are protected from any potential inappropriate contact from staff, Unbound volunteers, sponsors or other representatives of Unbound.  The privacy requirement extends to all digital communications between sponsored families and staff, volunteers, sponsors, or other representatives of Unbound.

### 5.3.5  Two Adult Rule

There should be no fewer than two (2) adults at all Unbound program activities involving children or youth. A youth or scholar who is 18 or over may count as an adult as long as s/he and the other adult are trained in protection policies. A child should never be alone with an adult that is not his/her parent during an Unbound activity. The project should ensure that digital communications between sponsored children or youth and staff, volunteers, or other representatives of Unbound are visible to at least two adults. In activities with older youth, scholars or sponsored elders, a project may institute a three (3) person policy to ensure that a program beneficiary is never alone with only one adult.

### 5.3.6  Appropriate Discipline

No child or youth should receive emotional or physical punishment from any project or subproject staff member or volunteer. Forms of discipline that are prohibited include but are not limited to corporal (physical) punishment of any kind, yelling, cyber-bullying, or any words that would make a child feel worthless or unloved.

### 5.3.7  Visibility

All interactions between adults and children in the Unbound program should be visible at all times to at least two adults. This applies to both interactions that occur in person and through electronic communication. Private electronic communication between an adult and a child/youth in the Unbound program is prohibited. Unbound strictly prohibits adults working with the Unbound program from being alone in a locked room with a child or youth. Confidential activities like counseling must take place in locations that are visible to other adults or where other adults are nearby (within sight but not hearing distance).

### 5.3.8  Chaperones for Overnight Activities

Because of the greater risks overnight activities create for the safety of children and youth, Unbound discourages projects from organizing overnight activities. Adults must be trained on Unbound's global child protection policy and trained on the project's complementary child protection policies before they can serve as chaperones for an overnight activity. Because of the higher risk posed by overnight activities, at least two adults of each gender must chaperone mixed gender groups of children/youth for overnight activities. The project must define and follow appropriate ratios of adults to children/youth for any overnight activity to ensure safety and protection of children.

### 5.3.9  Reporting and Investigating Abuse of Policy

Projects should develop procedures for handling the reporting and investigation of any abuse, and should address the following points:

- An allegation of child or elder abuse is a serious issue and it is thus essential that all parties maintain confidentiality.  Until abuse has been proven to have occurred, it should be referred to as alleged abuse.
- An alleged perpetrator of child or elder abuse will be suspended from their normal work assignment during the investigation of allegations unless local laws prevent such suspension.
- The investigations of alleged child or elder abuse must be timely and procedurally and substantively fair.
- The appropriate course of action, subject to local law, for proven child or elder abuse must be spelled out, and should include summary dismissal for a staff member, termination of relationship with Unbound for a board member, consultant, or volunteer, and termination of sponsorship for a sponsor.  The person may also be subject to criminal prosecution under local laws.

### 5.3.10 Reporting to Unbound headquarters

Any allegation of child or elder abuse regarding a staff member, volunteer or sponsor shall be reported to Unbound headquarters as soon as possible. The incident report form for making a report to Unbound headquarters can be found on the Portal homepage.

## 5.4  Gender Policy - Program

Unbound promotes integration of gender equity into the development, design, implementation, monitoring, and evaluation of all programs and activities. Gender equity means fairness of treatment for men and women according to their respective needs. This may include equal treatment or treatment that is different but which is considered equivalent in terms of rights, benefits, obligations, and opportunities.

Project teams should continually review Unbound programs and practices to identify and address gender disparities. Projects should create and implement internal policies  to promote gender equity.

Unbound seeks to ensure that girls and women have equal access as boys and men to adequate food, education, health care, shelter, leisure, emotional support, respect and opportunities. Unbound activities should enhance self-esteem and promote equity for all gender identities, and all sponsored members should have a primary voice regarding decisions that affect their lives.

Unbound believes it is each person's responsibility to build a more just world by questioning our own assumptions and challenging ourselves and all Unbound program stakeholders to deconstruct unjust systems and beliefs and build instead a world of gender equity.

### 5.4.1  Gender-Based Violence

Unbound opposes any form of violence within communities where it works, with a particular sensitivity to and awareness of gender-based violence. Gender-based violence includes but is not limited to: rape, domestic abuse, female genital cutting (formerly known as female genital mutilation), trafficking, incest, forced and early marriage, sexual harassment, misogyny (the disdain or hatred for women) and misandry (the disdain or hatred for men).

### 5.4.2  Program Eligibility and Design

Project staff should consider the ways in which gender influences the impact of Unbound programs and program eligibility and how women and men, and girls and boys contribute to and benefit from Unbound programs differently. The design of programs and activities should include steps to eliminate or lessen inequalities. These activities should explore and challenge socially prescribed roles which limit the ability for one to reach their full potential.

Unbound is committed to equal opportunity for girls and boys, women and men, in the pursuit of their chosen fields of study, skills development and livelihood.  Unbound additionally supports both genders in the pursuit of non-traditional roles.

## 5.5  Program Evaluation

As part of a culture of learning, Unbound programs are expected to balance reflection and action in their work. Evaluative thinking, a critical questioning of program outcomes is critical for organizational learning and program innovation and should be encouraged in Unbound. Findings from evaluation are to be utilized for programmatic improvements and planning.

Projects should dedicate staff, time and resources and follow protocol detailed in the Unbound evaluation manual. Evaluation plans should be reviewed by the Headquarters evaluation specialist before data collection begins. An outcomes report should be submitted by each project, at least two times per year (or in accordance with a timeframe agreed upon with the Kansas regional team).

# 6 <u>Mission with Sponsors & Donors</u>

Unbound treats sponsors as participants in the sponsorship program and donors as stakeholders in Unbound's work. Policies regarding the mission with sponsors are designed to promote the personalized relationship between the sponsor and the sponsored, while protecting the safety and privacy of each party.

## 6.1 Guiding Principles

### 6.1.1 Primary Support

Unbound sponsors are Unbound's primary source of support. The Sponsorship program seeks sustainability through excellence in human relationships of mutual respect and support.

### 6.1.2 Honesty & Transparency

Unbound headquarters and Unbound projects approach sponsors and donors with open, direct, and accurate information.

### 6.1.3 Authentic Personal Relationships

One goal of the sponsorship program is the development of a relationship of dignity and mutual respect between the sponsored member and the sponsor. Relationships of dignity and mutual respect are at the core of each project's mission and an integral part of the community of compassion developed by the project. Unbound encourages sponsors and sponsored members to support each other with words of encouragement, solidarity, care and love.

### 6.1.4 Balanced Relationships

Unbound expects a balance in sponsorship relationships. That is, the sponsorship relationship is one of mutual help. But Unbound reserves the right and responsibility to refuse donations or intervene in relationships which project staff believe are unhealthy or inconsistent with Unbound's mission, values and objectives.

### 6.1.5 Journey from Power to Love

Unbound provides opportunities for sponsors and donors to grow in their knowledge, understanding, and love for Unbound communities. Through sponsorship, Unbound sponsors experience a developing solidarity with their sponsored friends. Sponsors grow in humility and grow in their understanding of poverty.

# 6.2  Communication Policies

## 6.2.1  Communications between Sponsors/Donors and Project Staff

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

## 6.2.2  Communications between Sponsors and Sponsored Members

The relationship between the sponsor and the sponsored friend shall be monitored at all times to ensure the protection of each sponsored person and each sponsor.  All communications to the sponsor from sponsored members shall be monitored by project staff for appropriateness and sent through Unbound–Kansas.

Unsupervised communication between the sponsored member (and any of their family members) and the sponsor is strictly prohibited. This includes contact via telephone or any social networking application. The reason for this prohibition is the inability to provide adequate monitoring for the protection of children, elders, and sponsors, the volume of requests that might be created for a project and the lack of logging or tracking of such communications.

Unbound must be able to monitor the relationship between the sponsor and the sponsored member for the protection of the child or elder. In addition, Unbound headquarters must track correspondence to record the sponsored member's fulfillment of program requirements.

If a sponsor currently sponsors the sibling of a child he or she formerly sponsored, the sponsor and the retired sponsored member may not communicate directly.

## 6.2.3  Communications from the Sponsored Member to the Sponsor

Personal correspondence is Unbound's primary method to develop a relationship of mutual respect and support between the sponsored member and the sponsor.  Relationships are formed when there is a back-and-forth, mutual sharing of ideas, thoughts and feelings.  For this reason, the quality and frequency of correspondence is critical to the success of the Unbound program.  Quality is increased when the sponsored member responds to questions the sponsor has asked in an earlier letter, and when the sponsored member shows genuine interest in the sponsor by asking about the sponsor's life and family.

When communication between the sponsored member and the sponsor takes place through the sponsorship program, Unbound is responsible for the content of the correspondence.  It is Unbound's responsibility to ensure that healthy relationships are formed between the child or elder and the sponsor.

For a complete description of the correspondence involved in the sponsorship relationship, please refer to the Correspondence Manual.

### 6.2.4  Same Country Sponsorship Relationships Prohibited

A sponsor may not begin sponsoring a child, youth or elder that lives in the same country as the sponsor.

### 6.2.5  Continued Contact after Retirement

Some sponsors and sponsored members request permission to remain in communication after the beneficiary is retired from the program. Generally, this should be avoided. Permission is granted only on an exceptional basis if both the sponsored member and the sponsor have participated positively in the sponsorship program, and only if the sponsored member is 18 years or older, and only if both parties accept responsibility for direct contact and consent is documented by Unbound headquarters. Unbound headquarters will work with the project coordinator to determine these exceptions on a case-by-case basis.

### 6.2.6  Reporting Inappropriate Behavior

Any inappropriate relationship or communication between a sponsor and anyone involved in the sponsorship program should be immediately communicated to the Unbound headquarters program director.

### 6.2.7  Project Websites

Unbound's official website is the primary website for communicating with Unbound sponsors and donors. The purpose of any project website should be for local communication within the project and its sponsored families and with other organizations and institutions within the working area of the project. Project websites should not aim to communicate with Unbound sponsors.

Public project websites must be reviewed and approved by Unbound headquarters if they include references to Unbound. Projects should contact their regional team before creating a new public website.

The project website must not include specific names of children (sponsored or non-sponsored) and must not include specific names of sponsors or donors.  The publishing of names violates our commitment to privacy for sponsors and sponsored members.  Photos of individuals should not be posted to a website unless the individual in the photo has signed a release statement giving the project permission to publish his or her photo.  In the case of a photo of a child, the parent should sign a consent form.

Project websites that provide local contact information for the project (phone, address, or e-mail) may have higher risk of sponsors contacting the project directly. Unless a sponsor will be visiting the project, Unbound does not permit sponsors to have direct communication with the project office and should be referred to [www.unbound.org](http://www.unbound.org) for Unbound headquarters contact information.  This

is important to assure that the project focus can remain on outreach to sponsored members and also to ensure the consistent communication of Unbound policy as it relates to sponsors.

Project websites must not solicit new sponsorships or additional funds from current and former Unbound sponsors. This can be done only through the official Unbound website, www.unbound.org. The project website should refer persons interested in Unbound sponsorship to the official Unbound website.

### 6.2.8  Project Social Media Accounts

Public project social media accounts are not permitted. Public social media accounts are accounts that are visible to the public, open to join, and/or include sponsors. If a project would like to use social media to communicate with sponsored members, this should be done in a private group that is closed and not visible to the public.

# 6.3  Unbound Trips

Unbound encourages all sponsors to visit their sponsored friends through an Awareness Trip (AT). An Unbound Awareness Trip is an in-depth immersion experience for a group of sponsors to visit the country where their sponsored children live. Unbound projects in the host country and Unbound headquarters staff coordinate these groups, which usually include 15-30 sponsors. These visits foster stronger relationships, greater understanding and unforgettable experiences. Unbound views these visits as an extension of the community of compassion.

More detailed information about ATs is provided in the Trips Manual.

# 6.4  Individual Sponsor Visit Policies

Individual Sponsor Visits (ISVs) are an important part of the Unbound sponsorship program. They are an opportunity for the sponsor and sponsored member to meet each other face-to- face. Giving sponsors the opportunity to meet their sponsored friend in person is consistent with developing personal relationships and maintaining the credibility of the sponsorship program.

Preparing, confirming, carrying out, and following up an ISV involves a large amount of time, effort, and energy for everyone involved. When a sponsor expresses an interest in visiting their sponsored friend, Unbound encourages the sponsor to participate in an Awareness Trip. When that is not possible, a sponsor may request an ISV.

It is the responsibility of the project staff to ensure appropriate precautions should be considered to provide a safe, secure, and supervised experience for the sponsored friend, family and the sponsor.

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

### 6.4.1 Unbound Headquarters Contacts

The primary ISV contacts at Unbound headquarters is the Experience Integration team.

The ISV coordinators serve as the primary Unbound contact with sponsors who express an interest in an ISV. These individuals send the speed letters requesting and ISV and arrange confirmation details.

Projects should contact the ISV coordinators at [ISV@unbound.org](mailto:ISV@unbound.org) with any questions, concerns or problems related to ISVs.

The project's regional team and ISV coordinators are in close contact and support each other. Projects may contact either team if there is an urgent ISV situation.

The project's regional team and Sponsor Support ISV coordinators are in close contact and support with each other. Projects may contact either team if there is an urgent ISV situation.

### 6.4.2 ISV Blackout Dates

Unbound wants to respect the holidays in each project country and the calendar of activities of each project. Requests for ISVs will not be made for dates that projects have indicated as ISV blackout dates.

Each project must send ISV blackout dates to Unbound headquarters each year to avoid an ISV request falling on holidays or other days when the project has other activities that would make hosting an ISV difficult. Sponsors schedule their ISVs several months in advance, so projects should anticipate receiving a request from Unbound headquarters in August or September for their ISV blackout dates for the following year. ISV blackout dates should be submitted by email to the ISV coordinators at ISV@unbound.org.

The list of blackout dates is helpful, yet we acknowledge there are other reasons why a project may need to decline an ISV request. A project has the right to decline ISV requests.

### 6.4.3 Standard ISV Timeline

A typical ISV will follow the timeline below:

- Sponsors are required to complete and ISV application at least 60-90 days before the proposed ISV date and submit a background check (this is a search to attempt to reveal any criminal history and serves as a tool to assess whether a person should travel with Unbound). All accompanying visitors, (these are individuals that will be spending time with the sponsored friend), over the age of 18 years old, are required to submit a background check as well. Unbound now charges a fee for all ISVs. This amount is assessed based on the number of Sponsored friends and visitors joining the visit.

- An ISV coordinator will send an initial ISV notification speed letter to the project as soon as a sponsor has completed and ISV application and all visitors on the ISV have passed the background check. The speed letter will remain open until the project either confirms that they will facilitate the proposed ISV, proposes and alternative date, or declines and explains why the project is declining the proposed ISV.

- A Sponsor Support ISV coordinator will send an initial ISV notification speed letter to the project as soon as a sponsor has completed an ISV application and all travelers on the ISV have passed the background check.  The speed letter will remain open until the project either confirms that they will facilitate the proposed ISV, proposes an alternative date, or declines and explains why the project is declining the proposed ISV.

- Projects should send confirmation to the ISV coordinatorswithin 30 days of receiving the speed letter. Please remember to include anticipated expenses in the Speed Letter reply.

- Once the speed letter confirmation is received at Unbound headquarters, and ISV coordinator will confirm the ISV with the sponsor.
    - The ISV coordinator will provide the project's contact information, meeting location and any additional details related to the ISV.
    - The project staff will also receive the sponsor's contact information so that the staff and the sponsors can confirm the arranged time and location to meet for the ISV.

- Sponsors are asked to call the project contact person as soon as they arrive in the country to verify the visit. However, if the project staff has not heard from the sponsor one or two days before the scheduled visit, the project staff should contact the sponsor to confirm the visit time and location.

- An  ISV coordinator will send a 2nd speed letter to the project with the link to the ISV evaluation form on or near the date of the sponsor visit.  This speed letter will remain open until the project submits a completed ISV evaluation. The evaluation should be submitted within two weeks of the ISV.

- The project will assume the expenses related to the ISV and maintain documentation and receipts of the expenses to request reimbursement, per the process described in the Financial Policies Manual.

- Unbound headquarters will reimburse the ISV related expenses in the June and December transfers.

## 6.4.4  Preparing for an ISV

When a sponsor expresses an interest in requesting an ISV, the ISV coordinators will explain Unbound's policies and procedures and send the sponsor a packet of information about ISVs. The sponsor must submit a completed ISV application and all visitors over the age of 18 complete a background check and pay the ISV fee before Unbound headquarters will send a speed letter to the project requesting an ISV.

The speed letter request includes the sponsor's name; the sponsored child's name, CH ID and subproject; the dates the sponsor will be in country and the visit date requested for the visit; contact information for the sponsor. The in country of the sponsor will help identify alternative dates for the project to select if the proposed date cannot be accommodated.

There are cases where a sponsor requests an Individual Visit with more than one sponsored member. In these cases, we recommend a limit of two sponsored members from different families per visit. The main purpose of an individual visit is to strengthen a caring and healthy relationship between the sponsor and the sponsored so the number of participants should be limited.

### Declining an ISV

6.4.4.1 Unbound staff in Kansas and in the projects must always act in the best interest of sponsored members, and it is the responsibility of all Unbound staff to deny requests that are inappropriate or harmful to sponsored members or their families. Projects should never approve a proposed ISV if such a visit would put the sponsor, sponsored member, or project staff in an uncomfortable position or in physical danger.

If a proposed ISV is not in the best interest of the sponsored member or family, it is the responsibility of the project to provide a detailed explanation and deny the request or propose a different date. This will help us educate sponsors about the reality and culture in which their sponsored friends live, and it will also help the Unbound headquarters office to serve project teams better in the future.

The Unbound headquarters office does its best to minimize ISV requests that may not be feasible or appropriate, but it is not always possible to anticipate the impact a particular ISV might have on the sponsored member and family or on the project staff. When these situations arise, Unbound headquarters asks for the good judgment of the project staff to accept or deny a particular ISV.

Projects are required to notify the ISV coordinator via email ([ISV@unbound.org](mailto:ISV@unbound.org)) and copy the regional team when a proposed ISV is not feasible or may not be in the best interest of the sponsored members, their families or their communities.

6.4.4.2 No unscheduled ISVs are permitted.  In the event a sponsor does not coordinate through the Kansas office, and appears at the project or sponsored community, we ask the project to decline the visit. Notify Unbound headquarters and ask the sponsor to contact the Kansas office on their return.

### Confirming an ISV with Unbound headquarters

If the project determines that the proposed ISV is possible, the project should send confirmation of the visit via speed letter response to the ISV coordinators as soon as possible. Please submit answers within 30 days of the date the project receives the ISV speed letter that

requests confirmation. In the confirmation to Unbound headquarters, the project should include a proposed date, time and location where the ISV will take, the project staff who will serve as the contact person for the visit, their contact information and list any anticipated costs associated with the visit.

It is extremely important to send confirmation as early as possible.  Unbound cannot confirm the visit with the sponsor until verification from the project is received.   A delayed confirmation from the project can cause complications for the sponsor's travel plans.

### Confirming an ISV with the Sponsor

6.4.4.3

The ISV coordinators will send sponsor contact information to the project staff in the initial speed letter that proposes the ISV.  If the project confirms the ISV with Unbound headquarters, the project staff should use this information to contact the sponsor one or two days before the scheduled visit to confirm the visit time and meeting location.

Contacting the sponsor for the specific purpose of arranging the final details of an ISV does not compromise Unbound's general policy against direct communication between sponsors and project staff.  Remember, Unbound does not allow direct communication between sponsors and the project. Communication outside the parameters of the visit is prohibited.  After the visit communications with the sponsor must continue to come through Unbound headquarters.

Unbound headquarters provides the sponsor with the project contact's phone number.  Unbound headquarters instructs sponsors to use this contact information only after arriving in the host country with the purpose of confirming the visit time and "pick-up" location.  Unbound headquarters informs the sponsor that he or she may not use the project phone number for any other purpose than to confirm the visit.

## 6.4.5  Carrying Out an ISV

6.4.5.1

### Required ISV Participants

At least two adults must be present at all times when a sponsor and sponsored member are together. At least two staff must be present during an ISV.

In addition to the two staff, each sponsored member, regardless of age, must be accompanied by an adult family member during the visit with their sponsor. If a family member is not available, an adult family representative may be designated by the sponsored member or his/her parents/guardian. A family representative could be a trusted neighbor or anyone the family is comfortable entrusting with this responsibility. For example, a sponsored elder might prefer that their social promoter serves as their family representative or one of the mothers that assist him/her in the sponsorship program.

This family representative should actively participate in the visit. They must keep the sponsored member within their view and must be able to hear the conversation.

In the case of siblings who both receive a visit, one family member or family representative per group of siblings is sufficient.

At no time should a sponsored member or his/her family be left alone with a sponsor or other visitor without a project staff member present. The "two-staff" rule is important in case a staff needs to step away momentarily; the other staff is still present with the sponsor and sponsored friend. Two staff can support and serve to hold each other accountable in the event of inappropriate requests, situations, or behavior on the part of the sponsor or sponsored family.

The project should provide a qualified interpreter to assist with communication when necessary. Please ask all interpreters to review and sign the Unbound Code of Conduct for ISVs. Interpreters are not permitted to exchange contact information with a sponsor.

In addition, if a driver or any other staff member participates in any portion of the visit, they will need to review and sign the Unbound Code of Conduct as well

### Health and Safety Measures

**6.4.5.2** The topic of health during an ISV impacts every aspect of a visit, from who will be present to of the local Unbound office. When planning a visit, we want to minimize the risk to all participants, including staff, sponsored friend, their family, and the sponsors. The desire of one is never more important the wellbeing of others.

No one from the family, staff or sponsors should travel or attend an ISV when they are sick or have symptoms of contagious illness. If the sponsor falls ill while in country, they are asked to contact the in-country ISV contact to cancel the visit and inform isv@unbound.org. We ask the sponsored family to do the same. In the case that someone on the team or the interpreter is sick, we ask that the responsible person for the visit finds an alternate person to support the visit.

**6.4.5.3**

### Possible ISV Participants

All ISVs must be scheduled and confirmed through Unbound headquarters. Unbound has a responsibility to protect the privacy and safety of sponsored members and their families, and that responsibility requires that visits to sponsored members be cleared through Unbound headquarters before they occur (this will include completion of a background check before a sponsor, or accompanying travelers are permitted to travel). ISV participants may include the authorized sponsor, their authorized relatives and friends, the sponsored member, and their relatives or representatives. The primary purpose of an ISV is to nurture a caring and wholesome relationship between sponsored member and sponsor, and the number of people involved in an ISV should be limited so as not to detract from the ability to develop a relationship. Elaborate, large or costly presentations for ISVs are discouraged.

Sometimes a sponsor will send a friend or relative to represent them for an ISV when the sponsor is not able to travel to the country where the sponsored member lives. Non-sponsors visiting a sponsored member on behalf of the sponsor must request an ISV through Unbound headquarters

and complete an ISV application, background check and other forms. Non-sponsors should abide by the ISV guidelines included in that application and code of conduct.

All visiting sponsors and relatives or friends are asked to carry identification and projects should ask to see identification to confirm the visitor is authorized.

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

### Location & Transportation

6.4.5.4

Sponsors making an ISV must make their own travel arrangements to the point designated by the project as the "pick-up" location where the sponsor will be met by project staff. It is the sponsor's responsibility to make the necessary transportation arrangements to the confirmed meeting point. If the sponsor needs help with transportation arrangement, it should be mentioned during the application process to Unbound Kansas. This request will then be included in the ISV Speed Letter request. The project is not responsible for making transportation arrangements but may offer it as an option.

If there are anticipated costs related to retrieving the sponsor from the "pick-up" location, the project should list the cost in the speed letter reply confirming the visit. The sponsor will be required to pay these costs to Unbound headquarters in advance of the visit.

See the Financial Policies Manual for the process of accounting for ISV expenses and reimbursements.

The role of the project staff in an ISV does not include assisting sponsors with other details related to their personal travel.

6.4.5.5

### Location of an ISV

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

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

Unbound does not take sponsored families across international borders.
ISV visits at the sponsored member's home are not permitted. While we acknowledge that a home visit could be a profound experience for the sponsor and perhaps sponsored alike, child protection throughout the global Unbound community is currently a higher priority and calls for stricter policy. This also reduces opportunities for direct contact and unsupervised subsequent visits between sponsor and family.

A project may submit a request for an exception to this policy, for example, due to a serious condition or situation of the sponsored member. Please submit the request with reasons and details to the ISV coordinator in Kansas. The ISV manager and a regional team representative will review the proposal and confirm with the project if Kansas agrees with the exception. An example of an

exception may be a sponsored member who cannot travel outside their home for health reasons. If an exception is authorized by Kansas, the project is asked to review 4.1.2 Visit of a sponsor to their sponsored friend's home in the Awareness Trip Manual.

### Activities and Meals During an ISV

The project may recommend an appropriate activity during the ISV, such as the sponsor and family sharing a meal at a restaurant, or other suitable activity. It is not appropriate for a sponsor to determine or insist on an activity. This is completely up to the project staff discretion.

**6.4.5.6**

This is a good opportunity for the project staff to talk to the sponsor and share important code of conduct, policy, or other reminders for the visit before the sponsor meets their sponsored friend. It's a good opportunity to confirm that the sponsor and all accompanying travelers have been approved for the visit at this point. Any travelers accompanying the sponsor that have not been approved for the visit should not be taken to the location where the ISV visit will occur. There are no exceptions to this policy and requests for such should not be considered.

If there are anticipated costs related to a meal, snack or activity during an ISV, the project must list the estimated cost in the speed letter reply confirming the visit. The sponsor will be required to pay these costs to Unbound headquarters in advance of the visit. The project should cover the expense for the sponsor, family and staff. See the Financial Policies Manual for the process of accounting for ISV expenses and reimbursements.

An ISV coordinator Unbound headquartetrs will communicate with the project if the sponsor brings forward any specific areas of interest in terms of activities for the day. The project will always be able to confirm or deny specific elements of an ISV activity. The project should communicate the planned activities for the day to the ISV coordinatorat headquarters.

**6.4.5.7**

### Length of Visit

An ISV occurs within normal project business hours and lasts no longer than one day. We recommend that visits start no earlier than 9am local time and are no longer than 6 hours. The family and staff should travel to and return home from the visit on the same day before nightfall. In the case that a family lives very far away and it is not possible to complete travel to the nearest office and back to their home in one day, share this information with the ISV coordinator and copy a member of the regional team.

**6.4.5.8** If a sponsor is visiting multiple sponsored friends from the same project, the project staff should evaluate the feasibility of which visits can occur during a single ISV and provide the Sponsor Support ISV coordinator with a recommendation. Remember that a visit may not last longer than one day.

### Frequency of Visits

A sponsor may visit with a specific sponsored friend and their family once per calendar year. This visit can occur either on an awareness trip or through an individual sponsor visit (ISV) scheduled

through Unbound headquarters. In other words, Unbound does not accommodate multiple visits by a sponsor to the same sponsored friend or their family during the same calendar year. This policy applies to the sponsor and any family or friends who might want to visit on the sponsor's behalf. This policy applies to all sponsored members, regardless of their age. This policy also applies to sponsors who may be staying in their sponsored member's county for an extended period or who visit the country frequently.

Following are a few examples.
- A sponsor has an ISV with their sponsored friend early in the year and then would like to apply for the awareness trip to the same country occurring later the same year. Unbound headquarters would explain to the sponsor that we can accommodate one visit with the sponsored friend per calendar year, but not two.
- A sponsor visits their sponsored friend in the month of July and wants to visit them again in October. We cannot permit the October visit. The sponsor must wait until the following calendar year to visit this sponsored friend again, whether through an ISV or an awareness trip.

Unbound staff have a responsibility to our sponsored members and their families and our sponsors to facilitate balanced, healthy relationships. Unbound visit policies are written in accordance with our sponsored member protection policies and out of respect for the privacy, schedules and prior commitments of sponsored friends, their families, and all Unbound staff.

### 6.4.5.9 Volunteering

The purpose of an ISV is to build the relationship between sponsor and sponsored friend. An ISV is not a volunteer opportunity for the sponsor. ISV visitors are not allowed to volunteer at the project or subproject office even for a short-term period of time.

### 6.4.5.10 It's Okay to Say No to a Sponsor

It is the responsibility of all Unbound project staff to deny any requests that a sponsor makes during an ISV that are inappropriate or harmful to project staff, sponsored members, or their families. 6.4.5.11 Inappropriate requests include requests that are unreasonable, infeasible, or not in the best interest of the project staff, sponsored members, their families, or their communities.

### Code of Conduct for sponsors during ISV

6.4.5.12

Sponsors must sign a code of conduct before participating in an ISV. Portal users may view the document in Portal .

### Code of Conduct for sponsored family during ISV

Project staff or appropriate mother/parent-leaders will remind families being visited for an ISV of Unbound's policies regarding inappropriate requests, direct contact, and child and elder protection.

**Code of Conduct for project staff and interpreters during ISV**

The role of the project staff accompanying an ISV visit will be to assure all Unbound policies are being upheld by both sponsored family and sponsor. The project staff may facilitate and support the dialog and conversation between sponsor and sponsored member. The project staff are also expected to intervene in situations or requests either by the sponsored family or the sponsor which
<sub>6.4.5.13</sub> are not permitted by Unbound policy or are not respectful to either party.

Project staff who will be involved in the ISV should be familiar with topics covered in the Unbound Code of Conduct for ISVs (see Forms). This document describes the ISV parameters and behavior that the visitor has agreed to observe during the ISV. Contact your Unbound headquarters Program director or Program operations specialist prior to facilitating an individual sponsor visit with a former sponsored member.

Project staff accompanying an ISV should review 4.1.1 Protection of Sponsored Members during Visits with Sponsors in the Awareness Trip Manual. Further, these staff should read and sign "CODE OF CONDUCT FOR PROJECT, SUBPROJECT, CONTRACTED STAFF OR VOLUNTEERS" (see Forms).

## 6.4.6 Reporting after an ISV

For all ISVs, projects should complete an ISV evaluation and return it to the Sponsor Support ISV coordinators via speed letter response or by email to ISV@unbound.org. This includes scheduled ISVs, ISVs that are scheduled but do not occur, and unscheduled ISV attempts.

Please complete the ISV evaluation and return to Unbound headquarters within two weeks of the ISV. The ISV evaluation allows Unbound headquarters to record and improve sponsor visits, support the project in any problems that occurred, and close pending speed letters regarding the visit.

## <sub>6.4.7</sub>6.4.7 Unusual Circumstances

**Cancelling a Scheduled ISV**

The project coordinator has the authority and responsibility to cancel a scheduled ISV if the health and/or safety of a sponsored member, staff member, or sponsor could be put at risk by going through with the ISV. Examples of circumstances that might trigger a cancellation of a scheduled ISV include sudden illness of the sponsored member or close family member, death of a family member of the sponsored member, unexpected violence or threat of violence in the area, political instability, hostility toward foreigners, impassible roads, earthquakes and severe weather events such as hurricanes, typhoons and tropical storms.

Local staff should contact Unbound headquarters as soon as possible if cancellation of an ISV is being considered. If the sponsor is already in-country the local staff should contact the sponsor to cancel the ISV as soon as possible. It is important to clearly communicate the realities of the situation to the sponsor.

### When a Sponsor Does Not Arrive

6.4.7.2

Projects should use the sponsor contact information to contact the sponsor when the sponsor does not arrive at a scheduled ISV meeting time. It is possible that the sponsor's flight has been delayed, or a miscommunication has occurred. Contacting the sponsor directly is the best way to resolve any miscommunication about meeting time and location. Projects should also contact a Sponsor Services ISV coordinator when a sponsor does not arrive at the scheduled meeting location, when possible, to verify that the project has received the correct contact information and visit details from Unbound-KS.

Projects should send an ISV evaluation to Unbound headquarters and contact a Sponsor Services ISV coordinator when a scheduled ISV does not take place so that the Sponsor Services ISV coordinator can contact the sponsor to learn why the sponsor did not arrive and answer any questions the sponsor may have.

### ISVs made by an Awareness Trip participant during an AT

6.4.7.3

An Individual Sponsor Visit (ISV) cannot be scheduled by an awareness trip participant to occur during the same days as their awareness trip. The sponsor must follow the activities planned for the group and a meeting with his/her sponsored friend is one of the programed activities. In the case of a new sponsorship during an AT, if the project staff decides that it is possible to organize a meeting so that the new sponsor and sponsored friend can meet during programmed trip, this is considered an additional visit to an AT and not considered an ISV. No evaluation or ISV reimbursement will be sent. Expenses related to this additional visit should be included in the AT expense report. The Awareness Trip Manual for Projects can also be found in portal.

Some awareness trip participants contact Kansas to request an ISV with their sponsored friends to occur immediately before or immediately following the awareness trip. These requests are not accepted. A sponsor is permitted one visit per calendar year with their sponsored friend, either as an ISV or during an awareness trip.

6.4.7.4

If there are any questions or concerns regarding a particular situation, please feel free to contact a trip coordinator.

### Accepting Donations from Visiting Sponsors

The visiting sponsor should understand that all monetary gifts should be coordinated through Unbound headquarters.

If a sponsor wishes to give a cash donation directly to the project or subproject, please remind the sponsor that all monetary gifts to a family or to the project should be coordinated through Unbound headquarters. There are several reasons for this monetary policy. First, when funds are given through Unbound headquarters, a receipt can be provided to the sponsors, and it can be properly documented in our accounting system. Also, unaccounted for in-country income can cause discrepancies in project accounting. If accepting a cash donation is unavoidable, please refer to the Unbound Financial Policies Manual for instructions on how to process cash received by the project from a sponsor.

Prior to the ISV, the visiting sponsors paid Unbound headquarters the amount of the anticipated expenses related to the visit, such as meals and transportation. However, if the visiting sponsor insists on paying directly to a restaurant or driver for these services, this is not considered a violation of Unbound monetary policy.

### Unscheduled ISVs not permitted

**6.4.7.5**

**Unscheduled ISVs are not permitted** - all ISVs must be scheduled and confirmed through Unbound headquarters. Unbound has a responsibility to protect the privacy and safety of sponsored members and their families, and that responsibility requires that visits to sponsored members be cleared through Unbound headquarters before they occur. A background check is required before a sponsor is approved for a visit with their sponsored friend. This requires a 30-day processing, review, and coordination period.

There may be cases when a sponsor may contact a project office directly to try to arrange an ISV or arrive at the office or at the community of the sponsored member without prior arrangements having been made.

- If a sponsor contacts a project about an ISV prior to their arrival in country, the project should refer the sponsor to the Sponsor Expeperience department in Kansas and instruct the sponsor to schedule and apply for the visit through Unbound headquarters.
- If a sponsor contacts the project about an ISV after their arrival in country, the project must explain to the sponsor that an unscheduled ISV is not possible. Due to the required background check, all visits must be arranged and processed through Unbound headquarters.

**6.4.7.6**

Projects should contact an ISV coordinator if a sponsor attempts an unscheduled ISV. Unbound headquarters staff will contact these sponsors to explain Unbound's ISV policies and give notice so that the sponsor does not attempt another unscheduled visit in the future.

### Sponsoring an Additional Friend during the visit

**6.4.7.7**

Sometimes a sponsor will express interest in sponsoring an additional child during a visit. In such cases, Unbound encourages sponsors to sponsor a child from Unbound.org online sponsorship page or by contacting our Sponsor Support team for additional support. Following this process will ensure that the same sponsorship is not promised to two different sponsors.

### Dropping off gifts

Occasionally sponsors or a friend or family member of a sponsor ask if they can deliver a gift for their sponsored friend to the project office. In such cases, Unbound headquarters will notify the project of the requested gift drop-off date and approximate time through a speed letter. The speed letter will be closed when the project responds that a staff member or volunteer will or will not be available to receive the gift at the project office.

A gift drop-off is not an ISV. Please do not bring the sponsored member or his/her family to the project office to meet the person delivering the gift unless an ISV is specifically requested.

**Reporting Policy Violations**

Reporting Policy Violations. Projects should notify the SV coordinator (ISV@unbound.org), copying the regional team, if a violation of Unbound policy occurs during an ISV.

6.4.7.8 Project staff should notify local authorities when necessary to protect any child, adult, or elderly person.

# 6.5 Termination of Sponsor Relationship

If a sponsor refuses to comply with Unbound policies, it may become necessary to terminate the sponsor relationship with that sponsor. In this case, Unbound headquarters will notify the sponsor and coordinate with the project of any potential impact to a sponsored member.

# 7 <u>Documentation and Reporting</u>

Unbound expresses its core values of authenticity through a commitment to honest, transparent and timely documentation and reporting. Unbound headquarters attempts to limit documentation requirements to the documents and reports that are critical to financial and program accountability or to efficient and effective management.

## 7.1 Documentation & Reporting Policies

### 7.1.1 Document Retention

Projects should have internal policies regarding what documents are retained and for how long. Those policies should at least meet local legal requirements.

### 7.1.2 Proof of Transfer of Sponsorship Funds to Sponsored Member Accounts

Projects shall maintain documentation verifying the amount of funds that have been delivered to each sponsored family. Proof of delivery can be bank transfer documentation.

### 7.1.3 Benefit Logs & Receipts for Benefits purchased by Project

Projects that provide in-kind benefits are required to apply purchasing committee policies and maintain either benefit log sheets or individual benefit receipts for all benefits that are purchased by the project and delivered to sponsored members.

### 7.1.4 Annual Budget & Objectives

The annual project budget is a financial planning document outlining the projected program and administrative expenditures and key project objectives for the upcoming year. The annual program objectives should be dynamic, informed by evaluation results, and include a long-term vision for the direction of the program. Please refer to the Financial Policies Manual for more specific information regarding annual budgets.

### 7.1.5 Annual Financial Reporting – Non-Budget

In addition to the annual budget, projects must submit or make available the following annual financial reports.
- Up-to-date inventory listing
- Physical asset listing
- Project financial statements (audited version if audit was performed)
- Copy of the financial reports required by the local government

For details regarding these requirements, please see the financial policies chapter of this manual or the Unbound Financial Policies Manual.

## 7.1.6  Monthly Financial Reporting

Projects are required to report or make available transaction-level financial detail to the Unbound headquarters office each month within 60 days of the end of each month in compliance with the Unbound Financial Policies Manual. Projects are also required to submit a copy of the project's bank statement and a signed and dated copy of all bank reconciliation for all accounts. A cash reserve report must be submitted to the Unbound headquarters office on a monthly basis.

## 7.1.7  Confidentiality of Records

All records pertaining to the Unbound sponsorship program are confidential and should not be shared with anyone outside of the program.  Projects shall not provide lists of sponsored members to anyone outside of the Unbound sponsorship program.

## 7.1.8  Annual Calendar of Reports

| REPORT | FREQUENCY |
|---|---|
| Cash reserves report | Monthly |
| Bank reconciliations | Monthly |
| Bank statements | Monthly |
| | |
| Annual budget & key program objectives | Annually |
| Fixed asset listing | Annually |
| Salary & benefit roster | Annually |
| Copy of local legal compliance documents | Annually |
| Selected outcome evaluation | Twice per year |

# 8 <u>Reference Items</u>

# Bob Hentzen's foreword to the original manual

For God's people living in poverty, Unbound can be a sign of hope and freedom.  Yet, for many today, the future seems to hold little hope.  Time moves on, yet their lives feel immobilized by the weight of poverty and insecurity.  At Unbound when we sing "Love the children just as they are,"…we are crying "NO" to the poverty, disease, and injustice that afflict so many innocent families made in God's image.  When we sing "Love the children…near and far," we are proclaiming an unequivocal "YES" to a transformed and peaceful world.

Building community is essentially an effort to reestablish the basic freedom of God's humble people.  At Unbound, we strive to respond to the expressed, felt needs of our community of sponsored.  We work faithfully so that God's humble people will not just "have more," but "be more," and live with more dignity.  "I have come so that they may have life and have it more abundantly." (Gospel of St. John, 10:10).  The reality of the world situation calls us as an Unbound community to serious commitment and a sense of group responsibility…but in a calm…balanced…eye-toward-the future way.

The world is hungry for community.  At Unbound, we strive for the formation of Unbound communities among the sponsored, co-workers and the sponsors.  We are a community of service.  We are a community of diverse faith traditions united in compassionate and transformative service to one another.

We recognize that our communities will not be without tensions and difficulties.  Yet, problems, treason, vengeance, calumny, injury, death will not be the final word … but rather truth, life, hope, love, resurrection, peace and confidence.  It is my most fervent hope and prayer that the idea of working together, sharing the challenges and joys of this great adventure of love, will penetrate every corner of Unbound.  In order to be a part of Unbound, it is vital to be in sync with the spirit which animates the organization.  This implies an attitude of openness to change and of letting ourselves be continually transformed by the very families we work with.

We are not in this for the power or to establish our own way of thinking around the world.  This can be a temptation for us so-called educated people from a so-called developed part of the world.  Unbound is not about dominion.  We strive to be a community of service, which implies solidarity, fraternity, equality.  Jesus founded a community that would do better than continue the avarice, the exploitation, the oppression of His day, which is also our day.  No one said it was going to be easy.  In striving to build community, we can expect opposition and persecution.  We want to promote a new view of globalization, one in which we put into international motion a true sharing of the resources of God's creation.  We want the resources and goods of this earth to favor unity, not separation.  In our preferential option, we favor the poor.

Through our core value of mutual respect, the sponsored children, youth and elders are present, accounted for, visited, and loved.  This can be done with clear and solid Unbound structures and identity.  It can be accomplished around the world with a team of co-workers committed to excellence.  These co-workers must be gifted, loving and dedicated in their ways of relating to the poor.

Unbound is under construction.  It is not completely built.  It is not static, but always in movement, formation and growth.  Unbound is a gift from God.  You and I have received a special call and opportunity to build Unbound in prayer and action, not as individual free-lancers but together in community.  We share the same call, the same mission.  We are currently founding Unbound.  We live with a sense of just beginning.   This implies docility to the Spirit, a humble and simple attitude, coupled with patience, generosity, pardon, dedication, joy and courage.

Around the world, Unbound is considered a very good place to be and to work.  We look for colleagues who shine in the excellence of their work.  We ask for every effort for staff to be well-prepared for their respective responsibilities. We meet labor laws of the respective countries where we are called to serve.  In this whole process, we pray, "Lord, help me to realize that I don't hold the keys to heaven and earth, and that You were here before I arrived."

At Unbound, we say we walk with the poor.  Walking is one of the most common human activities.  For the poor, walking is not only a common human activity.  It has a profound meaning in their lives.  Many times, their very survival depends upon their daily walk.   Let us reflect together on our walk in life…how does God walk with the poor…how has Unbound walked with the sponsored and sponsors during these 30+ years?  Unbound is not a building in Kansas or one of the 19 countries where we are called to serve.  Unbound is each and every one of us, and we are invited to walk with the poor.

Good communication among us, mutual confidence, praying for one another, sharing joys and challenges in our service, discerning together the path ahead can help a great deal in the creation of our own small community of compassion.  We all have different responsibilities but the same spirit.  My fellow sponsors form an integral part of the Unbound community.  You are our sisters and brothers, who share your love, your goodness, your faith.

I welcome you to study this sponsorship manual compiled in dialog with Unbound teams around the world.  Together we will do our best to build community-based programs to restore dignity and offer hope for our sponsored members, their families, and their sponsors.  We will back the sponsored members and their families in their own pursuit of a more dignified and just world.

Please know of our welcome to Unbound, our appreciation and our love.

Bob Hentzen
Co-Founder of Unbound

# Project Coordinator Job Description



**Job Title: PROJECT COORDINATOR**

**Summary of Position:**
The Project Coordinator is responsible for the administration and performance of the Unbound sponsorship program and the proper management of project, zonal and subproject structures, finances and staff. The Project Coordinator is held accountable for the implementation of Unbound's policies and guidelines as stipulated in the Unbound Sponsorship Policy Manual set.

**Key Accountabilities:**
As a result of the project coordinator position, there will be:

- Improved outcomes for the widest group of sponsored members and their families according to the program characteristics as described in the Unbound Sponsorship Manual Set.
- Responsible monitoring, evaluation and adjustment in approaches regarding program effectiveness and integrity.
- Timely and highly personalized correspondence in support of relationships of mutual respect from sponsored persons to their sponsors.
- A fully compliant project legal entity in good standing with local and national government reporting agencies.
- Responsible monitoring and corrective actions regarding the financial transparency and integrity of the project.
- A well developed and competent project staff which models the community of compassion and service Unbound strives to create among sponsored families.
- Representation of local project perspectives and contributions to Unbound -Kansas for the development of policies and programs.

**Statement of Accountability:**
The Project Coordinator is employed by the local legal entity <Legal Entity Name> in <Country>. Unbound strives to maintain long-term relationships with committed staff members, however, permanent assignments are not offered.

The Project Coordinator is accountable for the transparent and complete reporting of important project developments to Unbound -Kansas and the local project board / legal entity.

The Project Coordinator shall not cause or allow any practice, activity, decision or organizational circumstance that is either unlawful, imprudent or in violation of commonly accepted business practices and professional ethics, or that could potentially impugn anyone's trust of Unbound if everything were immediately, fully and publicly known.

The Project Coordinator is subject to assessments based on Unbound policies and the contents of this job description; and is accountable to the local project board. The project coordinator's primary contact for Unbound headquarters is their Regional Program director. The assessment of the project coordinator may

include information collected from many sources, including the project's overall performance on Unbound policies and requirements; correspondence, financial, and program reviews; desk audits; onsite audits and visits; and interviews with sponsored families and staff members.

**Essential Duties and Responsibilities:**
1. **SERVANT - LEADERSHIP**
   a. Provide humble leadership, coaching and guidance to staff and sponsored members.
   b. Assure that Unbound policies are followed and the project team is providing the maximum benefits to sponsored they serve.
   c. Respect for diversity in culture, race, ethnicity, national origin, religion, class, gender, life-style, age and disability.
   d. Assure a culture of respect, service and teamwork within the project.
   e. Establish and execute excellent collaboration between the Project and Unbound -Kansas.
   f. Maintain open and effective communication between Unbound -Kansas and Project.
   g. Establish multiple points of contact between project staff and Unbound Kansas.

2. **PROGRAMS**
   a. Ensure effective monitoring of sponsored persons' eligibility and participation in the program.
   b. Plan, develop, and implement programs that contribute to the self-sustainability of the sponsored families and their communities.
   c. Develop and implement a project structure and team that ensures effective implementation of the 9 Unbound program characteristics.
   d. Define, measure and document outcomes and utilize results for continuous program improvements.
   e. Guide the project's strategic and annual planning processes.

3. **PEOPLE**
   a. Hire, develop and retain needed human resources (paid and unpaid).
   b. Develop an effective and collaborative leadership team.
   c. Develop, document and implement locally appropriate human resources policies that are consistent with local laws and Unbound values and policies.
   d. Develop methods for regular assessments of all staff, including the performance of zonal/subproject teams, providing regular feedback and making adjustments as needed.

4. **STRUCTURE**
   a. Ensure that the project complies with all local legal requirements and maintain its local legal status in current and good standing.
   b. Build and implement effective and appropriate internal management structures, systems and policies consistent with overall Unbound vision, core values and policies to achieve sustainable outcomes.
   c. Create a decentralized project management structure that provides adequate and effective support, guidance, and supervision to all team members.
   d. Ensure project, zonal office and/or subproject alignment with Unbound core values and compliance with Unbound policies.
   e. Develop and document local project, zonal and/or subproject policies and procedures as required, consistent with the overall Unbound polices.

5. **FINANCIAL ACCOUNTABILITY**
   a. Ensure effective financial stewardship.
   b. Plan, guide, and budget for the efficient use of sponsorship funds.
   c. Build and implement effective accounting structures consistent with Unbound Financial Policies that create financial controls which are effective.

    d. Ensure project, zonal office and/or subproject compliance and adherence to Unbound financial policies.

    e. Implement accurate, timely and transparent reporting requirements (both: internal for the project and Unbound -Kansas and external for the local government) and authorization procedures.

    f. Provide adequate oversight of financial matters and implement corrective actions in the event of misappropriation of funds in consultation with Unbound -Kansas.

6. **RELATIONSHIPS**

    a. Nurture informative and caring relationships of mutual respect and support between sponsored members and sponsors.

    b. Strive for excellence in correspondence where the sponsor comes to know the unique personality, attributes, talents, and journey of their sponsored friend.

    c. Develop an exchange of culture, understanding, and love between sponsored members/families and their sponsor.

    d. Ensure all staff members establish and maintain appropriate and respectful relationships with sponsored members, sponsored families, board members, sponsors and other staff members that contribute to the development of a community of compassion.

7. **UNBOUND IDENTITY**

    a. Clearly communicate and increase the understanding of Unbound's uniqueness and identity to the project staff, sponsored members and their families, board members, partners, service providers and the general community.

    b. Be responsive to Unbound Kansas requests and concerns.

**Competencies:** To perform the job successfully, an individual should demonstrate the following competencies:

- **Servant - Leadership:** The ability to organize and motivate people to accomplish goals while creating a sense of order and direction; ability to inspire others with a compelling vision and empower others to accomplish common goals; ability to represent a positive, motivational example for others to emulate in becoming leaders; ability to decentralize decision-making, humbly delegate authority and responsibility, and create an environment of autonomy and accountability so that staff may develop their own leadership abilities; and support others through providing clarity, direction, organization and purpose.

- **Diplomacy and Tact:** The ability to treat others fairly, regardless of personal beliefs and to maintain positive and respectful relationships with others; ability to understand and value differences between people; and respect for diversity in culture, race, ethnicity, national origin, religion, class, gender, life-style, age and disability.

- **Professionalism:** Represent the organization in a dignified manner; approaches others with tact and respect; reacts well under pressure; accepts responsibility for own actions; follows through on commitments; inspires trust in others; works with ethically and with integrity.

- **Communication Skills:** Speaks clearly and respectfully in all situations; listens to others and values many points of view without bias; regularly solicits input from others; listens to others without interruption verifies understanding; represents others' points of view impartially; demonstrates public presentation skills; effectively and efficiently conducts meetings; writes clearly and informatively; able to read and interpret written information; presents numerical data clearly and effectively.

- **Teamwork:** The ability to cooperate with others to meet objectives; willingness to discard personal agenda to cooperate with other team members in meeting objectives; ability to contribute positively and productively to team projects; ability to build and sustain a trusting relationship with each member of the team; and ability to support other team members and team decisions.

- **Developing Others:**  The ability to contribute to and advocate for the growth and development of others; willingness to devote appropriate time to training, coaching and developing others; understanding the implications of varied learning styles and their importance to individual development; and ability to regularly follow up and hold others accountable for high standards of performance.
- **Self-Management:**  The ability to prioritize and complete tasks in order to deliver desired outcomes within allotted time frames; ability to pursue organizational objectives in an organized and efficient manner; ability to prioritize activities to meet job responsibilities; ability to maintain required level of activity toward achieving goals without direct supervision; and ability to minimize work flow disruptions to complete high quality work within a specified time frame.
- **Empathetic Outlook**: The capacity to perceive and understand the feelings and attitudes of others; demonstrated awareness of how actions will directly and indirectly impact others; ability and willingness to listen to others attentively; demonstrated regard for and sensitivity to the feelings of others; and ability to value and respect diversity of opinions and beliefs.
- **Ethics** - Treats people with respect; Keeps commitments; Inspires the trust of others; Works with integrity and ethically; Upholds organizational values.
- **Cost Consciousness** – Works within approved budget; Develops and implements cost saving measures; Conserves Organizational resources.
- **Organizational Support** – Follows policies and procedures; Completes administrative tasks correctly and on time; Supports organizational goals and values. Thorough understanding of Unbound core values / policies and the application to projects.
- **Quality** - Demonstrates accuracy and thoroughness; Looks for ways to improve and promote quality; Applies feedback to improve performance; Monitors own work to ensure quality.
- **Adaptability** - Manages competing demands; Able to deal with frequent change, delays, or unexpected events.
- **Reasoning -** The ability to solve practical problems and deal with a variety of  variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.  Ability to determine proper implementation of Unbound core values and policies; ability to assess project communications to determine appropriate follow-up; ability to determine when corrective action is required; ability to assess quality fulfillment of sponsorship requirements.

# Annual board report: Accounting & government compliance

I, _____, in my role as project accountant of the legal entity

_____, hereby declare with my initials that I have

completed each of the following requirements, and I confirm that the organization is compliant with all legal

and ethical requirements.


**Tax**:

_____    I confirm that legal entity tax exempt status is current

_____    I confirm that applicable social security taxes have been paid

_____    I confirm that all other applicable taxes have been paid (list below):


**Government registration:**

_____    I confirm that legal entity tax exempt status is current

_____    I confirm that ownership of all properties is properly registered

_____    I confirm that registrations with relevant government authorities are current (list below)


**Accounting:**

_____    I have provided a copy of the external audit report to the board

_____    I have provided a copy of the Unbound headquarters audit report & action plan to the board

_____    I confirm that the legal entity is compliant with Unbound headquarters accounting policies


_____          _____

Signature                                                                    Date

# Annual board report: Risk management

I, _____, in my role as project coordinator of the legal entity

_____, hereby declare with my initials that I have

completed each of the following requirements, and I confirm that the organization is compliant with all legal

and ethical requirements.


**Insurance:**

_____ I confirm that general liability insurance coverage is paid & current

_____ I confirm that vehicle insurance coverage is paid & current

_____ I confirm that property insurance coverage is paid & current

**Child and elder protection:**

_____ I confirm that all staff members have received annual child & elder protection training

_____ I have disclosed to the board all child and elder protection cases involving project staff

**Data protection:**

_____ I confirm that staff are performing regular data back ups

_____ I confirm that all user accounts are current (Abila, Portal, Yammer, etc)

_____ I have provided the board with a copy of the legal entity's data privacy policies

_____ I confirm that all relevant staff have received annual data security training

**Anti-terrorism:**

_____ I have disclosed to the board all possible anti-terrorism matches sent by Unbound headquarters since the previous report and completed the appropriate follow up actions

**Misappropriation:**

_____ I have disclosed to the board all cases of misappropriation or fraud since previous report


_____          _____

Signature                                                              Date

# Annual board report: Human resources

I, _____, in my role as project coordinator of the legal entity

_____, hereby declare with my initials that I have

completed each of the following requirements, and I confirm that the organization is compliant with all legal

and ethical requirements.

**Human Resources:**

_____ I have disclosed to the board all staff departures since the previous report with a description of the cause for each departure

_____ I have disclosed to the board all staff grievances filed since the previous report

_____ I have provided the board with a copy of the responses to the most recent staff engagement survey

_____ I confirm that I am compliant with the Unbound Executive limitations of the project coordinator (Unbound Sponsorship Manual)

_____ I confirm that the legal entity is following its documented policies in the following areas (Unbound Sponsorship Manual):

- Size of staff & hiring policies
- Staff salaries –periodically reviewed for appropriateness in the market and maximum support to program
- Payroll requirements – must be in compliance with all governmental regulations
- Staff benefits – must meet what is required by law; should be usual and customary, not excessive
- Leave & paid time off policy – should be written and communicated to staff
- Personnel files – projects should have a file for each employee including CV/resume, job description, and annual performance reviews
- Equal employment opportunity/non-discrimination policy
- Job descriptions – projects should have written job descriptions for each staff member
- System of documented performance feedback for all staff
- Code or standards of conduct and discipline – for all project/subproject staff
- Policy for use of project resources (telephones, computers, vehicles, etc.) – not for personal use
- Non-harassment policy – each project should develop procedures for reporting, investigating and resolving complaints
- Non-fraternization policy
- Child and older adult protection policy
- Sexual misconduct policy – each project should develop procedures for reporting, investigating and resolving complaints

- Grievance policy & procedures - projects must have written policy; must be communicated to all staff
- Non-retaliation policy
- Involuntary termination of staff – appropriate procedures for terminating staff

_____     I confirm that I have disclosed to the board all violations since the previous report of Unbound's Code of Conduct policy (Unbound Sponsorship Manual section 4.3):
- Professional integrity
- Confidentiality
- Retaliation
- Conflicts of interest
- Bribes, kickbacks, commissions, discounts, and rebates
- Hiring family members or romantic partners
- Doing business with family members and romantic partners
- Non-fraternization
- Non-harassment
- Sexual misconduct
- Prohibition against political affiliation
- Use of computers, networks, internet, and email
- Use of project assets and vehicles

_____          _____

Signature                                                                      Date

# Unbound Code of Conduct for Individual Sponsor Visits

When visiting your sponsored friend, all participants are required to adhere to these standards. We reserve the right to determine if a visitor's behavior is considered inappropriate and have instructed the local staff to notify Unbound headquarters if there is a violation of any policy and to notify local authorities when necessary. Failure to comply with the aforementioned standards or with the instructions of local Unbound staff could result in the loss of visiting privileges or possible termination of sponsorship. This Code of Conduct provides standards of behavior including, but not limited to:

## I. Behavioral Standards

- Follow the directions of the project coordinator and staff.
- Treat everyone with respect, dignity, courtesy, and consideration.
- Modest dress is encouraged to avoid unwanted attention and adhere to cultural standards. We recommend that clothing cover the knees and shoulders. Do not wear excessive or expensive jewelry.
- Never give monetary or valuable gifts to a sponsored person or family member.
  - All monetary contributions should be made through Unbound's office in Kansas to ensure your contribution is appropriated properly. Local offices are not equipped to provide receipts required for tax deductions.
- In the event a sponsored person asks for additional assistance (monetary or material), please inform a project staff member to handle the situation accordingly.
  - We discourage our sponsored members from making requests during visits
- Consumption of alcohol may be considered offensive in some cultures.
  - We discourage the consumption of alcohol during your visit.
- Possession or use of illegal substance is prohibited. You will be subject to the laws of the country visited.
- All accompanying visitors, over the age of 18 years old, are required to submit a background check as well, if not do so, that person will not be able to join the visit.

## II. Protection and Consideration of Sponsored Members, Sponsors and Unbound Staff

- An Unbound staff member or volunteer <u>must</u> accompany you at all times during your visit with your sponsored friend.
- Cultural sensitivity is encouraged.
  - Avoid touching sponsored members in a manner that might be considered inappropriate, such as cuddling or kissing.
  - Avoid flirting, excessive flattery, suggestive comments, or intimate relationships with community members or staff.
- Do not offer or accept a request to bring a sponsored friend to visit or reside in the U.S. or your country of origin.
- Do not ask for or accept accommodations with your sponsored friend, their family or with a staff member during or following your visit.
- All communication must adhere to Unbound's guidelines.
  - Do not provide, ask for, accept or record personal contact information for a sponsored friend, family member, or local staff—this includes addresses, phone numbers, or e-mail addresses.
  - Communication via social media is prohibited. Initiation or acceptance of direct communication with a sponsored member could result in the termination of your sponsorship.
    - This includes Facebook, Twitter, MySpace, Gmail, etc.

I have read, understand and agree to abide by the aforementioned Unbound Individual Sponsor Visit Code of Conduct.


_____          _____

Printed Name                                                                            Date


_____

Signature