**THE SOCIAL AUDIT OF COOPERATIVES**

***THE SOCIAL AUDIT***

Social Audit is the process whereby a cooperative can account for its social performance, report on and improve that performance. It assesses the social impact and ethical performance of the cooperative in relation to its vision, mission, goals, and Code of Social Responsibility.

It is also process to assess the cooperative’s contribution for the upliftment of the status not only to its members’ economic needs but also social needs and the community where it operates. The cooperative’s actual performance and accomplishment arecomparedits vision, goals, and social responsibility as it relates to the impact not only to the community but to its regular members as the immediate beneficiary of the decisions and actions it promulgated, passed and implemented. Social Audit will serve as control mechanism to account for its social performance and evaluate its impact in the community taking into account the community development fund which shall be used for projects or activities that will benefit the community where the cooperative operates.

Social Audit validates the support of the cooperative to the 7th cooperative principles, i.e. the “Concern for Community” and determines whether the cooperative work for the community’s sustainable development through policies approved by their members.

The audit focuses not only to the economic side of the cooperative but also the social aspect of the organization and appraises the cooperative performance as value-based organization usually participative, user and community oriented and non-profit but service organization and how its social responsibility for its members and the community as a whole was fulfilled.

***THE SOCIAL AUDIT TOOL***

The social audit tool is an instrument to identify, measure, assess and to report on their social performance. This will provide the user a framework on how to collect data and what data is to be collected.

Similar to financial and management audit, the Social Audit has a one year cycle. The audit steps are also comparable to activities carried out for financial audit.

Consideration of the various aspects of Social Audit is relevant. Verification of records and documents is crucial to get vital information.

The tool will also present the score of the cooperative’s social performance, whether outstanding, very good, good, fair or poor. The score/rating should not be taken as the end of it. Any result thereof, shall be the major consideration for **improved social performance**, which is actually the first and foremost goal of Social Audit.

***THE COMPONENTS OF THE SOCIAL AUDIT TOOL***

Social Audit for cooperative shall look into the following components with their corresponding points:

1. Organization

This is a measurement of  cooperative's fulfilment of its  vision, mission and goals, feedback mechanisms, code of good governance and ethical standards.

1. Membership

Measurement on how the cooperative responded to the need of members, observed governance practices, considered provision for benefits of members,  and involved members in the affairs of the cooperative.

1. Staff/Employees

Assessment of the cooperative's fulfilment of the needs and welfare of the employees in terms of safety workplace and sanitation, including the provision for compensation and benefits.

1. Cooperation among Cooperatives

Measurement of the cooperative's affiliation/s and linkages to federations/unions and other cooperatives.

1. Community and Nation

Determines the involvement of the cooperative  and its contributions to the community and nation, in general.

1. Network Alliance and Linkages

Assessment on  how the cooperative relates to other organization and  its collaborative programs.

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**SOCIAL AUDIT OF COOPERATIVES**

**AS OF DECEMBER 31, 20\_12\_\_**

**General Information:**

1. Name of Cooperative as of the latest amendment:MACTAN ISLAND MULTI-PURPOSE COOPERATIVE
2. Present Address of Cooperative: 2nd floor Booc-Virtudazo Bldg.,F. Martir St.,Poblacion,Lapu-Lapu City
3. Type of Cooperative: MULTI-PURPOSE
4. Re-registration Number:9520-07000357
5. Vision / Mission & Goals
6. **ORGANIZATION (15 points)**

|  |  |  |  |
| --- | --- | --- | --- |
| **AREAS OF CONSIDERATION** | **MAXIMUM POINTS** | **RATING/ COMPUTATION/INSTRUCTION** | **POINTS** |
| A. Vision, Mission and Goals (4)1. Cooperative Vision, Mission and Goals (VMG)

 1.1 Indicate the **VISION**  Statement: Total human development through honest, transparent and thriving people-oriented cooperative business venture.1.2 Indicate the **MISSION**  Statement: 1.2.1 INSTILL cooperativism as a way of life, adhering to coop principles and practices 1.2.3 PRACTICE and be a living example of good governance 1.2.4 EDUCATE the members, officers and personnel on ethical standards 1.2.5 LEAD towards a jointly-owned and democratically-controlled enterprise 1.2.6 UPLIFT the socio-economic condition of the members, their families and the community in need1.3 Indicate the **GOALS**:  1.3.1 To enhance products and services at par with the best in the Industry 1.3.2 To serve members and community with fairness, sincerity and respect 1.3.3 To initiate innovative approaches for effective and efficient management 1.3.4 To implement a fair and just systems and procedures 1.3.5 To be responsive to family members and the community in needApproval of the VMG by the General Assembly, specify date: April 4, 2010. | 4 | 1. Indicate the Cooperative’s VMG;
2. Check if social responsibility of the cooperative is clearly defined;
3. Give rating:

|  |  |
| --- | --- |
| VMG Clearly define the social responsibilities of the coop | 2 |
| VMG is approved by the GA | 2 |
| Absence of a Vision, a Mission or a Goal | Less 0.5 for absence of any |

 |  |
| **AREAS OF CONSIDERATION** | **MAXIMUM POINTS** | **RATING/ COMPUTATION/INSTRUCTION** | **POINTS** |
| B. Code of Governance and Ethical Standards

|  |  |
| --- | --- |
|  | YES OR NO |
| With Cooperative Code of Governance? | YES |
| With Code of Conduct & Ethical Standards? | YES |
| Are all the key players of the cooperative involved in its development? | YES |

 | 3 | 1. Give one (1) point for every yes answer.
 |  |
| C. Feedback mechanism  1. With approved policy on feedback mechanismYES (x )NO ( )1. Presence of Mechanisms to gather feedbacks:

|  |  |  |
| --- | --- | --- |
|  | YES OR NO | If yes, indicate tools/ instruments |
| Members | YES |  |
| Officers | YES |  |
| Staff | YES |  |
| Other person/ institution | YES |  |

 | 1 4 | If the answer is YES, 1 Give 1 point for every positive answer. |  |
| D. Feedbacks acted upon.

|  |  |
| --- | --- |
| No. of feedbacks received | 50 |
| No. of feedbacks acted upon | 50 |

 | 2 | 1. Get the number of feedbacks received and acted upon;
2. Divide the number of feedbacks acted upon over the number of feedbacks received and multiply by 100 to get the percentage;

Feedbacks acted upon -------------------------------- x 100Feedbacks received

|  |  |
| --- | --- |
| 90% - 100% are acted upon | 4 |
| 70% - 89% are acted upon | 2 |
| 50% - 69% are acted upon | 1 |
| Below 50% are acted upon | 0 |

 |  |

1. **MEMBERSHIP (35 points)**

|  |  |  |  |
| --- | --- | --- | --- |
| **AREAS OF CONSIDERATION** | **MAXIMUM POINTS** | **RATING/ COMPUTATION/INSTRUCTION** | **POINTS** |
| A Asset Building (12 points)1. Economic Participation of members (2)
	1. Number of members who patronize the services of the cooperative

*For Single Purpose:*

|  |  |
| --- | --- |
|  Number of members who patronized the cooperative service |  |
| Total number of members |  |
| Percentage |  |

*For Multi-Purpose:*

|  |  |
| --- | --- |
| Number of cooperative services | 2  |
| Number of members’ patronage per service of cooperative |  501 |
| Total number of members | 573 |
| Average | 87 |
| Percentage | 80% |

 | 22 | *For single purpose*: No. of members who patronized the service of the cooperative------------------------------------------- x 100total number of members(regular + associates, whether MIGS or not)*For multi-purpose*: 1. Get the total number of members who patronize for every service of the cooperative
2. Get the average by adding all the number of members per service and divide by the total number of services of the cooperative

Average No. of members who patronizedthe service of the cooperative------------------------------------------------- x 100total number of members

|  |  |
| --- | --- |
| 50% - 100% | 2 |
| 30% - 49% | 1.5 |
| 20% -29% | 1.0 |
| 10% - 19% | 0.5 |
| below 10% | 0 |

 |  |
| 1. Ownership Participation through Capital Build Up (6)

2.1 Increase in the number of Existing members with additional share capital

|  |  |
| --- | --- |
| YEAR | No. of Existing Members with Additional Share |
| Current Year |  562 |
| Previous Year |  201 |
| Increase/decrease |  Increase 361 |

 | 1.5 | 1. Get the Increase:

No. of members of with additional share, current -  No. of members with additional share, previousIncreasing – 1.5 pointsStatus quo – 1 pointDeclining – 0 point/ |  |
| 2.2.Increase in the amount of share capital

|  |  |
| --- | --- |
| YEAR | Amount of Share Capital |
| Current Year |  6,870,569,97 |
| Previous Year |  5,856,597.25 |
| Increase/decrease |  1,013,972.72 |

 | 1.5 | 1. Get the point/s:Increasing – 1.5 pointsStatus quo – 1 pointDeclining – 0 point |  |
| Increase in number of Existing members with increased deposits

|  |  |
| --- | --- |
| YEAR | No. of Existing Members with Increased Deposits |
| Current Year |  350 |
| Previous Year |  324 |
| Increase/decrease |  26 |

 | 1.5 | 1. Get the Increase:

No. of members with increased deposits, current year - No. of members with increased deposits, previous yearIncreasing – 1.5 pointsStatus quo – 1 pointDeclining – 0 point |  |
| * 1. Increase in the amount of deposits

|  |  |
| --- | --- |
| YEAR | Amount of Deposits |
| Current Year |  16,375,842.36 |
| Previous Year |  11,258,201.76 |
| Increase/decrease |  5,117,640.60 |

 | 1.5 | 1. Get the point/s:

Increasing – 1.5 pointsStatus quo – 1 pointDeclining – 0 point |  |
| 1. Members Economic Growth (4)

3.1 Upliftment of the lives of the members:

|  |  |  |  |
| --- | --- | --- | --- |
|  | % Increase | % Decrease | % No change |
| Income |  10% |  |  |
| Livelihood | 8% |  |  |
| Savings |  10% |  |  |
| Assets |  10% |  |  |
|  |  |  |  |

 | 4 | 1. Survey at least 5% - 10% of Members in Good Standing but in no case it should be less than 30 individual respondents identified through random sampling. If members are less than 30, conduct survey to all members.
2. Tabulate and analyze data;
3. Give points:

|  |  |
| --- | --- |
| Increase in income | 1 |
| Increase in Livelihood | 1 |
| Increase in Savings | 1 |
| Increase in Assets | 1 |

 |  |
| * 1. Members governance (10 points)
1. Information facilities, please check:

|  |  |
| --- | --- |
| Newsletter |  x |
| Telecommunication (telephone, fax, CP, etc. |  x |
| Bulletin, flyers, primers, brochure, etc | x |
| Website/Social Network, etc | x |
| Membership Meeting | x |
| Others, specify |  |
|  |  |
|  |  |

 | 2 | 1. Count and give points:

|  |  |
| --- | --- |
| 3 or more information facilities | 2 |
| Below 3 information facilities | 1 |

 |  |
| 1. Members participation, please indicate the number and percentage

|  |  |  |
| --- | --- | --- |
|  | **ACTIVITIES** | **No. OF MEMBERS PARTICIPATED** |
| 1 | Members participated in the election of officers and approval of Development Plan & Budget during GA |  175 |
| 2 | Members attended membership meeting/ consultation/forum | 101 |
| 3 | Members participated in membership events (e.g. tree planting, medical mission, etc) | 50 |

 | 1 | 1. Get the result per item using the following denominator:

|  |  |  |
| --- | --- | --- |
|  | ACTIVITIES/ NUMERATOR | DENOMINATOR |
| 1 | a. Number of Members voted in the Election  | Total No. of members in good standing (MIGS) |
| b. Number of members participated in the Approval of Development Plan & Budget during GA/ Representative Assembly |
| 2 | Number of Members attended membership meeting/ consultation/ forum | Target member as indicated in the Plans or programs. In the absence thereof, use the total number of existing members |
| 3 | Number of Members participated in membership events (e.g. tree planting, medical mission, etc) | Target member as indicated in the Plans or programs. In the absence thereof, use the total number of existing members |

1. Get the average.
2. Get the rating

|  |  |
| --- | --- |
| 50%-100% of the average membership participated | 2 |
| 25- below 50% of the average membership participated | 1 |
| Below 25% of the average membership participated | 0 |

 |  |
| 1. Members Feedback
	1. Members’ perception in airing their ideas, feedbacks, and opinion

|  |  |
| --- | --- |
|  | Check |
| Easy |  x |
| Difficult |   |

* 1. Members’ satisfaction on the action made on their feedbacks

|  |  |
| --- | --- |
|  | Check |
| Satisfied |  x |
| Not Satisfied |   |

 | 1.51.5 | 1. Survey at least 5% - 10% of Members in Good Standing but in no case it should be less than 30 individual respondents identified through random sampling. If members are less than 30, conduct survey to all members.
2. Tabulate and analyze
3. Get the rating:

|  |  |
| --- | --- |
| 90% - 100% answered easy  | 2 |
| 70% - 89% answered easy | 1.5 |
| 50% - 69% answered easy  | 1 |
| Below 50% answered easy | 0 |

1. Survey at least 5% - 10% of Members in Good Standing but in no case it should be less than 30 individual respondents identified through random sampling. If members are less than 30, conduct survey to all members.
2. Tabulate and analyze.
3. Get the rating:

|  |  |
| --- | --- |
| 90% - 100% are satisfied | 2 |
| 70% - 89% are satisfied | 1.5 |
| 50% - 69% are satisfied | 1 |
| Below 50% are satisfied | 0 |

 |  |
| 3.3. Members’ Satisfaction on services

|  |  |
| --- | --- |
|  | Check |
| Satisfied |  x |
| Not Satisfied |  |

 | 2 | 1. Survey at least 5% - 10% of Members in Good Standing but in no case it should be less than 30 individual respondents identified through random sampling. If members are less than 30, conduct survey to all members.
2. Tabulate and analyze
3. Get the rating:

|  |  |
| --- | --- |
| 90% - 100% are satisfied | 2 |
| 70% - 89% are satisfied | 1.5 |
| 50% - 69% are satisfied | 1 |
| Below 50% are satisfied | 0 |

 |  |
| * 1. Members’ Benefits (3)
1. Presence and percentage of members benefitting from the members’ social benefit program/s

|  |  |  |
| --- | --- | --- |
| MEMBERS’ BENEFIT PROGRAM | YES OR NO\* | % OF MEMBERS BENEFITTING FROM THE PROGRAMS\*\* |
| Group insurance | yes |  20%  |
| Medical & health assistance benefit | yes |  10% |
| Educational Assistance |  no | 0% |
| Burial assistance/aid | yes |  10% |
| Others, specify |  |  |
|  |  |  |
|  |  |  |

 | 3 | 1. Determine the activities/ programs and indicate if yes or no.
2. With available members’ social benefit programs, give 1 point.

3. On the percentage of members benefitting from program/s:

|  |  |
| --- | --- |
| 2o% - above | 2 |
| 10% to below 20% | 1 |
| Below 10% | 0 |

 |  |
| * 1. Members’ Education (10 points)

1.Provision of education to members (5)* 1. Presence of continuing education program that contribute to human development of members(values, principles, ethics, practices, citizenship, livelihood/skills training)

YES (x )NO ( )12. Implementation of education program (4)

|  |  |  |
| --- | --- | --- |
| CONTINUING EDUCATION/ TRAINING PROGRAM | No. OF TRAININGS CONDUCTED \* | No. OF MEMBERS ATTENDED\*\* |
| Per Target/ Plan | Actual | Per Target/ Plan | Actual |
| Values Education | 12 | 8 | 100 | 87 |
| Cooperative Principles & Practices | 12 | 8 | 100 | 87 |
| Citizenship |  |  |  |  |
| Ethics |  |  |  |  |
| Entrepreneurial skills |  |  |  |  |
| Livelihood  |  |  |  |  |
| Leadership Training | 2 | 2 | 70 | 65 |
| Financial Literary | 1 | 1 | 100 | 70 |
| Others specify |  |  |  |  |

 | 12\*1 | If YES, full points.*For the number of trainings conducted*:\*1. Get the training conducted/attended by the cooperative, target and actual number of training;
2. Compute and get the rating:

|  |  |
| --- | --- |
| 6 – above trainings | 2 |
| 4 - 5 trainings | 1.5 |
| 2 - 3 trainings | 1 |
| 0 -1 trainings | 0 |

*For the number of members attended the training*:\*Get the sum of the average members attended per training indicated above. Denominator of each indicator is the number of members per target/ plan*For Large cooperative:*

|  |  |
| --- | --- |
| 50% - 100% | 2 |
| 30% - 49% | 1 |
| Below 30% | 0.5 |

*For Medium Cooperatives:*

|  |  |
| --- | --- |
| 30% - 100%  | 2 |
| 15% - 29%  | 1 |
| Below 15% | 0.5 |

*For Small & Micro Cooperatives:*

|  |  |
| --- | --- |
| 20% - 100% | 2 |
| 10% - 19% | 1 |
| below 10% | 0.5 |

 |  |
| 1. Leadership Development Program (5)
	1. Presence of leadership program for cooperative officers

YES ( x )NO ( )* 1. Implementation of program for cooperative officers

|  |  |
| --- | --- |
| LEADERSHIP DEVELOPMENT PROGRAM IMPLEMENTED | CHECK |
| Executive retreats/reflection session |  x |
| Succession planning |   |
| Immersion |  |
| Leadership Session |  x |
| Others specify |  |

 | 12 | If the answer is YES, give 1 point.1. Identify the programs for leadership development;
2. Count and give rating;

3 – above programs - 21 – 2 programs - 1 |  |
| * 1. Mandatory Trainings for cooperative officers Conducted/ Attended

|  |  |
| --- | --- |
| MANDATORY TRAININGS CONDUCTED/ ATTENDED | No. OF OFFICERS TRAINED |
|  Basic Course Training |  30 |
| Financial Management |  3  |
| Conflict Management |  4 |
| Parliamentary Procedure |  3 |

 | 2 | * + 1. Identify the mandatory trainings attended/conducted;

2. Count and give rating;3 – above programs - 21 – 2 programs - 1 |  |

1. **STAFF/EMPLOYEES (10 points)**

|  |  |  |  |
| --- | --- | --- | --- |
| **AREAS OF CONSIDERATION** | **MAXIMUM POINTS** | **RATING/ COMPUTATION** | **POINTS** |
| 1. Compensation and Benefits (4) points
2. Compensation (2)
	1. Standard Salary prevailing within the locality, specify:

\_minimum wage * 1. Other labor standards (i.e. PAGIBIG, SSS, Retirement, Philhealth)
 | 22 | The coop follow the standardized Salary Scale , give full points.The cooperative is compliant to other labor standards as provided, give 1 point. |  |
| 1. Benefits (2)
	1. Monetary benefits for staff/employees, specify:

(e.g. Leave credit (convertible to cash), performance bonus, nth month pay, etc)\_\_\_\_VL & SL\_\_\_\_\_\_\_\_\_\_13th month pay * 1. Non-monetary benefits for staff/employees, specify:

(e.g. HMO, rice subsidy, uniform, etc)UniformsPhilhealthInsuranceRetirement\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | 11 | The cooperative provide monetary incentives/benefits to employees/staff, give full points, 1.The cooperative provide non-monetary incentives/ benefits to employees/staff, give full points, 1. |  |
| 1. Employees Support Program (3)
	* 1. Presence of the following support program:

|  |  |
| --- | --- |
| SUPPORT PROGRAMS | CHECK |
| Employee Development Committee/Council |  x |
| Insurance Protection program |  x |
| Grievance mechanism |  |
| Awards and recognition  |  x |
| Continuing Education program (scholarship, seminar, trainings, etc) |  x |
| Social, cultural & sports programs |  |
| Others, specify |  |
|  |  |
|  |  |

 | 3 | 1. Get the number of support programs and give rating;

|  |  |
| --- | --- |
| 3 – up programs | 3 |
| 2 programs | 2 |
| 1 program | 1 |

 |  |

1. **COOPERATION AMONG COOPERATIVES (10 POINTS)**

|  |  |  |  |
| --- | --- | --- | --- |
| **AREAS OF CONSIDERATION** | **MAXIMUM POINTS** | **RATING/ COMPUTATION** | **POINTS** |
| 1. Membership and affiliation (4 points)
	* 1. Affiliation and participation
	1. Federation : Philippine Central Fund Federation; VICTO, CLIMBS
	2. Union: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. Support Services (projects/activities) to federation or union other than the patronage of their core business:
	1. Financial, specify: \_\_\_\_Trainings & Insurance, Investment
	2. Non-financial, specify: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
 | 111 | If affiliated to a federation or union, give full points.With financial support service/s - 1With non-financial support service/s - 1 |  |
| 1. CETF due to federation / union (2)

|  |  |
| --- | --- |
| Amount allocated for the audit period |  56,124.74 |
| Amount remitted for the audit period |  14,943.48 |

 | 2 |

|  |  |
| --- | --- |
| Full payment of CETF | 2 |
| Partial payment of CETF | 1 |
| Non-payment of CETF | 0 |

 |  |
| 1. Cooperative Alliance/linkage/network (4 points)
	* 1. Inter-cooperative Partnership

|  |  |  |
| --- | --- | --- |
| NAME OF COOPERATIVE | BUSINESS PARTNERSHIP (specify)\* | NON-BUSINESS PARTNERSHIP(specify)\*\* |
| De Paul MPC | Financial (T.D.) |  |
| Lapu-Lapu City Cooperative Network |  | Support Services |
| Mactan Peoples MPC |  | Coaching |

 | 0.5\*1\*\* | Business Partnership \*

|  |  |
| --- | --- |
| 3 - above business partnership  | 2 |
| 2 business partnership | 1 |
| 1 business partnership | 0.5 |

Non-Business Partnership \*\*

|  |  |
| --- | --- |
| 3 - above non-business partnership  | 2 |
| 2 non-business partnership | 1 |
| 1 non-business partnership | 0.5 |

 |  |

1. **COMMUNITY AND NATION (25 POINTS)**

|  |  |  |  |
| --- | --- | --- | --- |
| **AREAS OF CONSIDERATION** | **MAXIMUM POINTS** | **RATING/ COMPUTATION** | **POINTS** |
| * + - 1. Contribution to national and community development programs (15 points)
1. Presence of approved Projects/programs:

|  |  |
| --- | --- |
| NATION BUILDING PROGRAMS | WITH APPROVED PROGRAM/S(specify) |
| Peace and Order |  |
| Eradicate extreme poverty and hunger (livelihood program for non members) |  feeding |
| Achieve universal primary education (donations to school construction, of books, DEPED’s program) |  |
| Promote gender equality and empower women |  |
| Culture, Tradition and History (patriotism, love of country, etc) |  |
| Sports Program |  |
| Public Issues |  |
| Reduce child mortality | FP |
| Improve maternal health | MHC |
| Health and sanitation | Medical mission |
| Combat HIV/AIDS, malaria and other diseases |  |
| Ensure environmental sustainability (disaster & risk reduction program; tree planting; river and coastal clean up; etc) |  |
| Develop a global partnership for development (e.g. internationally funded program) |  |
| Youth Development Program |  |
| Others, specify |  |

1. Programs implemented:

|  |  |  |
| --- | --- | --- |
| PROGRAMS IMPLEMENTED FOR MDG | NUMBER OF NON-MEMBER BENEFICIARIES | RESOURCES APPLIED |
| Medical Mission |  170 | Food , medical kit & allowance |
| School Feeding | 300 | Food |
|  |  |  |

 | 11 | 1. Identify the approved program/s as part of its contribution to the national and community development programs
2. Count the programs and give rating:

|  |  |
| --- | --- |
| For Large/Medium Cooperatives |  |
| 8 - above approved projects/ projects | 8 |
| 6-7 approved projects/ programs | 6 |
| 4-5 approved projects/ programs | 4 |
| 2-3 approved projects/programs | 2 |
| 1 approved program | 1 |

|  |  |
| --- | --- |
| For Micro & Small Cooperative |  |
| 5 - above approved projects/ projects | 8 |
| 4 approved projects/ programs | 6 |
| 3 approved projects/ programs | 4 |
| 2 approved projects/programs | 2 |
| 1 approved program | 1 |

|  |  |
| --- | --- |
| 100% implemented | 7 |
| 80%-99% implemented | 5 |
| 60% - 79% implemented | 3 |
| 40% - 59% implemented | 2 |
| below 40% | 1 |

 |  |
| * + - 1. Responsiveness to Gender, Elderly, Youth and Person with Special Needs (PWSN)

1. Plans and programs1.1. Presence of approved policy YES ( x )NO ( ) Specify policy: Financial Policy Membership Policy Lending Policy1.2. Program implemented, specify:\_\_\_Savings Mobilization\_\_\_\_\_\_\_\_\_\_\_Lending/ Financial\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | 7 | If the answer is YES, full pointsGive 1 point for the program implemented for every social sector |  |
| * + - 1. Community Outreach

1. Number of members over working population in the area of operation

|  |  |
| --- | --- |
| Total number of members |  |
| Total number of working population in the area of operation |  |

 |  | 1. Get the quotient.Total No. of membersWorking populationNote: working population (issued by NEDA)2. Get the rating:

|  |  |
| --- | --- |
| 30% above  | 4 |
| 20% to below 30% | 3 |
| 10% to below 20% | 2 |
| Below 10% | 1 |

 |  |

1. **NETWORK, ALLIANCES AND LINKAGES (5 POINTS)**

|  |  |  |  |
| --- | --- | --- | --- |
| **AREAS OF CONSIDERATION** | **MAXIMUM POINTS** | **RATING/ COMPUTATION** | **POINTS** |
| A. Collaborative programs/projects (3)1. Organizations/institutions with existing programs/ projects, please check

|  |  |  |
| --- | --- | --- |
| CHECK | TYPE OF INSTITUTION | NAME OF INSTITUTION/ ORGANIZATION/ PERSON |
|  | Non-government organization (NGO) |  |
| x | Private Voluntary Organization (PVO) | PBSP |
|  | Cooperative Development Council (CDC) |  |
| x | Local Government Units (LGUs) | DILG |
| x | Government Organization (GOs) | LCRC |
| X | Business Organizations | KAISER International |
|  | Individual |  |
|  | Others |  |

2. Implementation of programs/projects in relation to the above collaboration, specify

|  |  |
| --- | --- |
| PARTNER ORGANIZATION | SPECIFIC PROGRAM/S |
| KAISER International | Health Program |
| PBSP-PRISM 2 | FP-MHC |
| DILG | LPRAT |
| LCRC | Trainings |
|  |  |

 | 1.51.5 | Presence of collaborative programs/projects in any of the given possible partners, give full points.2 - above programs/projects 1.5At least 1 program/project 1No program/project 0 |  |
| B. Accreditation/ Recognition1. Accreditation with local planning bodies

|  |  |
| --- | --- |
| LEVEL | AREA |
| Barangay |  |
| Municipal/City | Lapu-Lapu City |
| Provincial |  |
| Regional |  |
| National |  |

 | 2 | Cooperative is accredited in any local planning bodies, give full points |  |
| TOTAL SCORES/POINTS | 86 |  |  |

QUANTITATIVE RATING

|  |  |
| --- | --- |
| *For MEDIUM & LARGE COOPERATIVES* | *For MICRO & SMALL COOPERATIVES* |
| 90 - 100 points :  | Outstanding | 75 - above points :  | Outstanding |
| 80 - below 90 points :  | Very Satisfactory  | 65–below 75 points :  | Very Satisfactory  |
| 70 –below 80 points :  | Satisfactory  | 50–below 65 points :  | Satisfactory |
| 60 – below 70 points :  | Fair | 35–below 50 points :  | Fair |
| below 60 points :  | Poor | below 35 points :  | Poor |

SUMMARY OF POINTS

|  |  |  |
| --- | --- | --- |
| **AREAS OF CONSIDERATION** | **MAXIMUM POINTS** | **COOPERATIVE’S POINTS** |
| ORGANIZATION | 15 POINTS | 14 |
| MEMBERSHIP | 35 POINTS | 34 |
| STAFF/EMPLOYEES | 10 POINTS | 9 |
| COOPERATION AMONG COOPERATIVES | 10 POINTS | 6 |
| COMMUNITY AND NATION | 25 POINTS | 18 |
| NETWORK ALLIANCES AND LINKAGES | 5 POINTS | 5 |
| TOTAL POINTS | 100 | 86 |