



ANNUAL REPORT

2010

The present moment
is crucial. The work
to be done is urgent.



VISION

A Filipino society that upholds the dignity and nature of the human person with a special concern for improving the quality of life of the poor

MISSION

Guided by the Catholic Social Teaching, we catalyze critical thinking, discussion and action principally through research, advocacy and capacity building to bring about morally informed choices and effective solutions to poverty

ABOUT US

The John J. Carroll Institute on Church and Social Issues (JJCICSI) is an organization and community of professional researchers and advocates committed to faith that does justice. Working in solidarity with the Church and various sectors, JJCICSI strives to respond to the issues and concerns of the poor. More recently, JJCICSI's efforts have focused more strategically on capacitating local actors as an added dimension to the research and advocacy work for which the Institute is known. The Institute's programs continue to undertake research-based policy advocacy but they have also ventured into developing projects that benefit the urban and rural poor, women and children, and local communities in environmentally vulnerable areas. At the same time, they are engaged in mentoring, training, providing consulting services, and the production of manuals, templates and other tools to facilitate and make more effective the development of pro-poor projects on the ground.

This new strategy is born out of the analysis that in many cases, the failure to implement good laws and policies is due to weak institutions and/or incapacity of those running these institutions to effect change. Moreover, with the decentralization of most basic services and governance responsibilities, local governments play a particularly crucial role in implementing social policies. Hence, one important thrust across the different programs has been to empower local actors, particularly local governments, in the implementation of pro-poor programs.

At the same time, work with the organizations of the poor has continued, likewise focusing more strongly on capacity building. The usual research and advocacy efforts have been complemented with a more deliberate effort at enabling these groups to participate effectively in governance processes, as well as in the implementation of policies and projects. The Institute's expertise in social research and Catholic Social Teaching is put to use in the critical study of implementation and institutional issues, in addition to policy issues. This subtle yet important shift is also in keeping with the kind of policy implementation support increasingly being needed and requested by the Institute's various coalition partners.

PREFACE



Walking home to the Jesuit Candidates' House on evenings before Christmas, I was regularly assailed by groups of youngsters shouting "Pamasko" and holding out their hands for a few coins. Part of it was, I suppose, a game on their part, like the nondescript groups of "carolers" at our gate, banging on tin cans and "singing" Christmas carols out of tune. Our regular answer was "Come back on December 23 in the afternoon, and we'll give you a Christmas party."

Yet it set me thinking. Are we not encouraging a culture of dependency among these young people? Will they grow up with the attitude that their survival depends on the good will of those who are better off? Does this mentality go back to what has been called the "patron-client" system in the rural areas, e.g. the dependency of the tenant on his landlord. Or to Fr. Frank Lynch's early observation in a Bicol town that it was divided basically into "little people" and the "big people" on whom the former depended, with only a small group in between?

Whatever the cultural origins of this pattern of dependency, it is obviously supported by a distribution of family income in which 80% goes to the wealthier 50% of families, leaving only 20% for the poorer 50%, a pattern which has not changed in some 49 years. A pattern in which the total income of the top 1% equals that of the bottom 30%.¹ Given this reality and the low per-capita income of the Philippines, it seems clear that dependency is in fact the key to survival for many.

Whatever the cultural and economic bases for the pattern, it is clear that it is not the ideal in modern societies or in Catholic Social Teaching. The latter takes as its first principle the dignity of the individual, balanced by a second principle that the individual is a member of society with both rights and obligations vis-à-vis the community. The dignity of the individual implies freedom and a degree of autonomy – represented in agricultural societies by the small family farm which provided the basic necessities for the family and the relative independence needed for responsible citizenship in a democratic society.

Even in such a society there will always be "emergency situations" calling for direct assistance – the "widows and orphans" of the Bible. But such cases should be exceptional, not the result of a concentration of income and resources – land, capital, education, political power, legal and health services – which produces a hereditary proletariat of dependents raising children who will be dependent parents in the next generation.

¹ From a conference by Tomas Africa, sponsored by the Social Weather Stations. "Family Income Distribution in the Philippines," March 18, 2011.

Philippine society is far from the ideal in this matter, and the John J. Carroll Institute on Church and Social Issues, attempts to attack the problem from two directions. On the one hand, it does provide “emergency assistance” in the form of feeding programs in Payatas and Montalban, and scholarship programs for deserving out-of-school youth – while still requiring that the beneficiaries make some contribution in the form of community service.

On the other hand, it addresses in its own small way the institutional structures which support and perpetuate this evil situation. As will be seen in what follows, the Institute is deeply involved in urban poor issues, particularly decent housing for the poor which is accessible to their sources of income. In the rural sector it has long advocated serious agrarian reform and is now involved in problems of credit for small farmers and in the broader issue of land-use planning. The Church and Family Life desk is active in promoting responsible discussions of the Reproductive Health or Family Planning Bills in Congress, while doing pilot projects on natural family planning which will help poor couples to achieve their desired family size and provide their children with the educational and health resources necessary to move out of poverty.

The Juvenile Justice program was deeply involved in advocacy for the passage of the Juvenile Justice Bill and is following up by producing material and conducting seminars for the implementation of the new law while defending it in Congress against those who would weaken it. In this the objective is encourage local communities to rescue young people who have made a wrong turn, and give them the support which they need in order to become responsible and productive members of society. The program is also advocating the abolition of corporal punishment for children, which has been shown to be counter-productive in the long run.

Finally, our newest program, Church and Society focuses on Catholic Social Teaching as the basis for a just society, and on the programs of the Catholic Bishops’ Conference of the Philippines and of various charismatic groups in the political and social fields. It networks with similar groups particularly one providing support for workers in the informal and contractual labor fields.

There is no pretense that these efforts will of themselves solve the twin problems of poverty and dependency. But we do feel that for a small group of eleven individuals we are having a significant impact through our efforts and those of former staff members, some of whom now head their own organizations in the social field, and others who have come to share our ideals and ideas. For this we give thanks to the Lord and to the many who in one way or another are supporting us!

A handwritten signature in black ink that reads "John J. Carroll". The signature is written in a cursive style with a large, sweeping flourish at the end.



CHURCH & FAMILY LIFE

Through research, advocacy and direct services, the Church and Family Life Program assists the Catholic Church in addressing the social and spiritual needs of Filipino families, especially those in underprivileged communities.

Specifically the program aims to:

- Influence Church and State policy on issues affecting population and family life
- Organize seminars and conferences on Catholic Social Teaching and establish and strengthen networks with other Church-related groups
- Promote research-oriented agenda that help the Church to be a Church of and for the poor
- Work with government and non-government agencies to promote research and advocacy for juvenile justice
- Assist Filipino families in poor communities through the Pag-asa ng Pamilya Program which runs three direct service programs in Payatas: the Sagip Bata Program which helps feed malnourished children; the Landas ng Pag-asa Educational Scholarship Program which helps underprivileged students pursue their education; and the TAHANAN program which helps couples make intelligent decisions on how to plan their families using natural family planning methods.

2010 HIGHLIGHTS

CHURCH & SOCIETY

RESEARCH

- Comparative research on the social and political involvement of charismatic groups
- Study on the Catholic Bishops' Conference of the Philippines (CBCP) and democratization in the post-authoritarian regime

ADVOCACY

- Participation in the network and advocacy activities of the Ephphata Forum for inter-denominational agenda for the Aquino administration
- Participation in secretariat work for the Clergy Discernment Group in preparation for the anniversary of the PCP II

CAPACITY BUILDING

- Continued secretariat and resource support for *Liga Manggagawa*, an informal/contractual labor network
- Provision of CST-related inputs for the Couples for Christ Global Foundation, Inc. and for the JJCCSI staff



POPULATION & DEVELOPMENT

RESEARCH

- Success factors and stories on the Natural Family Planning
- Case study on the experience of the Philippine Center for Population Development (PCPD) on the issue of the passage of a Reproductive Health Bill

ADVOCACY

- Drafting of the Talking Points on the Reproductive Health Bill
- Participation in public hearings on the Reproductive Health Bill
- Writing of commentaries in the Philippine Daily Inquirer on the good and bad points of the RH Bill

CAPACITY BUILDING

- Sagip-Bata Supplemental Feeding Program
- Landas ng Pag-asa Scholarship Program
- Training sessions about the Natural Family Planning in Barangays Payatas and Pansol in Quezon City

JUVENILE JUSTICE

RESEARCH

- Case study on the experience of coalitions that advocated for the passage of the Juvenile Justice Welfare Act (JJWA)

ADVOCACY

- Promotion of restorative justice and conferencing in handling cases of children in conflict with the law (CICL) at the barangay level
- Lobbying for the passage of an Anti-Corporal Punishment Law
- Dissemination of the UN Convention on the Rights of the Child (UNCRC)
- Involvement in various networks: Philippine NGO Coalition, Philippine Action for Youth Offenders, Child Rights Network, and Juvenile Justice Network
- Promotion of positive discipline

CAPACITY BUILDING

- Training on restorative justice conferencing and diversion of CICL at the barangay level
- Support to the Malaysian NGO Group in forming their own NGO coalition that will monitor the implementation of the UNCRC
- Training on anti-corporal punishment and positive discipline



URBAN POVERTY & GOVERNANCE

The Urban Poverty and Governance Program addresses urban poverty and its principal manifestation – the lack of access to humane and secure housing. Through research and advocacy, the program aims to alleviate urban poverty by empowering urban poor groups to work for better urban governance.

The program's main thrusts are:

- Working with government agencies and funding institutions providing official development assistance to improve resettlement policy and practice
- Collaborating with urban local governments for the development of poverty focused plans and interventions, particularly in housing
- Assisting peoples' organizations and engaging them in participatory researches such as a city-wide urban poverty profile
- Conducting studies on security of tenure and formulating alternative tenure arrangements for possible application in areas proclaimed as socialized housing sites
- Disseminating information gathered from conducted researches through lectures and published articles, and
- Networking with government institutions and other urban poor related groups to create a stronger advocacy base for urban development and housing reforms

2010 HIGHLIGHTS

RESEARCH

- Study on institutionalizing alternative secure tenure approaches for the urban poor in the Philippines, undertaken for the Global Land Tools Network (GLTN)
- Post-disaster community profiling and mapping in one pilot barangay in Quezon City
- Case study on urban poor coalitions and the establishment of a local housing board in Quezon City, used as one of the capacity building modules on constructive citizen-government engagement towards governance reform project of the Affiliated Network for Social Accountability in East Asia and the Pacific (ANSA EAP)

ADVOCACY & CAPACITY BUILDING

- Participation in the activities and supporting/documenting the advocacies of the Urban Poor Alliance (UP-ALL)
- Formulation of the urban livability framework for the Philippine Misereor Partnership – Technical Working Group on Urban Livability
- Participation in networks most notably the Partnership of the Philippine Support Service Agencies (PHILSSA)
- Provision of technical assistance (research, data-gathering tools, consolidation of data), to the DFID-GTF PHILSSA Project (Institutionalizing Local and National Partnerships to Address Urban Poverty and Homelessness in the Philippines) in Quezon City. JJCISI is part of the DFID-QC NGO Consortium, specifically the Research and Education Committee.



RURAL DEVELOPMENT

The Rural Development Program of the Institute recognizes that the majority of the Filipino poor live in rural areas. It also sees that the lack of access to land and other productive resources hinders the rural poor from participating in economic activities to improve their incomes.

In the face of formidable structures that perpetuate poverty in the countryside, the Rural Development Program sets its sight on alternatives, substitutes or options that would address the issue of access, along with control and management of resources. Primary areas and topics of concern for research and advocacy include:

- Access to land - agrarian reform, alternative and secure tenure arrangements, land use policy and mining
- Access to capital and credit - microfinance services and schemes, and other sustainable financing approaches towards savings and capital build-up
- Access to technology - diversification through intercropping and processing of value-added products, and promotion of sustainable technologies
- Access to market - alternative trading and marketing, and fair trade

2010 HIGHLIGHTS

RESEARCH

- Learning from the Micro-crop Loan Program of the Negros Women for Tomorrow Foundation (NWTF), published as a digest on agricultural microfinance for small sugar farmers
- Program evaluation of the MICOOP (Microfinance Innovations in Cooperatives) Program of the National Confederation of Cooperatives (NATCCO)
- Case study on the passage of the Comprehensive Agrarian Reform Program Extension with Reforms (CARPER), published as a capacity building material on constructive citizen-government engagement towards governance reform project of the Affiliated Network for Social Accountability in East Asia and the Pacific (ANSA EAP)

ADVOCACY & CAPACITY BUILDING

- Participation in the activities of the People's Campaign for Agrarian Reform Network (AR Now!) on the implementation of the CARPER and bio-fuels. JJCICSI was part of the drafting of the paralegal manual on CARPER.
- Participation in the activities of the CLUP Now, specifically on the passage of a National Land Use Act
- Involvement in PinoyME, a multi-stakeholder social consortium advocating microfinance and micro-enterprise development as a tool for poverty reduction



A society living in sin?

A little reflection will show how far we are, the only Christian nation in the Far East, from living the Gospel of the Kingdom and incorporating it into the structures of our society. To make the reflection more realistic, one might imagine taking Jesus Christ on a sight-seeing tour. Hear the Lord ask you: "How can it be that a society which calls itself by My name, Christian, can permit such gross inequalities in the distribution of goods which were created for all, such violations of the dignity of human beings made in My image?"

By FR. JOHN J. CARROLL, S.J. | JOHN J. CARROLL INSTITUTE ON CHURCH AND SOCIAL ISSUES



Commentary Enough of demographic terrorism: Let's talk

By JOHN J. CARROLL, S.J.
Philippine Daily Inquirer
First Posted 01:57:00 02/09/2010

Filed Under: Population, Demographics, Family planning

Picking up on the article of Fr. Gregory Gaston ("Population trends: lessons for RP," Inquirer, 1/3/10) Rosie Brillantes-Luistro ("Population bomb theory defused," Inquirer, 1/23/10) warns against measures to reduce population growth. She speaks of what has been called a "demographic winter," i.e. a situation in which a society has too few young people to support the aged, which is a concern now in countries which have seen rapid drops in their birth rates. Thus the demographic



TALKING POINTS FOR DIALOGUE ON THE REPRODUCTIVE HEALTH BILL

18 commentaries in the Philippine Daily Inquirer

- Looking back, looking forward
- Enough of demographic terrorism: Let's talk
- Rice farmers adapt to climate
- Of flagellants and flood victims
- The urban poor and principled partisanship
- What Catholic vote?
- Lest we forget
- A tale of two prelates
- The power of the meek
- The underside of history
- The Church, demonization and democratic debate
- HUDCC-LGU partnerships
- The Times New Roman mystery
- Is peace about to break out?
- PCP II and the Pope
- A place in the city
- In all things, charity
- Christmas, law and solidarity

9 articles in the 2009-2010 National Situationer

- Things both new and old: the encyclical *Caritas in Veritate*
- Shifting paradigms in housing the urban poor
- Crossing the line: Church use of political threats against pro-RH bill legislators
- In focus: Maguindanao
- Celebrating children's rights and working for charity in truth
- Promoting charity in truth through labor: challenges for the Philippine church
- Believing in CARPER
- Climate justice and the challenge for adaptation to climate change

4 contributed articles in various publications

- Talking points on the RH issue (in CBCP's Impact Magazine)
- Philippine Catholicism as Disruptive Public Religion (in the Philippine Sociological Review)
- A society living in sin? (in World Mission)
- MTPDP Civil Society Assessment on Housing

144 editorials for Radio Veritas

REPORT OF THE INDEPENDENT AUDITOR

The Board of Trustees

INSTITUTE ON CHURCH AND SOCIAL ISSUES, INC.
2/F ISO Building, Social Development Complex
Ateneo de Manila University Campus,
Loyola Heights, Quezon City 1108 Philippines

Report on the Financial Statements

I have audited the accompanying financial statements of **INSTITUTE ON CHURCH AND SOCIAL ISSUES, INC. (a non-stock, non-profit organization)** which comprise the statements of financial position as at December 31, 2010 and 2009, and the related statements of activities, statements of changes in fund balances, and statements of cash flows for the years then ended, and notes, comprising a summary of significant accounting policies and other explanatory information.

Management's Responsibility for the Financial Statements

The Management is responsible for the preparation and fair presentation of these financial statements in accordance with Philippine Financial Reporting Standards for Small and Medium-sized Entities and for such internal control as management determines is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditor's Responsibility

My responsibility is to express an opinion on these financial statements based on my audit. I conducted my audit in accordance with Philippine Standards on Auditing. Those standards require that I comply with ethical requirements and plan and perform the audit to obtain reasonable assurance whether the financial statements are free of material misstatements.

Scope of Audit

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risk of material misstatements of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor consider internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control.

An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of accounting estimates made by management, as well as evaluating the overall presentation of the financial statements. I believe that the audit evidence I have obtained is sufficient and appropriate to provide a basis for my audit opinion.

Opinion

In my opinion, the financial statements present fairly, in all material respects, the financial position of **INSTITUTE ON CHURCH AND SOCIAL ISSUES, INC. (a non-stock, non-profit organization)** as of December 31, 2010 and 2009, and of its financial performance and its cash flows for the years then ended in accordance with Philippine Financial Reporting Standards for Small and Medium-sized Entities.

Report on the Supplementary Information Required Under Revenue Regulations 15-2010

My audit was conducted for the purpose of forming an opinion on the basic financial statements taken as a whole. The supplementary information on taxes, duties and license fees in Note 23 to the financial statements is presented for purposes of filing with the Bureau of Internal Revenue and is not a required part of the basic financial statements. Such information is the responsibility of the management of **INSTITUTE ON CHURCH AND SOCIAL ISSUES, INC.** The information has been subjected to the auditing procedures applied in my audit of the basic financial statements. In my opinion, the information is fairly stated in all material respects in relation to the basic financial statements taken as a whole.

MARIA LUNINGNING M. GUZMAN

Certified Public Accountant
CPA Certificate No. 93327
BOA/PRC AN: 0171 valid from February 8, 2011 to December 31, 2013
BIR AN: 05-000407-1-2011 valid from March 31, 2011 to March 30, 2014
TIN 175-009-151
PTR No. 4172404 issued on January 4, 2011 at Caloocan City

STATEMENT OF FINANCIAL POSITION

In PhP

As of December 31

ASSETS	2010	2009
Current Assets		
Cash	16,583,023.57	16,452,827.04
Receivables	466,736.93	379,968.37
Total Current Assets	17,049,760.50	16,832,795.41
Non-Current Assets		
Funds Held by Investment Manager	23,973,624.82	18,747,766.46
Property and Equipment	101,305.85	38,770.98
Total Non-Current Assets	24,074,930.67	18,786,537.44
TOTAL ASSETS	41,124,691.17	35,619,332.85

LIABILITIES AND FUND BALANCES	2010	2009
Liabilities		
Funds Held in Trust	1,695,127.19	717,792.74
Payables and Accrued Expenses	244,152.31	256,750.59
Deferred Project Fund	80,000.00	-
Current Statutory Liability	24,228.26	80,457.39
Total Liabilities	2,043,507.76	1,055,000.72
Fund Balances		
General Fund	37,065,040.98	31,746,772.46
Restricted Fund	2,016,142.43	2,817,559.67
Total Fund Balances	39,081,183.41	34,564,332.13
TOTAL LIABILITIES AND FUND BALANCES	41,124,691.17	35,619,332.85

STATEMENT OF ACTIVITIES

In PhP

For the years ended

	General Fund	Restricted Fund	2010	2009
Support and Income				
Donations and Contributions	7,738,286.90	5,587,900.56	13,326,187.46	14,340,263.42
Other Sources	232,868.26	-	232,868.26	311,781.77
TOTAL SUPPORT AND INCOME	7,971,155.16	5,587,900.56	13,559,055.72	14,652,045.19
Expenses				
Program Expenses	6,573,465.13	4,705,669.83	11,279,134.96	9,893,085.95
Administrative Expenses	869,443.52	1,689,863.09	2,559,306.61	2,287,328.84
TOTAL EXPENSES	7,442,908.64	6,395,532.93	13,838,441.57	12,180,414.79
EXCESS(DEFICIT) BEFORE OTHER INCOME (LOSS)	528,246.52	(807,632.37)	(279,385.85)	2,471,630.40
Add (Less):				
Foreign Exchange Gain (Loss)	(1,645,318.92)	-	(1,645,318.92)	68,306.87
Interest Income	43,763.21	6,215.13	49,978.34	54,709.38
Gain (Loss) on Investments	6,206,125.38	-	6,206,125.38	3,496,706.52
EXCESS OF SUPPORT AND INCOME OVER EXPENSES AND LOSS	5,132,816.19	(801,417.24)	4,331,398.95	6,091,353.17

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Corporate Secretary	Anna Marie A. Karaos

MANAGEMENT & STAFF

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Executive Director and Program Head, Rural Development Program

John J. Carroll, S.J.
Senior Research Associate and Program Head, Church and Family Life Program

Anna Marie A. Karaos
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