



# JOHN J. CARROLL INSTITUTE ON CHURCH AND SOCIAL ISSUES

## Annual Report 2011



[www.jjcicsi.org](http://www.jjcicsi.org)

## 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.



## Message from the Chair

As we look back in 2011, we recall especially the twentieth anniversary of the Second Plenary Council of the Philippines (PCP-II). JJCICSI came up with a book (in place of its usual publication called the *Intersect*) to commemorate PCP-II's 20th year. Entitled *Becoming a Church of the Poor: Philippine Catholicism after the Second Plenary Council*, and edited by Ms. Eleanor Dionisio, the book carries seven essays that describe the involvement of the Roman Catholic Church of the Philippines in some of the pressing issues of the country, such as mining and the environment, agrarian reform, electoral politics and the reproductive health debate in past years. As noted by Ms. Dionisio, some of the essays interestingly show that the laity, religious, clergy and other Church personnel have much to learn about how to impart the moral truths to the faithful and to Philippine society as a whole.<sup>1</sup> This book is an excellent example of the kind of intellectually rigorous and faith-informed thought brought to bear on very current Church and social issues.

Also in December 2011, His Grace Most Reverend Luis Antonio G. Tagle, D.D. was installed as the thirty-second Archbishop of Manila. We take this chance to congratulate and promise our prayerful support to him, a former member of the JJCICSI Board of Trustees. The Institute looks forward to continuing collaboration with Archbishop "Chito" especially since one of the auxiliary bishops of the same Archdiocese he now pastors continues to be a member of the JJCICSI Board, His Excellency Most Reverend Broderick S. Pabillo, S.D.B., D.D. (Bishop Pabillo is also the Chair of the Episcopal Commission on Social Action-Justice and Peace (ECSA-JP) of the Catholic Bishops' Conference of the Philippines (CBCP) and heads the National Secretariat for Social Action-Justice and Peace (NASSA).)

Finally, we remember the first death anniversary of the late Bishop Francisco F. Claver, SJ, one of the architects of PCP II and a co-founder of ICSI (since then renamed JJCICSI). The anthropologist bishop spent 11 of 35 years of what he calls the "episcopating" ministry as a writer/researcher at the then newly established Institute on Church and Social Issues. He is best remembered for propagating the importance of inculturation in the church's mission of evangelization, espousing a philosophy of social change based on the free, conscientious and discerning collective action of people responding to their local situation.<sup>2</sup>

On behalf of the Board of Trustees, I would like to thank all our friends and benefactors, especially our core funder, MISEREOR, for their trust and support, particularly in these times of serious financial challenges. We of course thank and congratulate the JJCICSI officers and staff members for all that have been accomplished in 2011.

May the coming year which the Holy Father wants to celebrate as the Year of Faith bring continued success to JJCICSI's endeavors.

  
FR. VICTOR C. DE JESUS, S.J.  
Chairman, JJCICSI

<sup>1</sup> Eleanor R. Dionisio, ed., *Becoming a Church of the Poor: Philippine Catholicism after the Second Plenary Council* (Quezon City: John J. Carroll Institute on Church and Social Issues, 2011), 8.

<sup>2</sup> Francisco F. Claver, *The Making of a Local Church* (New York: Orbis Books, 2008), 5.



# 2011 Highlights

The Church and Society Program aims to deepen the understanding of the role of the Catholic Church in Philippine society, with an emphasis on the dissemination of Catholic Social Teaching. Recognizing the crucial role that the Catholic Church has played in influencing Philippine social, political, and economic issues, the program seeks to foster reflection on the interface between the Philippine Church and society.



## Church & Society

### Research

- Draft of the study titled “The Couples for Christ and El Shaddai: Suborganizational Framing and Sociopolitical Mobilization in Two Philippine Catholic Charismatic Communities”
- The historical background of local Church teaching in electoral politics (1900-1986) and on post-PCP II local Church teaching on electoral politics (1992-2009)

### Advocacy

- Discussion and planning with the National Clergy Discernment Group for an inter-diocesan seminar on Catholic Social Teaching (CST)
- Talk on “The Social Engagements of the Catholic Church: Social Action for Justice, Peace and Development”
- Theological Hour of the Loyola School of Theology (LST) on “Becoming a Church of the Poor: Philippine Catholicism after the Second Plenary Council”

### Capacity Building

- Development and pilot-testing of two modules for participative reflection and analysis on aspects of CST:
  - “Ideas-Resources-Intelligibility-Shifts” approach to Social Analysis
  - Historical background and primary themes of Catholic Social Teaching
- Preparatory work for modules on local Church teaching:
  - The Second Plenary Council of the Philippines (PCP II) and various aspects of democratization
  - Pastoral documents of the Catholic Bishops’ Conference of the Philippines (CBCP) and electoral democracy
- Continuing conduct and supervision of leadership training for *Liga Manggagawa*, and ongoing drafting of funding proposal for program extension
- Seminar on CST given to the Pastoral Renewal Program of the Southeast Asian Interdisciplinary Development Institute (SAIDI)

Through research, advocacy and direct services, the Family Life Program assists the Catholic Church in addressing the social and spiritual needs of Filipino families, especially those in underprivileged communities. The program aims to influence Church and State policy on issues affecting population and family life, work with government and non-government agencies to promote juvenile justice, and assist Filipino families in poor communities through scholarships, feeding programs and natural family planning seminars for couples.



## Family Life

### Research

- *Neither Silver Bullet nor Vatican Roulette*, a monograph published by the Philippine Center for Population and Development (PCPD)

### Advocacy

- Networking with Institute for Politics and Governance, Sta. Maria della Strada Health Ministry, *Barangáy* Pansol's Council and Committee on Health, and the Quezon City District III Health Center in Pansol on the use of natural family planning
- Lobby for full implementation of RA 9344 and drafting of position paper against amending the said law
- Lectures on the United Nations Convention on the Rights of the Child (UNCRC)
- Lobby for the passage of the bill on Anti-Corporal Punishment and Positive Discipline (ACOP)
- TV and radio interviews on juvenile justice and children's rights
- Participation in the formulation of the Quezon City Children's Code

### Capacity Building & Direct Service

- Profiling of and one-on-one training for 110 mothers on Standard Days method for NFP use
- Trainings on fertility awareness and NFP attended by 120 participants and follow-up by trainers of participants in NFP training sessions
- Trainings on breast-feeding and primary health care with the NGO Arugaan
- *Sagip-Bata* Supplemental Feeding Program
- *Landas ng Pag-asa* Scholarship Program
- Trainings for 285 *Barangáy* Council for Protection of Children (BCPC) members/community leaders on children's rights and the importance of a BCPC for 9 *barangáys*, and technical assistance on strategic planning provided to 5 BCPCs to determine programs, and for yearly BCPC evaluations
- Conceptualization of training design and modules on juvenile justice, positive discipline

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.



## Urban Poverty & Governance

### Research

- Research on “Medium-Rise Housing for Urban Informal Settlers: Implications on Cost, Tenure and Financing Arrangements”
- Draft of “A Framework for Urban Liveability: The Cities Are Our Common Home” for the Philippine MISEREOR Partnership
- Documentation of Post-Ketsana Disaster Risk Reduction (DRR) Projects of 6 Christian Aid Partners in one city and three municipalities

### Advocacy

- Technical and secretariat support to the advocacy activities of the Urban Poor Alliance (UP-ALL), an alliance of more than 1,000 people’s organizations and NGOs, in engaging the Aquino administration to come up with housing solutions and a budget for identified urban poor sites. In 2011, JJCICSI actively participated in the meetings and consultations of the National Technical Working Group on Informal Settlers convened by the Department of Interior and Local Government (DILG). A major milestone of this engagement was the national government’s allocation of PhP10 billion every year for in-city medium-rise housing for informal settlers in Metro Manila.
- Technical support to the Quezon City Urban Poor Alliance (QC UP-ALL) in its continuing engagement with the Quezon City government through the Local Housing Board (LHB)
- Ongoing identification of prospective *barangáy*-wide PO alliances to be mentored for agenda formulation and *barangáy* development planning



The Rural Development Program 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 program sets its sight on alternatives, substitutes or options that would address the issue of access, along with control and management of resources.



## Rural Development

### Research

- Research on Agrarian Reform Cooperatives, “Revisiting ARB Cooperatives in Negros Occidental: Sustaining the Sugar Lands and their Organizations”
- Updating of the Rapid Field Appraisals and Scanning of the Sites of Struggle of the Anti-Mining Campaign of the Philippine MISEREOR Partnership
- Research on the Biofuels Policy, “Is the Biofuels Policy Safeguarding the Interest of the Small Farmer, his Household and the Community”
- Process Manual on Microfinance Innovations in Cooperatives in Agrarian Reform Areas (MICOOP@ ARAs) of the National Confederation of Cooperatives (NATCCO) and the Department of Agrarian Reform (DAR)

### Advocacy

- Participation in the committee hearings of Congress for the passage of a national land use policy, as member of the Campaign for Land Use Policy Now or CLUP Now! network
- Participation in forums involving POs, NGOs and coops involved in micro-credit and social entrepreneurship
- Conduct of a roundtable discussion on REDD-plus initiatives in the Philippines with presentation of two studies from the Ateneo School of Government: (1) carbon rights and ownership, and (2) mainstreaming of social accountability tools and principles in the National REDD-Plus Strategy

**A tale of two bishops**  
**COMMENTARY**  
*John J. Carroll, S.J.*  
*John J. Carroll Institute on Church and Social Issues*

... 1986, Bishop upon to put his of the bishops' clared that in s were unpar- conduct." The a government by fraudulent it "[i]f such a correct the evil is our serious it do so." nor violence ion, and they steps. Rather, s, the calli- light- ste-

out. After listening respectfully to these warnings, the bishops decided that it was within their competence, and indeed that it was their responsibility, to speak.

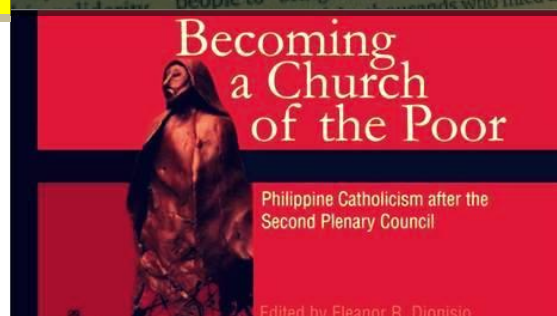
Events had slipped into fast forward in the week following the release of the statement, with the aborted coup attempt of the Reform the Army Forces Movement, the defections of Defense Minister Juan Ponce Enrile and Lt. Gen. Fidel Rar-



**Publications**

**29** commentaries in the Philippine Daily Inquirer

**154** editorials for Radio Veritas 846



**2** monographs



**Becoming a Church of the Poor**

Produced by the JJCICSI staff, *Becoming a Church of the Poor* is a collection of essays which provide a glimpse into how the Philippine Catholic Church has sought to fulfill the goals she set for herself in the Second Plenary Council of the Philippines (PCP II), convened twenty years ago in 1991. Among the issues tackled in the book deal with family and life, agrarian reform, environment, and electoral politics.



**Neither Silver Bullet nor Vatican Roulette**

Published by the Philippine Center for Population and Development (PCPD), this research examines the acceptance, continuation, and effectiveness rates of Natural Family Planning (NFP) in a working class community; possibly adding a factual, evidence-based dimension to the reproductive health debate.

**JOHN J. CARROLL INSTITUTE ON CHURCH AND SOCIAL ISSUES**  
 THE PRESENT MOMENT IS CRUCIAL. THE WORK TO BE DONE IS URGENT.

HOME	COMMENTARY	NEW PUBLICATION
ABOUT US PROGRAMS COMMENTARY PUBLICATIONS	<b>MFIs should think out of the box</b> <i>By Gemma Rita R. Martin</i> Today's complex and competitive markets offer many opportunities for innovation. Two Sundays ago, the Inquirer's Talk of the Town featured ways to produce consumer products from three coconut byproducts—candies and desserts with coco sugar, body juice and sports drink from coconut water, and various food preparations using coconut oil. Such innovative products not only present alternative income-generating opportunities for the small coconut farmer, but offer healthful options to consumers as well. There are indeed delightful prospects to a sector where most coconuts simply end up as copra or coconut oil. <p><a href="#">Continue reading &gt;&gt;</a></p>	<b>Becoming a Church of the Poor: Philippine Catholicism After the Second Plenary Council</b> Produced by the JJCICSI staff, <i>Becoming a Church of the Poor</i> is a collection of essays which provide a glimpse into how the Philippine Catholic Church has sought to fulfill the goals she set for herself in the Second Plenary Council of the Philippines (PCP II), convened twenty years ago in 1991. Among the issues tackled in the book deal with family and life, agrarian reform, environment, and electoral politics. <p>The volume also commemorates the first death anniversary of the late Bishop Francisco F. Claver, SJ, one of the architects of PCP II and a cofounder of JJCICSI, who died on 1 July 2015.</p> <p>Copyright 2011. 6x9 inches. 128 pages. Php 300.            Exclusively distributed by the Ateneo de Manila University Press, Bellarmine Hall, ADMU Campus, Katipunan Ave., Loyola Heights, Quezon City.</p>

**Building resilient communities**  
*By Gladys Ann G. Rabacal*  
 After Tropical Storm "Ondoy" wreaked havoc in

Website [www.jjcicsi.org](http://www.jjcicsi.org)



# 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, 2011 and 2010, 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 considers 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, nonprofit organization)** as of December 31, 2011 and 2010, 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 19-2011 and 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 required under Revenue Regulations 19-2011 and 15-2010 in Notes 27 and 28 to the financial statements, respectively, is presented for the 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 respect 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. 4920489 issued on January 24, 2012 at Caloocan City

# Statements of Financial Position

AS OF 31 DECEMBER 2011 AND 2010

In Philippine pesos

ASSETS	2011	2010
Current Assets		
Cash and Cash Equivalents	14,745,168.69	16,583,023.57
Receivables and Advances	194,208.12	466,736.93
<b>Total Current Assets</b>	<b>14,939,376.81</b>	<b>17,049,760.50</b>
Non-Current Assets		
Funds Held by Investment Manager	28,772,205.59	23,973,624.82
Property and Equipment	109,763.65	101,305.85
<b>Total Non-Current Assets</b>	<b>28,881,969.24</b>	<b>24,074,930.67</b>
<b>TOTAL ASSETS</b>	<b>43,821,346.05</b>	<b>41,124,691.17</b>

LIABILITIES AND FUND BALANCES	2011	2010
Liabilities		
Funds Held in Trust	1,936,845.13	1,695,127.19
Payables and Accrued Expenses	511,659.04	244,152.31
Accrued Retirement Liability	160,277.33	-
Current Statutory Liability	84,088.07	24,228.26
Deferred Project Fund	-	80,000.00
<b>Total Liabilities</b>	<b>2,692,869.57</b>	<b>2,043,507.76</b>
Fund Balances		
General Fund	41,078,194.26	37,065,040.98
Restricted Fund	50,282.22	2,016,142.43
<b>Total Fund Balances</b>	<b>41,128,476.48</b>	<b>39,081,183.41</b>
<b>TOTAL LIABILITIES AND FUND BALANCES</b>	<b>43,821,346.05</b>	<b>41,124,691.17</b>

In Philippine pesos

# Statements of Activities

FOR THE YEARS ENDED  
31 DECEMBER 2011 AND 2010

	General Fund	Restricted Fund	2011	2010
Support and Income				
Donations and Contributions	9,700,111.44	4,402,348.48	14,102,459.92	13,326,187.46
Other Sources	535,797.44	-	535,797.44	232,868.26
<b>TOTAL SUPPORT AND INCOME</b>	<b>10,235,908.88</b>	<b>4,402,348.48</b>	<b>14,638,257.36</b>	<b>13,559,055.72</b>
Expenses				
Program Expenses	7,490,488.40	4,781,947.42	12,272,435.82	11,279,134.96
Administrative Expenses	685,685.73	1,591,504.83	2,277,190.56	2,559,306.61
<b>TOTAL EXPENSES</b>	<b>8,176,174.13</b>	<b>6,373,452.25</b>	<b>14,549,626.38</b>	<b>13,838,441.57</b>
<b>EXCESS(DEFICIT) BEFORE OTHER INCOME (LOSS)</b>	<b>2,059,734.75</b>	<b>(1,971,103.77)</b>	<b>88,630.98</b>	<b>(279,385.85)</b>
Add (Less):				
Gain (Loss) on Investments	2,173,599.24	-	2,173,599.24	6,206,125.38
Interest Income	42,884.92	5,243.56	48,128.48	49,978.34
Foreign Exchange Gain (Loss)	(263,065.63)	-	(263,065.63)	(1,645,318.92)
<b>EXCESS OF SUPPORT AND INCOME OVER EXPENSES AND LOSS</b>	<b>4,013,153.28</b>	<b>(1,965,860.21)</b>	<b>2,047,293.07</b>	<b>4,331,398.95</b>

## Members of the Board

Chairperson	Victor C. de Jesus, S.J.
President	Gemma Rita R. Marin
Members	Emmanuel L. Alfonso, S.J. Luis S. David, S.J. Eric Marcelo O. Genilo, S.J. Angelita Gregorio-Medel Archimedes A. Lachica, S.J. Bp. Broderick S. Pabillo, D.D. Czarina Saloma-Akpedonu
Treasurer	Roberto Exequiel N. Rivera, S.J.
Corporate Secretary	Anna Marie A. Karaos

## Management and Staff

**Gemma Rita R. Marin**  
Executive Director  
Head, Rural Development Program

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

**Anna Marie A. Karaos**  
Associate Director for Programs  
Head, Urban Poverty and Governance Program

**Roberto Exequiel N. Rivera, S.J.**  
Associate Director for Finance  
Head, Church and Society Program

**Eleanor R. Dionisio**  
Research Associate, Church and Society Program

**Ma. Victoria S. Diaz**  
Project Officer, Family Life Program

**Marilou T. Abejar**  
Project Assistant, Family Life Program

**Gladys Ann G. Rabacal**  
**Gerald M. Nicolas**  
Research Assistants

**Veronica G. Bondoc**  
Finance Officer

**Sabrina T. Garcia**  
Administrative Assistant

**Sonny C. Cestina**  
Maintenance and Messenger



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