

Annex A. Documentary Requirements List (Regional or National Public Solicitation)

Requirements	Regular	Temporary	Renewal
SWDA with valid CRLTO			
1. Fund Utilization Report (Annex J) of Proceeds and Expenditures			✓
2. Notarized Declaration Form (Annex C)	✓	✓	✓
Organized Groups			
1. For new applicants: Certified True Copy (CTC) of Certificate of Registration with SEC which has jurisdiction to regulate the group, and Articles of Incorporation.	✓	✓	
SEC Certificate of No Derogatory			✓
2. Copy of the General Information Sheet (GIS) duly received by SEC or any similar document from a regulatory government agency that has jurisdiction to regulate the applying organization or agency	✓	✓	✓
3. Notarized Declaration Form for Other Organizations/ Associations/Corporations (Annex D)	✓	✓	✓
4. Written agreement or any similar document signifying the intended beneficiary/ies concurrence as recipient of the fundraising activities. <i>For children beneficiaries, only the parent/s of the child/ren or maternal/paternal relative/s may sign the document on behalf of the child.</i> <i>Beneficiaries who are in a group or community may be represented by their group/community leader or chosen representative in this agreement.</i>	✓	✓	✓
5. If applicable, endorsement or Certification from any but not limited to the following agencies allowing the applicant to undertake solicitation in their agency's jurisdiction such as: a. Director of Private Schools b. School Superintendent of Public Schools c. Head or authorized representative of National Government Agencies (NGAs)	✓	✓	✓

Requirements	Regular	Temporary	Renewal
<ul style="list-style-type: none"> d. Head or authorized representative of Local Government Units (LGUs) e. Bishop/Parish Priest/Minister or Head of any Sect or Denomination f. Others 			
6. Pledge of Commitment (Annex I)	✓	✓	✓
7. Fund Utilization Report (Annex J) of proceeds and expenditures			✓
8. Undertaking to comply with the requirements on PSP (Applicable only during State of Calamity/State of Public Health Emergency or for application of Temporary Solicitation Permit, and once during Renewal)		✓	✓
Non-profit corporations/Non-government organizations/associations (including Civil Society Organizations)			
1. For new applicants: Certified True Copy (CTC) of Certificate of Registration with SEC which has jurisdiction to regulate the group, and Articles of Incorporation.	✓	✓	
SEC Certificate of No Derogatory			✓
2. Copy of the General Information Sheet (GIS) duly received by SEC or any similar document from a regulatory government agency that has jurisdiction to regulate the applying organization or agency	✓	✓	✓
3. Notarized Declaration Form for Other Organizations/Associations/Corporations (Annex D)	✓	✓	✓
<p>4. Written agreement or any similar document signifying the intended beneficiary/ies concurrence as recipient of the fundraising activities.</p> <p><i>For children beneficiaries, only the parent/s of the child/ren or maternal/paternal relative/s may sign the document on behalf of the child.</i></p> <p><i>Beneficiaries who are in a group or community may be represented by their group/community leader or chosen representative in this agreement.</i></p>	✓	✓	✓
<p>5. If applicable, endorsement or Certification from any but not limited to the following agencies allowing the applicant to undertake solicitation in their agency's jurisdiction such as:</p> <ul style="list-style-type: none"> a. Director of Private Schools b. School Superintendent of Public Schools c. Head or authorized representative of National Government Agencies (NGAs) 	✓	✓	✓

Requirements	Regular	Temporary	Renewal
d. Head or authorized representative of Local Government Units (LGUs) e. Bishop/Parish Priest/Minister or Head of any Sect or Denomination f. Others			
6. Pledge of Commitment (Annex I)	✓	✓	✓
7. Fund Utilization Report (Annex J) of proceeds and expenditures			✓
8. Undertaking to comply with the requirements on PSP (Applicable only during State of Calamity/State of Public Health Emergency or for application of Temporary Solicitation Permit, and once during Renewal)		✓	✓
Government Agency			
1. Endorsement or Certification from any but not limited to the following agencies allowing the applicant to undertake solicitation in their agency's jurisdiction such as: a. School Superintendent of Public Schools b. Head or authorized representative of National Government Agencies (NGAs) c. Head or authorized representative of Local Government Units (LGUs) d. Others	✓	✓	✓
2. Notarized Declaration Form for Other Organizations/Associations/Corporations (Annex D)	✓	✓	✓
3. Pledge of Commitment (Annex I)	✓	✓	✓
4. Fund Utilization Report (Annex J) of proceeds and expenditures			✓
5. Undertaking to comply with the requirements on PSP (Applicable only during State of Calamity/State of Public Health Emergency or for application of Temporary Solicitation Permit, and once during Renewal)		✓	✓
Person/Individual			
1. Endorsement Letter from DSWD licensed and accredited SWDA or from the C/MSWDO allowing an individual to solicit funds under their name or responsibility	✓	✓	✓
2. Notarized Declaration Form (Annex C)	✓	✓	✓

Requirements	Regular	Temporary	Renewal
3. Endorsement letter of the group that he/she is representing with	✓	✓	✓
4. If applicable, endorsement or Certification from any but not limited to the following agencies allowing the applicant to undertake solicitation in their agency's jurisdiction such as: a. Director of Private Schools b. School Superintendent of Public Schools c. Head or authorized representative of National Government Agencies (NGAs) d. Head or authorized representative of Local Government Units (LGUs) e. Bishop/Parish Priest/Minister or Head of any Sect or Denomination f. Others	✓	✓	✓
5. Medical Certificate/ Abstract and/or Treatment Protocol certified by the attending physician with corresponding license number) or Hospital's Records Section (if applicable)	✓	✓	✓
6. Duly signed Social Case Study Report (SCSR) and endorsement from the Local Social Welfare and Development Office (LSWDO) (if applicable)	✓	✓	✓
7. Signed Memorandum of Agreement (MOA) between the DSWD and the C/MSWDO of the concerned LGU stating their commitment to monitor the applicant's solicitation activities and to submit post-reportorial requirements to the Standards Bureau	✓	✓	✓
8. Pledge of Commitment (Annex I)	✓	✓	✓
9. Fund Utilization Report (Annex J) of Proceeds and expenditures			✓
10. Undertaking to comply with the requirements on PSP (Applicable only during State of Calamity/State of Public Health Emergency or for application of Temporary Solicitation Permit, and once during Renewal)		✓	✓

REQUIREMENT LIST FOR AMENDMENT	
1. For SWDAs with CRLTO	<ul style="list-style-type: none"> ✓Amendment Form ✓Notarized Declaration Form
2. For Organized Groups and Non-profit corporations/Non-government organizations/associations (including Civil Society Organizations)	<ul style="list-style-type: none"> ✓Amendment Form <ul style="list-style-type: none"> ● For Change of Name/Address <ul style="list-style-type: none"> ✓Certified True Copy of Amended Certificate of Registration from SEC or Copy of the Updated General Information Sheet (GIS) duly received by SEC or any similar document from a regulatory government agency that has jurisdiction to regulate the applying organization or agency ● For change of beneficiary <ul style="list-style-type: none"> ✓Revised written agreement or similar document signifying the intended beneficiary/ies concurrence as recipient of the fundraising activities ● For Change of Project Proposal Information <ul style="list-style-type: none"> ✓Endorsement or Certification from any but not limited to the following agencies allowing the applicant to undertake solicitation in their agency's jurisdiction
3. For Government Agency	<ul style="list-style-type: none"> ✓Amendment Form ✓Endorsement or Certification from any but not limited to the following agencies allowing the applicant to undertake solicitation in their agency's jurisdiction
4. For Person	<ul style="list-style-type: none"> ✓Amendment Form ✓Notarized Declaration Form <ul style="list-style-type: none"> ● For change of name or address <ul style="list-style-type: none"> ✓Updated Annex K (SWDA/Barangay Certification)

