

**SOCIAL AUDIT WORKING DOCUMENT  
FOR THE YEAR \_\_\_\_\_**

**A. BASIC INFORMATION OF THE COOPERATIVE**

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

REGISTRATION NO.: \_\_\_\_\_ DATE REGISTERED: \_\_\_\_\_

**B. STATEMENT OF:**

VISION: \_\_\_\_\_  
\_\_\_\_\_

MISSION: \_\_\_\_\_  
\_\_\_\_\_

CORE VALUES: \_\_\_\_\_  
\_\_\_\_\_

SOCIAL GOALS: \_\_\_\_\_  
\_\_\_\_\_

**C. POLICIES AND GUIDELINES ON SOCIAL DEVELOPMENT**

TITLE/DESCRIPTION OF POLICY/ GUIDELINES	SOURCE OF DOCUMENT	BOD/GA RESOLUTION NO.	DATE APPROVED

**D. SOCIAL DEVELOPMENT PROGRAM**

The social development program of the cooperative focuses on two (2) areas: a) for the cooperative itself; and b) for the community. The source of fund for the first area may vary from Cooperative Education and Training Fund (CETF), optional fund or outright expense; while the second area is exclusive from the Community Development Fund (CDF).

**D.1. Cooperative**

**D.1.a. Members**

KEY AREAS	SPECIFIC ACTIVITIES	NO. OF ACTIVITIES	NO. OF BENEFICIARIES			AMOUNT UTILIZED	SOURCE OF FUND
			MALE	FEMALE	TOTAL		
Education; Scholarship; training							
Health program							
Social events/gatherings							

Social protection (insurance and mutual benefits)							
Disaster Risk Reduction & Management							
Gender equality and women empowerment							
Others, specify							
Subtotal							

D.1.b. Officers

KEY AREAS	SPECIFIC ACTIVITIES	NO. OF ACTIVITIES	NO. OF BENEFICIARIES			AMOUNT UTILIZED	SOURCE OF FUND
			MALE	FEMALE	TOTAL		
Education; Scholarship; training							
Health program							
Social events/gatherings							
Social protection (insurance and mutual benefits)							
Disaster Risk Reduction & Management							
Gender equality and women empowerment							
Others, specify							
Subtotal							

D.1.c. Staff

KEY AREAS	SPECIFIC ACTIVITIES	NO. OF ACTIVITIES	NO. OF BENEFICIARIES			AMOUNT UTILIZED	SOURCE OF FUND
			MALE	FEMALE	TOTAL		
Education; Scholarship; training							
Health program							
Social events/gatherings							
Social protection (insurance and mutual benefits)							
Disaster Risk Reduction & Management							
Gender equality and women empowerment							
Others, specify							
Subtotal							

**D.2. Community**

KEY AREAS	SPECIFIC ACTIVITIES	NO. OF ACTIVITIES	NO. OF BENEFICIARIES			AMOUNT UTILIZED
			MALE	FEMALE	TOTAL	
Education, training, seminar for non-members						
Environment conservation and protection						
Health and sanitation						
Partnership and community groups						
Sports, Cultural and religious activities						
Disaster Risk Reduction & Management						
Gender equality and women empowerment						
Inclusivity (Membership expansion)						
Support to the vulnerable sector of society						
Children and Youth						
Person with Disabilities						
Elderly						
Indigenous people						
Others specify						
Sub Total						

**E. COMMUNITY DEVELOPMENT FUND (CDF)**

Accumulated Amount of CDF	Amount Utilized for Cooperative Social Activities	Percentage of Utilization

Accomplished by:

SOCIAL AUDITOR/AUDIT COMMITTEE/INTERNAL AUDITOR

## PROFORMA SOCIAL AUDIT REPORT

XYZ Multipurpose Cooperative is a duly registered cooperative with the Cooperative Development Authority (CDA) under Registration no. \_\_\_\_\_ on \_\_\_\_\_. Its registered office address is \_\_\_\_\_.

We have audited the social performance of the XYZ Multipurpose Cooperative on \_\_\_\_\_ (date) covering the CY 20\_\_\_\_ to validate the adherence of the cooperative to the seventh cooperative principle, the "Concern for Community" and determines whether the cooperative works for the community's sustainable development through policies and programs approved by their members.

This Social Audit is in compliance with Rule 11 of the Revised Implementing Rules and Regulations of RA 9520 and Memorandum Circular No. 2017 - \_\_\_\_ issued by the CDA.

Hereunder are the Auditor's report on the comments/recommendations in major key areas of social performance:

KEY AREAS	COMMENTS AND RECOMMENDATIONS (SOCIAL DEVELOPMENT PERSPECTIVE)
A. STATEMENT OF VISION, MISSION, CORE VALUES & SOCIAL GOALS	
B. POLICIES AND GUIDELINES ON SOCIAL DEVELOPMENT	
C. SOCIAL DEVELOPMENT PROGRAMS	
• COOPERATIVE	
• COMMUNITY	
D. ALLOTMENT AND UTILIZATION OF COMMUNITY DEVELOPMENT FUND	
E. OTHERS, SPECIFY	

Based on the above information, the following are the recommended action/s to enhance the social performance of the cooperative to achieve its social goals:

AREAS FOR IMPROVEMENT	RECOMMENDED ACTION/S	MANAGEMENT COMMITMENT

Prepared by:

\_\_\_\_\_  
SOCIAL AUDITOR/AUDIT COMMITTEE/  
INTERNAL AUDITOR

Conforme:

\_\_\_\_\_  
GENERAL MANAGER

\_\_\_\_\_  
CHAIRPERSON

**MANAGEMENT SOCIAL PERFORMANCE REPORT**

SOCIAL DEVELOPMENT PLAN	ACTUAL ACCOMPLISHMENT	VARIANCE	REMARKS

Prepared by:

MANAGEMENT STAFF

Reviewed by:

GENERAL MANAGER

Approved by:

CHAIRMAN