

TEACHING NOTE  
FOR WORKSHOP  
FACILITATORSENLISTING ORGANIZATIONAL  
SUPPORT FOR PHE:  
PERSPECTIVES FROM A  
MICROFINANCE INSTITUTION

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Key Issue	Case-Study Discussion Questions
Organizational change	1, 3, 4, 5
Message formulation	3, 5, 7
Mission drift	8
Microfinance	2

### Case-Study Synopsis

Enlisting organizational support for a new concept or innovative idea can be a daunting challenge. This case study relates the story of how decisionmakers at the First Consolidated Bank Foundation, Inc. (FCBFI), a non-profit microfinance institution, evolved from being skeptical to cautiously optimistic about innovative approaches to social development and pro-poor lending—including integrating PHE concerns into the foundation’s programs.

### Teaching Tip

Part II of this case study is significantly longer and contains more material for discussion than Parts I and III. Be sure to plan your time accordingly.

### Selected Learning Points

The case-study author, a committed and passionate advocate of PHE approaches, set goals for herself in order to more effectively advocate for small changes within her organization. She had the following insights to share, which may be useful additions to the workshop discussion:

- ▶ **Making clear connections to your organization’s mission promotes success.** The first step to getting buy-in from your colleagues is showing them that your ideas will help the organization attain its goals.
- ▶ **Persistence, courage, and data.** Changing the way that an organization interprets and acts on its mission takes time, and victories are likely to be incremental. Persistence and courage can be your best allies in attaining your goal. But don’t forget that data is needed to back up key messages.
- ▶ **Different organizational audiences respond to different messages.** Know your organizational audiences and tailor your message to each. The message that will be most effective with the president is likely to be different than the message that will be most effective with colleagues who are directly implementing projects on the ground. Know the key PHE messages and how these will be communicated in the right way, at the right time, and by the right person or institution.

- ▶ **Collaboration helps to sustain momentum.** Identifying people inside and outside your organization who share your vision will bring new confidence, energy, and ideas into your work.
- ▶ **PHE is a clear fit with microfinance.** Poverty can project various faces. But to fully understand its root causes, one must examine the health of both the environment and the population. Improving microfinance services to include and address the magnitude of health needs and social problems faced by the poor seems like an ambitious program for microfinance institutions requiring heavy funding. Nonetheless, including these factors can propel many communities toward significant improvements in their quality of life.

## Related Readings and Tools

The following documents on microfinance strategies can be found in the microfinance portion of the Philippines' National Credit Council's website at [www.dof.gov.ph/nccsite/ncc.asp](http://www.dof.gov.ph/nccsite/ncc.asp):

- ▶ *Establishing an Appropriate Regulatory Framework for Microfinance in the Philippines*
- ▶ *Performance Standards for All Types of Microfinance Institutions in the Philippines*
- ▶ *National Strategy for Microfinance*