

# A SHORT 'GUIDEBOOK' TO CAPACITY BUILDING

(By Tom Ulrich, Catholic Relief Services Staff)

## INTRODUCTION

A challenge consistently identified by diocesan social ministry staff is the desire and expectation to do more social ministry with fewer resources. This set of guidelines is offered as a sort of "summary reflection" to address that issue. It is a 'summary' in that it attempts to encapsulate personal experience as a diocesan director, several discussions with Jeff Korgen, current staff of the ROUNDTABLE organization of diocesan social action directors and on-going conversations with various social ministry diocesan directors... past and present.

The fundamental solution to the problem of trying to do more with less in the world of social ministry is suggested to be "building staff capacity". This short guidebook, therefore, offers a definition of "CAPACITY BUILDING" followed by a set of guiding principles for how to do that. It is written specifically for use by diocesan directors of social ministry but may offer insights for anyone in any faith ministry wrestling with the stated problem.

## WORKING DEFINITION

In light of the articulated challenge regarding increasing tasks in the face of dwindling resources, the reader is invited to take a moment to think about what it means to "build capacity" and why it is proposed as the primary way to address the issue. The following definition will be utilized for the purpose of this reflection:

*Building Capacity means having the really smart insight to realize that you can do more (CRS) work with a minimum amount of resources by having skilled people (leaders) to share the tasks; then to actually find, train and organize those people (leaders) to help. When you "build capacity" you multiply yourself!*

In examining and analyzing the definition, it is clear that the key is *recruiting and activating skilled leaders* who will enthusiastically take on, with minimum supervision, ministry responsibilities.

## Key Characteristics of a Leader

It is appropriate, given the above definition and claim, to ask, what should a leader look like in the context of "capacity building"? Please consider the following primary characteristics of an ideal leader:

An Organizer/Leader...

1. Understands 'self-interest' to be that which a person feels strongly about and will take action upon. **Self interest reflects deeply held values, including faith values.**
2. Understands the positive nature of 'power' as necessary to make things happen or change things for the good.
3. Understands that mission effectiveness is critically dependent upon bringing a maximum number of people together, with all their resources, around their shared self interest to build power.
4. Understands that **the** essential task of an organizer/leader is to **find** those people and **bring them together**... both in small groups to build community and in large groups to have a significant impact.
5. Understands that an essential task of an organizer/leader is to facilitate the strategic planning and implementing of doable action on the mission.
6. Understands that an essential task of an organizer/leader is to identify and mentor other leaders.
7. Understands that an essential task of an organizer/leader is to facilitate the development of skills of those engaged in action.
8. Understands the vision of organized ministry (i.e. what organized ministry looks like) and that such a vision requires long-term thinking but is built with incremental steps. Therefore...
9. Understands the differences between organizing, leading and doing ministry and can clearly articulate those differences.
10. Understands the critical role of faith formation.

It is suggested that this list represents a sort of profile of what to look for or, more likely, what to develop in individuals who might be recruited to build capacity as defined. The question becomes where to look for those people.

There are a number of pools from which to draw. Two that stand out in my experience are permanent deacons (and please do not forget their spouses) and JustFaith graduates. In both cases, those folks have gone through extensive formation with a strong focus on social ministry. In addition, both are enthusiastically searching for a way to put their formed

faith into action. With encouragement, they can become strong leaders in the ministry that is global solidarity.

## **Capacity Building Models**

In discussions with Jeff Korgen, four models of successfully building social ministry capacity seem to have emerged over the past several years among social ministry directors. For the purposes of this reflection, the focus will be specifically on global solidarity social ministry. Those models are:

1. "The Diocesan Global Solidarity Team/Committee"... where an organized team of leaders (say from 8 – 15) work in a specific structure whose mission is to take responsibility for a wide range of global solidarity/CRS tasks and functions. (Sometimes this team is combined with a diocesan CCHD committee.)
2. "The Clone"... where one, two or three volunteer leader(s) are recruited and trained to do global solidarity/CRS diocesan tasks.
3. "Tunnel Vision"... where a CRS diocesan staff intentionally chooses one or two major areas of focus and ignores the rest of the tasks.
4. "From the Top"... where the bishop clearly articulates strong support for the global solidarity/CRS mission and backs that up with some resources.

Models 3 and 4 have primarily to do with managing the work rather than capacity building. Model 2, "The Clone" is, in general, pretty self explanatory. Therefore, the remainder of this reflection will concentrate on building a diocesan global solidarity team.

## **Building a Diocesan Global Solidarity Team**

It is critical to be clear about a few things before launching into the effort to create a diocesan global solidarity team:

1. The task is a construction project! As such, start with a vision and blueprint/plan. Then proceed simply and slowly, building on the progress of the previous step. In other words, do this "brick by brick". Celebrate and affirm small successes. But, make sure to keep one eye on the vision. You want to always be clear about and stay mindful of what you ultimately are trying to end up with.
2. Like anything of value, know that this is going to take a concerted effort and hard work to create. It will take an upfront investment,

mainly in time. From vision to launch will take approximately a year. However, the dividends will be worth the investment. Trust this... that's according to those who have successfully done this. **(See Steps 1 – 3, below!)**

3. Be intentional and have a plan. A systematic approach will save time, energy and frustration.

That said, here are the steps for building a diocesan global solidarity team/committee:

1. *Conduct a meeting with yourself: "I will make a real commitment to intentionally build (my) capacity"...*
  - *Be clear what I get out of it!*
  - *Make sure that's what I want and that it will help me to do more with less!*
  - *Be prepared to take a year, to be disciplined about building it and to follow the steps (i.e. have a plan)!*
  - *Don't apologize for making the commitment and taking the time.*
2. *Continue the meeting with yourself: Conduct an "activity priority assessment"...*
  - *Identify the minimum that needs to be done for the next year.*
  - *Commit to only those activities, PLUS...*
  - *Commit to building your diocesan team. Remind yourself that it's going to take a year. (Yes, it's worth repeating this point!)*
3. *Create a construction plan consisting of the steps that follow; BUT, communicate to your supervisor, bishop, all who need to know and whose support you require.*
4. Do a diocesan "global solidarity" scan...
  - Have a good idea **who** (*parishes, other diocesan offices, schools [especially Catholic universities], other community and church groups, Catholic Charities, etc...*) **is doing what** in the world of international justice and peace. **NOTE:** This is not a "scientific survey". It is an accumulation of knowledge and information as a result of intentional conversations with lots of people.
5. Based on the "Job Guidelines for a CRS Diocesan Director" have a vision of the team. (**NOTE:** It is recognized that this team may be combined with other diocesan ministry teams such as CCHD)
  - Be able to answer the question: "In 5 years, what will this team look like and be doing?"

6. Clarify the Mission and Function of the team.
  - *Be able to describe to an ordinary, good-willed but unknowledgeable parishioner (perhaps your mother?), briefly, clearly and with confidence, the team's purpose and its work.*
  - Be able to state why the team is organized.
7. Clarify the structure of the team:
  - How it is to operate (ground rules and decision-making);
  - Number of meetings, number of members and term lengths;
  - Leadership roles;
  - Sub-groups and working committees such as 'Allocations', 'Education & Leadership Development', 'Parish Programs', (Hint: Helpful to have "job descriptions')
8. Recruit members (THIS IS THE HEART!!)
  - This is intentional and strategic. Identify potential pools of leaders (e.g. JustFaith grads) and select people you want. At an individual meeting (in person or by phone) describe the expectations and experience. Be honest and direct. Then... ASK!
9. Orient members to Vision, Purpose, Function and Structure.
10. Provide Theological formation on Catholic Social Teaching, especially global solidarity.
11. Develop an annual plan and implement it.
12. Evaluate the work after a year:
  - What was and was not accomplished. Why.
  - What changes are needed and why.
13. Celebrate the effort and keep focused through prayer.

## **Diocesan Global Solidarity Team/Committee Examples**

Three examples of diocesan teams are provided starting on the following page. They include:

- Archdiocese of Washington D.C.
- Diocese of Arlington, Virginia
- Archdiocese of Cincinnati/Dayton

## **Conclusion**

Even though I have constructed and worked with diocesan committees like the ones described and believe them to be excellent ways to build capacity, I wanted to test that experience. When gathering the above examples, I asked staff whether or not they really do believe the committee expands their ability to do the work AND worth the effort. All said yes. I will let Cori Thibodeau's candid e-mail response speak for itself...

"Yes, it completely increased capacity. I can't even fathom a half-way compelling reason as to why we wouldn't want teams of people doing this work. At the same time, it certainly required a lot of my time, but each year more was done by team members who were empowered and motivated to do more. I would have been busy either way - doing it by myself or doing it with community. An easy decision! One helpful structural piece is that we have a 24 member advisory commission to our office appointed by the Archbishop - as much as possible I tried to use commissioners for leadership positions because it was a group that could be trusted and counted on to represent our office."

Final Words: Hope all this makes sense and helps. Blessings!!!

# **ARCHDIOCES OF WASHINGTON D.C.**

## **Archdiocese of Washington Department for Social Concerns Global Solidarity Committee**

### **History**

In 2006, in order to support the evolving local efforts of Catholic Relief Services, the Department for Social Concerns requested that an Archdiocesan Global Solidarity Committee be formed to engage talent within the Archdiocese in both an advisory and volunteer work assistance to the Department. Cardinal McCarrick established the committee and it was established in the early spring of 2006.

The first year was formation and clarification of the organization and operation of the committee. Sub-Committees were established and leadership was developed. Goals were identified as well as planning for the successful completion of these goals.

### **Mission**

*The Archdiocese of Washington's Global Solidarity Committee advises and assists the Department for Social Concerns, and the Diocesan Director for Catholic Relief Services in fulfilling its mission in collaboration with parishes and institutions to promote human rights, educate and advocate for peace and justice; encourage a fair and just distribution of the world's resources; restore the integrity of creation; and develop a constituency on global concerns reflecting the rich diversity and balance within the Archdiocese of Washington.*

### **Structure/Function**

The Committee will achieve this through its regular meetings and the establishment of both standing and ad hoc subcommittees which will address specific issues and meet as necessary. An Executive Committee will meet on a more regular basis to ensure a flow of information and that overall goals are being met. There will be a Co-Chair rotating system on a yearly basis.

Current Sub-Committees are:

- Peace
- Parish Program
- Parish Twinning
- Secondary School Educators

### ***Member Responsibility and Roles***

Members will strive to enthusiastically contribute by/ through:

- Attending yearly formation retreats;
- Attending bi-monthly Committee meetings;
- Participate in one of the ad hoc subcommittees which will meet as needed;
- Assisting in planning and implementation of special events;
- Evaluating the ongoing work of the Global Solidarity Committee and participate in its process of goal and priority setting;
- Facilitating and offering Committee projects and initiatives in Archdiocesan parishes, schools and institutions;
- Representing and speaking on behalf of the Committee as requested by the recommendation of the Committee.

The establishment of a Global Solidarity Committee was supported by a Capacity Building Grant from CRS. Recently, the Archdiocese received news of the award of a second grant to support the proposed project for an Archdiocesan Global Solidarity Day in 2008.



## ***DIOCESE of ARLINGTON, VIRGINIA***

Dear Prospective Committee Member,

In October, 2005, a task force was convened to decide how the Catholic Relief Services (CRS) and Catholic Campaign for Human Development (CCHD) programs could be more effective in the Diocese of Arlington. The task force developed two recommendations:

- To hire a staff person to coordinate the programs, fulfilled when I was hired in January of this year
- To combine the two separate committees that reviewed local grant applications and expand their purpose beyond the grant programs

To achieve this second goal, I am looking for 4-5 individuals who are familiar with CRS, CCHD and Catholic Social Teaching, who will make a six-month commitment to join the current committee during the transition period. This group will set some initial goals for the programs and will better define what form the committee structure will take. Once the structure is in place, we will be recruiting more volunteers from across the Diocese to make a two-year commitment to serve. I hope that many members on our "transition team" will decide to continue, but they will be under no obligation to do so.

What do the CRS and CCHD programs look like on a Diocesan level? A percentage of both the CCHD collection and the Operation Rice Bowl collection stays in our Diocese to fund local anti-poverty programs. A committee of volunteers is needed to review grant proposals and make funding recommendations to the Bishop. What I find exciting about CCHD is the requirement that low-income people provide the leadership for the funded groups. Yet this is also a challenging requirement, so we need the committee to help identify potential applicants.

In addition to the grant program, both CRS and CCHD have educational components. It is a goal of CRS to educate Catholics about global poverty and involve them in advocacy on issues such as foreign aid. CCHD has educational materials about poverty in the United States, including a wonderful website at [www.povertyusa.org](http://www.povertyusa.org). The local committee would find ways to make these resources available to parishes, youth groups and Catholic schools. Finally, the committee would promote parish participation in both collections and would promote other Catholic Relief Services programs, such as fair trade initiatives or the "Food Fast" program for teens.

I invite you to consider serving on the CRS/CCHD transition committee. In the future, new members will receive a volunteer job description and attend an orientation, but this transition committee needs volunteers who are very flexible with changing structures and who don't mind diving right into a project. If this describes you, I invite you to return the enclosed application **by May 30**. If you

prefer to work in a more structured environment, I hope you will consider serving on the committee in the future when things are more defined.

In Peace,

Terry Shuping Angelotti  
Program Coordinator CRS/CCHD  
Diocese of Arlington

## **CRS/CCHD Committee Member Job Description**

### **General Responsibilities:**

- To attend an orientation to learn about the program and the faith basis of it
- To participate on the grant review sub-committee for the first six months to gain a better understanding of the funded groups
- To attend a goal-setting session each June, where members will divide themselves into sub-committees
- To actively participate on a sub-committee
- To attend a Day of Reflection in the Fall to keep strong the connection between our faith and this work, as well as to build community with other committee members
- To nominate new committee members who would have special contributions to make to the CRS or CCHD work

### **Qualifications:**

- To have passion for and a commitment to changing the systems that keep people in poverty in the United States and around the world
- To have the ability to work with people of many backgrounds and have respect for divergent opinions

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### **Education Sub-Committee**

- To assist in planning the annual orientation and Day of Reflection for the larger committee
- To assist in planning and presenting Journey to Justice days for JustFaith participants
- To find ways to promote the CRS international speaker tours
- To develop a local speakers' bureau
- To meet regularly to develop plans to educate Catholics of all ages about domestic and global poverty issues

### **Promotions Sub-Committee**

- To make suggestions as to web site content and design

- To adopt two parishes and ensure that CRS and CCHD materials are available to them
- To help staff information tables at various conferences throughout the year
- To meet regularly to develop plans for promoting specific CRS and CCHD programs, like Fair Trade and Operation Rice Bowl.

**Grant Review Sub-Committee**

- To make 1-2 site visits in March/April of groups that have applied for either national or local CCHD funding and write evaluations of those groups
- To read and review all CCHD grant applications (Typically, 5-8 applications are received.)
- To attend a meeting in April to prepare CCHD funding recommendations for the Bishop
- To build a relationship with one of the funded groups, getting on their mailing list and attending 1-2 events of theirs during the year
- To review Operation Rice Bowl Grants as requested (Typically 20-25 applications, but may find a system to divide them among members.)
- To attend a meeting in September/October to prepare ORB funding recommendations to the Bishop
- To participate in any revisions of the grant applications and evaluation process that need to be done
- To recommend new groups for funding

**Executive Committee**

- To chair one of the sub-committees, having the responsibility of working with the staff to set meeting times and agendas, communicating with committee members as needed, and facilitating the sub-committee meetings
- To attend executive committee meetings as needed, not more than four per year
- To assist the staff in recruiting potential committee members
- To assist the staff in long-range planning for the programs, including budget requests

***Sample Calendars***

**Grant Review Committee**

January	orientation for new members (optional for continuing members)
early March meeting	receive CCHD applications for review and attend pre-site visit
March-April	conduct one-two site visits and write evaluation
late April	attend CCHD decision-making meeting

June full committee goal-setting session  
July-October visit funded group  
mid-September receive Operation Rice Bowl grants for review  
early October attend ORB decision-making meeting  
November meeting to make revisions to process, if needed

**Education/Promotion Sub-Committees** meet at least four times per year (more often as needed) and participate in special events several times a year.

## ARCHDIOCESE OF CINCINNATI/DAYTON

This is how we were structured in Ohio (by Cori Thibodeau)...

### **Part I...**

CRS Conference Team: We started with what was supposed to be an overarching CRS Team, but it became clear early on that the group of folks who made up this team were deeply interested in global issues and CRS' response. I was very frustrated in the beginning because I wanted this to be the group that would help administer ORB, promote Food Fast, help with the CRS Collection, etc. It finally dawned on me that the group assembled had a very deep commitment to issues, so why try to force them in another direction. Going on that strength, we decided to focus on one CRS-related issue per year. Our first year we held a major conference on Immigration from a perspective on global solidarity. The CRS regional office helped to sponsor, and the intent was to create links between our local immigration issues and the global context. This year we didn't want to abandon immigration, but decided a connected but distinct thread was human trafficking. We worked closely with national CRS and USCCB staff on this.

### **Part II...**

Fair Trade Team: So - as the conference team was happening there was another group of people who loved fair trade and work of human hands. We formed a group to hold a yearly fair trade sale. This sale was huge - required over a 100 volunteers. We thought the best way though, for this not to become a yearly "craft sale," was to make it a leadership development opportunity. Our fair trade team and a social justice collaborative group planned the sale each year, but we put almost all of our effort on recruiting the 100 volunteers. We tried to get volunteers who were not currently engaged in social action ministry but seemed open to it to volunteer for a shift the day of the sale. To volunteer they had to commit to a 3 hour workshop on parish social ministry. We made sure we had PSM people from each parish where we had a volunteer so they could meet people currently involved. The training also focused heavily on CRS since this was about working a fair trade sale.

### **Part III...**

When I left, our focus was turning toward creating a CRS Advisory team that would be made of one person from each of the above teams, plus a few people who really cared about advancing CRS as a whole in the diocese. We were hoping to establish in every parish a CRS/CCHD point person who would take responsibility for the CRS/CCHD collection, ORB, Food Fast promotion, etc.

As for Hartford, we are basically starting from scratch since CRS has never been the

responsibility of this office. We'll see where we go - I'm sure it will take a different shape than Ohio but I found going with people's first love was more important than implementing some strategic idea I had as DD. What I tried to do was to keep the larger picture (strategic idea) in front of each group so that we were not acting as silos.