



CRS Diocesan Capacity Building Initiative

2014 Evaluation

Introduction

In 2010, Korgen Associates led an evaluation of the early CRS Capacity Building Grants disbursed from 2005 to 2007. At the time, the grants program was open to a wide number of potential projects, adopting an approach that encouraged diocesan director (DD) creativity. If a diocesan director had an idea, she or he wrote up an application, submitted it before the deadline, and, if approved, then did the work. Fifty-five (arch)dioceses participated, developing varied projects, from the now-familiar model of hiring of an intern, to producing a short film, to purchasing materials for outreach, to sponsoring special CRS trainings and retreats.

Korgen Associates' study found that the most common use of grant funds—to hire an intern or part-time staff person—produced mixed results. If the grant-funded staff person gave presentations and promoted CRS programs, there was a measurable impact. But that impact ended when the grant finished. *When the grant-funded staff person organized a new structure—new Just Faith groups, a diocesan solidarity team—the impacts endured longer, often three to five years.* When grant funds were used to buy materials or produce a film, for example, “increased awareness of CRS” was reported, but little quantitative evidence was provided to support this position. In every case, even the diocesan directors noted these effects were short-lived.

In recent years, CRS revised the Diocesan Capacity Building Initiative based on its experience with the first wave of grants to eliminate the multi-category approach, with diocesan directors defining what those categories might be, to the current model centered around paid interns organizing diocesan solidarity teams over a three-year cycle. In those dioceses receiving grants, these teams would then promote several dimensions of CRS ministries within the diocese, with local priorities determining orders of emphasis. Regional CRS offices worked with the diocesan directors closely intending to multiply the intern's effectiveness with consulting and programming.

CRS contracted with Korgen Associates a second time, in 2014, to evaluate three (arch)dioceses that successfully completed the three-year cycle: Hartford, Cincinnati, and Palm Beach. This report provides a summary of findings and offers recommendations.



Methodology

In terms of methodology, this study took an asset-based approach, examining, as noted in the previous section, three (arch)dioceses successfully completing the Initiative, 2011-2013. Interviews were held in-person in the Cincinnati and Hartford archdioceses and by telephone with the Diocese of Palm Beach during the month of September, 2014. Questions were developed to measure impacts and to develop an understanding of what approaches worked best—and why. Supplemental telephone interviews were conducted with (arch)diocesan leaders who could not make the primary meetings, CRS regional staff serving the three (arch)dioceses, and CRS regional staff who worked with other (arch)dioceses that did not complete the full cycle.

Focus Dioceses

Archdiocese of Cincinnati: Diocesan Director Pam Long convened a meeting with herself, Anne Bollheimer (key parish leader and Parish Promoter), Dave Schafembarger (second intern) and Korgen Associates. The Cincinnati model included a focus on “Parish Promoters,” who, as members of their parish, promoted CRS programming and worked to varying degrees with diocesan staff. Most attended an annual conference and six served on the Archdiocesan CRS Committee. In other dioceses, this committee would have been the chief focus of the “intern,” but here, the parish promoters were a greater center of attention. Dave was the second intern hired during the three-year period, preceded by two women who shared the role, one facilitating and giving presentations, and the other organizing by telephone. While this arrangement got the program off the ground, it was when diocesan leaders became more intentional about emphasizing relational outreach /a community organizing approach, their efforts became more effective. Dave had been an organizer, and is credited with much of their ultimate success. All were grateful for support, consultation and training from CRS regional staff and CRS Baltimore.

Archdiocese of Hartford: Diocesan Director Lynn Campbell convened a meeting consisting of herself, Mary Breen (Global Solidarity Team leader and wife of former staff member Deacon Tom Breen), Mary O’Brien (“intern”), and Bob Appacelli (parish leader). Mary O’Brien, a retired community organizer, explained the approach—different from Cincinnati’s, but also permeated by an organizing perspective. In the Archdiocese of Hartford, nine leaders comprise the archdiocesan Solidarity team. This group, with the lion’s share of organizing done by Mary, invites parishes to take actions across a broad spectrum of CRS activities, with the aim being getting the churches up to four of these activities. A full list of these indicators is included in Appendix B. Mary then trained leaders in these parishes how to do 1:1’s to increase their own capacity. All were grateful for support, consultation and training from CRS regional staff and CRS Baltimore



Diocese of Palm Beach: Diocesan Director and former intern Elena Garcia convened this conference call, which included parish leader Jill Hanson, Dianne Laubert, Diocesan Director of Communications, and Sheila Gomez, Executive Director of Catholic Charities. Barbara Roth of CRS, who served as a member of the team, participated on another call by herself. Here, Elena initially organized a diocesan solidarity team as the intern, but when the previous diocesan director left the position, she stepped in as director, hired by Catholic Charities, merging the team with a Parish Outreach Ministry team. This seems to have been a good fit, for both her part-time attentions and for the group taking a broader approach to social ministry, with support and mentoring from her CRS Relationship Manager.

Focus of the Diocesan Solidarity Teams

As noted earlier, each (arch)diocese took a different approach to capacity building. Nevertheless, there were similarities in what each group of leaders—and the leaders they engaged—worked on. CRS Rice Bowl appeared to be the top priority in each diocese, and the promotion of Just Faith (a source of new leaders), Fair Trade coffee, chocolate, and crafts, CRS speaker tours, and advocacy on immigration and Catholics Confront Global Poverty all appeared to be strong secondary priorities. Institutionally speaking, increasing CRS’ reach into parishes was clearly the chief aim, although each (arch)diocese reported progress engaging schools.

Impact Highlights

Both qualitative and quantitative data showed not only whether or not (arch)dioceses made progress, but also what areas progress was or wasn’t made in.* The Archdiocese of Hartford reported 22 parishes moving from less than four indicators to more than four. Taking on four indicators is their definition of a highly engaged parish. They also saw a marked increase in speaking invitations from parishes and believed they developed 150 primary leaders—leaders strongly directly engaged in the office’s ministries and known by name. Promotion of JustFaith has become a “virtuous circle,” with more leaders invited in, and those leaders coming out prove to be more passionate than ever. Mission trips, about four per year within the parishes, have also been a source of strong leaders.

***Note:** While some quantitative data was gathered for this report (e.g. RB proceeds/participation, CCGP sign ups/actions), it was difficult to correlate with the individualized goals of the diocesan plans, and needs to be refined in future years in order to more accurately measure the long term impact of CBI.



In the Archdiocese of Cincinnati, the number of parish promoters increased to 94, close to half of the parishes. While Pam Long still sees a glass more than half empty, this achievement is remarkable in its intentionality. The number has been increasing, and most of these leaders are not just names on a list. Many of them are well known locally for running the Fair Trade sale that has become a town holiday tradition, for example. This is a good example because it occurs so often in this archdiocese—a parish promoter becomes passionate about a particular CRS project, and then the numbers begin to rack up. An impact on spirituality was also noted in Cincinnati, attributed to the stories told by CRS speakers .

In the Diocese of Palm Beach, an especially enterprising Fair Trade Ambassador had a tremendous impact, multiplying her effect by bringing in others passionate about Fair Trade. With regard to Catholics Confront Global Poverty, some JustFaith leaders became very active, and work closely on the action alerts. Immigration remains a high priority for people living in the Diocese because of the large number of undocumented Latinos and a prayer walk that engaged hundreds of parishioners—a direct outcome of the grant. This walk, in turn, brought in both more leaders and a sense of spirituality from the encounter with the undocumented. In five parishes, scattershot social ministries became united under the umbrella of solidarity. An interesting spinoff of having Elena work out of Catholic Charities has been a convening of advocates assisting child refugees, which would not have happened without Elena and the work of the solidarity team.

Ingredients for Success

Each team’s discussion of impacts begged the question that animates this evaluation, “What are the ingredients of success?” Reviewing the responses from the three diocesan teams, and the interviews with regional staff, ten ingredients for success became clear, regardless of the priorities or unique structures of the dioceses in question.

1. *Role of Diocesan Director:* Without a doubt, a diocesan director who is strategically engaged in the Capacity Building Initiative emerged as the most important ingredient, particularly in comparing dioceses that succeeded in growing their capacity for global solidarity ministries with those that did not. The director coaches the intern, inspires her or him, and supervises. Even the best intern would never produce the greatest capacity building achievements if she or he is not organized, supervised, and inspired well. Interviews with regional staff who worked with those that did not complete the three-year cycle, underscored this point.
2. *The Right “Intern”:* When it comes to building capacity, the key, as noted above, is *people*. Who will go into the parishes and schools helping the faithful to become excited about global solidarity and invite them to take action? Someone who has organizing skills! In two of the



(arch)dioceses, a person with decades of experience with relational organizing was hired and thrived. In the third (Palm Beach) a person with strong relational instincts was closely mentored by a CRS relationship manager and grew to the point that she now sees herself as a relationship manager. While she does not use the language of community organizing to describe her activities, her notion of relationship management appears quite close to organizing.

3. *Trainings in Conducting 1:1's:* Both Hartford and Cincinnati explicitly conducted trainings for parish leaders in how to do 1:1's. Both sets of interviewees touted these trainings as important, and the parish leaders involved agreed. In growing capacity, the lead organizer of the solidarity team, the intern, should not be doing all of the organizing. Because they had the skills to train parishioners in how to do 1:1's, these interns multiplied their own capacity building ability.
4. *Fair Trade Ambassadors:* In each (arch)diocese, a Fair Trade Ambassador made a tremendous difference, working almost as a second intern. Words like "blooming," "amazing," and "exceptional" were used to describe the ambassadors in each of the (arch)dioceses. While these ambassadors were not referenced in any of the grant proposals, their work augmented that of the interns and the sum of their ministry was far greater than that contributed by each.
5. *Conversion Opportunities:* The most passionate leaders, the diocesan directors reported, all emerged from one conversion experience or another. The three chief conversion experiences, in order of impact, were (1) JustFaith, (2) parish mission trips, and (3) CRS speakers, on tour. Each of these experiences gave parish leaders an experience of solidarity—a direct relational tie with a person living in poverty in another country. And each produced transformational effects on 5-50 people. JustFaith, in particular proved to be an especially important source of new leaders with lots of passion. At this point, the JustFaith graduates are happy to be guided by the CRS diocesan director and her team, but at some point, we could expect them to be sources of new wisdom about the ministry.
6. *Key (Arch)Diocesan Collaborations:* In each of the three (arch)dioceses, efforts to build a stronger relationship with a new partner augmented the overall building of capacity. This usually occurred through repeated 1:1 meetings, but was often augmented by shared projects (for example, working on immigration justice with a diocesan Hispanic Ministry director). Sometimes the local partnerships built on efforts CRS had worked on nationally. The top partnerships included Hispanic ministry directors, Catholic schools offices, international priests, missions and



faith formation offices, Catholic Campaign for Human Development ministries, evangelization and youth offices, as well as councils of Catholic women.

7. *The Right Convening's:* Bringing leaders together at just the right moment proved to be very helpful as well. For interns, the most important convening's were the CBI leadership gatherings in Baltimore. For Mary O'Brien in particular, these meetings helped fill in the gaps between directors, providing a kind of peer and CRS supervision. Regular convening's like Cincinnati's annual CRS conference for Parish Promoters and deanery gatherings in both archdioceses as well as regular meetings of the Parish Outreach Coordinators proved a great morale booster and a source of new ideas. It appears that an essential element of capacity building is bringing leaders together, though capacity building cannot be limited to this dimension.
8. *The Role of the CRS Regional Office:* In each of the graduated dioceses, a strong, positive relationship with the regional CRS office existed where the regional office was seen as a source of mentoring, fresh ideas, support, and training. Interviews also revealed a relationship of solidarity, a strong relational "glue" that helped especially when work would become challenging.
9. *The Role of CRS-Baltimore:* CRS-Baltimore was seen by each diocese as a source of resources beyond just money. Direct training of their leaders by CRS-Baltimore staff was cited most often by interviewees as important to the development of those leaders. In addition, as noted above, Mary O'Brien in Hartford said the CBI annual gatherings in Baltimore (which 'interns' attend) were what kept her from "going adrift" during the director transition.
10. *Strategic Attention from CRS:* In the Diocese of Palm Beach, particularly, there was a sense that its designation (via CBI) as a "strategic diocese" helped create the conditions for a successful Diocesan Capacity Building Initiative. The ongoing attention from Bill Farrand as Relationship Manager laid the groundwork from the beginning and continues through today. A model of moving off of a Diocesan Capacity Building Grant while remaining a "strategic diocese" could be developed from this experience.

Obstacles to Success

By connecting the obstacles faced by these three successful "graduate" dioceses with information shared by regional staff about lower performing dioceses, we have developed this list of eight obstacles to success. At least one of the three successful (arch)dioceses noted each of the following as obstacles.



1. *The Diocese selects an intern who lacks organizing skills:* When a diocese selects an “intern” who lacks relational instincts/skills. Here, the challenge is that the main expense of the initiative has been wasted. Few 1:1’s will occur. Few if any new leaders will be invited in. All of the elements of success will be lost. In short, capacity will not be built if the intern lacks organizing skills or at a minimum strong relational instincts, and a body of evidence has developed among previous grantees to support this point. While it may be tempting to view the outreach as a series of tasks (i.e. phone calling, surveys), anything that minimizes strategic, face to face relationship building yields fewer diocesan and parish leaders.
2. *All Organizing is Re-Organizing:* One diocesan director who does not come from an organizing background noted her disappointment when parish leaders faded away or even died. She said that she struggled with disappointment in herself until Kathleen O’Toole explained that “All organizing is re-organizing.” It helped her feel better and get out and re-organize. Conversely, in other dioceses, directors had spurts of organizing and then sat back as what they built gradually fell apart, without re-organizing. This approach/attitude is not conducive to capacity building.
3. *A Lack of Continuous Engagement with the Bishop.* Having an ordinary who wishes to be directly involved in CRS activities is fairly rare. However, a lack of active engagement does not seem to *prevent* successful capacity building. Nonetheless, it appears that it would help tremendously if a local ordinary were more actively and strategically engaged beyond simply giving the green light for the effort.
4. *The Shrinking Church Economy:* Catholic dioceses are struggling to provide adequate staffing to a number of important ministries. Each diocesan director wondered aloud how they could maintain their current level of global solidarity activity without the capacity building grant. There simply isn’t the money available to fund even a proven program. Thus increased capacity may be only temporary, if all organizing is re-organizing. The question remains: *will these (arch)dioceses have the capacity to reorganize once the grant funds are no longer available?*
5. *One Person Parish Solidarity Committees:* In several parishes, diocesan directors noted, the parish’s engagement in the diocesan global solidarity ministry was simply through the efforts of one person. This places the parish’s global solidarity ministries’ long-term viability in question.
6. *Little Focus on Latinos:* Except in the Diocese of Palm Beach, there was little evidence that engaging Latinos in global solidarity ministries was a top priority. At a time when it is predicted



that Latinos will shortly be a majority of the Catholic Church—and among those who attend Mass regularly, probably already are, such an omission will ultimately be self-defeating. While dioceses typically see robust Latino community engagement in CCHD funded efforts, e.g. around immigration and local issues, significant opportunities exist around global solidarity as well. This lack of Latino engagement in global solidarity ministries seems especially worthy of further reflection in the Archdiocese of Hartford’s Office for Social Justice, which has, in the last six years, dramatically expanded its engagement of Latinos—but mainly connected to poverty and immigration issues, rather than ownership/leadership in broader global solidarity work.

7. *Turnover among Diocesan Directors:* Both Hartford and Palm Beach experienced the loss of a diocesan director partway into the grant period. Initially devastating, both (arch)dioceses recovered by hiring the directors who ultimately shepherded the project home. Even so, the transition drew energy away from the capacity building effort. Hard to avoid completely, turnover is nevertheless an obstacle that must be reckoned with.
8. *Campaigns Against CRS:* The relentless, negative attacks on CRS by small, highly amplified organizations was reported to have had a noticeable impact on the faithful in Palm Beach and Cincinnati. Even some generally reasonable Catholics heard about these organizations’ allegations and reportedly withheld participation. Whether or not dioceses have lost potential leaders and contributions as a result of these attacks, at a minimum valuable organizing time has been tied up in refuting negative allegations.

Conclusion and Recommendations

The Diocesan Capacity Building Initiative has grown in effectiveness and its width and depth. The organizing approaches adopted have been at the heart of its success. This report has identified ten dos and eight don’ts after studying evidence gained through in-person and telephone interviews.

Based on the findings in this report, Korgen Associates has four recommendations, apart from maximizing the ingredients for success, minimizing the obstacles to success.

1. *Strengthen the Organizing Emphasis:* The evidence accrued during the time CRS has been awarding capacity building grants points to two clear lessons: (1) the encounter with people living in poverty overseas changes lives, and (2) inviting people who have had these encounters into deeper and deeper levels of leadership produces highly motivated leaders who build diocesan capacity for global solidarity ministries. CRS has been successively narrowing the scope of its capacity building grants with a greater organizing emphasis (i.e. identifying and training



leaders, creating sustainable structures) in each iteration—why not increase that emphasis further with more 1:1 trainings and leadership development targets for global solidarity teams and key parish leaders?

2. *Grow Response to the Diminishment of Diocesan Resources:* While this initiative is one response to the shrinking Church economy, the question has been asked more than once, “What happens when the grant ends? Luckily in these three dioceses talented intern/animators have remained engaged in other capacities (Diocesan Director, FT Ambassador) CRS compensates in two ways: money and personal/spiritual/leadership growth. Thus,, the model of highly skilled volunteer leaders needs to be cultivated to augment diocesan CRS staffing and structures for now. *However, this remains a topic that deserves much exploration, and CRS ought to have that conversation with the assumption that diocesan resources will grow smaller over time in most dioceses.*
3. *Choose DCBI Dioceses like Organizers Choose Leaders:* Korgen Associates recommends that CRS reconsider the application process and simply invite (arch)dioceses that are ready into the DCBI. When Jesus selected the Apostles, he did not ask, “Are there any volunteers?” nor do organizers ask for volunteers to negotiate with a city mayor. Certainly, just like an enthusiastic leader, an (arch)diocese might indicate interest and then be offered benchmarks it needs to reach, and *could* with the help of CRS. The process could be a give-and-take while still being one in which CRS assumes the role of organizer.
4. *Rename “Intern” Role:* In two out of three dioceses (the dioceses that hired professional community organizers who were retired or phasing out of employment) the representatives of the solidarity team interviewed expressed strong reservations about the term “intern.” For an individual with forty years organizing experience to be called intern seemed to the diocesan director to be inappropriate, though the interns tended to be humble folks who didn’t seem to care much about the title.

Nevertheless, recent U.S. Department of Labor statements have defined unpaid internships, under the FSLA, as being “similar to training which would be given in an educational environment,” “for the benefit of the intern,” and “the employer that provides the training derives no immediate advantage from the activities of the intern.” Of course CRS provides the \$5,000 stipend, but the guidelines suggest the term “intern” should be applied to people just starting out in a field, an experience akin to an apprenticeship. Korgen Associates suggests the term be replaced with “CRS Animator.”



From APPENDIX B

DIOCESAN CAPACITY BUILDING INITIATIVE

Archdiocese of Hartford Global Solidarity Indicators

- 1) Immersion/mission trip
- 2) Fair Trade Sale
- 3) Serves Fair Trade Coffee
- 4) Liturgy connections
- 5) Religious education programs include Global Solidarity
- 6) Twinning
- 7) Rice Bowl - parish wide
- 8) Advocacy
- 9) Educational opportunities (presentations, speakers on global concerns)
- 10) Hunger-solidarity activities (Food Fast, Hunger Banquet)
- 11) Just Faith programs
- 12) Parishes in Action (OCSJM Communities of Salt and Light program which includes CRS overview)
- 13) Event or action (prayer vigil, etc.)
- 14) Global Direct Service (raising/sending money for global projects)