

Briefing Document

Theological Institute for Advocacy and Research in Africa – TARA¹

Institute for Leadership Training and Capacity Building in Social Development for Churches in Africa

1. The Institute

Persistent levels of mass poverty² and inequality are challenging the theological foundation of churches in Africa. The need for leadership training and capacity building in applied social research and advocacy towards a meaningful social development³ involvement of the churches in Africa has come to the forefront in this crisis. The Institute intends to make a contribution in addressing this need concretely.

It is widely accepted that the Church in Africa needs to play a pivotal role in development due to its theological self-understanding as well as its social acceptance and infrastructure throughout society. In Southern Africa the churches have a long tradition of social involvement. The churches were an integral part of the struggle for political freedom and they became people's platforms, where human rights and social issues were taken up directly. The church could often speak up where the liberation movement was silenced. After achieving political freedom churches understood their role still as being one of social involvement. This found its expression in e.g. the involvement in income generating projects. At the same time there was often a withdrawal from the direct political sphere in order not to be seen in opposition to the newly established governments⁴.

A critical reflection and assessment of church involvement in development during the last years has

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- 1 Tara is an Otjiherero word, which means 'look' – pointing to the basic idea of the Institute to look carefully at the social realities by doing participatory research, but also points to the advocacy aspects. The churches play a role in making the voices of those who are suffering heard.
 - 2 Throughout this outline the **Desk for Social Development's working definition on poverty** is used, which draws on the United Nations High Commission for Human Rights (UNHCHR) definition on poverty and Amartya Sen's capability approach. The working definition is: *“Poverty is on the one hand characterised by the lack of resources to meet basic needs (nutrition, access to health facilities, housing etc.) and on the other hand by the lack of capability (“real opportunity”) and thirdly the lack of freedom of choice, security and power to take ownership and use resources to become a full functioning agent in society”* (DfSD Research Manual, 2006:7).
 - 3 Throughout this outline the **Desk for Social Development's working definition on social development** is used: *Social Development through strategic interventions in society strives towards better living conditions for people living in poverty guided by the principle: that is based on human dignity, human rights, equality, respect, peace, democracy, mutual responsibility and cooperation, and full respect for the various religions and ethical values and cultural backgrounds of people. (World Summit for Social Development, Copenhagen 1995) Social development as a function of the church is a new approach in the social involvement of the Church. However, the [church] has historically played a role on political level to represent those, who otherwise were not heard. In its prophetic voice the church became the voice of the voiceless during the liberation struggle. The new challenges of extreme poverty alongside high inequality and the HIV/AIDS pandemic necessitate the church to be true to its calling to stand in for the poor and marginalized. Therefore, the [church] wants to ensure to be a true voice of the people plights engaging constructively on societal level to overcome the social and economic ills in Namibia's society* (Strategic Plan DfSD; 2004:4-6).
 - 4 For a detailed discussion see: Kameeta, Zephania; Haarmann, Claudia; Haarmann, Dirk 2007. *Church-State-Relations as an Ecumenical Issue. A contribution from Africa.* Bishop Dr. Z. Kameeta presentation for the 41st International Ecumenical Seminar at the Institute for Ecumenical Research Strasbourg, July 4th – 11th 2007. Strasbourg.

brought to the forefront that poverty cannot be tackled on an individual or community project basis only. Up to today many churches in Africa are still faced with continuing and ever deepening levels of poverty and inequality meaning that people are denied their GOD-given right to live in dignity and in His image. Staggering mass poverty thereby challenges the divine mission of the church in Africa and necessitates a spiritual and practical renewal to again become prophetic witnesses and meaningful actors on societal level⁵.

In order to be effective and become a meaningful player in a more and more technical development debate, often removed from the reality of the people, the churches need to have an in-depth sociological and economic understanding and ability to conduct quality research in order to use their advantage of being a 'people-centred organisation' and to make this fruitful for local development agendas. This highlights the urgent need for capacity building within the churches to combine theological reflection, a professional understanding of the economic structures at play and the ability to conduct Participatory Learning and Action research⁶. This is the gap the **Theological Institute for Advocacy and Research - TARA** intends to address.

TARA aims at supporting churches in Africa to acquire the necessary skills to act prophetically and professionally in their context, taking ownership of local social development agendas. The intention is three-fold: Firstly, to train and build capacity locally in Africa and to network among the churches. Secondly, to provide expertise to assist and professionally support research, analysis and advocacy work amongst local churches, thus fostering expertise in social development and concrete involvement of churches in the development of the African continent. Thirdly, to render sound information and regional strategic positions on development in a globalized world within the worldwide ecumenical community.

2. Context

The above mentioned new social development approach has become a central theme in the discussions of the churches of Africa. The establishment and work of the LWF's Arusha Poverty Task Force, of which Bishop Kameeta is the patron, bears witness to this. The DfSD of the ELCRN has developed a new model of the role of the church in development since 2003 by being engaged in capacity building, participatory research and prophetic advocacy.⁷ The work of the DfSD is focused on the Namibian context, but the need and wish for similar approaches and work in other African churches was expressed, for example, when the LWF Assembly in Lund in 2007 identified the ELCRN's approach to poverty as represented by the work of the DfSD as a "best practice model" and recommended it as such to the member churches.

5 See also Bishop Dr. Z. Kameeta *Capacity building for Churches in Africa towards prophetic and professional engagement in Social Development* at the meeting of the Lutheran Council in Africa in Johannesburg, May 2008.

6 Participatory Learning and Action research underlines: One the one side that the learning processes on the part of both the insiders (community members) and the outsider (facilitator/researcher); they enable people to share, analyse and enhance their knowledge. Furthermore, the fact that information is not extracted from, but generated by, the communities enables the latter to own the information as well as the recommendations and activities arising out of the process.

7 The BIG Pilot project implemented through the Desk for Social Development of the ELCRN is an example of how the church together with broader civil society can engage prophetically and through a small project challenge major economic role players like government as well as e.g. the IMF. See also: Haarmann, Claudia; Haarmann, Dirk; Jauch, Herbert et al 2009. Making the difference! The BIG in Namibia. Basic Income Grant Pilot Project Assessment Report, April 2009. Windhoek. (http://www.bignam.org/Publications/BIG_Assessment_report_08b.pdf)
The DfSD leads the Secretariat of the BIG Coalition and partakes in regional and continental civil society processes (e.g. Civil Society Platform towards Social Protection within the Livingstone Process of the AU Ministers). See also www.dfsd-elcrn.org.

The Church Leadership Conference in Windhoek in 2005, together with the Arusha Poverty Task Force and the Lutheran Council in Africa, echoed the need for a more concrete and prophetic approach towards the ever increasing poverty in Africa from the side of the Lutheran churches. The Conference went further and stipulated key components, like professional capacity building for church leaders and lay people as well as building qualified research and advocacy teams to actively engage in social development:

- *Establish management and leadership training programmes for senior church leaders (Continuing education).*
- *Embark on lay leadership training and empowerment in line with our Lutheran understanding of the priesthood of all believers.*
- *Set up an advocacy team comprising representatives of the sub regions to work with sister churches to support, encourage, advocate and sometimes challenge our governments (Church Leadership Conference in Windhoek, 2005).*

Putting these components in concrete terms means requiring both, socio-economic competency as well as working at the cutting edge of analytical and technical skills in development. There is a great need for a programme where church leaders as well as committed and engaged lay people can find the time and know-how to equip themselves with these skills to take ownership of the social development agenda and to become effective in advocacy work. It does not help to only have development consultants from outside the church, but the technical and professional developmental insights need to be instilled and applied right in the churches.

3. Activities

The following three main programme components are envisaged:

1. **Capacity Building:** Through intensive 4 to 6 week courses small groups of church leaders and committed laity will be professionally trained in social development. The courses will cover the economic and sociological background for development, as well as applied practical training based on concrete and specific needs of our context. These courses will make use of external resource people and experts, if need be. The main focus of such training is poverty and development, economic literacy and advocacy work, but it will also address concrete needs in training like computer skills and proposal and report writing, which are increasingly needed in today's environment in order to be effective.
2. **Development:** TARA will engage in and train people to do participatory research, compile common quantitative research agendas and publish findings. Based on this, prophetic action and advocacy should be promoted by local research and advocacy teams, the churches and the Institute itself. The development experts will provide local and regional support for the teams during this process.
3. **Theological Reflection:** TARA will engage in biblical and systematic theological analysis of and for the development agenda. This will help to define and guide the public role of churches as well as develop material for development work within the churches.

A total of 2-3 intensive courses (each involving a combination of all three programme components) per year are envisaged. The duration and frequency of the courses will be such that church co-workers in their current jobs can attend them, without having to vacate their jobs. Unlike formal university education, TARA intends to directly link up to people's continuous church work. Besides course work, the staff of the Institute will provide support and professional back up for research and development

programmes in the churches.

While the national contexts sometimes differ substantially, the question of structural poverty and economic security is cutting across the continent and the Institute will, through a participatory process with the churches involved, identify common areas. At the same time, the specific context of the country and topical debates in society will be accommodated as far as possible.

By reflecting the development agenda in the light of a thorough biblical and systematic-theological analysis and by developing corresponding material, the Institute hopes to make a contribution towards defining and guiding the public role of churches.

When taking into account the effects of structural poverty and fighting against it, TARA will follow a gender-sensitive approach: The focus on economic security, comprising income, health, food, political awareness etc. is paramount at first for addressing the practical and basic needs of women and children, while also taking account of the role of men in this process. The capacity building and training courses will likewise be gender-sensitive in terms of participants as well as in terms of staff and resource persons, thus empowering women as well as men through skills transfer and continuing education of leadership.

4. Outline of Curriculum

The curriculum will consist of core modules with basic social development and contextual theology theory as well as research methodology⁸. Besides this, topical modules will be included and developed with external expertise, similar to a college. The nature of social action research requires to revise and adapt the curriculum guided by the churches and communities involved and participating. The following modules or units therefore will be put together, adjusted, shortened and extended - depending on the participants and the actual social realities and needs at hand.

- **Basic social development theories**

Starting from perceptions on poverty, various definitions of poverty (e.g. relative vs absolute) are introduced and the application and limitations are discussed. Key is the understanding of poverty as a complex social phenomenon, which is by no means static or cast in stone, but always has to be questioned and linked to people's lives.

Behavioural and structural explanations of poverty and the dialectic of structure and agency are looked at, both in terms of a historic literature overview as well as linking it to the participants' experience.

The concept of insecurity, its origin, and strength and weakness are discussed. A special focus is given to income security and its links to e.g. job, health, political security.

Part of this module is the question of the state and power. This includes the role of the church versus the state.

- **Development economics**

Starting by looking at actual national budgets, key economic concepts are analysed, this includes free-market, interventionism, social spending, social investment, international trade, economic growth, inflation etc.

8 Compare the Research Manual developed for the ELCRN researchers (2004 and updated 2006).

Depending on the participants and their level of economic background, this will also include economic literacy, e.g. understanding and analysing tables and graphs and linking them to the social underlying realities.

- **Research methodology**

This module will start off with the question, why we do need research? It then contains a theoretical overview of research methodologies, key concepts and terminology e.g. insider vs outsider, qualitative vs quantitative, structured interviews vs participatory learning and action research.

It gives guidance of how to compile a research agenda: From the analytical framework, to choosing the research methodology to a plan of action derived from the research results.

Important issues of any data capturing are debated e.g. what is a true reflection of social reality, how not to jump to conclusion. This also emphasises research ethics like confidentiality as well as accountability and transparency of results and actions.

- **Classic qualitative and quantitative research methodologies**

Different tools of qualitative research are explored like structured interviews, case studies etc, including theoretical and practical background of it, like choosing key informants, structuring interviews, recording and transcription, compilation of qualitative research results etc.

In quantitative research, the design of Household Questionnaires, data collection, data entry, data verification, data analysis, visualisation of results will be taught. Depending on the statistical background of the participants, this section includes training in statistical analysis, from a basic level working with counts, percentages and averages in CALC and EXCEL to more advanced statistical analysis introduction and training in SPSS and STATA.

The qualitative and quantitative research of the BIG Pilot Project bears reference.

- **Participatory Research Methodology**

Starting with Paulo Freire's *Pedagogy of the Oppressed* and the Southern African adaptation *Training for Transformation*, key participatory research methodologies and their application are introduced (listening surveys, case studies etc.). Participatory bible studies are included in this section. The participatory bible studies done by the BIG Coalition in Namibia following the methodology of Gerald West's *The Academy of the Poor* bear reference. This module includes also methodologies like budget tracking or the monitoring of a “food basket” like successfully implemented by the Jesuit Centre for Theological Research in Zambia while monitoring the implementation of structural adjustment policies. Furthermore the project evaluation of the ELCRN hostels serves as an applied example of how to actively incorporate stakeholders, including children, in participatory research.

- **Scenario Planning and Microsimulation**

This module introduces basic techniques of scenario planning. *The Mont Fleur Scenarios*, which played a pivotal role in sketching scenarios of transition for South Africa in 1991, give a practical example, how this technique can help to move beyond political ideologies and normative debates, towards creative and consensus building solutions.

Microsimulation techniques are taught to inform creative as well as realistic social and economic scenarios. The level can range from simply linked cells in a spreadsheet programme to complex microsimulation models based on national household survey data. The first application of microsimulation technique in the developing world, as developed during the civil society campaign for a child support grant in South Africa, by Claudia and Dirk Haarmann 1996 to 2000, can illustrate the relevance in social policy development. It further illustrates the mutual dependency between action research and campaign.

- **Report writing**

Naturally, research is only effective if results and outcomes are properly compiled. Training in report writing, illustration and publication is key. With a huge skills deficit in this area, the emphasis is to work with participants from their current level. The focus will be on taking ownership and developing writing skills and coping mechanisms in a highly technical environment. This includes computer literacy in word processing, presentations, mind-mapping and spreadsheet applications.

Depending on the need proposal writing and reports to donors will be included.

- **Advocacy and lobby work**

This module covers applied advocacy and lobby work strategies e.g. strategic networking, planning of an advocacy campaign, approaching decision makers, working with regional and national government, the use of pilot projects

The Institute will explore accreditation options of its courses.

5. Way Forward

Since April 2010, TARA has been set-up in Namibia as an affiliate to LUCSA and will be registered as an independent non-profit organisation, governed and given directions by a Board. The Board will consist of (but is not limited to) committed experts from within African churches/bodies (like e.g. LUCSA), experts from outside, and partners and funders of the Institute.

Currently, the Institute is staffed with Rev. Dr. Claudia & Rev. Dr. Dirk Haarmann, with 1.5 positions. The salaries are covered by the Evangelical Development Service (EED) and the Evangelical Lutheran Mission in Hermannsburg. For the first 12 months, TARA receives funding from VELKD and LUCSA for the planned activities.

During this first 12 months, TARA plans to be setting-up and developing its focuses and content of the courses for the next year. The identification of the focuses will be based on the experience, agendas and activities of the Churches. TARA therefore embarks on this visitation programme to the Churches in order to introduce the Institute, but more importantly to learn from the Churches about their activities and challenges in the development field and consult and discuss focus areas for capacity building, research and advocacy.

TARA is looking forward to being of service to the churches in Southern Africa.