

# Partnership and Capacity Strengthening Case Study: Caritas India

**KEY PERFORMANCE INDICATOR:** Number of Documented Examples Where Local Partner Capacity Was Strengthened as a Result of Significant Contributions by CRS<sup>1</sup>

## Partnership and Capacity Strengthening Background

CRS began operations in India in 1962 with the establishment of Caritas India. CRS and Caritas focus on emergency relief and disaster response, anti-trafficking and livelihood programs. CRS funds these projects and strengthens Caritas India's organizational capacity to implement projects effectively. CRS views Caritas India as a long-term strategic partner. Caritas, in turn, describes the relationship with CRS as "co-travelers on a journey together."

This case study showcases CRS' wide-ranging capacity strengthening (CS) activities to support Caritas India to develop and implement systems and processes, including strategic planning. In fiscal year 2021 (FY21), CRS provided support at varying degrees to multiple levels of the Caritas India network: national Caritas, 14 regional forums, and 175 diocesan social service societies.<sup>2</sup> The strategic priorities of CI guide the partnership. Due to COVID-19, partners postponed elements of the CS work and other activities. Caritas expressed appreciation for CRS' flexibility in extending deadlines and conducting remote training: "The partnership is very much flexible and open and partner driven."

Formal discussions affirmed the long-standing relationship; both partners perceived CS as mutually beneficial, productive, and positive. "It is growing and stands for

**Partner:** Caritas India (CI)

**Project name:** India Delhi Forum Support

**Area:** Development

**Funded by:** CRS

**Duration:** 12 months

**Fiscal year:** 2021


**Capacity Assessment Tool:** Formal Discussions on Capacity by CRS in India (CRS) With Caritas India (Caritas)

**CS approaches applied:\*** Institutional Strengthening, Capacity Building and Accompaniment

\* CRS CS approaches are explained here <https://ics.crs.org/resource/overview-crs-comprehensive-approach-partnership-and-capacity-strengthening>

<sup>1</sup> [Resources for Cross-cutting Indicators \(sharepoint.com\)](#)

<sup>2</sup> Regional forums and diocesan social service societies function as independent entities as the social work units under the regional bishops' council and the dioceses respectively.



strong ties,” says a CRS staff member. The partnership has contributed significantly to tangible outcomes for the organizational capacity of Caritas India’s entire network and the communities it serves. “CRS brings in a lot of experiences of other countries, which is helpful,” a Caritas staff member says.

## What Capacity was Strengthened in FY21

In FY21, CRS collaborated with Caritas to strengthen capacity in four primary areas.<sup>3</sup> CRS in India funded CS activities implemented by Caritas India and provided capacity strengthening support through training and accompaniment.

- **Staff orientation and development.** Staff development programs (SDPs) began in 2019. In July 2021, staff training continued in work ethics, catholic social teaching (CST) and interpersonal relations. Caritas identified staff needs and CRS developed training manuals accordingly. Caritas highly valued staff orientation and trainings as key pillars of human resource management. Staff training addressed organizational values, expectations related to work ethics and cultural perspectives, and self-performance.
- **Safeguarding policy.** CRS and Caritas initiated discussions on safeguarding as an agency priority. A consultant designed the policy, which Caritas plans to roll out to different levels of its network. In FY21, Caritas submitted the roll out plan to CRS for funding and capacity strengthening support. Caritas called the process “hand-holding.” A Caritas staff member says, “CRS has contributed in building an enabling environment within our organization where we are looking at critical issues such as safeguarding and taking it forward in terms of policies and also sensitizing our own staff on those issues.”
- **Key strategic pillars implementation.** CRS continued supporting the implementation of Caritas India’s five-year strategic plan. CRS assisted with the rollout through network-wide staff training, orientation, and dialogue on strategic priorities. These efforts enabled the implementation of a separate COVID-19 project. Caritas described CRS staff as “very polite, very approachable and that makes us feel confident to basically express our needs for capacity strengthening.”
- **Emergency response (July-December 2021).** CRS and Caritas responded to the pandemic through a project in risk communication and community engagement (RCCE). The initiative leveraged the existing volunteer platform to reach communities. Caritas said the joint venture was valuable to both organizations as they learned together throughout the process. Project approaches were shared with regional forums and volunteers through CRS’s support. CRS trained volunteers, oriented forum staff, developed audio-visual materials and educated communities on COVID-19 response. CRS also supported Caritas in assessing the COVID-19 project, which served to further reinforce Caritas’ expertise in research methods and MEAL processes and procedures.

## How CRS Strengthened Capacity

Examples of CS activities conducted by CRS’ India staff in FY21 included:

- Shared ideas and concepts, for instance, on RCCE and safeguarding.
- Shared guidelines and advice, such as MEAL.
- Accompanied the partner during study and research, including a study of COVID-19 impact on food security and livelihoods.
- Conducted staff training (design, execution, pre- and post-training evaluation), such as CST.
- Conducted orientations with many levels of staff on various topics, for example, leaders and coordinators on resource mobilization.

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<sup>3</sup> There were other areas of CS, such as support with Caritas India signature programming areas, e.g., orientation and targeting in child focus. However, the above areas were specifically highlighted by the majority of interviewees.

## What was the Outcome of the Capacity Strengthening in FY21

CRS and Caritas staff highlighted multiple examples of success. The partners believed that the positive outcomes are built upon the long history of PCS work, which they believe will inform future results.

- **Progress with strategic plan implementation.** CRS supported Caritas strategy rollout through internal meetings and staff training on the four strategic pillars, reaching about 50,000 volunteers. As a result, there is a collective understanding of the strategic plan by the staff on different levels, including field-level staff. “CRS’s support was very, very instrumental,” a Caritas staff member says.
- **More skilled and motivated staff.** Caritas staff became knowledgeable about the extent of the Church and Caritas involvement in communities and their roles and responsibilities. RCCE project staff learned how to leverage social media for information campaigns and train volunteers with varying skill levels around technology. Staff also learned strategies to overcome language barriers.
- **Stronger volunteer engagement and resource mobilization capacity.** In FY21, 3,226,178 families and 8,192 volunteers engaged with the RCCE project.<sup>4</sup> Caritas expressed pride in successfully managing the work of a high number of volunteers. In turn, CRS applauded Caritas India for effectively reaching a large population with cost savings due to social media.

## Lessons and Advice for Capacity Strengthening

Numerous factors enabled the success of CS, including:

- Having good rapport among the leadership of both organizations.
- Communicating regularly through management meetings and coordination calls.
- Having frequent interactions (both virtual and on-site) to address challenges in communication, such as organizing meetings weekly.
- Listening to each other’s opinions and needs.
- Learning by doing.
- Targeting Caritas India and its entire network: regional forums (through the regional bishops councils) and diocesan social work units. Both CRS and Caritas India stressed the partnership as broad-based and strategic.
- Collaborating daily.
- Sharing openly views, challenges and perspectives. Raising concerns and trying to find solutions together create trust.
- Being open to accompaniment from CRS, particularly by sharing guidelines and know-how and introducing new concepts. Caritas India perceived CRS as an approachable partner who promptly addressed CS needs, increasing Caritas’ confidence in asking questions and requesting support.

## Gathering trainees’ feedback on training and incorporating such input in the training modules and processes to address trainees’ needs better.

### Advice for improvement:

- Prioritize staff motivation and retention of middle-level staff
- Support trainees’ mastery of newly acquired skills and learning; provide accompaniment to address the challenges in applying knowledge and skills.
- Follow up on action plans (successes and challenges) and provide refresher training.
- Engage in structured processes for PCS feedback.
- At the start of CS, clarify scope, roles and responsibilities.

<sup>4</sup> This program involved 14 regional forums and 165 dioceses across India.

## Vision for the future of this partnership

Caritas India aspires to strengthen its primary focus on emergency response by continuing its long-term partnership with CRS and leveraging the strengths of the sizeable Caritas International confederation. Caritas plans to bolster systems and processes, such as MEAL and resource mobilization, and continue progress in implementing key strategic priorities by also conducting capacity strengthening of the network partners.

CRS' country program in India, which views Caritas as a leader in emergency response, plans to continue policy and systems support, emergency response capacity strengthening, and prime readiness. CRS plans to actively support the aspiration of Caritas India as a leader in the larger humanitarian response community and local communities. Caritas commented: "Together, we are more. It's not about who is bigger, who is smaller. It's about traveling together for a common mission."

## Looking ahead

CRS will start documenting the process and outcomes of capacity strengthening, including accompaniment. The documentation will include the structured process of identification of capacity priorities as well as planning to address those priorities. CRS will also document the results of the capacity strengthening.

CRS intends to clarify the roles and responsibilities within capacity strengthening. CRS will address with Caritas the handing over processes of capacity strengthening activities. The sustainability lens will be applied to all capacity strengthening initiatives—from the beginning until the end of the cycle. Co-designing and co-facilitating the capacity strengthening activities will serve as key approaches for ensuring a strong sense of ownership and continuity. As Caritas independently designs and facilitates CS activities, CRS will accompany Caritas India to ensure further improvement. Training of trainers will serve as another technique to continue support with staff orientation and development and the implementation of key strategic pillars.

CRS will continue supporting Caritas India in its journey to becoming more robust in emergency response through the EMPOWER Asia initiative and ALLRight Funds. CRS also plans to support Caritas and regional forums in fine-tuning the safeguarding policy from a functional standpoint.

## Evidence

- Pre- and post-training results on Module 1 (work ethics, CST and interpersonal relations) and a summary on the SDP, Module 1, which mentions the role of CRS in conducting the trainings.
- Caritas India's website provides an article on the RCCE project that lauds the CRS partnership and mutuality in collaboration.