



A Diocesan Caritas Toolkit

This toolkit has been produced by Caritas Social Action Network (CSAN) in collaboration with our diocesan Caritas members. The CSAN office team is grateful to the following for their contributions and support. The toolkit is a practical example of solidarity in action.

Caritas Archdiocese of Birmingham

Caritas Archdiocese of Westminster

Caritas Middlesbrough

Caritas Portsmouth

Caritas Salford

Caritas Shrewsbury

Nugent Care (Caritas Archdiocese of Liverpool)

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1. Why create a Caritas organisation in your diocese?

I. Introduction: the Church's Mission

During his public life Jesus proclaimed the good news of the Kingdom of God, carried out signs which became the Church's sacraments and healed people of their ills. He called his followers to love one another and to serve those in need. Through parables such as the Good Samaritan he taught his disciples the meaning of love for neighbour. Caritas means the Christian love for humankind, expressed through the practical service of those in need. Pope Benedict XVI's wrote in his apostolic letter "On the Service of Charity":

"The Church's deepest nature is expressed in her three-fold responsibility: of proclaiming the word of God, celebrating the sacraments and exercising the ministry of charity. These duties presuppose each other and are inseparable"¹

So caritas, the loving service of those in need, is an indispensable part of what it means to follow Christ and to be a Catholic. Caritas organisations exist to help us put this into action.

II. To improve the organisation and integration of Catholic social action

In the same apostolic letter Pope Benedict described how he wanted the Church's charitable mission to be organised:

"Wherever necessary, due to the number and variety of initiatives, the diocesan Bishop is to establish in the Church entrusted to his care an Office to direct and coordinate the service of charity in his name. The Bishop is to encourage in every parish of his territory the creation of a local Caritas service or a similar body, which will also promote in the whole community educational activities aimed at fostering a spirit of sharing and authentic charity."

In England and Wales we have long had a Caritas organisation which works abroad, CAFOD. More recently Caritas Social Action Network was established as an agency of the Catholic Bishops' Conference of England and Wales in order to support, coordinate and develop Catholic social action in our home nations. CAFOD and CSAN work together to deliver the social action mission of the Church.

We also have many excellent national Catholic charities like the SVP and Apostleship of Sea which work in England and Wales. There are also many wonderful individuals,

¹ Deus Caritas Est, 25

parishes, communities and local Catholic charities involved in social action or the Justice and Peace Network. However, until recently, we have not had Caritas organisations in dioceses. This is now happening and the benefits are becoming apparent. These include better integration of programmes and initiatives, mutual support for those involved and the more active involvement of parishes, schools and communities. However the most important benefit is the increased support to those in need and so a greater contribution to the common good of society.

III. To provide witness to the world and proclaim the Gospel

For Christians when we serve the poor and vulnerable we are serving Christ. Pope Benedict reminded those involved in Catholic social action that for us when we encounter those in need we encounter Christ:

“It is important, however, to keep in mind that “practical activity will always be insufficient, unless it visibly expresses a love for man, a love nourished by an encounter with Christ” In carrying out their charitable activity, therefore, the various Catholic organizations should not limit themselves merely to collecting and distributing funds, but should show special concern for individuals in need and exercise a valuable educational function within the Christian community, helping people to appreciate the importance of sharing, respect and love in the spirit of the Gospel of Christ.”

Because of this, for Christians social action is an important way of proclaiming the Gospel. When we do this as part of Caritas we do so as part of the Church and demonstrate to the world the love of Christ for all humanity, particularly for those excluded or neglected by society.

IV. To be part of the Caritas Family

Inspired by the Gospel, Caritas is the helping hand of the universal Church, reaching out to the poor, vulnerable and excluded, regardless of race or religion, to build a world based on justice and fraternal love.

Every diocesan Caritas organisation is part of the global Caritas family. In England and Wales this is through membership of Caritas Social Action Network (CSAN), the social action arm of the Catholic Church in England and Wales. CSAN is an agency of the Catholic Bishops' Conference and an independent charity and provides its members with policy analysis, advocacy, media voice and networking support. The Caritas family in England and Wales includes the CSAN members, a network of over forty member charities, religious congregations and diocesan Caritas agencies. Our membership is diverse, from small groups of volunteers to big national charities, and this is a strength.

Through CSAN, diocesan Caritas organisations are part of Caritas Internationalis which has its headquarters in Rome and co-ordinates emergency operations, formulates development policy and advocates for a better world for everyone. CSAN is also a

member of Caritas Europa, the regional Caritas network. In England and Wales CSAN works in close partnership with our Caritas sister agency CAFOD.

Since the founding of the first Caritas in Germany in 1897 Caritas organisations have a rich history of listening respectfully to the suffering of the poor and giving them the tools to transform their own lives. The deep moral and spiritual principles of dignity, justice, solidarity and stewardship still guide Caritas today.

V. How to decide if Caritas is right for your diocese

The decision whether or not to have a diocesan Caritas organisation is one which can only be taken by the Bishop of the diocese. The Bishop may ask for advice from others. In order to give him the best advice it may be worth carrying out a “SWOT” analysis. This involves asking:

- Strengths: what benefits would a diocesan Caritas bring?
- Weaknesses: what disadvantages are there?
- Opportunities: what opportunities do we have in our diocese?
- Threats: what problems would we face?

If the Bishop decides to form a Caritas organisation there is then the question of what type of organisation to create. Each diocese is different, so it is important to discern the best possible model for each diocese. Examples of a variety of models are provided in Section 4 of this Toolkit. It may be useful to have an awayday of the Caritas team within the diocese to consider the options. CSAN can help facilitate this.

2. The Diocesan Caritas Journey Programme

I. Aims of the programme

The Diocesan Caritas Journey Programme is the way that CSAN supports dioceses as they develop their Caritas organisations. We aim to include dioceses with established Caritas organisations as well as dioceses which are just starting out.

Important milestones on that journey are the meetings which occur every six months. At these meetings the dioceses on the journey can share their experiences, learn from each other and provide mutual support. Between meetings diocesan representatives are welcome to contact CSAN or other dioceses for individual support as needed. A list of contacts is provided in Section 5 of this Toolkit.

II. Journey Meetings: what happens and who should take part?

Caritas Diocesan Journey meetings involve prayer, reflection on progress, mutual support, sharing of resources, expert contributions from dioceses with relevant experience and action planning. An example of an agenda can be found in Appendix A. There is usually a mixture of small group work, presentations and plenary sessions. The format is informal and interactive. Those who have participated in the meetings have found them encouraging and energising.

We suggest that the Bishop asks two or three representatives attend from the diocese. These might include:

- A member of the clergy with an interest in social action
- A member of the diocesan Justice and Peace organisation
- A person involved in social action in the diocese, either through a parish or a charity such as the St Vincent de Paul Society (SVP) or a Society such as the Columban Missionaries

It is important that the outcomes of meetings are reported back to the diocesan Bishop so that he is updated about the progress within his diocese.

III. Actions between meetings

At the end of each meeting representatives are asked to make an action plan for the next six months. In the early stages this may simply be to feed back progress to the Bishop and to other interested parties in the diocese. Later on there may be more detailed plans. However it is important that participants do not feel over-whelmed and so plans should be “SMART”: Specific, Measureable, Achievable, Realistic and Time-limited. An example of such a “SMART” template can be found in Appendix B.

It may also be useful to create a Caritas Journey timeline for your diocese. This can be a useful way of recording progress. An example of such a timeline with suggested milestones can be found in Appendix C.

IV. Solidarity and subsidiarity

CSAN is a national agency of the Catholic Bishops’ Conference of England and Wales, but within the Catholic Church the diocese is the key structure. CSAN has a small national office. It cannot do all the work alone so it needs the support and involvement of the established Caritas organisations. This Toolkit and the Caritas Diocesan Journey meetings are practical examples of this solidarity.

Within Catholic Social Teaching subsidiarity means that decisions are taken as locally as possible. Decisions about the development of Caritas within a diocese can only be taken by the diocesan bishop, advised by those he chooses. Because every diocese is different the forms of diocesan structure adopted may vary, although they remain united in their mission. Examples of different models can be found in Section 4 of this Toolkit. There is no “one size fits all model” and no “top down” pressure to conform to a particular model.

Subsidiarity does not mean that every diocese is an island. The experience of the Caritas Diocesan Journey programme is that by working together we can become more effective. Participants have found that the more they put in the more they receive. Hopefully this will continue to be the experience.

3. Holding a Caritas Diocesan Roadshow or other consultation event

I. What is a Roadshow?

A Roadshow is a diocesan event which brings together people and organisations working in the diocese on social action. The event enables these stakeholders to discuss how they might better work together and how a diocesan Caritas organisation might support their work. The event is usually organised jointly by CSAN and whoever is leading the Caritas development in the diocese. The hope is that by the end of the day there will be a clear direction of travel and an agreed plan will have been created.

Some dioceses have chosen not to hold a Roadshow but rather another form of diocesan consultation. For example Portsmouth Diocese held a diocesan consultation in May 2015 to inform the way in which Caritas would operate. There was a clear message that in the main Caritas needed to operate at a parish level, with governance of individual projects remaining with the individual priests and the parish finance committees. However, there was a clearly articulated need for a variety of support with projects from a central 'light touch' organisation.

Not every diocese decides to hold a Roadshow. For example the Diocese of Portsmouth used a diocesan wide consultation in which various stakeholder groups were asked to 'imagine' a future Caritas. An outline of the model used is in Appendix D below.

II. Identifying key stakeholders

The support of the Bishop is essential. He will be ultimately responsible for any diocesan Caritas agency which may be created, so it is vital that he is supportive of the day. It is essential to involve a senior member of the diocesan clergy in planning the day. This may be a Vicar General or a member of the Bishop's Council.

Other important partners will include the diocesan Justice and Peace organisation, the SVP, volunteers from local and national Catholic charities, parish groups, religious communities in the diocese like the Columban Missionaries and other committed people.

III. Planning the day

It may be helpful to set up a steering group to organise the day. CSAN is keen to be involved in the steering group meetings and can provide help, practical support and guidance along the way. This enables us to develop strong relationships for the future.



Among the things that need to be considered are: aims of the day, who should be invited, likely numbers of attendees, venue, format and agenda, facilitation, recording of the discussion and plans for follow up.

IV. On the day

CSAN staff can assist the diocesan team with running the day. The most recent Roadshow was held in Shrewsbury. Details of the event can be found in Section 4 II of this Toolkit.

Mary Kilcoyne (Caritas Diocese of Shrewsbury) comments:

“From my own experience I think CSAN must be involved from day one in order to build up good partnerships by attending meetings with different groups. Involving the CSAN team in pre-event meetings, the core planning team and on the day were key factors in the success of our day”

V. After the day

In many ways the most important part of the event takes place afterwards. Clear plans need to be made to provide feedback to the Bishop and to the diocese more widely. CSAN and existing Caritas agencies can support the process as it moves along. CSAN can help with formulating these plans.

Just as between the Caritas Diocesan Journey meetings it is important that participants do not feel over-whelmed and so plans should be “SMART”: Specific, Measureable, Achievable, Realistic and Time-limited. An example of such a “SMART” template can be found in Appendix B.

It may also be useful to create a Caritas Journey timeline for your diocese. This can be a useful way of recording progress. An example of such a timeline with suggested milestones can be found in Appendix C.

4. Diocesan Caritas models

As the examples below demonstrate there are a wide variety of existing models and more will develop depending on the history, geography, population and plans of each diocese.

I. An existing Catholic agency takes on the diocesan Caritas role

In Merseyside Nugent Care is the official caring service of the Archdiocese of Liverpool and has been in existence for over 135 years. Although it is a legally separate entity from the Archdiocese, its Charitable Deed states that Nugent Care will offer services in accordance with the Roman Catholic Foundation of the Charity. Its Caritas work includes ecumenical work and all services are open to people of all faiths and none. For example, Nugent Care provides a programme called 'Welcoming the Stranger' which works with Asylum Seekers and is a joint initiative with the Church of England.

II. Diocesan Caritas works alongside an existing Catholic agency e.g. Birmingham

In the Archdiocese of Birmingham Caritas was established to bring together and support all Catholic social action initiatives in the Archdiocese. It was recognised that there are many agencies in the Archdiocese that have been originally Catholic and remain inspired by or influenced by the Gospel and Catholic social teaching but now are partnership projects. There are three types of membership to reflect this diversity:

- Full Membership is for those organisations (including parishes) which have Episcopal approval to carry out social action or care in the name of the Catholic Church in this Archdiocese.
- Associate membership is for those organisations which have originated from or been inspired by the Gospel and Catholic Social Teaching from a Catholic parish or organisation, Catholic Schools or Catholic individual/s or group/s and which do not require the approval of the Archbishop for their work. Associate membership is available to Christian or Faith organisations involved in Social Action.
- Friends of Caritas membership is for organisations or individuals who are attracted to the Caritas vision of Social care and wish to share in this in some way.

Father Hudson's Care is the social care agency of the Catholic Archdiocese of Birmingham, a charity registered in England and Wales and a private company limited by guarantee. It is a member of Caritas, provides secretariat services for the network and is involved in the Caritas Executive Committee.

III. Diocesan Caritas combines professionally led agencies and parish voluntary action

Caritas Westminster is the Archdiocese's social action agency. It promotes parish-based social action through providing local support to new and existing parish-based social initiatives, establishing partnerships with local and national organisations and developing resources for



parish priests and volunteers. It is the umbrella organisation for a lifelong learning school for people with intellectual disabilities, a service for the Deaf Community and a refuge for women escaping human trafficking. It also provides grants for parish-based social action initiatives and for individuals in need.

In Westminster the Caritas Advisory Board is delegated with the responsibility of supporting the work of Caritas on behalf of the Archbishop's Council and the board of Westminster Roman Catholic Diocesan Trust (WRCDT) trustees.

Caritas Diocese of Salford is the official charity of the diocese and is co-located in the Diocesan offices and chaired by the Bishop. Caritas Salford is made from joining up well-established charities in the Diocese, merging to bring forward the work of each. These include Catholic Children's Rescue Society, Catholic Welfare Societies, St Joseph's Mission to the Deaf, Catholic Family Care, Justice and Peace and Racial Justice. Caritas Salford also encourages and supports parish and community involvement in charitable activities.

IV. Diocesan Caritas networks parish and community social action in partnership with local charities e.g. Middlesbrough

Caritas Diocese of Middlesbrough consists of a core group of members of the Diocese who volunteer with a range of social action charities and groups working in Catholic, ecumenical, interfaith and secular partnerships. It is part of the Episcopal Vicariate for Christian Discipleship and seeks build a network supporting and encouraging the practical expression of Catholic Social Teaching.

V. Diocesan Caritas uses a community development model to enable development of projects in parishes and schools

Caritas Diocese of Portsmouth is part of the diocesan structure within the Department for New Evangelisation. It exists to enable the support, teaching, promotion, ordering and organising of caritas as a constitutive element of the Church within the parishes, schools, pastoral areas and deaneries of the diocese. All the projects promoted are firmly rooted in Catholic Social Teaching. Governance of individual projects remains with the individual priests and the parish finance committees. The diocesan Caritas organisation provides a variety of support to projects from a central 'light touch' organisation.

4. Helpful documents and resources

I. Examples of documents

Mission, vision and values statements

[Caritas Internationalis](#)

[Caritas Europa](#)

[CAFOD](#)

Caritas Social Action Network (in progress)

[Caritas Archdiocese of Birmingham](#)

[Caritas Diocese of Portsmouth](#)

[Caritas Archdiocese of Westminster](#)

[Nugent Care \(Archdiocese of Liverpool\)](#)

Constitutions, strategies, partnership documents

[Caritas Archdiocese of Birmingham](#) - constitution

[Caritas Archdiocese of Westminster](#) - structure

Other useful documents

[Statutes and Rules of Caritas Internationalis](#) (after the first few pages it's in English!)

II. Templates

SWOT analysis template (Appendix A)

SMART plan template (Appendix B)

Caritas Diocesan timeline (Appendix C)

Portsmouth Caritas diocesan consultation (Appendix D)

III. Catholic Social Teaching resources

[Love in Action](#)

A CST resource for parishes produced by Caritas Archdiocese of Westminster

[Caritas in Action](#)

A CST resource for schools produced by Caritas Diocese of Salford

[CST resources](#)

Faith in a Better World website

IV. Important Church documents

[Intima Ecclesiae Natura](#)

Pope Benedict XVI apostolic letter on the organisation of the Church's charitable mission (2012). A crucial document for diocesan Caritas agencies.

[Rerum Novarum](#)

Pope Leo XIII's encyclical, the founding document of modern Catholic Social Teaching (1891)

[Populorum Progressio](#)

Pope Paul VI's encyclical on global development (1967)

[Centesimus Annus](#)

Pope John Paul II's encyclical reflecting on a century of social change since Rerum Novarum

[Catechism of the Catholic Church](#)

The authoritative guide to the Church's teaching (1993)

[The Common Good](#)

An important statement of the Catholic Bishops of England & Wales (1996)

[Compendium of Social Doctrine of the Catholic Church](#)

The summary of the Church's social teaching (2004)

[Deus Caritas Est](#)

Pope Benedict XVI's encyclical on Christian love (2005)

[Caritas in Veritate](#)

Benedict XVI's encyclical on love, truth and charity (2009)

[Evangelii Gaudium](#)

Pope Francis' apostolic exhortation on the Church's evangelical mission (2013)

[Laudato Si](#)

Pope Francis' encyclical on our common home (2015)

[DOCAT](#)

The Church's social teaching in the YOUCAT format (2016)

Appendix A: Deciding to create a diocesan Caritas agency

Introduction

Forming a diocesan Caritas agency is a considerable commitment. Carrying out an analysis of the diocese’s strengths and weaknesses as well as identifying opportunities and threats can be a useful aid to making the right decision and finding the right model for your diocese. Strengths and weaknesses are internal to the diocese, opportunities and threats are from outside.

This template can be adapted for use.

Name:
What strengths do we have that will help us form a Caritas agency?
1
2
3
What weaknesses do we have that could prevent our success?
1
2
3
What opportunities would a Caritas agency provide for us?
1
2
3
Are there any threats to making this happen?
1
2
3

The SWOT leads on to four more questions:

- **How can we build on our strengths?**
- **How can we address our weaknesses?**
- **What do we need to do to achieve the opportunities?**
- **What do we need to do to prevent the threats affecting us?**

Appendix B: Action planning

It can be easy for people to feel overwhelmed, particularly if your diocesan Caritas is volunteer led. It is important to break up the project into manageable tasks so that everyone knows what they are doing. Making sure that task is “SMART” is one way of doing this.

SMART Action Plan

- S** Be **Specific** about what you want to achieve, and make sure it’s agreed by everyone
- M** Have a clearly defined outcome and ensure this is **Measurable**
- A** Make sure it is an **Achievable** outcome
- R** Check that it is **Realistic**, taking account of time, ability and finances.
- T** Set yourself an achievable **Time** frame, set deadlines and milestones to check your progress.

Action	Specific	Measurable	Achievable	Realistic	Time	Person Responsible	Status
1.							
2.							
3.							

Appendix C: Timeline

The process of forming a diocesan Caritas agency may take many months or even a couple of years. It is easy to let deadline slip and that can cause frustration and delay. It may be useful to keep a timeline so everyone involved knows how far the process has come and what still needs doing. An example is below.

Task	Duration	Completed (Y/N)	Additional Comments
Consult with your Bishop to discuss the type of Diocesan Caritas model they would like set up	1 month		<ul style="list-style-type: none"> Conducting an initial SWOT analysis would be beneficial
Contact CSAN for assistance and support e.g. requesting any resources that are available	1-2 weeks		<ul style="list-style-type: none"> Best person to contact would be the CEO and/or Network Officer
Attend CSAN Caritas Journey meeting	1 day		<ul style="list-style-type: none"> Opportunity to connect with other Diocesan agencies which are at different points of the journey
Feedback to the Bishop and other relevant stakeholders following Caritas Journey meeting	1 day		<ul style="list-style-type: none"> Would be beneficial to create a spreadsheet of contacts of relevant stakeholders.
Devise an action plan and updated SWOT analysis based on the information provided at Caritas Journey meeting and consultation with appropriate stakeholders	2 weeks		
Organise a Caritas Roadshow			Recommended to start planning 7 months in advance
Complete an evaluation of your Caritas roadshow			KPIs include: <ul style="list-style-type: none"> How many local and national charities were represented? Was there sufficient communication with parishes? Was the event adequately promoted?
Attend second CSAN Caritas Journey meeting			<ul style="list-style-type: none"> Share the successes and lessons learnt from your Caritas roadshow
Engage with your Bishop to inquire if they're happy with the progress being made	1-2 weeks		

Appendix D: Diocesan consultation

The Diocese of Portsmouth had no financial resources to put into a Caritas project. Thus to begin the work it was necessary for the Caritas Development Group to build a sufficient interest within the diocese to provide a platform to support initial Caritas development. This was done through a diocesan wide consultation in which various stakeholder groups were asked to 'imagine' a future Caritas. An outline of the model used is below.

The information collected was written up and analysed. Caritas development has been carried out with regard to the consultation. The direction of travel will be evaluated in year three of the four year development period. The aim is to build a fully sustainable organisation, with a light central infrastructure, which is capable of delivering a variety of projects in every parish.

OUTLINE OF POSSIBLE DIOCESAN CONSULTATION FOR CARITAS DEVELOPMENT

Pre consultation: Identify stakeholder groups: for example, Bishop's Council, diocesan trustees, deans/lead clergy, lay people, schools, youth and Catholic charities and aim to have roughly equal numbers of each group. All tasks are carried out in groups with feedback then being given to all present.

BUILDING A COMMON AGENDA

Exercise one: Focussing on the Present

The Purpose of this task is to build a collective picture of what is going on in our diocese, where the gaps might be and what major changes have taken place in the recent past

Method

Listing the issues with which we are all dealing

Listing how these might affect our diocesan community

Prioritising the most important of these issues

Mapping what we know about the issues we have prioritised and thinking about how these might change in the future.

Exercise two: Imagining the Future

The purpose of this task is to think critically, using the conversations from this morning, to think about what we are currently doing to address the issues we have highlighted – always taking responsibility for our actions.

- (i) what do we feel pleased that we are doing?
- (ii) what should we be feeling sorry that we are not doing?

As a group – highlight out three 'most pleased' and our three 'sorriest sorries' – feedback to the whole room.



How do we feel about this task?
Are there some common themes for this task?

Exercise Three: (over lunch break) a focus on the present

The purpose of this task is to be aware of the key social issues facing us.
Using newspapers/magazines for the last three months think about what has been in the news.

Exercise Four: Caritas Diocese of...

The purpose of this task is to imagine an organisation you believe in and wish to be involved in in three years' time...

In Stakeholder groups, describing Caritas 'Diocese of ...' (it is like...; we do...; etc); a brainstorm could be done – it is important for groups not to edit out suggestions at this stage.

Exercise Five: Our common ground

The purpose of this task is to reach a consensus on how we would like Caritas to look in 4+ years and to identify which issues need to be overcome.

Using a 'dot' or other method if required each participant is asked to mark the four (or more) 'suggestions' from Exercise Four that most fit their idea of Caritas.

The 6-8 highest scoring items are carried forward into...

Exercise 6: Planning the Future

The purpose is to decide on short and on long term action steps that will be needed to reach the common agenda. How will we recognise success?

Each group takes one/two items and thinks about

- (i) time scales (short, medium and long term) and time table
- (ii) action steps on areas of need
- (iii) next steps

FINALLY sheets are collected by facilitators and written up. The resulting document informs the way forward.

Forms to support this process are available from Caritas Portsmouth