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**Towards a *carescape*: Evidencing religious contributions  
to social welfare after the post-war consensus<sup>1</sup>**

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<sup>1</sup> The focus of this study is Christian forms of religion, institutions, networks, resources, skills and social welfare responses in the context of the changing governance, organisation and *carescapes* of social welfare.

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## Acknowledgments

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Here at Warwick, I am deeply and enduringly indebted to Professor Leslie J. Francis FAcSS for powerful encouragement from the outset combined with wisdom, skill, challenge, humour and not a small amount of kindness and patience. I have learnt so much and that's what I was hoping to do.

My thanks, too, to Professor Richard Hastings for academic hospitality at the Centre for Educational Development, Appraisal and Research. In the future I hope lockdown will not restrict access to so many conversations.

Anita, Rebecca, Sarah, Benedict and Luke and my parents deserve a special mention. Each has been incredibly supportive, collectively encouraging, cajoling, proofreading, commenting, and debating as we went. My parents, of course, arranged for me to be born in a missionary hospital, even today five hours drive from the capital, while they were working in the then recently independent Zambia. Seventeen years later they gave me G. H. Sabine's *History of Political Theory* just in time for *Faith in the City's* publication and *Live Aid*. Maybe it's all their fault? This dissertation and bundle of papers is dedicated to them.

Very especially also a shout out and additional dedication for Anita – a Warwick graduate herself – who is a rock, friend, and ally to whom I owe so much.

## **Declarations**

All the published work included here is entirely my own except for the one co-authored paper: Davis, F., Murangira, E. and Daenhardt, M. (2020). *Ageing in Rwanda: Challenges and opportunities for church, state and nation*, published by Tearfund and University of Birmingham. This submitted work is a collaboration where I was Principal Investigator, designed the study, played an active role in gathering data through the field research and was the principal author. A letter from funders and co-authors has been included at Appendix two.

This overall thesis and accompanying publications have not been submitted for examination at any other university and are submitted here only to the University of Warwick.

## **Abstract**

This thesis is a research contribution at the interface of public policy, (Christian) religion and empirical enquiry as a feature of political and social policy studies. It constitutes a focused and original analysis and critique of the justifying rationales and manner that various parts of the Christian religion mobilise to provide or facilitate social welfare in a variety of 'British', mainland European and African settings.

The context of the study was a period in which the everyday life of the state and the churches had been changed or was (and is) changing as the old bureaucratic hierarchies and welfare assumptions of the post-war period collapsed to be increasingly replaced by a new multi-layered world of constant re-invention and networked governance.

Combined the papers that comprise the thesis seek to address some of the misunderstandings, misrepresentations and oversimplifications made about social welfare agency by some church leaders and by some policymakers too in the new welfare arena.

In doing so they ultimately draw out insights that begin to identify a way that a new *carescape* can be actively assessed and enriched by evidence-informed analysis to enhance insight and social welfare practice. This enhancement could benefit several institutions and actors in societies, but especially help an understanding of (Christian) religion as it relates to social welfare after the post-war consensus.

## **List of published work included in Appendix three**

The following eight published works form the basis of the work on which this submission reflects:

### **Submitted work one**

Davis, F. (2001). A political economy of Catholicism. In N. Timms & K. Wilson (Eds.), *Governance and authority in the Roman Catholic Church: Beginning a conversation* (pp.103 -116). London: SPCK.

### **Submitted work two**

Davis, F. (2009). The demise of prophecy or the reinvention of governance? Faith and the welfare state. *Crucible*, Jan to March, 22-32.

### **Submitted work three**

Davis, F. (2009). Faith advocacy and the EU anti-poverty process: A case of Caritas. *Public Money and Management*, 29(6), 379-386.

### **Submitted work four**

Davis, F. (2009). Ideas, institutions and poverty reduction in the European Union: Questions for a theology of governance. *International Journal of Public Theology*, 3(1), 24-41.

### **Submitted work five**

Davis, F. (2011). Roman Catholicism and the welfare society: Catholic ideas and welfare institutions after Labour. In K. Chappell & F. Davis (Eds.), *Catholic social conscience: Reflection and action on Catholic social teaching* (pp.169-197). Leominster: Gracewing.

### **Submitted work six**

Davis, F. (2013). Social innovation and enterprise as a ground for the common good: The new inter-religious frontier. In D. Singleton (Ed.), *Faith with its sleeves rolled up* (pp.153-174). London: Faith Action.

### **Submitted work seven**

Davis, F. (2019). God, government, and religion as a feature of the economy and civil society: Insights from a fractious UK debate. In J. Creemers & H. Geybels (Eds.), *Religion and state in secular Europe today: Theoretical perspectives and case studies* (pp.151-168). Leuven: Peeters.

### **Submitted work eight**

Davis, F., Murangira, E., and Daenhardt, M. (2020). *Ageing in Rwanda: Challenges and opportunities for church, state, and nation*. Birmingham and London: Tearfund and University of Birmingham.



## **PART ONE: ESTABLISHING THE CONTEXT**

### **1.1 Context of the study**

At the outset I needed to understand the debates regarding the changing shape and role of welfare and the way Christian and other writers, leaders, and theorists were responding to them.

### **1.2 Christian social welfare leadership in ‘Britain’<sup>2</sup>: Struggling to make sense of a collapsing post-war consensus**

When *Faith in the City* was published in 1985<sup>3</sup> Plant (1989a) observed that its defence of the post-war welfare consensus, and the form of its critique of ‘injustice’, was already obsolete. While the Church’s leadership rejoiced in its ‘prophetic role’, Plant argued that they had missed the point of dominant neo-liberal rejections of inequality as an ‘unfreedom’ by inadequate assessment of the ideas shaping ‘Conservative capitalist’ trajectories (Plant 1989b; Plant 1989c).

Plant’s critique complemented significant studies of elite capture, failure to adapt and then subsequent collapse of the Keynes-Beveridge inspired post-war ‘British’ welfare ‘consensus’ which *Faith in the City* took for granted (Dunleavy, 1981; Giddens, 1994; Habermas, 1973/1988; Marquand, 1988). Indeed, Crouch (2004) later suggested the elite captures and social fractures delegitimizing the old welfare consensus were global trends constituting a new ‘post democracy’.

### **1.3 Re-inventing governance: A ‘new consensus’ begins to emerge**

In 1990 John Major became Prime Minister and embraced the ‘new public management’ (McLaughlin et al, 2002; Moore, 1987, 2012).<sup>4</sup> The 1990/1 NHS and Community Care Act enabled vast numbers of ‘independent providers’ to contribute to social welfare using resources previously in public monopoly control.<sup>5</sup> A new government Inner Cities Religious Council, was soon briefing churches on the ‘fundamental shift’ in governance of public

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<sup>2</sup> The welfare state has never been uniformly designed identically, even on its own terms, in the nations that make up Britain and NI. The churches, in turn, are not all organised along ‘British’ lines. A caution then is that many ‘English’ claims to Christian and other social thought discounted ‘Britain’, Northern Ireland, Wales and even the variety of classes and regions of each. See, for example, Pitt (1979), Archer (1986), Wakefield and Rooms (2016) and the work of Professor Duncan Forrester, and those around him, at the University of Edinburgh from 1978. See also Leech (1998).

<sup>3</sup> *Faith In the City* was published in the year I left school. The Church Urban Fund that grew from it funded my first job after university.

<sup>4</sup> Before *Faith in the City*, in a first, Michael Heseltine as Secretary of State had demanded management accounts and an organogram for his department (Heseltine, 1987; 2000).

<sup>5</sup> I wrote a briefing note on the new Act for The Marble Arch Trusts at that time and co-founded a social enterprise in response which grew by 2004 to 1000 staff. In 2007 it was DTI/The Observer social enterprise of the year.

service represented by ‘public service agreements’ across the institutions of state *and* society.<sup>6</sup>

Labour’s rising generation concurred. John Smith’s Commission on Social Justice accelerated that trajectory (IPPR, 2004) and ‘New Labour’ even more. Responsive services and welfare could no longer rely on ‘producer claims’ or their unique ‘ethos’ for legitimacy or ‘success’ (Osborne, 1992; Plant, 2003; Leadbetter, 1997; Le Grand, 1993, 2003; Barber, 2007; Diamond and Kenny, 2011).

Even on the Left simple alignment between a single strategy (or ethics) of securing welfare, consensus and social reality collapsed completely. (Elster et al, 1998). It became commonplace to speak both of a variety welfarisms and a similar variety of capitalisms (Amsden, 1979; Redding, 1990, 1994;).<sup>7</sup>

#### **1.4 The ‘new’ emerging evidence gap in church, government, and governance**

However, in the churches change still seemed misunderstood.

Plant’s critique of *Faith in the City* and related perspectives in political economy infuriated interlocutors in the then leadership of Church Action on Poverty (CAP)<sup>8</sup>. Others, for example from the ‘Manchester School’ of Christian social thought shared that concern (Brown, 2014; Davis, 2008; Sedgwick, 2018). Notwithstanding the pace of transformations, they remained attached to paradigms embedded in *Faith in the City* and similar ‘old consensus’ precepts. (Archbishops’ Council, 2006; BSR, 1986; CBCEW, 1996; Davis et al, 2007; Davis, 2011a).<sup>9</sup>

Moreover, they had not grasped that a convening and commissioning state was changing how, where, with whom, at what scale, in what manner, and with what ‘success’ criteria the churches’ own words and deeds regarding social welfare might now be assessed.

‘What worked’ and could be measured increasingly mattered in the policy realm (Benington, 2007; Davies et al, 2000;) rather than the systemic reach for a normative ‘Christian ethics’ or a speculative consideration of the ‘meaning’ of leadership choices. (Alford and Naughton, 2002; Brown, 2010).

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<sup>6</sup> I was among them (1993) as an Executive Member of the Churches Community Work Alliance for Britain and Ireland. The briefings were from Rev Chris Beales who had been seconded into government by the CofE. See also Davis (2008).

<sup>7</sup> Comparative capitalisms were a particular interest of Martin Jacques, the co-founder of the influential think tank DEMOS that in part grew from Marxism Today’s ‘New Times’ project.

<sup>8</sup> I interviewed the chair of CAP, Hilary Russell, at this time who was very defensive of CAP’s ‘Hearing the Cry of The Poor’ campaign which began with several claims ‘It must be wrong that...’ which confirmed Plant’s critique.

<sup>9</sup> In the period of this study (2001-2021) there was, according to Hansard (accessed Nov 2021) an average of 5 speeches per year from Bishops praising William Temple.

Instead, much Christian debate continued to take self-referential turns. Claims of intrinsic superiority were widespread (Hauerwas, 1981; Millbank, 1991) and have endured (Wells et al, 2017).<sup>10</sup> Deep confusion between the new approaches to public service innovation and previous phases of grant or contract funding to local church projects; and regarding ‘privatisation’ or (an undifferentiated) ‘capitalism’ were rife (Davis, 2008). Some held out for a return of the old consensus (Brown, 2020) while others advocated for engagement but only in the parts of politics that interested them (Spencer, 2014; True and Lloyd, 2017).

For example, taking Routledge’s journal *Political Theology* as a reference point, which claims a ‘canon’, its content defaults to articles with an extremely limited view of what constitutes the ‘political’ (True and Lloyd, 2017). *Political Theology*’s ‘canon’ and constituency is almost entirely expressed through ‘input’ factors such as values, advocacy, legislation, or inter-textual relations (Bradstock, 2007; Johnson, 2021; Reddie, 2018; Rowlands, 2019; Shank-Cruz, 2021).<sup>11</sup> The journal consequently excludes academic consideration of public leadership, governance and policymaking altogether.<sup>12</sup>

However, the new world of government and governance beyond the churches was beginning to face fresh confusions and omissions too.

Rather as public leadership, management and policy had been absent from ‘political theology’ it was becoming increasingly evident the (Christian) religious civic contribution was being held out of sight from public governance also. The absence of a ‘religion’ question in the UK census was one of many cases in point (Bari, 2018; Sheriff, 2011).

### **1.5 The need for fresh, focused, original and evidenced analysis at a time of flux: ‘Britain’ and beyond**

It would be necessary to (re)discover fresh data to record the civic contribution of the churches to social welfare, to make them more comprehensible to the new actors in public governance in all their diversity – and themselves also.

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<sup>10</sup> Richard Roberts observed that for all of its claims to innovation Millbank’s book had generated no interest among social scientists at all. See, Roberts (1993).

<sup>11</sup> A recent *Reader in Political Theology* almost entirely absents political writing from theology altogether (Phillips et al, 2021).

<sup>12</sup> At the end of this study – as at the start – *Political Theology* has no editorial board member from either public leadership, public management, or public policy. In its twenty years of publication, it has published only one article (Henriot, 2013) with either policy, public policy or public leadership or management in its title or as its main focus.

## **1.6 The eight submitted works: A focused and original analysis of a shared leadership challenge**

Consequently, the eight submitted works here comprise a study of the new public service realm broadly defined as (Christian) religion is encountered by it, and as it encounters (Christian) religion.

The works are chosen to reflect a consistent strand of my research and the various vantage points I had during the period of the study and so are flavoured in turn by professional roles in dioceses, civil society, academia, plus government at several levels and in several countries.

## **PART TWO: NEW EVIDENCE FOR NEW TIMES**

In this part I turn to the submitted works in turn.

### **2.1 Submitted work one: A new sociological imagination: Metaphors and metonyms**

#### **2.1.1 Title**

Davis, F. (2001). A political economy of Catholicism. In N. Timms & K. Wilson (Eds.), *Governance and authority in the Roman Catholic Church: Beginning a conversation* (pp.103 -116). London: SPCK.

#### **2.1.2 Elucidation of the research question**

The work is based on research in a diocese and a 'case' drawn up by consolidating research in several national church social welfare bodies.

Drawing on Morgan and Migdal it seeks to analyse and explore the extent to which participants in and around Catholic institutions in particular are in the habit of speaking and articulating their visions and ideas of themselves in one direction – or in competing directions – while believing themselves to be more uniform than they are.

#### **2.1.3 Summary of discussion**

Adopting Gareth Morgan's notion of 'images of organisation' and the metaphors that people use to make sense of them, the work sheds a fresh and original light on 'church' (Morgan, 2006). The complementary impact of Joel Migdal's thought on Davis (2001) was to help recognise that the very process of allocation of resources and implementation of decisions based on, say, metaphors and what Morgan later calls their related 'metonym', might (re)shape the original metaphor or intended image and its impact as alternative images and local leaderships were encountered with their own emphases, 'mental checkpoints', interests, and decisions regarding resources (Migdal, 1998, 2001; Morgan, 2016; Ortenblad et al 2016).<sup>13</sup>

Identifying a wider range of metaphors than those formally foregrounded in Morgan's original studies permitted these theories of organisation (and so of church) to be viewed as describing those persons, actors, impacts, and supply chains (both 'without' as well as those consciously 'within' church) that previous studies and some accounts of theology discussed in Part One had underplayed or ignored. Where any boundaries would be drawn was, as

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<sup>13</sup> Migdal would later call this 'mental maps' and 'virtual checkpoints' that shape boundaries, responses, and identity. See, Migdal (2004).

shown even more clearly later in this study (Davis, 2009a, 2009b, 2009c), a question of the community being imagined, everyday interactions and a(n) (un)principled choice or leadership.

This management or shaping of such judgements or demands through their (re)combination and exclusion would require a certain artistry, a sociological and organisational imagination, and at the least a strategic frame.

#### **2.1.4 *Unique contribution to knowledge***

Davis (2001) is original in the application of the ideas of modern political economy and the metaphors of management to Catholic institutions and dynamics. Applying Morgan's paradigm meant treating theologies as theories (or metaphors) of organisation and persons in the hope of making them more accessible to those outside the 'family business' of the church.

The implication was that a church that spoke as 'one' could only do so by one of its metaphors triumphing or being chosen over another. With that 'one' being identified it could be verified, if it were a welfare claim, by assessing its related resource allocation (or what Morgan later called 'metonym').

### **2.2 Submitted work two: Reinvention of governance – exit, voice, and innovation**

#### **2.2.1 *Title***

Davis, F. (2009a). The demise of prophecy or the reinvention of governance? Faith and the welfare state. *Crucible*, Jan to March, 22-32.

#### **2.2.2 *Elucidation of the research question***

Davis (2009a) was a first step to build on Davis (2001) to explore which observable theories and practices were factors, aids, or hindrances in the increase or decrease of (Christian religious) contributions to social welfare in society; also, the extent to which the dominant metaphors of church leaders regarding social welfare and welfare states were grounded in empirical evidence.

If the Christian community could not evidence its presence or its contribution, then it would risk a tendency to drop out of sight of the new governance as a multi vocal religious and civic landscape reshaped the assumptions of recognition that especially Established Church status in England had previously sustained.

### **2.2.3 Summary of discussion**

First, Davis (2009a) notes that the research process identified a shift in the attitude of religious leadership away from a debate about *whether* they should be engaged in public affairs to one about what form this engagement should take. However, because there was an assumption on their part that they were understood, their contributions were:

- (i) Often unrooted in evidence, and so the object of incomprehension on the part of policymakers.
- (ii) Likely to claim a metaphorical/theological traction that was absent from view for those not aspiring to engage in 'prophecy'.
- (iii) Consequently, was causing church leaders and policymakers to miss developing robust theories of change or the opportunity to draw coherently on the most creative strands of innovation available to them in any of their contributions.

The submitted work and the associated book length study (Davis, 2008) draws on original data and data gathered through the examination of church annual reports, interviews with religious leaders including bishops, interviews with policymakers, previously unpublished internal management information, and new surveys of organisations and dioceses.

The Church's 'theology', it concludes, causes it to overclaim its contribution in some quarters and understate it in others. This meant that the Church was not taken as seriously as a social welfare contributor as the civic value it was adding in new times suggested it ought to be. Davis (2009a) describes debates about emergent civil charity law regarding 'religion and public benefit' which symbolise part of this struggle.

The Charity Commission, in seeking evidence, was angered to encounter a suggestion that religion was more than an 'idea' or that the Commission had a duty to assess fully any religion's charitable contributions to everyday lives (even while seeking to regulate them).

This got more complicated still when the church sought to speak out: A deep devotion on the part of many bishops to an unreflective and ahistorical view of the old consensus had become a core conundrum in this regard. Bishops might think, for example, that speaking out is highly significant, but policymakers could consider (and were considering) this as nothing more than another user contribution to an improvement feedback loop in a public service design and management process (Hirschman, 1970).

As Davis (2001) had suggested, theological metaphors can be huge in their ontological ambition but be associated with small resource allocations. Davis (2009a) suggests that the converse is also true.

By exploring the (resource and metaphorical) weight of responsibility that parts of the Church must take, and the practice and reach associated with such responsibility, Davis (2009a) is framed around shedding empirical light on expressed behaviours.

#### **2.2.4 Unique contribution to knowledge**

The approach is original because:

- (i) It steps away from a singular emphasis on belief or the normative idea of Anglican social thought/tradition or the Church's role to consider the reach, capacity, cash flows, and capability of Anglican institutions to (a) sustain civic action, (b) to take on and manage contracts and service level agreements procured by government(s), and so (c) to shape or respond to aspects of government policy in social reality.
- (ii) It describes new empirical findings that both consolidate existing studies of the economic impact of Anglican institutions, but also goes further by, for the first time, assessing the skills of diocesan staff and the time allocations made by bishops to social concerns.
- (iii) By teasing out patterns beyond a congregational approach, it raises the question of Church/denominational structure/design on its public impact and role.

Building on Davis (2001), Davis (2009a) presents the key insight that in empirical terms words such as 'church', 'Christian', 'congregation', 'cathedral', 'diocese', 'welfare state', or even 'place' are never metaphorically, materially, or metonymically neutral. Instead, they hide beneath them any number of organisational expressions, assets, budgetary resources, capabilities, access points, and 'failures', and 'successes' regarding welfare, which require empirical attention if they are to be fully understood.

This was an enquiry at the national level in England with implications for Britain. The associated book length study attracted global attention and all of its recommendations to government were adopted.



## **2.3 Submitted works three and four: Faith advocacy at the European level**

### **2.3.1 Titles**

Davis, F. (2009b). Faith advocacy and the EU anti-poverty process: A case of Caritas. *Public Money & Management*, 29(6), 379-386.

Davis, F. (2009c). Ideas, institutions and poverty reduction in the European Union: Questions for a theology of governance. *International Journal of Public Theology*, 3(1), 24-41.

### **2.3.2 Elucidation of research question**

Davis (2009b, 2009c) is based on the same 22-country case study of anti-poverty advocacy by the pan-EU Caritas Europa faith-based Non-Governmental Organisation networks. The submitted works describe and analyse the attempts by the European Commission to create a pan-EU social policy framework related to the Lisbon Treaty process, by strategically involving faith actors.

### **2.3.3 Summary of discussion**

Davis (2009b), first published in the *Journal of Public Money and Management* (Routledge), explores the case from a policy perspective. Davis (2009c), first published in the *International Journal of Public Theology* (Brill), approaches the same data more explicitly by reference to theology and its discourses.

A theory drawn on and tested in Davis (2009b, 2009c) is 'institutionalism' or, to be more precise, the political approach to 'historical institutionalism' and everyday political anthropology as presented in the work of Joel Migdal (1998, 2001), complemented by aspects of Taylor-Gooby's (2004) assessment of the contrasting pathways by which European welfare states have emerged. Davis (2009b, 2009c) calls into question a simplified correlation suggested, for example, by the UK Department of Communities and Local Government's reading of Robert Putnam (2001) regarding a linear relationship between 'believing', good 'social capital', and positive welfare contributions.

Between his book and essay cited in Davis (2001, 2009a, 2009b), and his collections of essays on 'state in society', Migdal seeks to locate institutions historically and anthropologically to describe their work in movement (Migdal, 2001, 2004). By doing so, he resists giving them fixed or insulated positions entirely removed from each other either in history (through anything akin to 'sphere sovereignty') or in the philosophical concepts or language they use about themselves – even if they express a desire for that to be the case (Chaplin, 2016). 'Establishing authority', he observes, 'is no easy business...for people live in

a multi-vocal world'. Even if their inclination is to follow, 'they hear many commands, often at odds with one another, barked out at them' (Migdal, 2001).

The arguments in Davis (2009b, 2009c) consequently explore how, despite a policy (and religious) perception of there being normative faith-based advocacy and values, actual religious responses to moving policy vary at least as much in seemingly direct relationship to the structure of the state body and relationships that the external advocacy group seeks to shape, and the needs it wishes to represent, as they do to expressed values and ideas. That is to say, both works observe that religious responses are at least as much shaped by the social institutions that provide their context 'in' society as by any normative claims, no matter how intensely they are put. State policies are still impacted by them, however.

The *Journal of Public Money and Management* article sets out the advocacy process for the policy reader and interprets it in those terms. This view contrasts with the assessment for theological and church leader readers in the subsequent *International Journal of Public Theology* article.

If it had ever existed at all in its pure form the Beveridge-Keynesian welfare state was simply one among many welfare states and welfare institutions in society, each characterised by immense variety, then an ontological or normative theological claim as to its merits was unsustainable (Brown, 2014). Similarly, generic calls to the 'common good' on the part of formal Catholic discourse would need to be tested by reference to particular institutions in movement and society – unlike, for example, Rowlands' (2011) more static approach.

Additionally, and despite being Europe's largest religious civil society network, in the metaphors of its authorising Church (or ecclesiology), Roman Catholic Caritas, the focus of Davis (2009b, 2009c), is both fully 'church' and yet not fully congregation, diocese, mega-church, national church, denomination, or uniformly demanding of belief; nor is it purely *intra-* or *extra-state* (Six and Randon, 1985). Both articles thus uncover new insights into the interaction and policy impacts of voluntary sector body structure, state structure, ideas of welfare, day-to-day interaction, and likely impact.

These two articles began to confirm even more strongly that evidence that captures the full extent of religious social welfare contributions and interactions shows how more limited accounts such as those discussed in Part One diminish understanding. This is because those narrower accounts force policy process, variety and all the criteria available for

evidenced assessment from the process of action to be squeezed small and thin in pursuit of their own priorities.<sup>14</sup>

As we have seen, Davis (2009c) overlaps with the assessment of Davis (2009b) but was prepared for the theological and church leader and published as an *International Journal of Public Theology* article. Consideration is given to those who might find the isomorphism of religious bodies concerning. It seeks to strengthen institutions from such isomorphism through an exploration of a putative choice of a refreshed, post-liberal narrative theology.

### **2.3.4 Unique contribution to knowledge**

Davis (2009b and 2009c) represents the first and largest study of faith bodies at the EU policy level, and the only one of Caritas in relation to social protection advocacy and the Lisbon Treaty.<sup>15</sup> Davis (2009b) has been cited eight times in political, regional and EU studies journals.<sup>16</sup> Davis (2009c) is the only public theology treatment of the pan-EU advocacy social inclusion process.

This contextual and institutional insight, built on the previously cited works, enhanced the richness of the emergent learning of the overall study, more than many other studies of religion, policy, and politics. Innovatively, the two works (Davis, 2009b, 2009c) deal with faith-based agencies which are in many cases larger than all cited by Dinham combined – and most recorded in *Political Theology* and Rowlands (Dinham, 2009a; Rowlands, 2019). ‘The local’ considered in Davis (2009b, 2009c) are EU member states and the EU community, and the faith groups relating to them are sometimes larger than many departments of state in several EU member governments.

The impact of the article and the associated reports was to cause Caritas Europa to adapt the manner of their support to Caritas members at the national level as they went about subsequent phases of advocacy.

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<sup>14</sup> Claims akin to those such as DCLG, that belief motivates social welfare action referred to here are assessed more fully in the consolidating thoughts of Submitted work Seven.

<sup>15</sup> The publications are based upon interviews with advocacy officers, decision-makers, and observers across the EU, supplemented by internal correspondence and surveys.

<sup>16</sup> Google Scholar accessed 12<sup>th</sup> August 2021.

## **2.4 Submitted work five: Religion and the welfare society <sup>17</sup>**

### **2.4.1 Title**

Davis, F. (2011). Roman Catholicism and the welfare society: Catholic ideas and welfare institutions after Labour. In K. Chappell & F. Davis (Eds.), *Catholic social conscience: Reflection and action on Catholic social teaching* (pp.169-197). Leominster: Gracewing.

### **2.4.2 Elucidation of the research question**

This work is a critical reflection on three empirical studies in the light of my enduring theme of the evidencing of the relationship between expressed priorities, the civic and policy context, and actual behaviours of churches and those associated with them when it comes to social welfare. A theory being tested here is the principled and evidenced identification of need.

### **2.4.3 Summary of discussion**

In the light of the enduring theme of this study of the relationship between expressed priorities, the civic and policy context, institutions, and actual everyday behaviours, Davis (2011b) records what collectively constitute one of the largest empirical studies of English Catholicism since the Second Vatican Council. The specific context of the work was the expressed hope on the part of the English Roman Catholic bishops that they might make more of a civic contribution in word (advocacy for 'the common good') as well as deed (social welfare contributions).<sup>18</sup>

Pointing back to issues with which Davis (2001) and Davis (2009a) were trying to grapple, and Davis (2009b) and Davis (2009c) build upon, Davis (2011b) moves forward by exploring the problems faced in undertaking evidence informed research and, thus, welfare action in the seemingly 'enchanted' context of Catholicism and wider religious life.

### **2.4.4 Unique contribution to knowledge**

The three empirical studies are original. The findings shed new light on Catholics and their sexual relationships, Catholics and (im)migration, and Catholics and social welfare needs. In the process, the findings reveal, in a new setting, how the Church is both able to respond to great social needs and, at the same time, miss them; and how the church attempts to shape

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<sup>17</sup>Davis (2011a) has been cited in subsequent studies while the studies underpinning it attracted extensive coverage in the *Tablet* and on BBC Radio 1 and BBC Radio 4.

<sup>18</sup> The bishops ran a series of conferences and issued a variety of publications at this time. I assess these in Davis (2011b).

needs but can be shaped by them. The tension here is between metaphor, need, and, once again, the notion of skills, capability, authority and/or leadership.

If Davis (2009a) and Davis (2009b) described movement, inter-relationship, and the moving field of actors to advocate against poverty, Davis (2011b) identifies similar movement 'in' society between churches, parts thereof, and those linked or unlinked to them, and in the identification and response to need at the community and most intimately interpersonal of levels.

Social research evidence could, it seemed, both better describe work undertaken and provide a ground for planning than some of the wild theological claims being made by the church itself.

*Angel's* trustees agreed, changing part of their strategy as a consequence.

## **2.5 Submitted work six: Religion and social innovation, finance, and resources**<sup>19</sup>

### **2.5.1 Title**

Davis, F. (2013). Social innovation and enterprise as a ground for the common good: The new inter-religious frontier. In D. Singleton (Ed.), *Faith with its sleeves rolled up* (pp.153-174). London: Faith Action.

### **2.5.2 Elucidation of the research question**

Davis (2013) takes the form of an original response to the same question of need as in Davis (2011b) but, in this case, by returning to the question of conscious innovation in response to pressing challenges to clarify the path of decision-making and action. It does this by assessing a case of social enterprise and social innovation (a popular mode of public service reform, and at the heart of many articulations of the 'new consensus' throughout the period of this study).

### **2.5.3 Summary of discussion**

Davis (2013) seeks to apply theory to the deliberate design of social innovations taking the form of new institutions or enterprises with a social purpose and, therefore, point to pathways through some of the mismatches and tensions described thus far in other submitted works. The argument does this by consciously privileging social need as a/the crucial analytical starting point for the entire discussion. Arguing for disputation to agree on need and a

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<sup>19</sup> The essay formed part of a collection launched by the cabinet minister for Faith and the Chair of the All-Party Parliamentary Group on Faith in Society.

common response to pressing social challenges provides, it is suggested, an entry point to debates about how churches (and others) might order their own reflection, again focusing on a plane that is not merely congregational, normatively theological or belonging based (or which never links metaphors to metonyms). Davis (2013) then sets out case studies of institutions and causes that have modelled approaches to these habits. Consequently, the work explores how religious principles broadly articulated might be located/embedded in a particular kind of inter-faith engagement rooted in institutions deliberately grounded and launched and evidenced from faith communities (and where competing metaphors and everyday dynamics are named, evidenced and communicated transparently).

#### **2.5.4 Unique contribution to knowledge**

While not being the last word on the matter, Davis (2013) is an original contribution to faith and policy debates regarding the potential of social enterprise and innovation, inter-religious/faith dialogue, and responses to pressing social needs.

- (i) By touching on (a) disputation to agree on need and (b) common responses to pressing social challenges it provides (c) an entry point to debates about how churches might order their own reflection and collaborative action
- (ii) By theorising on the deliberate design of social innovations taking the form of new institutions or enterprises with a social purpose.

Davis (2013) suggests therefore that the deliberate application of evidence and discussion to test options might assist in planning a way through some of the dynamics described previously in this study which may have diluted and denuded social welfare.

The chapter was included in a book launched by the Secretary of State for Communities and Local Government and the Chair of the All-party Parliamentary Group on Faith in Society in the Houses of Parliament.

## **2.6 Submitted work seven: Complexity, evidence, and economy**

### **2.6.1 Title**

Davis, F. (2019). God, government, and religion as a feature of the economy and civil society: Insights from a fractious UK debate. In J. Creemers & H. Geybels (Eds.), *Religion and state in secular Europe today: Theoretical perspectives and case studies* (pp.151-168). Leuven: Peeters.

### **2.6.2 Elucidation of the research question**

Davis (2019) reflects on topics related to earlier works and then links them to debates regarding post-rational choice theories and the problems of some religious claims to understanding (and prediction) in the face of government innovations such as the adoption of behavioural science and economics. It also reflects on the 'religious sector'.

### **2.6.3 Summary of discussion**

Addressing the tension between belief, faith, action, behaviour, and claimed motivation, touched on throughout the present study in the tensions between claimed metaphors, actual metonyms, institutional design and the everyday lives of government and churches, Davis (2019) revisits such topics by reflecting on fractious UK debates.

The work's implication is that believing on its own as a behavioural factor is as incomplete for understanding wider policy in any realm as it is for analysis of (Christian) religions or welfare actions. Davis (2019) consequently sets out a range of empirical factors that grounds this claim.

On the one hand, it describes how policymakers are right to be cautious about some (Christian) religious articulations of 'prophecy' and 'impact', whether because they are self-referential or because, compared with, say, behavioural 'nudges', they are not as successful in driving pro-social behavioural change as some religious leaders may infer their own strategies to be. Conversely, this work critically assesses how policymakers have overemphasised belief to dematerialise religion, adding to their behavioural conundrum. To emphasise this, (Christian) religion is noted to add significant economic value which is rarely taken seriously by policymakers. It can be evidenced as a 'sector' like others, and not to recognise that is to apply tests to religion that other sectors do not have to face.

Indeed, a thoughtful religious community may consider pro-actively materialising some of its claims in institutional and empirical forms, while an attentive government might seek to harness the full range of social evidence to its work rather than legal 'belief' categories alone as the ground for its objections or collaborations with such (Christian) religious entities. If these steps are omitted, public benefits (and risks) may be unseen by both parties.

Davis (2019) concludes that:

Religiosity and secularisms which over-emphasise 'beliefs' at the expense of behaviour, institutions, resources, and demonstrable civic contributions both distract religions from the society in which they are located while increasing the risk that policymakers respond with

policy choices unrelated to the actual realities of the societies in which they find themselves, because policymakers accept theological accounts uncritically or 'secular' accounts as though they are normative.

#### **2.6.4 Unique contribution to knowledge**

Davis (2019) is based on a paper given to an international academic conference at the University of Leuven and published in a refereed, edited collection by Leuven/Peeters. The approach to evidence, behaviour and practice was entirely original in the Belgian context. The work triggered a subsequent programme from Leuven to look at 'the economy of the religious sector' (Davis, 2021a).

### **2.7 Submitted work eight: Developing the multi-dimensional paradigm and *carescapes***

#### **2.7.1 Title**

Davis, F., Murangira, E., and Daenhardt, M. (2020). *Ageing in Rwanda: challenges and opportunities to church, state, and nation*. Birmingham and London: Tearfund and the University of Birmingham.

#### **2.7.2 Elucidation of research question**

The initial overall research objective was to establish empirical evidence to inform a church- and community-based model of intervention addressing challenges of old age vulnerability and breakdown in social safety nets for older people in Rwanda. The community focus arose directly from Tearfund's theory of change which in turn built on its theory of organisation of the 'church.' It is, to date, the single largest research enquiry of Rwandan elders.<sup>20 21 22</sup> The very distinctive context of Rwanda 25 years after its genocide produces unique insights that flow from the approach.

After 1994, Rwanda had lost most of its public services and public servants, and the churches faced issues of credibility, having been at least in part complicit in the killing sprees unleashed by President Habyarimana's death in a plane crash (Longman, 2010).

Consequently, Davis et al (2020) is a fresh and innovative empirical enquiry into social and care needs, and the position of older people in Rwanda, and the way churches and

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<sup>20</sup> In turn, it influenced the development of the new Rwandan National Plan for Older People.

<sup>21</sup> Davis et al (2020) is an original study designed, actively researched (as PI) and written up by the present author. It was funded by Tearfund and other partners.

<sup>22</sup> A follow-up valuation of the economic contribution of the churches beyond their savings groups, advocacy patterns, and the balance between believing, belonging, and affiliation after genocide had been planned but is postponed at the time of writing due to the C19 pandemic.



government policies (dis)empower them. It is based on extended and fresh empirical work in Rwandan villages, towns, and the nation's capital, and with government and church leaders.

### **2.7.3 Summary of discussion**

Davis et al (2020) explicitly picks up the themes of the previous works but in the demanding social context of Rwanda they take on particularly stressed forms, namely:

- (i) Christian religion expressed through institutional variety and competing metaphors notwithstanding claims of uniformity, unity and shared notions of success.
- (ii) An interplay between 'wars of position' within and between (Christian) religious institutions, their imagined positions, impacts, and actual behaviours.
- (iii) The relationship between these moving parts of everyday civic life and the policy environment manifested through how interactions are managed internally in churches and through a dynamic interface of church members and citizens with social protection policies, the variety of institutions comprising not only state bodies but also (fractured) families, firms, personal actions and other social institutions and forces.
- (iv) It uncovers immense needs with mismatches of perception within and between (Christian) religion and government

If we started in Part One with the struggle to make sense of social welfare and religion at a time of social flux and developed that through UK and EU explorations with the previous seven submitted works, the extreme case of Rwanda's shifts in governance offered more patterns than most from which to learn of change, devastation, renewal and the contingent role of churches, government, other social institutions and their parts in such movement.

Davis et al (2020) describes how, for the government, rebuilding social welfare at the same time as seeking to encourage modernisation of urban arenas, while sustaining a level of overall economic growth has been like 'building a ship at sea'. Davis et al (2020) uncovers some very striking needs among the generation of survivors and the increasingly large cohort of older Rwandans. It then shows how care and support are adapting to respond to these issues but are never static (or yet adequate). Davis et al (2020) captures the movement in policy ideas, policy outcomes, their shaping of each other, and their intended and unintended impacts and interactions with families, churches, and localities.

Sensitive to African narratives about the distinctive position of families, and wise elders as carers and contributors, Davis et al (2020) is zealous in clarifying need and responses to need while relativising singular accounts of state, family, church, and welfare further still.

As a consequence, the work develops the learning from the first half of the present study about metaphors and resources, institutions in society, and the constant negotiation and renegotiation that goes on between social institutions and social welfare, including efforts to help sustainability of care in and from churches and by those linked with them.

In the process, Davis et al (2020) maps out the dynamism and interplays of resources, capacity, expressed hopes, ecclesiology, ideas of nationhood, spirituality, and action, and how these help and hinder the sum of support (and self-help) for older people in and from churches and between church members, citizens and the hard-pressed welfare mobilisations of the government. Davis et al (2020) then puts Migdal's view of social and political patterns being 'in' society to work and consolidates how these interplay with metaphors, metonyms, institutions, impacts, and *carescapes*, to deepen our understanding of how policy might work with (Christian) religion and religions together with other social institutions and actors in pursuit of social welfare.

Developing a church (and state) 'in' society approach, the assessment maps the practical care contribution made by parts of the church (broadly defined) onto the contributions of other civic actors and, thus, we can begin to elucidate a *Carescape* (Davis et al, 2020; Hoffman and Pype, 2018; Obrist, 2018).

Testing religious and state discourses through *carescape*, institutional analysis, social context, the use of imagined metaphors and qualitative feedback resulted in particularly sensitive findings:

- (i) Regarding safeguarding, ecclesiology, and finance.
- (ii) Regarding the actual lived pressure faced by older people and the – often accidental – paucity of support from government and church.
- (iii) In relation to the risks associated with a new and unregulated social care sector.
- (iv) Emerging from the identified weaknesses of health-costing and pricing tools and welfare/social protection allocation categories visa-vis government.
- (v) Arising from the lived experience of trauma and post-traumatic lifespans of the older and disabled members of churches.

- (vi) Describing most especially ongoing stigma and tension in the areas of Gacaca (customary court prosecution) status, genocide history, ethnicity, memory, welfare allocations, and expectations regarding civic censorship and participation.

Although focused on the needs of older people in Rwanda, *carescape* introduces an important descriptive and analytical framework by creating synergies with the insights developed across the present study.

In this locale of immense needs then *carescape* provides a way to explore and better evidence the weight of social welfare carried by contrasting social actors and institutions in a world of networked governance and scarcity. In Rwanda this is essential as the scale of informality in the economy and the relative weakness of the state make European assumptions or theological ontological claims entirely irrelevant.

#### **2.7.4 Unique contribution to knowledge**

Davis et al (2020) was launched by parliamentarians and bishops in Kigali and Westminster and has already changed Rwandan public policy and Tearfund's approach to elder inclusion. It attracted ministerial praise from the FCDO.<sup>23</sup> This study breaks new ground:

- (i) As an original study into the needs of older people, adding to extremely limited literature regarding ageing and older people in Sub-Saharan Africa, and to almost entirely absent relevant literature on Rwanda in particular.
- (ii) As the first study of its kind to enter related enquiry and research questions using (mainly Protestant) churches as the point of entry with a mind to teasing out their positive and negative impacts, potential and roles in emerging *carescapes* for older people in relation to government, social protection, civic action, and social change.
- (iii) In its inter-disciplinarity with insights for ecclesiology, psychology, disabilities, poverty, and health.
- (iv) In its implications for adult safeguarding in NGOs and religious institutions, in view of the strengths and weaknesses in existing approaches.<sup>24</sup>

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<sup>23</sup> It was presented in summary paper form at the University of Oxford Institute on Population Ageing, and at the University of Antwerp, and attracted praise from Foreign, Commonwealth and Development Office Ministers in Hansard [Written questions and answers - Written questions, answers and statements - UK Parliament](#)

<sup>24</sup> This led to a journalistic article in the *Tablet* (2020) [Age is no protection against abuse \(thetablet.co.uk\)](#)

## **PART THREE: CONCLUSION AND EVALUATION**

In this part, the intention is to identify areas to which further research should be directed and draw the thesis to a conclusion. These aims are necessarily interlinked.

### **3.1 Analysing civic value and *carescapes* in society**

As we have seen the notion of *carescape* provides a means to map out across the social institutions and actors 'in' society their respective contributions to social welfare. In this study it draws on, and extends, an approach first articulated by Hoffman and Pype (2018) and Obrist (2018).

Theology as a theory of organisation, institutional analysis, the interactions and mutual shaping of churches and governments, evidence of need, assessment of the church's role as a 'sector' or its claims in tension with evidence and more effective interventions such as we saw across the submitted works can all be included in such a *carescape*. Indeed, many of these facets of the submitted works are referenced directly or developed in submitted work eight.

When presented this *carescape* was encountered as incredibly helpful by academics and activists in Rwandan churches and civil society bodies (and by those here encountering it at the UK launch and presentations). Those in the Rwandan local government ministry, the Commonwealth Association for the Ageing, and Help Age International expressed how helpful they found it in teasing out how intention and outcome might not be the same, and how actions for social welfare could overlap and accidentally compete or assist each other.

Crucially the *carescape* could help to map where social welfare support was absent or where an institution was not fully fit for purpose in taking on the expectations or resources being expected or assumed of it. Church leaders and those in government alike have been able to see and clearly understand the implications even if those implications have surprised them.

A challenge for the future then will be to take the combined lessons about the power of evidence uncovered across this study and combine these with the mapping of *carescapes* in settings where the social challenges are not as great as Rwanda's but where the levels of governance, everyday shaping of welfare action and social welfare outcomes are even more complex. Applying the *carescape*, for example, to the criminal justice sectors of in the UK and the US would make a notable case.

### **3.2 The need for a more evidenced theology or ‘empirical political theology’**

This enriched evidencing of the *carescape* for diverse settings may be important for another reason, namely that, when the concepts in the present study have been presented to theological audiences in the UK, many religious academic interlocutors have struggled to make sense of them.

At the core of their objection remains a reach for some of the problematic paradigms critiqued in Part One. Letting go of the ‘old consensus’ as an ‘ought’ has been difficult even for those open to the use of some evidence.

Expanding ‘political theology’ to develop a fresh and robustly ‘*empirical* political theology’ for the new times may likely be a prerequisite to break this logjam (Cartledge, 2106, 2019; Francis and Robbins, 2004; Van Der Ven, 1993).

For some church leaders and policymakers this will be challenging. There remains a time lag in ecclesial insight – and of wider insight too.<sup>25</sup>

### **3.4 Project summary and conclusion**

This project began with a consideration of the challenges of social welfare at a time of flux. It set out in a focused way to explore the pressures and opportunities in play as one welfare consensus gave way to an emergent and continuously changing social welfare arena. It has at each stage recorded original insights which, in turn, provide a ground to legitimate an ultimate notion of *carescape* for enhanced analysis in diverse (inter) national and sub-national settings in the future.

It has thus provided a critique of the justifying rationales and manner that various parts of the Christian religion mobilise to provide or facilitate social welfare in a variety of British, mainland European and African settings. It has also begun to elucidate a framework through which they might be better understood and planned in the future beyond the post-war consensus.

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<sup>25</sup> The weak briefing to the Church of England’s Synod on the Cameron Government’s Big Society passion (Brown, 2015), silence on the significant UK decentralisations of governance that have been enduring since 2011 would all be cases in point.

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<sup>26</sup> \* Denotes page extent not available as hard copies not accessible at time of submission due to archive restrictions.

McCrudden (Oxford), Johan Verstraaten (Leuven), Julie Clague (Glasgow). *The International Journal of Public Theology*, 5(3).

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***Learning resource***

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## Appendix two: Statement of authorship



Emmanuel Murangira 29<sup>th</sup> November 2021

10:03 AM (7  
hours ago)

to R.Hastings, Madleina, me

Dear Professor Hastings

I am writing with regard to *Ageing in Rwanda: Challenges and Opportunities for Church, State and Nation* on behalf of myself and Dr Madleina Daenhardt (who is presently away from work)

As Director of Tearfund in Rwanda I commissioned Professor Francis Davis to lead the work for this publication. I arranged for him to be supported in the field by a number of our staff, not least Tearfund's Research and Impact Adviser, Dr Madleina Daenhardt. As the published acknowledgements (inside cover) of the study record " it has been extensively developed and shaped throughout by Professor Francis Davis ..supported in the development of research methodology by Dr Madleina Daenhardt".

I am thus able to confirm that the following statement is correct and accurate:

Davis, F., Murangira, E. and Daenhardt, M. (2020). *Ageing in Rwanda: Challenges and Opportunities for Church, State and Society*. Tearfund/University of Birmingham.

This work is a collaboration where I was Principal Investigator, designed the study, played an active role in gathering data through the field research and was the principal author.

Dr Madleina Daenhardt has seen this statement and confirmed that she too supports its accuracy. I am copying her into this mail so that she has a record for when she returns.

Emmanuel

Yours sincerely

**Emmanuel Murangira**  
Country Director  
Tearfund Rwanda

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## **Appendix three: Submitted works**

## A POLITICAL ECONOMY OF CATHOLICISM

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Francis Davis

Francis Davis was educated by the Benedictines, at Durham University and the School of Oriental and African Studies, University of London. A former community worker and BBC Radio contributor, he founded and coordinated the Centre for Voluntary Sector Studies at La Sainte Union College of Higher Education (now Southampton University New College). He has undertaken consultancy with UK, East European, Asian and North American religious voluntary organizations and retains advisory and trustee roles with several European non-profits. Married with three young children, since 1998 he has been managing director of a leading century-old family enterprise in the design and print industry.

The problems uncovered in the attempt to establish frameworks for analysing the Church, its governance and notions of authority are legion. First, there is the political conflict over who should be concerned about authority and governance in any case. Second, there is the huge gap in the research literature of organizational psychology, decision-making studies, political science, management studies, and voluntary/third-sector studies when it comes to Christian organizations in general and the Catholic Church in particular. Third – and possibly most significantly – there is the question of epistemology. For example, in his pioneering study of global political Catholicism, Hanson (1995) comments that one of the difficulties faced by those seeking to analyse the Church by mobilizing the (modern) social sciences is that the Church – at least at the formal level – perceives itself to be inspired by a different set of norms, norms rooted in what we might term pre-modern frameworks of reflection.

A short chapter such as this then must acknowledge its limitations for the task of analysis. Particularly at a time when the Church in the

West faces such profound demographic changes, the main task is possibly more to find new ways to ask questions about governance and authority than to attempt to elucidate normative answers/hopes about problems and opportunities.

Perhaps such an exercise is particularly important in the light of the contributions in the present collection, many of which seem to suggest the relevance of a voluntary-sector theory, organizational theory, or a clear vision of theology as a foundation for analysis of the Church. This chapter, the reflections of an activist in the Church's social apostolate, also draws on a number of interviews carried out with lay Catholic workers between 1989 and 1992. I want to suggest that it is the very assumption of clarity on the part of both conservatives and radicals which obscures from our view a number of key issues in relation to governance and authority. These issues, which can only be introduced here, fall roughly into three areas: What is our dominant image of the Church? What do we know about how decisions are made? Who are the key players in the Church's decision-making and leadership? Throughout I will be particularly concerned about issues relating to the allocation of the Church's material resources, partly because the Church in Britain seems occasionally to underestimate its material impact. Recent US 'economic impact' studies of church organizations have surprised their authors by the scope of activity they have uncovered, and the Church in Britain is surely not insignificant, especially in its relative strongholds. Moreover, it is not unreasonable to suggest that exhortation to mission without an allocation of proportional resources is often a sign of lack of missionary commitment.

### *What is our Dominant Image of the Church?*

Gareth Morgan (1986) has argued that the way we think about organizations can go a long way to explaining how we actually run them. While most of us would deny any great intellectual, theological or organizational insight, each of us actually thinks quite hard about our image of the Church, whether we work in bishops' conferences or feel part of the put-upon 'poor bloody infantry' at parochial level.

In this section I want to suggest that one of the dominant images, or metaphors, that we have constructed for the Church in England and Wales is similar to the 'community of service' ideal found in Beyer and Nutzinger's (1993) research on employment patterns in German church institutions. Subsequently, I want to examine the validity, and usefulness, of this image in helping the Church's

decision-makers fully to understand the organizational realities of the Church today.

On the basis of a survey of a range of staff in Christian welfare organizations, Beyer and Nutzinger identify a pattern of beliefs suggesting that as far as the Christian community, and especially its leadership, go, there is a normative sense of purpose overarching the activities of all church institutions – both worshipping communities and non-worshipping communities. Taken together the activities of all church institutions could be descriptively distilled as a community of service.

Community of service means that all parties in church institutions are members of a community with a special mission based on fundamental principles ... where the normative concept is that all (workers) agree that their individual work is also part of the service of the lord.

(Beyer and Nutzinger, 1993)

In this study the implications of the community of service ideal are extensive. For example, at times of tension over salaries between employed staff in church institutions an appeal was made to the community of service idea by the Church leadership. Despite what staff interviewed saw as a clash between labour and capital within the Church community/institution, and notwithstanding the presence of non-professing staff in the organizations surveyed, all were alleged to be on the same side despite their different perspectives. Everyone was said to share an overarching commitment to 'the service of the lord' and hence to 'the community of service'.

Arguably, in England and Wales something akin to the community of service ideal/image provides a related but different effect. The community of service ideal serves an image of the Church which suggests that the purposes and practices of the Church are commonly agreed and that although there may be different perspectives on, for example, the ordination of women, the relationship of the Church to capitalism or – my main concern – disagreement over how material resources should be allocated, the opposing extremes in such debates are not identified as mutually exclusive but part of the ebb and flow of relationships in one unified whole organization often described as 'the body of Christ' or 'the family of the Church'. For example the vicar general of one English diocese argued in his 1996 Christmas newsletter that 'right wing, left wing, centrist or radical we are all one Church ... and there is room for all of us in the family of the Church'. This image of the community of service is reinforced by notions such as 'collegiality' and

'collaborative ministry' and the seeming increase in interest in consensus. We are all members of one body because we are all 'equal' and 'baptized'. In this sense, often repeated today, 'we are all Church' not only on Sunday but throughout the week.

In the light of the Second Vatican Council, some might argue, such an image of the Church is unsurprising and, in fact, inspiring. The question we need to ask, however, is to what extent this image of a community of service or of being one body relates to the empirical policy practice of the Church.

Our 'one Church' in Britain is made up of three bishops' conferences who, between them, have pastoral responsibility in four nations. In England and Wales there are 24 dioceses which, despite bishops' conferences, are the pastoral groupings to which the Holy See relates. Each of these dioceses, while served by bishops who share, theologically speaking, in the pastoral work of the papacy, is divided into deaneries and parishes which are in turn served by priests who pastor in the bishop's stead. In passing, we should note that other parts of this 'one Church' include a range of religious orders whose governing constitutions vary in character from the Dominican to the Jesuit, a substantial number of official agencies at the diocesan and bishops' conference levels, and a vast array of identifiably Catholic organizations that are not official agencies but which compete for material resources. This is without mentioning our private schools, which continue to be objects of Catholic philanthropy, and our state schools, which comprise 10 per cent of public sector education provision. Moreover, if all that the baptized do is a feature of the Church, the Church is also, for example, an MP in London, a beggar in Farnham, a businessman in Glasgow, a shopkeeper in Preston and a cleaner in Hammersmith. And, if we take natural law (or liberation theology for that matter) seriously, the Church extends at least a sense of sharing in the project to 'all people of good will' or 'the poor' whether they know (or like) it or not.

At the national level the following imaginary extended case based on a number of real organizations may ring bells for those who have ever tried to run a Catholic organization in recent years:

Catholic HIV/AIDS Action is – we may imagine – a national charity founded some years ago. Its annual income is £550,000, partly garnered from the Department of Health but mostly raised via the Church. It employs a director, a trainer and three secretaries in its central office in London as well as supporting a network of volunteers. It is not an official agency of its bishops'

conference. Three bishops have barred the organization from their dioceses because the organization provides its services 'non-judgementally' – a term which is seen as supporting homosexual lifestyles – but almost unbeknown to those local ordinaries, the organization does run seven projects in the three geographical areas of those dioceses as part of its response to Department of Health grant criteria of providing a 'national service'.

In 2001 a major piece of legislation is proposed in the form of a White Paper by the government which will lead to an effective withdrawal of NHS-funded care for those dying of an AIDS-related condition if they cannot prove that they contracted the virus from non-sexual activity.

The day after the publication of the White Paper the phone is ringing non-stop because the media, looking for a Catholic angle, have tracked down HIV/AIDS Action. Most diocesan press officers have also referred enquirers on to the organization because they feel embarrassed to comment. Halfway through her twelfth interview, the director is told that the bishops' conference is on the line and needs a briefing on how on earth to respond as they have no staff member with expertise in the HIV area. They also tell the director that about 20 secular organizations who are shocked by the White Paper have phoned in asking for Catholic support. The bishops' conference start referring all organizational, press and individual enquiries to HIV/AIDS Action. Soon HIV/AIDS Action – the representative of 'one Church' – is part of a coalition of groups campaigning against the Bill which will implement the White Paper's proposals. The organization's line is that cutting such care is disgraceful because all who are sick deserve love and support: HIV/AIDS Action is attacked by a conservative Catholic newspaper for affirming the homosexual lobby and castigated by part of the Church's justice and peace movement for not affirming gay lifestyles more aggressively. Meanwhile, the archbishop who chairs the bishops' conference begins to realize that the Bill, though presenting difficulties, actually presents a clear opportunity for the Church to be seen as caring for homosexual people without affirming their lifestyles at the same time. In trying to prepare his press releases and articles in *The Times*, not to mention a statement that he wants the bishops' conference to make, he requests that the Director of HIV/AIDS Action should attend each and every one of his preparation meetings as the Church's expert in this field. Sucked into this and feeling that the organization cannot let the Church down and knowing that the bishops control access to fundraising

for the organization, the director of HIV/AIDS Action helps out and the number of days away from the office start ratcheting up. This director cannot call on the research departments of secular agencies or their public relations departments because, unlike them, she does not have 20-plus staff.

Before long the organization's service delivery is struggling, and its Department of Health grant being questioned: the organization is now rudderless as the director and the secretaries try to meet the demands placed on them by the bishops' conference, the dioceses, the archbishop's office, the Catholic right, the Catholic left, other church groups, as well as the wider lobbying coalition against the Bill and the organization's clients. The director does suggest a small grant from the bishops' conference to buy in a general manager for six months, but this is met with warm smiles and the assertion that 'we are all part of the Church'.

Although this example is imaginary, the tensions will be clear and find their parallels in the stresses on a parish priest criticized by parishioners for being away too often as chair of the diocesan schools commission, or an inner-city deanery youth worker who loses part of his trust funding because of being continually called upon by the diocesan youth office to 'help out' elsewhere in the diocese, or even in an official overseas aid body of a bishops' conference which has to cover up for the extremely poor development work of another Catholic charity in order to safeguard its own reputation, and the reputation of the Church, for the future. In addition, we might mention the bishop who was asked recently how many staff his diocese employed. His response of 'twelve' recognized his Curial employees but failed to appreciate that his central offset banking system, into which all parishes contract, makes him/the diocese in civil law legally responsible for over 100 staff employed by parishes.

The point is that while we might talk and think all the time within the frameworks of collegiality, one Church, community of service and increasingly collaborative ministry, this dominant image/metaphor actually obscures from our view both the intense competition that has grown up in Catholic networks for resources and attention and the profound confusion of how the Church should decide, preach and act. The reality is probably closer to a view that suggests that the Catholic world is made up of hundreds of organizations and images of the Church in intense conflict – and some of them mutually exclusive in orientation – rather than of some clearly shared project/normative metaphor. It is conceivable that

in turn these images of Church are actually rooted in different theories about life and notions of God.

To learn then about how decisions are made in the Church, and particularly about the allocation of material resources, we need to learn more about which images of Church and life are truly in play at any given decision-making moment. This is not necessarily an argument for rejecting the community of service ideal but more an argument for taking a long, reflective look at the 'is' of Church decision-making rather than the 'ought', a distinction which theologizing often confuses.

### *What do we Know about How Decisions are Made?*

In recent years a great deal of research has been focused on the nature of decision-making, particularly among what are termed 'policy elites' (e.g. Migdal, 1988; Migdal et al., 1994). There is an emerging research consensus that, despite structural factors, decision-makers still have and can create 'policy space' in which to manoeuvre. From their research Grindle and Thomas (1991) identify certain factors that influence the nature of decisions taken by decision-makers from within those policy spaces. These include personal attributes and goals, ideological predispositions, professional expertise and training, memories of similar policy experiences, position and power resources, and political and institutional commitments and loyalties. The purpose of identifying such factors is twofold: first it helps us understand the cause of certain policy choices. Second, it also enables us in some instances to recognize factors that may be involved in decision-making that are actually unrelated to the putative rationality of choices made. For example, infinite demands may be made by a number of groups, often with incommensurable aims, seeking what are termed 'rents' (e.g. government funding) on the state apparatus. If these are granted – particularly if this happens by 'non-rational' processes (i.e. allocation on the grounds of kinship or political expediency) – then a number of consequences may follow. Policy may change, core policy priorities become unimplementable because key resources are diverted or lost, and – despite mighty flown rhetoric – the state apparatus may actually begin to fracture and decay as its resources are scattered in a thousand disparate directions. For those concerned with public management then there is a vital task to accelerate the competence/rationality of decision-making at every level of the state bureaucracy.

Given this perspective on the nature of decision-making in state



institutions one might subsequently ask whether, for all the implementing force that the Curia can summon with regard to certain cases, the main decision-maker in the Church – the ordained celibate male cleric, whether parish priest, provincial, bishop or cardinal – actually has considerable scope for manoeuvre? Either way what are the forces at play in the way that he allocates clergy, staff, real estate and financial resources within, across and possibly beyond the Catholic community? Is the cleric as decision-maker insulated from the rent-seeking forces of particular causes and crusades or does he feel constricted by the need to placate certain forces within the Catholic community to maintain peace, square his relations with another part of the Church, or simply to maintain popularity (legitimacy?) in the eyes of his parishioners and possibly – perhaps more importantly – his brother clerics? Is his dominant image of the Church ‘the community of service’ and if so does he feel he has to provide a little bit to everyone or does he feel able to identify key priorities, such as an option for the poor, and drive them forward with more targeted resources? For example, the policy choices (let us call them pastoral priorities) of an archbishop in a Vatican department of state may be determined by any number of the factors outlined by Grindle and Thomas and this may run on down through any layer of the clerical machine. Is the priest/bishop a risk-taker, happy with conflict, or simply convinced that if he prays the decision will be shown to him (personal attributes)? Is he steeped in Oscar Romero’s sermons or inspired by the charismatic movement (ideological predispositions)? Was he an accountant in an international company before ordination and trained at the Beda or did he go to junior seminary from the age of 11, 12 miles from his home town, and never travel overseas (professional expertise and training)? Does he respond in different ways to similar problems as they emerge or is his habitual response due to the fact that it worked for his bishop when he was a bishop’s secretary 24 years ago (previous experience)? Is his diocese, his religious order, or his department large or small, or does he still go walking each Wednesday with Cardinal Ratzinger who taught him theology at university (position, access and power resources)? Does he welcome the YCW to his diocese because the local cardinal is a great fan or does he support the Neo-Catechumenate because without their mobilization of foreign financial support the diocese would go bust (political and institutional commitments and loyalties)?

And what does that clerical decision-maker believe he is doing? For example, imagine if one was a pope who allocated huge

resources to Solidarity, unstintingly lobbied G7 leaders in defence of Poland's cause, but after Solidarity's victory attributed the whole thing not to one's own efforts or policy choices but to 'Our Lady drawing her veil over Poland'. Or does such a pope speak with the formal ideological expressions of Vatican II but actually respond from within profoundly pre-Vatican II informal ideological paradigms because of generation, geography of training, and life experience? For example, using almost religious language, Levine (1994) has suggested that even post-revolutionary elites in China, although trained in academies with formal Party approval, still respond from informal ideological frameworks because of their pre-revolutionary formation in the great tales and histories of China as the centre of global affairs and moral governance.

This process of identifying why certain choices are being made would be one first step to clarifying the matching of resources (or not) to professed mission priorities and practice. It would certainly make things more transparent and hopefully eliminate a variety of poor decisions which may sometimes be made. It might hold in check the glorification found in some circles of chaos and poor stewardship as 'the mess of human life and incarnation'. It could possibly increase income in the long term by encouraging a more widespread sense of the ownership of giving and it might contribute at the least to a ring-fencing of resources of time and money to encourage work focus. Vitally it might also lead to the discovery that a diocese, for example, has developed such a broad definition of the community of service (or another image) that competing voices and images of the Church are actually reproducing a form of extreme rent-seeking on endowments, congregations and investments. This may in turn demonstrate that a public commitment to a particular form of mission cannot be moved forward in anything but words because of the inertia caused by mission distortion, weight of spending on alternative and opposing ministries, and dissipation of energy as volunteers and clergy are distributed in every conceivable direction at parish and diocesan level. Given such institutional dissipation it would be unsurprising if priests often felt pulled in all directions.

By way of symbolic contrast, we may note the proposal during 1989/90 in the Portsmouth Anglican Diocese that the parochial poll tax to the central diocesan body should be levied not on the number of congregation members but on the basis of the extent of poverty identified (by national poverty statistics) in the local parochial area. This would have the effect of affirming the real struggles of the poor of the diocese, of maintaining resources in poor economic areas which were experiencing too much capital flight anyway, releasing

resources in poor areas for social ministry, and encouraging richer areas to improve their fundraising techniques to meet their new responsibilities to the diocese and – by implication – to the poor.

It may be objected at this point that my emphasis on individual (clerical) decision-makers is elitist, too narrow, and does not adequately address the emergence of collaborative ministry and consensus-building as the basis for decision-making. I shall address this point a little more fully in the next section, but I want here to stress that consensus, in Christian terms, may be valid but, if we take formal Catholic teaching seriously, only if it is metaphysical rather than political. By this I mean that it is an insight of modern political science that justice in liberal societies has become what we can instrumentally agree on as a polity at any one time rather than being a value in its own right and in relation to some underpinning notion of telos (Rawls, 1972). Given that Catholics in England and Wales are more profoundly schooled in modernism today – particularly when encouraged to ‘reflect on their own experience’ – than in the virtues, there is a danger that consensus-building in what we might term the polity of the Church becomes the thinnest point of agreement between all the competing images that Catholic organizations and individuals proclaim about the Church. By its nature then this is a ‘thin’ political subjective consensus rather than a rich, or ‘thick’ objective articulation of Catholic insights. Thus in some instances while a consensus may have been achieved in the name of God it may actually be closer in reality to some form of political accommodation between competing voices seeking resources of dominance for their image of the organization of the Church. This may temporarily overcome an institutional inertia and fracture in the longer term. So, if consensus is the preferred model for decision-making we will still need to hear why and discover more about how a theological consensus may or may not be merely a political accommodation rather than the discovery of a deeper metaphysical reality formed around a common conception of the telos of the Church.

But this relates directly of course to who makes decisions and how they come to be in those positions of influence over the Church’s material resources in the first place. It is that to which I now turn.

### *Who are the Key Players in the Church’s Decision-Making and Leadership?*

It is rarely acknowledged that most secular priests come forward from their own diocesan geographical areas to have their own train-

ing funded by their own diocese to which they will return to be 'incardinated' on a permanent basis (i.e. for life) and to serve – theoretically – in whichever parishes the bishop places them. Even in past periods of comparatively high clerical vocations dioceses would then be drawing for their leadership on a comparatively restricted pool of mostly local men who, once ordained, would remain the pool of personnel upon which the diocese could call given any number of changes in the external or internal environment. Even in days gone past, the matching of skills or merit to the practical tasks required, and the allocation of material resources, was never a clear option because bishops could only really choose those who were members of the ordained priesthood in that diocese. There has never been a necessary relationship between competence in the range of skills needed, beyond the act of consecration, and the allocation of clerical resources. Consequently, it has been ordination and not necessarily skill/competence which provided the primary ground upon which clergy are released/permited to work in certain parishes.

With the decline in vocations this limited pool of localized talent has been even further restricted, and arguably some dioceses are now reproducing some of the more acute problems faced by the most unlucky kinds of third- or fourth-generation family businesses. So we may therefore experience first of all a shortage of 'talent in the family' upon which to draw for staffing in general and to take up senior positions at a later stage. Second, 'older members of the family' have to forego retirement to sustain the enterprise, and this in turn reduces the organization's openness to change. Lastly, there is a danger of rapidly reducing quality in decision-making not from lack of commitment and willingness, but from lack of appropriate competence.

Such problems are important to note because one response to deceleration in the availability of clerical human resources has been the development of lay ministries in general and talk of collaborative ministry in particular. This allegedly involves discovering new models of Church that enable priests and people to work together to share their common rootedness in baptism. Ordained priesthood here is often talked of as 'different' not 'superior' (although I still ponder on the claim of the seminarian who told me a few years ago that he would be 'ontologically superior' to a lay person after ordination, and some Vatican texts still talk of the 'objective superiority' of the ordained man). There is a hope in the language of collaborative ministry that the equality that accrues to us all in baptism will become the ground of a new set of relationships where priests and

people work together in a way that perhaps they did not in pre-conciliar days. In terms of those who makes decisions about the Church's material resources is this really convincing and satisfactory as a reality rather than a theological 'ought to be'?

First, it is not unfair to suggest that the cleric is present in the relationship of collaboration not necessarily because of skills he has but simply because he is a priest. To use the family business analogy, it is a little like saying that son X has much to contribute to this set of decisions not because he may or may not be up to the task but because he is a member of the family. Second, it is important to ask where the lay people come from who are in collaboration with the priest in, say, a parish. If it is an area of very low social mobility with an ageing demographic profile, or in a rich commuter area where only a tiny proportion of people live for more than six months at a time, the lay component of the relationship may itself reproduce aspects of the family business insularity. And if the lay people encouraged to join a finance committee or any other pastoral grouping are encouraged to do so by the priest, to what extent is the priest, or other lay people, competent to judge whether decisions would be better made in a Church setting with advice from the finance director of BAT, a professor of accounting, or a local charity's bookkeeper, all of whom might be found in his parish and each with different images of what makes an organization tick financially/mission-wise. Will the best decision-makers really always be found in one parish, or diocese, and once identified do they need to be used in broader ways that transcend traditional boundaries? Lastly, when it comes to material decision-making the relationship of lay people is, according to canon law, only advisory to the priest. In the end, and no matter what his possible lack of competence in any given field, he can reject it all as can the Curial offices (and the bishop as key trustee) in a central offset system. How truly collaborative is that?

### *Conclusion*

In this chapter I asked whether the dominant images that we have constructed to describe the organizational reality of the Church are adequate to the task. I suggested that underneath the seemingly normative and straightforward claims of those who might, for example, be called conservatives, liberals and radicals has arisen an incommensurable number of images of the Church which are now in intense conflict and competition. Drawing on recent research on decision-makers I subsequently suggested that the

danger of this confusion of images was that it might accelerate institutional fracture, mission distortion and inertia while at the same time giving the impression of great activity and expansive commitment. This is because each articulation of image is more often than not matched with a separate claim for material resources. Lastly I have wondered whether in the Church we have confused individual competence or skill to make decisions with an individual's alleged theological status, and geographical presence. Does this mean that at many levels of the Church ordination, local knowledge, orthodoxy, reputation, perceived holiness or marital status – political acceptability – have become the key to being promoted as a good decision-maker? And has this been achieved at the expense of competence in governance – or merit – and a decline in real authority?

None of the foregoing is meant as a criticism of either bishops, priests, or lay people or of collaborative ministry. It is intended to suggest that unlike secular voluntary organizations or public and private bodies which can cast their net ever wider in search of the right skills, talent, resources and competences Catholic organizations are more restricted than they think by the intense localism of Catholicism, declining resources, and the specificity of perceived core beliefs. This comes just at the time when the number of images of the Church seems to be increasing, not to mention demands from both the previous Conservative government and the current New Labour one that, 'the Church should do more'.

The lack of reflection on such limitations in the face of huge demands risks scarce resources being dissipated in pursuit of too many tasks and via possibly less-than-competent policy-making bodies/individuals just at the moment when we need to be clearer about our role, more certain of our potential and more focused in elucidating and implementing our vision of the future. Do we need to do less more effectively? We certainly need to reflect on such questions more deeply.

A more focused approach need not be managerialist but could be what other organizations would call having a credible strategic plan at each appropriate level. Perhaps our task should be to match clear vision to coherent, researched and planned decisions about training of our people and allocation of our financial resources through the waste of which we become legends in our own minds – collapsing slowly while protesting our universal potential and uniqueness?

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Cover: Archbishop William Temple

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## EDITORIAL

Living creatively in turbulent times produced the William Temple Foundation and has informed its progress. Created in 1947, in memory of Archbishop William Temple, it began life in a modest parsonage in the small North Wales village of Hawarden, next to the great St Deiniol's Library of William Gladstone. Its work focused particularly on the innovatory task of developing women's ministries in a deeply traumatised post-war Europe. Its move to a new college in Rugby in the 1950s and 1960s developed novel interdisciplinary ways of working by bringing together such diverse groups as business leaders, trade unionists, industrial chaplains, probation officers, police and clergy to work on common agendas for the common good.

In the early 1970s, surrounded by early signs of economic and political turmoil, its Council took the bold step of selling the college and renting an office in the newly formed Manchester Business School. From that base, learning to live off the land, it proceeded to develop pathfinding work in the 1970s and 1980s, engaging with the 'rediscovery' of poverty, particularly as it affected unemployed, unskilled, uneducated young people, and then with marginalised urban communities. It therefore played an important part in the seminal report *Faith in the City* (1985) and its follow-up, including the report *Faithful Cities* (2006). The astonishing globalised world of the late twentieth and the early twenty-first centuries, in which resurgent religion plays such an important part, has seen the Foundation develop nationally and internationally recognised programmes which explore the nature and role of faith-based contributions to such a context, including as religious capital, happiness or human wellbeing, and urban and rural regeneration. And always theologically inspired, practically embodied and spiritually enlivened.

It is through this powerfully comprehensive contribution that the Foundation has, in so many ways, continued - and more importantly, developed - the tradition of William Temple's contribution to Church and society nationally and internationally through the first half of the twentieth century. Faced by world

wars between nations and political religions, economic depressions financially provoked, gross inequalities deforming both poor and vulnerable and rich and powerful, and bitter conflicts between Christian denominations, Temple developed a way of working, often in collaboration with others in government, business, trade unions, and the voluntary sector, and with other Christian Churches. The task was to pursue nationally and, inevitably now, internationally, the common good of all through greater peace, equality and ecumenical relations. And always inspired by a deep sustaining belief in God which informed both Temple's theology and his spirituality. I can best summarise this world-view through his beloved great narrative of God's incarnation, from St John's Gospel: 'I came that they may have life, and have it abundantly.' It is the promotion of that gift, that grace of God, as abundant life, of greater human wellbeing in and through Christ, that produced one of the finest contributions to public theology in the public realm certainly in the twentieth century.

In recent years, however, there has been a rather easy tendency to over-criticise William Temple. It is argued he gave too much support to an over statist approach to welfare, that his ill-informed economics led to a too simplistic criticism of the banking system, and that he lacked a sympathy for evangelicalism. Interestingly, global and national events in 2008/9 are more likely to confirm Temple's judgements on the importance of the state, welfare, moral finance and a capacious Christianity. Conversely, they are equally likely to question the verdicts of his critics. Big men of great vision and accomplishment are always going to be sniped at, sometimes with some justification, but they remain big and their critics small. So history is likely to judge Temple. The present Archbishop of Canterbury should take some comfort from these reflections.

This special edition of *Crucible* brings together four lectures specially commissioned to celebrate the 60th anniversary of the William Temple Foundation. They represent much of its ongoing work, often addressing what David Jenkins, inspirational leader of the WTF in the 1970s, once creatively described as the questions behind the questions. It is these underlying issues which F. D. Maurice, great founder of that modern incarnational theology which informed William Temple's work, referred to as addressing the signs of the times. For Maurice, 'No man I think will ever be of much use to his generation who does not apply himself mainly to the questions which are occupying those who belong to it' (1842). This therefore reminds us that the very contemporary agenda of these anniversary lectures is rich with strong connections not simply with Temple's work but with that Christian social tradition to which he was only one later contributor.

For example, Bob Langley's first lecture on partnerships reflects a growing tendency for the churches to work in collaboration with others in government (local, regional and national), business, and the voluntary sector on common

problems for the common good of all. This is a requirement for effective working in an increasingly global context dominated by increasingly global problems, from finance to poverty and environment. It is because Bob writes out of a generation of such experiences in the North-East that his contribution is a particularly fine example of putting public theology to work in the public realm. And it is especially the detail of the work and the theology which lies behind all good partnership working, and which makes it so relevant to so many working away in similar local situations where the glory, as well as the devil, is in the detail. Although some have argued that William Temple overemphasised the role of the state in welfare delivery, it is most important to remember that Temple argued strongly and persuasively for the importance and role of voluntary bodies in a free and flourishing society. (He called them intermediate associations, that is, groupings acting as bulwarks standing between government and individual, and thereby operating also as schools of democracy or participation.)

The second lecture was given at Manchester University by Francis Davis as the first Ronald Preston lecture – an acknowledgement not just of Preston’s great contribution to British Christian social ethics but also of his long and influential relationship with the William Temple Foundation from its early Hawarden days to its current Manchester home. Francis particularly reflects the growing interest in the nature and role of faith-based organisations in society, globally and nationally, and including in Britain as part of the ongoing reformulation of the place of religion in a post-secular society. What he reminds us is that the new and growing interest of government in faith-based organisations has to be both encouraged but also criticised. Government, of course, can’t cope with criticism from its proposed partners. Yet, as the lecture illustrates, it has a profoundly inadequate understanding not of faith (it is very interested in Islam because it is perceived partly as threat, and because it fits with its increasingly confused commitment to multiculturalism) but of faiths, and particularly of Christianity. The lecture especially illustrates this with reference to government ignorance of the Church of England’s contribution nationally, regionally as dioceses and cathedrals, and locally as parishes, to social and human well-being. The current research of the Foundation complements some of this judgement through its detailed work on the nature of such faith-based contributions – both as the output, as what they contribute (what we call religious capital), and as the motivation or energising force behind such outputs (what we call spiritual capital – as beliefs, worship and ways of living). Government so often pursues a restrictive functionalist policy and philosophy, including to faith-based organisations, interested only in what they do without therefore facing up to the indispensable influence on that by religious behaviour and its formation. Widening understandings of such realities and potentials is all part of a likely growing importance of the nature and role of the voices of faiths in the public square, a Western post-secular part of a global trend of engagement with the phenomenon of resurgent religion.

The third lecture consists of three contributions to a seminar in London on well-being in a post-scarcity age, and the contribution of health, economics and religion. Ostensibly part of the launch of John Atherton's book *Transfiguring Capitalism. An Enquiry into Religion and Global Change*, it also thereby provided an opportunity to address ongoing Foundation agendas. For example, all three contributors are active members of a Universities-research-council-founded project seeking to explore the religious contribution to happiness and well-being debates.

Atherton's piece locates the task in a contemporary context informed by increasing prosperity, with part of that trend being the happiness-hypothesis (that increasing affluence has not brought increasing happiness). The implications for politics, health, economics and religion are briefly noted, but the other two contributors to the seminar also explore two of these aspects, economics and health, in more detail.

First, Ian Steedman writes as an academic economist, and is rightly critical of moral and religious tendencies to promote ethical concerns over the top of and often ignorant of basic economic understandings. The current financial and economic crisis has understandably, though often very unhelpfully, allowed moralists and theologians to pronounce on complex economic matters in ways which, as usual, generate far more heat than light.

The second perspective, health, is examined by Peter Gilbert, and focuses on mental health as an increasingly important problem for personal and public health in the West and globally – what James has called the representative disease of influenza, of selfish capitalism. Peter's work particularly recognises the importance of people's spiritual and religious natures for health and wholeness. Through the National Institute for Mental Health in England (NIMHE), he works assiduously to develop national, regional and local policies for the mentally ill which take proper account of these findings. The latter are also confirmed by the happiness and wellbeing research – that is, as the importance for human wellbeing of religion and spirituality, and the obstacles to this which mental ill-health constitutes.

Clearly, such material emerging from the three papers for this seminar reveal strong resonances with the work of William Temple. For example, he understood the importance of happiness as personal and relational reality for delivering an effective welfare state. Similarly, he recognised the central role played by economics in promoting happiness; yet like F. D. Maurice, his economic ignorance did sometimes lead to ill-considered judgements. However, that limitation can never excuse taking seriously his pursuit of the ethical dimension. It can be overlaid, particularly when

combined with poor economics, but that does not remove it as a central priority for wellbeing. Interestingly, at the end of his great *Christianity and Social Order* (1942), he concludes with six points for a way forward for society (essentially middle axioms) including concern for children, family life, education, work, leisure and human rights – all essential features of what current research regards as essential features for happiness and wellbeing.

Reflecting on such material, it is equally clear that this continuity of religion between William Temple and the Foundation's current work should not obscure the major change in context which has occurred from Temple's death in 1944 to today's developments. We now inhabit a quite different situation nationally and globally, and our secular and Christian understandings have also developed significantly. The agendas of the twenty-first century are quite different, and require very different responses. Most of the literatures I work with now have been produced since 2000. *Faith in the City* (1985) seems a long way away.

The final, fourth lecture on welfare and wellbeing was given by the Archbishop of Canterbury in St James's, Piccadilly, London. It provided a particularly fitting location, because William Temple was its Rector during the First World War. Even more important was the subject, because Temple provided much of the moral-religious argument for the welfare state, complementing the social-policy work of his friend William Beveridge. Linking this to human wellbeing both reflects much in Temple's thinking, and takes us to the heart of much of the Foundation's current work.

What Rowan Williams does is to connect very creatively and realistically these two themes, human wellbeing and the social structures of welfare delivery. His entry-point is carefully chosen – the problem of welfarism, or welfare dependency – because it reveals both a defective view of the welfare state and human wellbeing. Using Christian knowledge, he therefore begins with Christian anthropology, focusing on human dignity, and therefore the centrality of the human as agent, including moral agent, and its learning responsibility including through and with others (and including their rootedness in communities, including faith communities). This latter therefore allows him to link this view of human agency, particularly as formed in local and faith communities, with his emerging argument, recently elaborated in other places, for a reformulation of our understanding of the state. In conversation with early tradition, particularly with scholars like Figgis from the Community of the Resurrection, Mirfield in the early twentieth century, he develops a movement from the Fabian/Webb tradition of an over-dominant, over-competent state to society as a community of communities, with government essentially holding the ring between them and providing basic guarantees, including human rights. This links strongly to his lecture on the contribution of such communities, including religious, to law and order (the sharia lecture) under and in relationship to such an overarching state umbrella. It is an emerging and

powerful model of an interactive pluralism (in and between such communities) overseen by government, generating and providing key essentials for human living, but never overriding the essentials of human agency and wellbeing, which can only come from the individual responsibility formed and sustained in and through such local communities or associations. It is an interpretation of person and welfare which resonates strongly with Temple's thinking but equally with the current work of the Foundation. For Temple always returned to the primary principle of the person in relationships, never collapsing the one into the other. His commitment to the welfare state never led him too far from that foundation which was theologically (incarnational) and philosophically (idealism) inspired. The Foundation's work today in the happiness and religious capital fields similarly strongly emphasises the central importance of the person in community. The happiness research is constantly about human wellbeing as individual and social reality, firmly recognising the role of relationships and associations in the promotion of character and virtue, and therefore of happiness. The religious-capital research likewise emphasises the role of beliefs and values (as spiritual capital) forged in the ongoing ordinary life of faith communities, and without which their contributions or outputs would not occur. What Rowan Williams does is to provide an inextricable connection between person and communal, agency and welfare. What this cannot do, particularly in an increasingly globalised world with all its uncertainties and challenges, is to reduce unduly the role of the modern state in contributing to human wellbeing, including as welfare state. And here lies a critical conversation with Williams's more minimal view of the state. Both William Temple, and the Foundation set up in his memory, share much in the pursuit of such an historic agenda as the Foundation begins its next 60 years of promoting the relationship between Christianity and society.

*John Atherton is Company Secretary of the William Temple Foundation as well as joint editor of Crucible.*

# LEARNING TO FLOURISH: COMMUNITY, CHURCH AND PARTNERSHIP IN THE POST-INDUSTRIAL NORTH-EAST

Bob Langley

One of the local people remarked with pride at the opening of the new St Martin's Centre in Newcastle – combining as it does a base for Sure Start in Byker, community and worship space – 'St Martin's has been restored to its place in this community which the old building had when it was built in the 1930s.' As such, it provides an appropriate setting for this William Temple Foundation anniversary lecture, as we remember someone at the centre of whose belief was that concern for the interaction of church and society, and as we celebrate the way in which a focus has been maintained on that commitment, first through the William Temple College in Rugby, and for the last 30 years through the Foundation in Manchester.

The task I agreed to undertake is daunting, both in terms of doing justice to its complexity, and to the William Temple tradition.

Part of the complexity arises because any reflection on the last twenty years has to take account of immense change, and yet in other ways lack of change in the North-East in that period.

About the time I moved to Tyneside, Fred Robinson and others produced a book, *Post-industrial Tyneside* – an economic and social survey of Tyneside in the 1980s. Reading it again after twenty years evokes powerfully how things were then, and recognises just how much things have changed, whilst some underlying themes remain the same.

The authors recognise that the term 'post-industrial' is not totally appropriate, but does emphasise the coming to an end of a previous industrial era. In the 1920s, 45% of the workforce of Tyneside was in manufacturing or mining; in the 1980s that was down to 20% in manufacturing and 2% in mining. Between 1981 and 1987, the numbers employed in ship-building and off-shore industries fell from 17,500 to 5,000. Between 1979 and 1985 there was a fall in manufacturing output of 33%. The rapidity of the change in the early '80s is obvious from such figures. It meant male unemployment in 1986/7 was around 20%, with 44% of those claimants out of work for more than one year, with the consequent effect on communities.

Fears were expressed about the creation of a permanent underclass: 'commitment to maintaining full employment is becoming obsolete' commented one of the contributors. They also record the divide between rich and poor, a useful symbol being the burgeoning Metro Centre with its consumer

delights in direct view of those in Scotswood and Benwell, who could not afford to benefit from it. In the final chapter, 'Tyneside Life', Hetherington and Robinson point to the strengths of Tyneside, its people and environment, seeking to dispel the myth of an 'industrial wasteland or desert', but that does little to ameliorate the broad picture presented, in which the old and familiar is being swept away. Overall, the essays reminded me of the greyness, the sense of decline and a certain powerlessness, and the struggle for survival of people in many of the communities in Newcastle and North Tyneside at that time.

Efforts to address the situation tended to be piecemeal, targeted projects, for example the creation of Enterprise Zones, Community and Urban Programmes, Youth and other Employment Training Schemes, which were frequently discredited because they did not lead to jobs. For the Church, it meant trying to be alongside people as they struggled to cope with what was happening, the Cedarwood Project on the Meadowell in North Shields, (1982), being a particular example. And then nationally, came the *Faith in the City* report (1985), the result of growing concern, if not anger, about the plight of people in inner-cities and outer-estates, and how the most vulnerable members of society were paying a disproportionate price for necessary economic and industrial change.

The report carried strong messages to state and Church, and backed its own commitment with the Church Urban Fund. In many ways, that important report missed an underlying shift in approach which was taking place, from seeing the state as the primary resource to deal with the issues brought about by the changes in society, to seeing the private sector as an instrument of renewal. It was a shift later broadened out into a wider partnership approach. It was the point at which, using John Atherton's characterisation in *Public Theology for Changing Times*, the movement occurred from Age of State and Incarnation to Age of Partnership and Reconciliation.

While *Faith in the City's* thinking was still largely rooted in that Age of the State, its impact nevertheless raised the profile of the Church's concern for society to a degree which had not been present since William Temple, and the Church Urban Fund enabled it to bring money to the table and enter with credibility into the partnership age culture which was just beginning.

The book *Post-Industrial Tyneside* appeared at this same turning point. Its final chapter refers to the coming of the Tyne and Wear Development Corporation (TWDC), part of a second wave of Urban Development Corporations, marking deliberate attempts by central government to take control of areas of dereliction and kick-start new life, primarily through attracting more private investment. TWDC was not welcomed by Labour-controlled local authorities, because it was perceived to be taking away their power and diverting money from them to an external, unaccountable agency.



But it did mark the beginning of trends which developed in a variety of directions, and did resonate with Robinson's identifying the need for larger scale strategic approaches, and more radical interventionist policies for economic development.

In spite of many changes, especially physical, making parts of Tyneside unrecognisable from twenty years ago, some of Robinson's underlying issues remain the same, for example, the economy being controlled from outside the area, an absence of leadership and vision, increasing dependence of local on national government and lack of power and local commitment in the private sector. So the recent OECD *Territorial Review of Newcastle in the North East* says that:

- The industrial base is modernising, but currently has few major strengths.
- Knowledge-intensive and creative industries have shown potential but at a low scale.
- Manufacturing is still important, but lacks innovation, with little growth in high-tech manufacturing.
- The presence of a limited number of company HQs is helping to diversify the economic base but there are few strong industry clusters.
- Politically there are challenges for central government to devolve powers and responsibilities that can enable Newcastle and the North-East to exert traction over their economic future.
- Locally there is a need to overcome the problem of parochialism in setting economic policy priorities.

Similarly, the Regional Development Agency, in its mission to raise the Gross Value Added in the north east from 80% to 90% of the national average, identifies in its Regional Economic Strategy that leadership is a key issue, a point endorsed by respondents in a recent paper on 'Governance and Governing in the post-referendum North-East' by Fred Robinson and Keith Shaw. In educational attainment and health we also still lag behind the national average.

The extent of change in the countryside, though less visible than in urban areas, has been no less great. Rural communities in Northumberland are diverse, from commuter villages of the Tyne Valley, to small remote settlements in the north and west of the county and ex-coalmining villages in the south-east. In many places locals find themselves priced out of the housing market by people from urban areas who can afford second homes. In terms of the economy agriculture's dominance is being replaced by tourism and the development of small businesses. Health and educational services become more stretched and remote. Recent closure threats to rural post offices and telephone boxes is another significant example of an increasing sense of marginalisation and the loss of values underpinning rural life for centuries.

While the region is undoubtedly more prosperous, with unemployment well

below the levels of the 1980s, there are still pockets of severe deprivation even if now less extensive, for example in ex-coal mining and rural areas as well as in the conurbation. Starting from a low base, Tyneside now has a greater number of people from different ethnic and national backgrounds, asylum seekers, refugees and economic migrants than twenty years ago. The divide between well off and poor is probably greater than ever. The *Journal* reported recently that the number of higher rate tax-payers in the region has increased by 33.8% in the last five years. Only Northern Ireland in the UK has had a faster increase.

That is a brief sketch of a context of considerable change, yet with some barely changing underlying factors. There have also been a number of trends emerging at the time of *Faith in the City*, which have also been a key part of this scene, and which I will elaborate further, including:

1. Developments in government policy, particularly around public/private/voluntary sector partnerships and the greater involvement of communities.
2. Recognition of the need to think holistically in terms of both individual people and the wholeness of communities, and the encouragement of cross-cutting approaches to particular issues.
3. Growing consciousness of links between the local, regional, national and international, the consequential need for broad strategic thinking, and necessary changes in approach to governance and democracy, and to the relation of central to local government.
4. Growing recognition of the contribution of faith communities within a wider context of the importance of civil society.

With regard to the first trend, clear progression can be discerned in the development of urban policy, through Urban Development Corporations, City Challenge and Single Regeneration Budget (SRB) Schemes, New Deal for Communities, and Neighbourhood Renewal Fund, towards a requirement to work in partnerships and the involvement of people in local communities. The development of Local Strategic Partnerships expressed the same principle of partnership working across a local authority area, rather than in relation to a particular area of deprivation, and began to open the way to recognition that the regeneration strategy for Newcastle is now about the whole city not just deprived areas.

Partnership working can be immensely creative and positive. In my experience, from two SRB Partnerships and the Neighbourhood Renewal Fund, having contributions from around the table from a range of people with different experiences and expertise, from housing, Chamber of Commerce, voluntary sector, and the community as well as elected members, makes for rich discussions and good creative decisions. Its success depends much on clearly

defined terms of reference and objectives, shared vision on how to address them, and different relevant experiences which members bring to the discussion. It also proved important that all the community members had previous experience of local regeneration schemes. They provided vital ingredients of locally rooted knowledge and experience of being at the receiving end of regeneration schemes. Their confidence and expertise brought about a sense of equality of contribution to the task from the community perspective, and meant that as the group worked together over a period we were able to learn from one another to develop ideas and effective working.

Where some or most of these factors are not present, partnership working happens in name only. The difficulties must not be underestimated. There is a fundamental issue about power which needs acknowledging and overcoming. People come from different backgrounds, cultures and professionalisms, each with assumed boundaries. This applies to voluntary sector organisations as much as local authority departments and officers. The private sector can become frustrated with community representatives who often are perceived as requiring endless consultation. Some are present to gain money for their own cause. Working in partnership can question the role of elected members, demanding hard thinking about the nature of community leadership, and within that the relationship between participative and representative democracy.

Partnership working also needs embedding in the way decisions are implemented if it is really to make a difference. Some of the best work done through the Neighbourhood Renewal Fund was in persuading public sector officers to step outside their silos of education, health, environment or economic development and to work collaboratively, and to include relevant people from the voluntary and community sectors, on an issue which touched all those areas. A recent report on 'Health Inequalities in the North-East' identified such working in partnership between different agencies as the major factor helping them to make improvements.

This touches on the second of the trends discernible over the period, of thinking more holistically, recognising that many problems cannot be solved by any one agency. We need to think imaginatively about all whose experience and resources might be brought to bear on a particular problem. For instance, supporting someone back into employment needs to draw on Job Centre Plus, but also those concerned for mental health, running local community self-help groups who can help people's confidence to grow, and the provision of housing and transport.

Such thinking holistically drove some of us to develop work in Ouseburn. We had initially experienced the Tyne & Wear Development Corporation as an external and powerful agency parachuted in to bring regeneration within a

limited area, without any regard to the most disadvantaged communities on its boundary. To be fair, the Corporation, after initial resistance, did much within its restricted remit for property-led regeneration, to relate to the local communities. For example, an enlightened approach to disabled access in its developments was much stimulated by a local disabled person, a Community Development Project in the immediately adjacent area was a partnership between local churches together and the City Council and ran for more than ten years, and the Caring Hands Charity, were all important spin-offs of the development.

Learning from this experience, we saw the opportunity in Ouseburn to pursue a process of regeneration emphasising community and continuity with what was there already. We wanted an approach built on the signs of emerging new life, including cultural activities based in 36 Lime Street, a City Farm, small businesses, local community organisations, the Boat Club and the Homing Society. We also thought it important to honour the architectural and industrial heritage and the stories of the lives of those who had lived there. We wanted to bring more people to live in the area in affordable housing, and to develop the diverse communities of the Valley both individually and in relation to each other.

This process has raised many questions about the nature of regeneration. By developing things even in this holistic and organic way, would not something of the essence of the Valley as a particular place be lost? One of our number wrote a piece called 'Ouseburn Gothic', exploring the way in which some of the Valley's existing characteristics, including the sense of being a slightly different world on the edge of the mainstream, a mysteriousness with echoes of the past and the people who had lived and worked there, might be lost, and therefore something of the soul of the place sanitised or removed for ever. That has always provided a point of challenge, to try to ensure that all voices have been heard and yet to live in the real world of the market.

As development has taken place, such conflicts between different interests have frequently come to the surface between those idealists who didn't want any commercial development, seeing it as impure, and those who recognised it, because they wanted to make a living and saw that growing the local economy was necessary to achieve other objectives. Other conflicts of interests have occurred at a more mundane level, such as the noise from bands, either practising in one of the workshops or performing at one of the venues, annoying the residents of nearby flats. There have also been endless meetings to try to gain agreement about traffic and parking in a restricted space, again trying to hold together views of those who would ban all traffic, and those who needed deliveries of wood for their furniture workshop, or access for coaches delivering children to Seven Stories, the national centre for the Children's Book.

All this makes very real Atherton's linking of partnership and reconciliation, and provides material for mutual learning and the development of understanding, respect and shared envisioning. The whole exercise has been about trying to see things whole, and to give substance to the rhetoric of sustainability understood in the broadest sense in terms of economy, environment and community.

The third discernible trend has been the growing consciousness of links between the local, regional, national and international, and the need for broad strategic thinking. The creation of the Regional Development Agency, the movement towards City Region working, The Northern Way activities bringing together the core cities of the north of England, the referendum on Regional Government and most recently the moves towards unitary authorities for Northumberland and Durham, are all part of a recognition of the way we are being driven to think regionally if we are to compete economically in the wider world.

The downside of adopting this ever-expanding frame of reference is that localities become more powerless. There are particular fears in rural Northumberland that the combined forces of City Regions and Northern Way will suck yet more life out of the north of the region. It is also becoming more common to say that what is needed is fewer, larger, more strategic projects, rather than spreading available money amongst a larger number of individual projects. This almost inevitably disadvantages smaller communities. In the urban areas, the old SRB schemes and the Neighbourhood Renewal Fund did make space for small local initiatives. It was possible for faith communities and other voluntary and community organisations to put forward work and receive funding for it. That is not going to be so straightforward under the new Local Area Agreement regimes. Again, immediately after the Foot and Mouth epidemic of six years ago, the government clearly wished to put resources into supporting rural communities. But there is concern now that the agenda has changed, as have the responsible government departments delivering them, and the attention of DEFRA has switched to climate change. Rural Community Councils across the country are feeling a considerable draught, threatening jobs, and the consequent support for small, often fragile community groups in rural areas.

Clearly, regional strategic planning is necessary in the current economic world, but recognising its effects on marginal areas and communities needs to be part of the approach, and the huge inequalities across the region also addressed. It cannot be right for instance that average income level in Berwick is half the national average.

Changes in governance arrangements in the recent White Paper and development of the partnership approach in a more thoroughgoing way through the establishment of Local Area Agreements (LAAs) promise a way

forward. LAAs propose a new relationship between local and national government. More power is being given, or some would say restored, to local government, to choose their own targets from within a greatly reduced national list, with a focus being flexibly responsive to the needs of diverse communities. It assumes they will work with a range of partners, including voluntary and community sector, and aim for the goal of 'holistic working'.

The rhetoric is predictably excellent. But for this 'new localism' to genuinely ensure greater involvement of people in shaping their localities, whilst feeding into necessary strategic thinking at another level, a culture change is needed. It demands that more people than at present need to take responsibility for shaping their area's future, in contrast to the perception in many communities that 'It doesn't matter what I say, they will do what they want.'

A similar debate is going on in Northumberland, where it is proposed that the new unitary authority will have as its base unit 27 community forums, consisting of clusters of parish councils with other groups making up civil society. I supported the single unitary bid because I believe that a powerful unified voice is needed for Northumberland to counter the strength of those economic forces of the Tyneside conurbation to which I have already referred. But I also believe that hand in hand with this must go those local forums, with all the work that needs to go in to making sure that happens. Without this the danger is the new authority would fulfil fears of opponents of a single unitary, that local areas would become even more distant in terms of influencing decisions. The matter is in local people's hands to make sure that the rhetoric is given substance.

The fourth discernible trend in the last twenty years has been growing recognition of the contribution of faith communities, within a wider context of the importance of civil society.

While *Faith in the City* was a Church of England initiative, with a clear set of recommendations to government and Church, its successor twenty years on stands in a different place. *Faithful Cities – A Call for Celebration, Vision and Justice* (2006), is set firmly in the context of the contribution of the faith communities to what makes a good city. Whereas at the time of *Faith in the City* there was a sense among many inner-city churches of being beleaguered, of what David Jenkins called 'communities of endurance', the tone now is much more upbeat. It draws on a range of examples of positive contributions to community in different places across the country. Since *Faith in the City*, there has been a growing sense of the churches and other faith communities being invited back into partnerships with government. In very recent times there has been a number of reports, from the Local Government Association encouraging local authorities to engage with faith communities, the Joseph Rowntree Foundation assessing the contribution of faith communities, to evidence from

the North-West Development Agency on the considerable economic contribution made to regeneration in the north-west by faith communities. There has also been the work done by the William Temple Foundation on spiritual and religious capital in Greater Manchester.

All this is set within a growing concern for developing civil society, and the assumption within the government policies to which I have referred, that the voluntary and community sectors will play a crucial role in the partnership culture. Yet some of the expectations of these sectors have been challenged. For example, it sometimes appears that the voluntary sector is being unrealistically expected to deliver services, and there is the fear of being co-opted into government agendas. It also sometimes feels that the voluntary sector is being used to make contact with those other agencies find difficult to reach, rather than the wider contribution they can make in terms of the values and approaches they bring to the work. But it is also true that just as the partnership culture, and the coming LAA, means that the public sector agencies need to examine afresh the roles they play and the way they work, so the voluntary sector may need to reappraise its position, asking what it means to be a partner, rather than an independent agency dependent on grant funding to do its independent work.

Whatever, the strengthening of civil society, within which the faith communities must be a key element, is crucial. In this respect, a recent inquiry into the future of civil society by the Carnegie Trust identifies questions to address for civil society to be able to make a contribution into LAA and other partnership structures. These include:

How does civil society respond to the emerging conflict between conventional economics and environmental and resource issues?

How does civil society help support the spaces (physical and otherwise) where differences can be explored and reconciled about future values, social needs and problem solving?

How does civil society connect to representative politics at all levels - from the global to the national to the local?

How does civil society influence the development of technology so it supports the development of a 'good society' rather than undermines it?

What are the future problems that can be addressed only by civil society and its organisations - and what is the nature of these problems that make this true?

Finally I turn briefly to some of the questions which this lecture is supposed to address. What has been learnt about human flourishing that might give us hope for a renewed north-east, and is working to-

gether across different sectors possible or are competing interests irreconcilable?

I have come to believe strongly that crucial contributions to human flourishing are made, first, by ways of working which draw on different gifts, experiences and perceptions of different individuals, and second, by ways of working which respect difference and provide the opportunity to develop shared visions and enable people to learn and grow through that process and make something happen for their community. For example, Stuart Dawley, Cheryl Conway, and Professor David Charles of Newcastle University used Ouseburn as a case study in 2005 to explore the characteristics of 'communities of practice'. They identify a number of factors: joint enterprise and shared vision; mutual engagement; boundary-spanning exchanges, involving the transfer of knowledge and expertise both across communities and between community-led and professional regeneration areas; and participatory learning.

From my Christian perspective, these factors are profoundly theological statements about how transformative communities might exist, based on hundreds of similar small scale but significant examples of such activities in both Newcastle and Northumberland in the last twenty years. Most recently in Newcastle I would point to the pilot work in the Outer West on Participatory budgeting. It is a process whose origin is in Latin America, and has been developed in one or two places in this country. People in an area are invited to work together to decide what would best make a difference to their area, what would make living there more worthwhile, and a budget is provided. They make a number of proposals, present them to one another, debate them and then vote which ones should be adopted. This is a learning experience for all involved, not least for those whose ideas do not get chosen. The fact of having a budget gives an element of real control to those local people. It is not just a matter of them being consulted about what others may or may not provide, but being able to make a difference themselves and having to take responsibility for the consequences.

These small-scale exercises and projects are signs of hope. The difficulty comes in translating some of the processes into the mainstream way of working. The established way of doing things, the rigidity of the boundaries of professionalisms, the comfort of working within your known silo, are immensely powerful and require a huge culture change to break out of them. I was pleased to hear a local authority officer in north Northumberland, in talking about the development of the community fora and the local area agreement, say that people like him had to let go of a lot of control if the objectives of the exercise were to be met.



There is, then, much work to do to support people through the changes that will be required, both local residents and those in positions of authority within public and voluntary sector agencies.

Is working together across different sectors possible? The answer must be that it has to be made possible because in our present world no one agency has the ability or the resources alone to bring about the necessary transformation. Every issue stands at the centre of a huge network, horizontally of partners who need to make specific contributions, and vertically in terms of wider strategic allocation of resources. For instance, maintaining a school in a Northumberland village is linked to the availability of affordable housing, employment opportunities, and the availability of medical care and transport. All these can be affected at the vertical level by how local authority and other agencies such as ONE NorthEast, English Partnerships, and DEFRA decide to allocate their resources.

Where are faith communities and especially churches in all this? *Faithful Cities*, and other recent reports on the importance of the faith communities' contribution to regeneration, demonstrate that much is already going on. St Martin's Centre is one such example, where local churches have supported the greater flourishing of their communities, from the support for asylum seekers and refugees, to detached youth work, drop-in centres and credit unions, community projects seeking to help people to take responsibility for their area, imaginative use of buildings in both urban and rural parts, and in the latter various tourism initiatives. Most of these do not simply have 'soft' outcomes, as often portrayed, but 'hard' economic implications for the local economy, as the NWDA survey showed.

### **What are the future lessons for the churches?**

First and foremost it requires an open-eyed stance towards every aspect of the world, not in a neutral way, but as Christians expecting an encounter with the presence of God in human affairs in which it becomes clear that, in the words of the Latin American theologian Gutierrez, 'at the root of our personal and community existence lies the gift of the self-communication of God, the grace of God's friendship'. For Gutierrez, spirituality must be a totality informing every aspect of life. It is nothing less than how we are in the world, and for Christians that is a position of expectancy, of picking up the signs of God's creative and reconciling forces in the communities and events around us.

Second, it requires shared vision of our responsibility for transforming the world, placing people and their flourishing at the centre so that we all may reflect the true humanity which is in Christ.

Third, it requires acute listening in our relationships with people, particularly

those on the edges of our society, but also in our approach to cultures, other faiths, and by no means least, to the wide range of languages, economic, political, and scientific in which people try to make sense of their experience and carve out proposed solutions to the issues which face us. For God is to be found within all that, as well as often being obscured. If we are to speak of him, there we need to be able to articulate that in languages which others share. Helen Cameron has written: 'We need public theologians who have a way with words, who are willing to learn academic and policy languages that are not their own, who can express compelling links between belief and action.'

Fourth, I believe that as we listen and discern we can make distinctive contributions to society. For example, we can;

- always help people see the bigger picture, to transcend the immediate, to open eyes to a larger vision;
- always promote a holistic view of human beings and their environment;
- ask how we can best deploy our assets of buildings, land and people;
- support and ally ourselves with those sharing our hopes for human flourishing. There are many working in public and voluntary sectors who share our aspirations. With our support they may be helped to overcome some pressures which threaten to limit their action;
  - provide spaces (physical and otherwise), referred to in the future of civil society document, where differences can be explored and reconciled about future values, social needs and problem solving;
  - challenge vested interests, however well intentioned, when they threaten to limit the possibility of human flourishing;
  - hold those who speak the rhetoric to find ways of making it real;
  - encourage people to break out of worlds in which they have imprisoned themselves, as a result of fear or too narrow a professionalism;
  - celebrate the diversity of human experience and expression and find ways of working which draw people into inclusive networks;
  - be honest broker with no axe to grind, capable of being within yet detached from a situation, driven by the desire that God's presence amongst us should be honoured.

None of this can happen without that deep engagement with the people, community and world around us. I have gone into some considerable detail, because it is in the detail that engagement really bites, and it is through that deep, time consuming, often difficult working with the detail that we learn, grow and gain the authority to speak. A precondition of such engagement is being part of the existing networks. These are both horizontal and vertical, and our engagement with them at every level is crucial. We would not be sitting in this building which serves this community had not that engagement in local networks existed. Some of this engagement will be done by clergy or other paid members of the Church, but from the churches' point of view we need to support more fully many lay people already in such settings as part of their job,

wrestling with some of these difficult questions and making decisions affecting people's lives.

The churches, alongside other participants in civil society, need to be constantly scanning the horizon, analysing and understanding the way things are moving, interpreting implications, identifying entry points for opportunities to enhance human flourishing, and then working with others to take action.

The opportunities are probably greater than they have been for a long time to make such common cause with others through partnership working, to support faith and other communities within civil society to take more responsibility for shaping the future, to have an influence within networks at every level, and to encourage all working to further human flourishing to resist those forces making them fearful of change and those attitudes restricting and stifling the possibilities.

*Bob Langley has played an important role in church and society in the North East for a generation. He became Archdeacon of Lindisfarne and chair of the William Temple Foundation. This lecture was given in February 2008 in St Martin's Centre, Byker, Newcastle.*

# THE DEMISE OF PROPHECY OR THE RE-INVENTION OF GOVERNANCE? FAITH AND THE WELFARE STATE<sup>1</sup>

Francis Davis

In June 2008 my colleagues and I published a report for the Church of England entitled *Moral But No Compass – Church, Government and the future of welfare*.<sup>2</sup> It was the latest in a series of exploratory studies that we had undertaken, reviewing aspects of church life, and faith-based advocacy, in the UK and the wider EU.<sup>3</sup>

As with some of our other work, when the report was published it attracted international media attention. In this case it also provoked the intense ire of the UK Government, the National Secular Society, and certain newspaper columnists. The Secretary of State for Communities even used a Prime Ministerial reception at 10 Downing Street as a special platform to attack its findings.<sup>4</sup>

Some who had written affirming the content, tone, and title of the report before publication scattered from view when faced with this line of fire. Others who read it for the first time called the study ‘fascinating and important’<sup>5</sup>, ‘important and provocative’<sup>6</sup>, ‘formidable’,<sup>7</sup> worthy of positive publicity,<sup>8</sup> and ‘hits the target’.<sup>9</sup> The chair of the Christian Socialist Movement did not want his MPs to read it, but they, and more than three thousand others, still bought it. On mainland Europe, where the role of religions is increasingly contested, the report has been used as a case study to underpin fresh strategy in faith-based national organisations.

In this article I want to return to both our published and unpublished research for the report, aspects of the ensuing debate and other studies, to suggest that

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<sup>1</sup> This article is based upon, and develops, the Ronald Preston Memorial/WTF 60th-anniversary Lecture of the same title at the University of Manchester May 2008.

<sup>2</sup> Commissioned by Bishop Stephen Lowe, Bishop For Urban Life and Faith. F. Davis, E Paulhus, A. Bradstock (2008), Matthew James Publishing.

<sup>3</sup> I am drawing especially on research for *Moral, But No Compass* and four further studies on migration, the churches and anti-poverty action funded by Caritas Europa and Caritas Social Action. See [www.vhi.org.uk](http://www.vhi.org.uk)

<sup>4</sup> Thursday 12 June 2008.

<sup>5</sup> Archbishops of Canterbury and York 9 June 2008.

<sup>6</sup> Rt Revd John Gladwin, Bishop of Chelmsford, 9 October 2008, House of Lords, Hansard.

<sup>7</sup> Rt Hon Greg Clark MP Shadow Minister for the Third Sector. Letter to authors.

<sup>8</sup> Lord Griffiths of Burry Port, 9 October 2008, House of Lords, Hansard.

<sup>9</sup> Rt Revd Kenneth Stevenson, Bishop of Portsmouth, 9 October 2008, House of Lords, Hansard.

we stand at a critical juncture in Church-state relations in the UK. By this I do not mean to assess questions regarding (dis-) Establishment. I will concentrate more on aspects of the challenges that Churches in the UK now face when it comes to enhancing or advancing some idea of 'social justice'. I will focus especially on the three interlocking areas of evidence, voice, and innovation.

During our research we have been struck by how concerns that would have been high in the last century among Church leaders, as to *whether* they should be involved in public or political prophecy, have increasingly shifted to accepting such a calling as a given while debating *the form* such involvement should take instead. Key to this debate about form has been a concern that 'getting into bed with the state' to deliver welfare services might dilute the 'prophetic cutting edge' of the Church. Likewise the state's approach has moved from one of informal discourse to an increased structuring of faith-state interactions. Is the emerging policy agenda one in which an authentic Christian role of 'prophecy' can be sustained, or are new forms of governance neutering the Christian potential to 'renew the face of the earth'?

### **1. Encounters Without Evidence: a conversation without comprehension?**

'Evidence-based policy making' is driving a change in culture on the part of Government.<sup>10</sup> This approach to policy formulation is not simply traditional Fabian 'fact gathering'.<sup>11</sup> Linked as it is to a more managerial direction within the state, it is also conditioned by a desire to identify and codify as part of a social balance sheet, to enhance the seeming insulation, rationality and neutrality of the state apparatus, while also providing an approximation to commercial operational management information for public leaders. To use a metaphor: not to exist, or to be inadequately captured in key evidence, is to be excluded from the stock and work in progress of public bodies and/or to risk being inserted into the production-line of policy formulation and impact at fundamentally inappropriate junctures while still feeling enthusiastically involved in the manufacturing process.

In our research we encountered many Bishops and other church leaders who perceived the role and significance of the Christian contribution to the civil society and social welfare sphere to be well understood in government.

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<sup>10</sup> H.T.O. Davies, Sandra Nutley, and Peter C. Smith (2000) *What Works?: Evidence-based Policy and Practice in Public Services* Policy Press; Davies, H. T. O. and Nutley, S. M. (1999) 'The rise and rise of evidence in health care,' *Public Management and Money*, Vol 19, 1, 9-16

<sup>11</sup> A perception of Archbishop Peter Smith, Chair of the Roman Catholic Department of Christian Responsibility And Citizenship, England and Wales at a seminar of the Catholic Doctors Guild, Clifton Cathedral, Jan 2006.

Thinking this to be so, we visited the office of the Secretary of State for Communities (DCLG) and senior staff at the Cabinet Office. As *Moral But No Compass* (MBNC) reveals, we encountered concern at the DCLG that its researchers had no formal evidence-base on Christian communities. In the Cabinet Office there was a recognition that the Office of National Statistics served the third sector in general ‘poorly’, but little sympathy for the suggestion that an evidence resource on Christian faith-based action would be useful in an environment where government is designing faith-focused policies across several departments of state – while also seeking to renew third-sector bodies more generally.

We turned to the Charity Commission – as the regulator of some Christian charities with legal personality – in search of evidence especially because it judges itself to have undertaken a highly successful three-year consultation process with the faith communities. This programme of work drew heavily on the faith and social cohesion unit at DCLG, and also on specialist advice from the Foreign Office. It led to the creation of a new Charity Commission Faith and Cohesion Unit which ‘would focus on the Muslim community in the first instance’.

In its report of its three-year process of ‘working with faith groups’, published in December 2007, the Charity Commission said that the reason why it had become interested in faith-based charities was because of problems of governance in independent Evangelical Christian congregations and mosques. This had led it to initiate a new engagement which, ‘because they were the major world religions’, involved most of the UK’s minority faiths but not either of the two largest religious groupings in the country.<sup>12</sup>

One outcome of this consultation was that the Commission reported that ‘as a result of ‘new research, it had unearthed ‘in excess of 25,500 faith-based charities’. This contrasted with the figures quoted by the Carnegie Commission Into the Future of Civil Society that reported at around the same time. They had been told by the Commission that there were 23,383 charities registered by religion with a total income of £4.6 billion but – significantly – noted that this must be an understatement because the figure did not include Church of England parishes whose number is in excess of 15000.<sup>13</sup>

By contrast, the NCVO *Civil Society Almanac* – described by Ed Milliband MP as the ‘Bible’ of the voluntary sector – in March 2008 said that there were 10,213 faith-based charities on the register in 2005/06, with an income of £3.19

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<sup>12</sup> *Working With Faith Groups: The Charity Commission Faith Groups Programme 2004-07*. Downloadable at [www.charity-commission.gov.uk/enhancingcharities/faithgroup.asp](http://www.charity-commission.gov.uk/enhancingcharities/faithgroup.asp).

<sup>13</sup> Cited in *Moral But No Compass* (2008) op cit.

billion and owning £11.9 billion in assets. They judged that the requirement in the new Charity Act for 'excepted charities' to report to the Commission if they have a turnover of over £100,000 would mean that 2,734 faith-based charities would be added to the Charity Commission's statistics.<sup>14</sup>

More worryingly, Palmer<sup>15</sup> has observed that this underestimation is due to deeper failures of classification and understanding. Researching on the Charity Commission's website, Palmer notes that charities are classified by their type of beneficiary, their function, or their field of operation. Consequently, she spent time searching the database by name, registration number, areas in which charities worked and by key words. Based on the name of charities and their objects, she judged that 5 out of 8 organisations in her subsequent full research example would not have been classified as 'religious' or 'faith-based' despite the fact that they were fully and self-consciously Christian in origins, ethos and governance. Fearing this may be a misperception, she contacted the Charity Commission helpdesk and her discovery was verified. Palmer comments that 'if 5 out of my 8 missing faith-based charities . . .' in the social-welfare sector 'is representative, then the faith-based charity population' in this field...', on the Charity Commission's register alone, would be understated by as much as 62.5 per cent.'

Using the same method, we searched the Charity Commission's website. We discovered that the Bishop of Guildford's Foundation, Church Action on Poverty, Housing Justice, The Passage Centre For the Homeless, Methodist Homes For the Aged, a couple of Catholic Children's societies, and the St Vincent De Paul Society, would not count as religious charities despite their expressed ethos and constituencies.

On telephoning the Charity Commission ourselves, we had this perception confirmed. 'While we do use key-word searches to identify additional religious charities,' they said, 'we usually focus on key words relating to minority religions . . . such as "mosque" and we do not look at Christian words.'

In June 2008, upon publication of *MBNC* the chair of the Charity Commission protested loudly<sup>16</sup> and has since said she was 'disappointed'<sup>17</sup> by our observations. And yet simultaneously the Charity Commission briefed journalists that coincidentally, just as we were interviewing their staff, they had undertaken new research which had unearthed 24,529 Christian charities, lifting the overall number of faith-based organisations that they were aware of

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<sup>14</sup> O. Reichardt et al (2008) *The UK Civil Society Almanac* NCVO.

<sup>15</sup> E. Palmer (2008) *The True Cost Of Sustainable Funding*. Unpublished Thesis. South bank University.

<sup>16</sup> Letter to *The Times* 14 June 2008.

<sup>17</sup> Address to the Association of Provincial Bursars, High Leigh, 7 October 2008.

considerably.<sup>18</sup> At that time, and in a subsequent paper on the detailed work-in-progress on the problem of counting Christian and other faith-based charities, the Commission also confirmed that our fundamental thesis was correct, namely that current classification criteria, even when enhanced with the use of key-word searches, do not yet enable the regulator to know how many Christian charities there are.<sup>19</sup> Even though the Commission is now inviting senior figures to sit on a new religious advisory board, it would seem that there are important mismatches between non-executive denial and executive reality at the Charity Commission.<sup>20</sup>

## **2. A Structured Dialogue: private religion, the problem of political theology and the search for voice?**

Aside from issues of social and civic recognition, this absence of convincing evidence has a number of powerful consequences when it comes to the interpretation of the law, the practice of policy-making in the third sector, and on the search by the Churches for an authentic prophetic voice.

Under the 2006 Charity Act, the Charity Commission now needs to regulate the 'public benefit' delivered by Christian charities. From 2009 charities will be required to report on the 'public benefit' that they are contributing.

At the time of writing final guidance is awaited as to what 'religion and the advancement of public benefit' might constitute. In draft guidance to date, the Commission have taken a very narrow view of the common law<sup>21</sup> to argue that that which constitutes 'religion' is defined by explicit Christian branding and also must not take coherent political stances.<sup>22</sup> For the Commission, 'religion' is distinguished from *non charitable* 'ethical and moral belief systems' by it having content that involves 'worship', 'submission', and the acknowledgement of a divine being.<sup>23</sup> While in the draft guidance on public benefit, religion is judged to be incapable of unspoken or unadvertised public consequences, the

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<sup>18</sup> Copies of press briefing available from the author.

<sup>19</sup> S. Brennan (2008) *Working Paper: Faith Based Charities*. Given to the NCVO Researching the Voluntary Sector Conference. I am not quoting the paper in full at the request of the author.

<sup>20</sup> And even the charity commission's best efforts leave huge gaps. For example, the Church of England Stewardship office reports that 14,000 Anglican parochial charities will still be untouched by new reporting standards in the 2006 Charity Act.

<sup>21</sup> This comment is based on legal advice from Stone King Sewell LLP. See also R. Meakin (2008 forthcoming) *The Law of Charitable Status – Maintenance and Removal* (CUP)

<sup>22</sup> Charity Commission (Feb 2008) Draft Supplementary Guidance on the advancement of religion.

<sup>23</sup> Charity Commission (Oct 2008) Consultation on draft supplementary guidelines on public benefit and the advancement of moral and ethical belief systems. Downloadable at [www.charity-commission.gov.uk/publicbenefit/pbmor.asp](http://www.charity-commission.gov.uk/publicbenefit/pbmor.asp)



consultation on guidance for ethical and moral belief systems accepts that they have an impact on behaviour and the way people positively interact together.

Indeed, a Christian project that feeds the hungry because it is the right thing to do but without ‘God-talk’, or which advances a political cause quoting sacred texts – such as opposition to apartheid or the sale of Hawks to Indonesia – would not be, for the Commission, appropriate tasks for a religious charity. Instead it would either be required to register a second *secular* object, namely ‘relief of poverty’, or lose its registration. (Perhaps ironically there is no indication from the Commission that if, say, a secular charity such as the Red Cross raises money through carol and memorial services it should have to register an additional *religious* object.)

In such circumstances it would not be surprising if the Commission’s limited interpretation of the law reduced the number of Christian-based projects that were able to ‘bridge’ with the wider community and, in turn, began to undermine open-minded and key strands within Christian volunteering and social advocacy as well as current government social cohesion priorities. It would also not be surprising if some progressive Christian voices were quietened or even silenced. Religion, then, is to be a private idea of the mind and the sacred building, not of unconditional solidarity in the gutter.

Notwithstanding these concerns, it has been said that the rise of new consultative bodies and arenas in which faith-based voices can be ‘heard’ will overcome any reservations that people in the Christian community may have. At the regional level ‘Baptist Ministers are listened to with the same respect as Anglican Bishops’ and in Local Strategic Partnerships ‘Christian participants are increasingly present.’<sup>24</sup> Also, in the regions there is some cross over between the Churches’ ecumenical bodies and the Government’s Faith Action initiative.<sup>25</sup> And yet, while some Christian bodies see this as the apogee of access and voice, there are at least three reasons why such an assumption should be handled with great care.

First, as Richard Farnell’s work in London has suggested, there are high long-term risks for both government and the faith communities in consultation and participation without budgetary allocations. It may be good to talk, but when faith communities are asked to repeatedly attend meetings which are separated from budgetary decisions the faith communities can have their strong social capital diluted by policy conversation processes while concrete policy outcomes may be minimal.<sup>26</sup>

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<sup>24</sup> This was the view of some participants from the Churches Regional Network at a seminar in Birmingham October 2008.

<sup>25</sup> For example *FaithNetSouth West*

<sup>26</sup> R. Farnell (2007), *Faith In Lewisham – A Review and Evaluation of Partnership Work between the London Borough of Lewisham and Local Faith Groups*, Coventry University/Lewisham Borough Council.

Second, the lack of evidence and the tension between the anti-radicalisation and equalities agenda, and policies to renew civic participation can mean that the right religious body ends up being allocated to the wrong policy tasks. So, while, from an equalities perspective, it is a positive step forward that diocesan officials from skilled and high-net-worth charities meet on interfaith bodies those of resource-scarce representatives of other faiths, from the perspective of engaging these large diocesan charities in developing significant community foundations or engaging in service-level contracting, it may be a profound drain on available time and resources.

Such ‘structured dialogue’ is now also raising similar questions in Ireland but also, across Europe, a further question: to what extent is the attempt to co-opt faiths into these new governance arrangements actually part of a rapid secularisation process? While in Ireland Bertie Ahearn defended ‘structured dialogue’ as a recognition that ‘the best traditions of Irish republicanism’ would be betrayed ‘if an aggressive secularism had its way’,<sup>27</sup> new European voices sense a wider agenda of co-option and polite exclusion.<sup>28</sup>

Third, this brings us to a more profound challenge for the Churches, namely the extent to which *political* inputs at the parliamentary and council-chamber levels are less important than they were in a world before the new public-management, quasi-governmental governance, and performance-improvement strategies. Traditionally in much UK theology of welfare, the state was seen as a neutral actor in implementation. The decision-making processes between the *political inputs* of committees with which political theology has been so concerned, and intended and unintended *policy outcomes* in which it has had less interest, are now to the fore. This is partly because of an acknowledgement of the ‘rent seeking’ capacities<sup>29</sup> of some social forces, and partly because of an increased willingness to affirm the potential agency of public managers.<sup>30</sup>

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<sup>27</sup> B. Ahearn (2007) quoted on RTE News 26<sup>th</sup> February See [www.rte.ie/news/2007/0226/religion.html](http://www.rte.ie/news/2007/0226/religion.html)

<sup>28</sup> T. Modood (2008) *Muslims, Equality And Secularism* in B. Spalek and A. Imoutal (eds) *Religion, Spirituality And The Social Sciences* Policy Press, for example, draws out a careful set of distinctions between the methods of institutionalising the *secular* in a variety of European countries. In France - and despite the explicit commitment to *laicite* - formal state strategies have sought to establish consultative councils of approved religious voices. By contrast, in the UK a “milder” form of secularism has thus far arrived at less formalised - and perhaps less rational - institutional arrangements. In neither case is the “secular” judged by this Muslim academic to be only located in individual hearts and minds. The inference is that as secularism increases the more the state seeks to define, codify and institutionalise that which it deems to be acceptably “religious”. Such a view would sit powerfully alongside the manner in which the Charity Commission is going about interpreting the common law. It would also raise doubts over the form in which a good number of local civic conversations with faith communities are taking place .

<sup>29</sup> P. Dunleavy (1981) *The Politics of Mass Housing in Britain: Study of Corporate Power And Professional Influence In The Welfare State* Oxford, Clarendon.

<sup>30</sup> M.H. Moore (1995) *Creating Public Value*, Harvard

Whatever view the Churches take toward the transformation of welfare forms experienced in the past 60 years, the question they face today is how to respond to the situation *as it is* as well as *it ought to be*.

For example, and certainly until the recent liquidity crisis for banks, moves were under way within government to refine what it calls its ‘public-sector reform strategies’. Crucially, in the light of what we heard from the Churches’ leaders about their commitment to ‘prophecy’ and the importance that many attach to consultative committees and partnerships, this process is informed by a powerful conviction that ‘exit, voice and loyalty’ (or increased ‘choice and governance’ as it has been described by the London School of Economics) could help smooth out blocks to public-sector renewal that Labour policy-makers see themselves as having encountered, especially in the NHS.<sup>31</sup>

At the heart of this approach is an understanding by government of ‘advocacy’ by civil-society groups, not as something distinct from ‘delivery’ but a fully integrated part of its improvement strategy. ‘Advocacy’, ‘consultation’, and ‘delivery’ are flipsides of the same coin. Inspired by, for example, Albert Hirschmann’s work, government has sought to introduce ‘choice’ or flexibility into service provision and mirror in the social sector what is said to occur already in the private sector. For Hirschmann, users of organisations send clear signals that they are failing, and for the need for improvement, by ultimately withdrawing their custom when dissatisfied. Crucially for government, Hirschmann does not only rely on such a ‘classical economic’ perspective. He also suggests that key organisational improvements can be influenced also by those customers who do not ‘exit’ immediately but, out of a sense of loyalty, will exercise their ‘voice’ instead. Especially in public service organisations this provides a second signal with regard to the need for renewal.<sup>32</sup>

In this view campaigning, consultation, complaining, and advocacy are consequently critical to lifting the performance of public services and bureaucracies, many of which are seen to be under pressure in terms of political support in the country.

For the Church this analysis challenges the ‘primacy of prophecy’. In short, civil society – or faith-based participation – in service delivery and advocacy builds both ‘choice’ *and* ‘voice’. So does participation in Local Strategic Partnerships, which openly describe their primary task as being linked to efficiency. All are equally valid means by which to improve public-sector performance.

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<sup>31</sup> J. Benington (ed) *Reforming Public Services* HMSO

<sup>32</sup> A. Hirschman (1970) *Exit, Voice, Loyalty: Responses to Decline in Firms, Organisations and States* Cambridge, MA: Harvard.

Consequently, when the Government approaches public-sector reform and improvement, it does so not with a simple philosophy of 'privatisation' or by driving commissioning on the grounds of 'price'. The combination of 'choice' and 'voice' seeks to introduce a fresh approach that brings the state into full contact with a range of actors who can help it improve. New voices are sought to enter into those conversations, whether they be social entrepreneurs such as Andrew Mawson at the Bromley-by-Bow Centre in London's East End, or the community entrepreneurs who have founded post offices, police stations, business start-up units, and more within their local church building.

A church leader then, speaking without evidence visibility, may simply become part of a policy-improvement-feedback loop just at the moment that he or she considers him- or herself to have been most outspoken and 'prophetic'. Because of misperception of the leader's role and institutional location, the 'prophetic' contribution may in turn add to the confusion rather than ameliorate it.

### **3. Words and Deeds: which sources of social innovation?**

For the future then there is an important task in teasing out more clearly what we mean by 'advocacy' and 'prophecy'. Given the institutionalisation of 'secular' voices, there is also a challenge to discern a way of consciously locating ideas of social renewal in institutions which sustain authentic Christian principles – and the building of new institutions fit for modern needs.

Theologically this may cause some consternation – especially among those with a very 'low' theology of Church or those with a very high conception of what public bureaucracies are able to achieve. Practically however it is also to test the extent to which a theology of public engagement is genuinely rooted in structural change or ultimately is underpinned by an unspoken assumption that embedding conversion in an individual mind or heart is the true seedbed of social transformation. Preaching can make huge contributions, but because a sermon has been spoken, or a statement issued, or someone turned to prayer, or a textual victory in parliamentary legislation secured, has social change been advanced in any concrete fashion?

Consistently in our interviews with Christians across Europe, we have heard of the 'complex' and 'multi-dimensional' needs of the poorest while equally consistently being presented with the phrase 'the government must do more' as the response to questions about what should be done. When interview groups have been asked the question 'If we want to implement kingdom values what are the first three things we should do?' more often than not an embarrassed silence descends – or an exhortation to write to MPs arises. It is this lack of a nuanced theology of strategy that provoked a senior government adviser to say:

'The trouble with those that advise the Church is that more often than not they are just a vicar with an interest in politics.'<sup>33</sup>

In the space available here it is difficult to develop the argument in full but suffice to say the question at stake is what the Church's approach to social innovation and the initiation of change is. To review this question poses a number of challenges, especially because much prophetic Christian exhortation to social renewal is so light on strategic detail. Again there is a tension between the Christian approach and the approaches emerging in the realm of public governance.

First, as I have mentioned, in our interviews we encountered a consistent distinction between 'service delivery' and 'prophecy', 'projects' and 'radicalism'. And yet Geoff Mulgan, former Head of the Downing Street Policy Unit, advises that the fastest way to secure a policy change is to develop an innovative and pioneering new way of doing something and then have Whitehall visit it. If it can then be demonstrated to work, it will be 'replicated' and 'scaled' at speed. He has gone so far as to work up a fully-fledged theory of 'ideas'-driven social innovation which has provoked the first Christian responses.<sup>34</sup>

Second, radical words have often blurred a Christian interest in their institutionalisation in practice, and we have paid inadequate empirical attention to our own traditions of social innovation.

For example, St John's College with Cranmer Hall in Durham rightly lays claim to being the place from which the UK Fairtrade movement was launched. However, was it social networks, clustering of interests, or the movement of the Holy Spirit that caused a number of its alumnae of the same period to emerge across the country as significant social innovators, in addition to Tearfund and Traidcraft?<sup>35</sup>

Meanwhile, it is arguable that the reason why church groups were so convincingly able to support the passing of the ground-breaking 1977 Housing (Homeless Persons) Act was because of the moral and innovating authority they had gained while caring 'on skid row' or at 'Centrepoint'. This is before we mention the faith-based engagement in credit unions, hospices, and social enterprise more broadly.

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<sup>33</sup> Quoted in *Moral But No Compass* op cit.

<sup>34</sup> Mulgan cited based on talk to Young Foundation seminar 2006. See also G. Mulgan et al (2006), *Social Silicon Valleys*, Young Foundation. For a Christian counterpoint see A>Elliott (2006) "The Spirit Of Social Innovation" downloadable at [www.internationalfuturesforum.com/iff-publications.php](http://www.internationalfuturesforum.com/iff-publications.php)

<sup>35</sup> See [www.dur.ac.uk/st-johns.college/](http://www.dur.ac.uk/st-johns.college/). From the same base the Revd Brian Strevens went on to found the SCA Group ([www.scagroup.co.uk](http://www.scagroup.co.uk)) while Bishop Michael Doe has worked in regeneration and mission in Portsmouth, Swindon and at USPG.

If our 'prophecy' is to move beyond a well-meant contribution to a public-service improvement process, it would seem clear that we need to pay more attention to these and other endeavours of faith in social innovation. What are the unique attributes and obstacles that Christians bring to the task? How can our major institutions such as cathedrals and dioceses help or hinder? What are the theological constraints on working 'from our imagination backwards rather than our history forwards'?<sup>36</sup> In short if 'prophecy' is not to be undermined, what new models of governance and social innovation can we invent – or draw from the global Christian experience – which both makes us a partner and the genuinely thoughtful critical friend that so many church leaders consider themselves to be?

## Conclusion

In this short article I have set out to raise a number of questions as to whether a rich Christian prophecy for social justice is being strengthened today by changes in governance arrangements, or if aspiration is being undermined.

I have suggested that for the purposes of a rich dialogue, and genuine partnership, the state's evidence base and thus recognition of the Christian (and wider faith-based) contribution is fatally flawed. This puts the Churches at risks of being involved in policy forums and policy design which is based on mistaken assumptions and, worse, ignorance.

I have noted that there is a risk that, in a number of areas where the Church considers itself to be 'making progress', shifts in contemporary decision-making strategies actually render the perception of such progress as close to meaningless: 'radical advocacy' can be seen as simply feeding an improvement loop, taking part in new governance frameworks as a new secularisation. Lastly, a resistance to 'projects' and 'service delivery' can be a means by which to avoid looking in a tough-headed way at the strategies, successes, and failures of Christian organisations whose behaviours have genuinely caused paradigm shifts in public conversation. Can we avoid the temptation to a comfortable preaching and well-meaning committee mission field that heralds the demise of prophecy? Only time will tell.

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<sup>36</sup> This quotation is taken from G Hamel (2000) *Leading the Revolution* Harvard. Hamel argues for step change innovation to overcome inertia in organisations and that this requires working back from our imagination as an innovation process.

# WELL-BEING IN A POST-SCARCITY AGE: THE CONTRIBUTION OF FAITH, HEALTH AND ECONOMICS

John Atherton

The relatively static nature of material conditions for most of human history began to change dramatically in the nineteenth century. For the first time in history, there appeared 'rapid economic growth fuelled by increasing production efficiency made possible by advances in knowledge'. The result was an 'astonishing rise of income per person', and the consequent erosion of absolute poverty (Clark, p.8). This dramatic change was also associated with increasing well-being in terms of better health and amazing increases in life expectancy. This is often referred to as the demographic transition (Livi-Bacci), as increasing life expectancy and declining fertility, allowing the efficiency advances of the Industrial Revolution: these efficiencies, in other words, were not translated into the usual endless supply of impoverished people, as hitherto in history, but now into the rise of income per person. This demographic transition took 90 years for Germany to achieve, 70 years for China today, and is still ongoing in Sub-Saharan Africa with the result that its major population growth outpaces any wealth creation increases, resulting in no material advances beyond the hunter-gatherers of the past. This is reminder that post-scarcity is an increasing world experience, but not shared by all. So modern economic growth is accompanied by the Great Divergence (Pomeranz) - between an increasing number of nations with increasing wealth and a significant number of nations experiencing static or declining incomes. These latter include much of Sub-Saharan Africa, what Collier has described as the Bottom Billion - that global poverty is falling rapidly, 'but in 50 failing states, the world's poorest people - the bottom billion - face a tragedy that is growing inexorably worse' (Collier, back cover).

Interestingly, I came across this concept of post-scarcity in the epidemiologist Wilkinson's work - an important source in my *Transfiguring Capitalism* - and it has been confirmed by subsequent wider reading - for example in the works of Clark (*A Farewell to Alms*) and Fogel (*The Escape from Hunger and Premature Death, 1700-2100*) as economic historians. Essentially, post-scarcity is a thought-provoking concept, recognising that given human history as encounter with scarcity, from the end of the last ice age 13000 years ago, then only since the mid-nineteenth century, in the last 150 years, has that Malthusian Trap of scarcity been broken for increasing numbers of people as a post-scarcity era of improving well-being begins to emerge.

The consequences of this transition to post-scarcity for politics, health, economics and religion, are profound.

**First, the development of more egalitarian-inclined politics.** The major gains from increasing wealth and well-being have accrued to ‘the unskilled workers’, as the redistribution of income from owners of land and capital to unskilled labour (Clark, p.11). Other sources note the impact of improving health, life expectancy and consumption on skilled and unskilled labour. So Fogel argues that this increasing equality in real consumption ‘mirrors a dramatic narrowing of other inequalities between rich and poor, such as inequalities in height, life expectancy and leisure’. Normal measures of economic well-being often miss such major changes in life conditions. ‘In every measure that we have bearing on the standard of living . . . the gains of the lower classes have been far greater than those experienced by the population as a whole’ (*The Economist*). Despite improvements in general well-being, Wilkinson still rightly recognises the persistence of inequalities in health which benefit the richer and penalise the poorer, for example as life expectancy – including as part of Pomeranz’s Great Divergence – but rightly locates this judgement in a wider time-frame of the trend to more egalitarian ways of living, politically as well as economically. Politically, Dunn’s *Setting the People Free: The story of Democracy* recognises increasing participation as a key part of happiness and good social capital. Economically, Offer has identified an important aspect of this egalitarian trend in terms of ‘an economy of regard’, which as non-market exchange, has persisted despite the supposed overwhelming dominance of an impersonal market. It includes family businesses particularly in emerging economies, the substantial not-for-profit sector, especially in the USA, and the reciprocity exchange within the household – as nurturing children and caring for the sick, disabled and elderly. It merges into social enterprises, and includes civil society, the voluntary sector, faith-based operations, and co-operative enterprises from Mondragon in Spain to the John Lewis Partnership and Co-op in the UK. It can be located on a continuum from ethical economics to theological economy of grace, and has strong behavioural implications, for example, as the movement from the Malthusian Trap, during which modern economics was formed, and the significance of scarcity in its self-understanding, to a wider post-scarcity understanding of human behaviour, including its relationships, and as multidimensional reality, including spirituality and religion.

**Second, the implications of post-scarcity for health.** This transition to post-scarcity ensures that health and health care are likely to become growing centres of interest, including, given increased life expectancy, the quality of life of the over 50s, obesity (inevitable, given improving nutrition and the transition from physical work-oriented societies), and, increasingly, mental health. There is a major link here between Fogel’s work and the research of psychologists like James, and economists like Layard, and their growing concern over mental and emotional ill-being. This disease appears to characterise post-scarcity economies, almost as defining characteristic of the disease of ‘affluenza’. Searching for antidotes links to my first point: the growth of more egalitarian



societies, given the damaging impact of inequality on ill-health, as charted by Wilkinson. This is confirmed by Halpern and Putnam's work on social capital, that good social capital as trusting relationships and the volunteering as economy of regard, is stronger in more and weaker in less egalitarian societies. I will chart religion's contribution to controlling affluenza in my fourth implication of post-scarcity.

**Third, there is the implication of a post-scarcity era for understanding economics, and particularly economic behaviour.** This material is wider than, though focused by, what is known as the 'happiness hypothesis': that increasing prosperity as well-being, including in a post-scarcity era, is not characterised by increasing happiness. Interestingly, Clark concludes the sections on the industrial revolution and the Great Divergence (features of the post-scarcity era), with a conversation with the American economist Easterlin, who, from the 1970s, recognised the paradox of increasing prosperity but not increasing happiness. Significantly, Clark calls his concluding section 'the rise of wealth and the decline of economics'. By this he means not just that 'wealth has not brought happiness', but also this means 'another foundational assumption of economics today is incorrect' (pp.15,16). It is as though the focus on scarcity of so much of classical, and today's neo-classical economics emerged out of the latter stages of what Clark calls the Malthusian Trap in the late 18th and early 19th centuries - as a struggle to maximise finite limited resources. (This confusion in economics is captured by Hill's judgement on the late eighteenth century, that: 'The economists were newly conscious of scarcity because of the new prospects of abundance' - Hill, p.287.) Here also note Darwin's survival of the species through the survival of the fittest owed much to Parson Malthus' *Essay on the Principle of Population* (1798) and his recognition of the struggle between rising population (1798) and finite resources. His thesis was much maligned, and contributed to early understandings of economics as the dismal science. It is a thesis returning to haunt us, as we see the struggle between expanding populations and their resources and the limited capacity of our ecosystem. It is that emergence of modern economics out of that context of scarcity, which resulted among other things, in a defined and confined understanding of human economic behaviour as best interpreted as the pursuit of a maximising of individual rational self-interest in an open competitive economic and social environment.

It is this understanding of anthropology which is increasingly challenged within and outside economics - for example, the 2002 Nobel Prize in Economic Science was shared by Kahneman and Smith, both of whom questioned the 'extreme view of rational behaviour as the basis of economic decision-making' (Henderson and Pisciotta, p.14). It is this evolving reformulation of what it means to be human, economically, which needs, I think, to be located in these wider understandings and implications of what it means to inhabit a post-scarcity era.

**Fourth, and finally, interacting with these first three implications regarding politics, health and economics – there is a religious dimension**, operating as a relatively autonomous field of power and influence alongside and interacting with other fields, including the political and economic. It is a recognition of the value and necessity of religion in its own right, and as required by the other fields of interest. For example, with regard to the latter contribution of other fields to the religious field, the current debate over well-being in a post-scarcity era regularly recognises the new importance of religion and spirituality (essentially as the search for meaning in life, for a philosophy of life) in relation to new possibilities and problems of a post-scarcity era. So, Wilkinson’s work on the socio-politics of increasing egalitarianism notes the contribution of Christian socialism to co-operatives in the mid-late-nineteenth century, and the religious impetus behind the Mondragon cooperatives in the post-Second World War period. Dunn’s book on democracy, again on its last page, observes the movement to ‘a shared political authority across that globe’ as a ‘natural yearning with a lengthy Christian and pre-Christian past’ (p.188) – but that this has to interact with the vast differences of power across the globe – a reminder to balance theological idealism with realism. Fogel, in his reflections on post-scarcity as the escape from hunger and premature death, ends his research findings with a major analysis of the likely significance of health and health care (including the feasibility of its financing) in the 21st century. As a central aspect of the search for well-being in a post-scarcity era, he observes how the human is likely to move from more material to more spiritual concerns, including as the renewed pursuit of a philosophy of life. This links with the third implication of post-scarcity for economic behaviour. Here, the work of the economist Layard argues for the supreme importance for happiness of a philosophy of life, ethics and spirituality as both diagnosis of contemporary unhappiness and its solutions. When discussing the latter, he notes the value of cognitive therapy, meditation and spirituality, but suddenly observes that ‘people who believe in God are happier’ (p.72). It is a conclusion that the psychologist James now shares, not in his *Affluenza*, but in a later interview to the *Church Times* (15 February 2008). Here he expresses misgivings over the Church’s current exhibiting of signs of affluenza, but despite this, he comments: ‘I’d say there is a very subtle – yet very profound – sense that the Church underpins everything – that people who go to church as well as those who don’t, but who are “spiritual and ethical” – “quietly” infect everybody else.’ As he observes, this additionality factor of religion is related to the ‘wisdom’ of liturgy and bible – a judgement confirmed by the psychologist Haidt’s title for his book *The Happiness Hypothesis. Putting Ancient Wisdom and Philosophy to the Test of Modern Science*. Both James and Haidt are acknowledging the importance of religion’s traditioning communities in the formation of character, and therefore of virtue – major debates in Christian social ethics today.

It is these insights and evidential-backed conclusions from wide variety of post-

scarcity studies which confirm and substantiate religion's contribution to well-being in a post-scarcity era. It has led me to undertake an enquiry into religion and global change – the findings of which include two perspectives on this nature and role of religion in such a context.

First, in terms of describing and analysing faith's contribution to global change. Here, I work with a continuum from overlapping consensuses – to which faith contributes, in partnership with others in civil society, government or business, in promoting human well-being. This takes the form on the one hand, of theory – as inter-disciplinary work on global problems from poverty and HIV/AIDS to the environment. And on the other hand, it also takes the form, *practically*, of partnerships, from work in Uganda on HIV/AIDS to the Bradford Mentoring Scheme for under-achievers. The continuum then moves from overlapping consensuses to distinctively different faith-based initiatives – including as critique of and alternatives to the mainstream whether in economics or politics – and which can be embodied in, for example, such social economic projects as Fair Trade, the international debt remissions of Jubilee 2000, and Muslim interest-free banking. Five years ago, I would not have given much weight to this, and Ronald Preston would have given much less. Yet my enquiry recognises globally resurgent religion today, including in the UK as the growing interest in church contributions to faithful or religious capital – witness the new report on faith-based contributions to welfare provision, *Moral, But no Compass: Government, Church and the future of welfare* (2008). The recent theological tradition of radical orthodoxy is another aspect of this trend. All this suggests any outline of religious contributions to global change has to include its varied nature, including the distinctively difference of faith, as well as the focus on partnerships.

The second perspective I have found useful relates to religion's contribution to economics itself. Here I work with a continuum from:

- on the one hand, ethical economics (and its interaction with positive economics), and the growing interest in it of economists like Sen, but standing in a long tradition from Adam Smith and Malthus to Keynes and then Sen today. This links to the reformulation of economic behaviour, and to the economic engagement with such ethically-laden concerns as environment poverty reduction, trade and finance.

- on the other hand, a specifically theological economics – for example, as Tanner's economy of grace recognising that theology itself, in terms of scriptures and tradition, certainly includes Christian ideas of the production and circulation of goods in and as the functioning of the religious household of God. Tanner talks of the Christian story as the story

about 'God as the highest good, a God constituted by exchange among the persons of the Trinity, a God who aims in creating and saving the world to distribute to it the good of God's own life to the greatest degree possible'. Fundamentally at stake in this story are principles for the production and circulation of the good and what they mean for human life in God's service' (Tanner, p.xi). Tanner then usefully elaborates this basic economy, or *oikonomia* or functioning of God's household through the distinctively and decisively Christian understanding of grace as the economy of grace.

What I have done in *Transfiguring Capitalism* is to expand all this through a critical but constructive conversation between these findings of Christian social ethics and contemporary economics, from mainstream to neo-Marxist and well-being debates. And it is at the heart of this that I have found the model of transfiguration most useful, both as emblematic contribution of the Christian story to these global debates but also as a creative and purposeful way of holding together all these current struggles in economics and health for human well-being in an emerging post-scarcity age. It is that twofold gift of the Christian story to the contemporary task which I have reformulated as the transfiguring of capitalism.

*John Atherton, William Temple Foundation. These three papers (Atherton, Steedman and Gilbert) were given in London on the 25 June 2008 as part of the 60th-anniversary celebrations of the William Temple Foundation.*

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# JOHN ATHERTON'S *TRANSFIGURING CAPITALISM* – COMBATING ECONOPHOBIA

Ian Steedman

*Transfiguring Capitalism* ranges over 13,000 years of history and the disciplines of (among others) anthropology, economics, history, psychology, sociology, and theology. Exciting as I find this as reader, I had better stick to my last, in economic theory, and the role of commentator. As in previous works, Atherton employs his skills as a Christian social ethicist with a facility in making connections to insist that theologians, ethicists and reformers must face up to, indeed embrace, the positive role played by economic forces in bringing about a better world. The 'economic illiteracy of many theologians and moralists' (p.5), who so 'regularly [predict capitalism's] demise' (p.42) and denounce it in statements 'disconnected from engagement with hard reason' (p.61), is firmly – and rightly – rejected by him. Yet his task of enlightenment will doubtless continue to be hampered by widespread prejudices and misunderstandings about economic theory and economic reasoning. What follows is a brief attempt to dispel some of them.

The root misunderstanding of econophobes perhaps lies in the persistent fallacy that economic theory necessarily supposes the economic agent to be selfish/egotistic/narrowly self-interested/ahistorical/abstract/asocial; in short an 'economic man'. John Stuart Mill, one-and-a-half centuries ago, did use the theoretical construct of the 'economic man', and Carlyle may have had a genuine target for his fulminations. But it would be wildly irresponsible to regard that as adequate grounding for present day pseudo-criticism. Alfred Marshall's *Principles of Economics* (1890, 1st edn. to 1920, 8th edn.) already rejected 'economic man' out of hand: economists 'deal with man as he is: not with an abstract or 'economic' man; but a man of flesh and blood' (1920, pp.6-7), with his complex interweaving of self-regard, family affection, virtues and morality. Wicksteed, in his *Common Sense of Political Economy* (1910), was even more forthright in his dismissive rejection of any idea of 'economic man'. So much so that Lionel (later Lord) Robbins could write (in 1933) that: 'For anyone who has read the *Common Sense*, the expression of such a view [i.e., that the whole structure of Economics depends upon the assumption of a world of economic men, each actuated by egocentric or hedonistic motives] is no longer consistent with intellectual honesty. Wicksteed shattered this misconception once and for all.' Strong words – but true words. To suggest, one century after Wicksteed wrote, that economic theory necessarily presupposes selfish (etc) agents would be, quite simply, intellectually disreputable.

Economic theorists do very often (though not always) treat the aims pursued by economic agents as data. This procedure may be open to valid criticism but not on the grounds that those aims have to be selfish (etc); they can in fact be other-

regarding, socially influenced, morally informed and so on. Agents are simply taken to be however they are. Consider, for example, the capitalist who strives hard to maximize profits – precisely because she wishes to maximize her annual donation to the Church of England’s Division of Mission and Public Affairs. Any suggestion that economic activity is necessarily selfish is, to be blunt, simply stupid. More abstractly, the sociologist Bourdieu (2005) may well be right to say that ‘the social world is present in its entirety in every ‘economic’ action’ (JA, p.95) – but Wicksteed, a purist of economic theory, said exactly the same thing in 1910.

Theologians, moralists, and others who wish to contribute to the genuine criticism of economic reasoning must first cleanse themselves of the fallacy considered above. That will naturally leave them entirely free to criticise any modern economists who regress to pre-Marshallian, pre-Wicksteedian ways of arguing and to ask whether the workings of capitalism tend to foster selfishness, etc. They will be no less free to stress the importance of character and of the shaping of values, as did Alfred Marshall on the very first pages of his *Principles of Economics*.

We shall return to the matter of values below, but may first note another aspect of common misunderstandings about economic man’s selfishness, etc; this concerns the economists’ assumption of rationality. We note first that ‘rationality’ here is not even remotely equivalent to ‘selfish’, etc. More importantly, it must be stressed that ‘rationality’ has become a narrowly defined, technical term in economic theory – concerning ‘completeness’, ‘transitivity’ and ‘reflexivity’ in the jargon – and is most certainly not a synonym for ‘reasonable’ as that term would normally be understood. There would thus not be the slightest contradiction in saying that an agent with ‘rational preferences’ (in the jargon sense) acted unreasonably (in the everyday sense). Correspondingly, if anyone were to present observations of ‘unreasonable’ actions as evidence contradicting the economists’ ‘rationality’ axioms, they would merely parade their ignorance concerning these latter. The axioms do not preclude, for example, that agents may be short-sighted, exhibiting an ‘unreasonable’ concern with the immediate future relative to the more distant future. (Experimental psychologists, such as Kahneman, Tversky *et alia*, who challenge the ‘rationality axioms’ understand very well what they are criticising and economists must listen to them – but not to ‘economically illiterate’, so-called critics.)

To return now to values, it need only be re-iterated with respect to the values of economic agents that the economic theorist takes them to be whatever they are. In the words of the Buddhist Phra Payutto (as quoted by JA, p.266), ‘It may be asked how it is possible for economics to be free

of values when, in fact, it is rooted in the human mind . . . it is impossible for economics to be value-free'. When the reference is to economic agents, this is so obviously true that the only question to be asked is: 'Could anyone ever be silly enough to suppose that the economic theorist denies it?' A quite different matter, however, is what role the economic theorist's values do/should play; or, again, what role values play in economic policy making; or, yet again, what effects capitalist activities have on values. These various questions must be kept distinct if anything useful is to be said.

Conventional textbooks of economics include chapters on 'welfare economics' and both there and elsewhere discuss 'efficiency and equity' – a catchphrase in economics – the determination of income distribution, the economics of discrimination, of education and of health; thereby recognising that such value-laden issues matter to many people. At the same time, by far the dominant view, since the 1930s say, has been that the economic theorist's own particular values ought to play no role in what is said. (A mild qualification to this has been the convention within welfare economics that one may call situation A better than situation B if at least some people are better off in A and no one is worse off; that is not, of course, a value-free statement.) A similar stance has prevailed in policy discussion: the economists' modest role is to predict the economic consequences of alternative policies but it is for others (elected politicians?) to make the value-laden choices among the alternative predicted outcomes. (It would of course be oxymoronic to speak of 'value-free policy-making'!) Would any theologian wish economic advisors to promote particular values? If so, which ones? The theologian's?

It is certainly an important question whether or not the workings of capitalism tend to undermine some of the very values, virtues and character-types (trust, truthfulness, willingness to work, to save, to invent, to take risks) on which it itself depends as a social system. It is not though a question on which the economic theorist can claim any particular expertise. But anyone may note that it would be incoherent to claim both that capitalism is a value-free system and that it is undermining the values on which it is founded. Equally obvious is the fact that if, say, trust is declining while capitalism is expanding, it by no means follows that the latter phenomenon has caused the former!

Is economic theory based on a philosophy of utilitarianism? The multiple meanings of this last term and the changing nature of economic theory over the last two centuries render this a question patient of extended discussion. Yet a few things can be said both briefly and clearly. Any suggestion that economic theory today is based on utilitarianism *à la* Jeremy Bentham would be nonsense-on-stilts. Marshall's *Principles* already dissociated economic theorising from utilitarianism (pp.17n, 92-93n) and the 1930s saw the outright rejection of any notion of either the cardinal measurability of 'utility', or the comparability of 'utility' amongst different people. As Myint put it in his famous book of 1948:



'The less knowledgeable critics have accused the economists of Utilitarian philosophy. . . The imputation of Utilitarian philosophy can be dismissed without much difficulty. . . economists nowadays are always on their guard against Utilitarianism' (pp.217-8). The term 'utility' survives, unfortunately, but (like rationality) has become a term of art, retaining none of its earlier force. That this is so emerges strongly in Layard's recent book (2005), in which he roundly criticises modern economics for not being utilitarian (pp.133-5); he considers that economics today would be more useful if only it were still strongly influenced by Bentham!

The reference to Layard will call to mind the recent 'economics and happiness' literature. Welcome as it is in its own right, it may – at least in its more popular manifestations – have the unfortunate tendency to promote some of the misunderstandings about economics considered above. It is therefore relevant to note here that each and every one of Layard's 'Big Seven' factors of happiness was considered by Alfred Marshall and/or by A. C. Pigou, the effective founder of 'welfare economics' (1920). No one should imagine that the Big Seven will be news to any well-read economist – or, come to that, to anyone who thinks. (Whoever thought that family, friends, philosophy of life, health, etc. were unimportant to happiness?) It should not need to be said – but probably does – that not one of the Big Seven is incompatible with the assumptions of economic theory.

That is not to say that no questions can be raised about the economics-and-happiness claims. For example, Sen is quoted by JA (p.121) as asking: 'Can we possibly believe that he [a person in poverty] is doing well just because he is happy and satisfied?' Whatever originally provoked Sen's question, it does raise a doubt as to how much weight should be given to 'happiness questionnaires' and their results. Johns and Ormerod (2007) raise a different kind of objection to the way in which happiness is often measured (pp. 31-33, 75-76) and then claim that if per capita income is not well correlated with happiness measures, nor are leisure time, declining infant mortality, life expectations, unemployment, increasing gender equality, public spending, income distribution or crime levels! (pp.34-40, 77-86) Is one supposed to conclude that none of these things matter? Let the econophobes study this literature as freely as anyone else – but let them not leap to the careless conclusion that it clearly supports their favourite fallacies. It does not.

Well-informed criticism of economic theory can only ever be welcome. To contribute to such criticism, however, one must first prepare oneself by grasping clearly what economic theorists do in fact assume and say; to 'criticise' their work from the standpoint of 'economic illiteracy' is to contribute only to one's own disgrace. We must be deeply grateful to John Atherton for his many stirring efforts to educate theologians, moralists, and others and thus to render such self-inflicted humiliation less likely.

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# SUFFERING WITH – NOT DOING TO

Peter Gilbert

## Compassion Fatigue?

When Government launches value-driven policies and approaches, such as the recent one on 'compassion', I react with mixed emotions: wanting to cheer and yet weep in exasperation. Because of the necessities of a media-driven age when governments launch such initiatives, which are essentially common-sensical and with a value-base we can identify with, they seem to present them as something startlingly new that only they have thought of. It sometimes comes as a surprise that major world faiths have taken a clear stand on issues such as compassion over many centuries (see Gilbert and Kalaga, 2007). Christian monasteries provided asylum and sanctuary for people stigmatised and cast out by society; Muslims had some of the first specialist mental-health centres; the Health Minister Ivan Lewis, who used to manage Jewish care in Manchester, continually speaks of the need for inter-dependence as well as independence; Buddhism takes forward its emphasis on compassion; and the Sikhs provide this in a very practical form, in the provision of daily communal meals (*langar*) for those who need them.

Even current government policies are not simply new, and often require strong criticism. Just as we tend to forget that *assessment* derives from the Latin 'to sit beside', *compassion* similarly reminds us of one of the great human 'with' words: to suffer with, to empathise, not to stand apart from in judgement. In contrast to the faith communities' emphasis on personal and communal inter-dependence, secular ideologies of the 20th century (see Burleigh, 2006) emphasised an impersonal society, masquerading as community. The regimes of Hitler, Stalin, or Mao are rightly seen as pathological. Yet just as heretical is Margaret Thatcher's oft-quoted dictum: 'there is no such thing as society, there are individuals and families and nothing else.' Just as the Jewish sociologist Zigmund Bauman talks about vulnerable people and out-groups during the Nazi regime in Germany being seen as 'deficient citizens', we now have deficient consumers (see Bauman 2000 & 2007). Those who consume least are given least value: the severely mentally ill, those with learning disabilities, the elderly mentally infirm, and the unemployed. The Jesuit theologian James Hanvey therefore speaks of 'an endlessly wanting culture'. In welcoming the recent proposed NHS constitution, Hanvey also spoke of the faith communities' refusal to become 'disembedded from the community', and the need for people of faith to 'incarnate these values; to live them and to witness them' (Hanvey, 2008, and 2007). After 34 years working in health and social care, my judgement is that often we do not engage with people. We have become an 'Aspergers society', in that we have knowledge about a narrow range of issues but find it

difficult to connect the self, others, our minds, hearts, bodies and spirits, and that feeling of the transcendent – something other and higher than our individual selves.

## **Happiness – A Modern Pilgrimage?**

One of my colleagues, Jay Boodhoo, who has Hindu, Buddhist and Roman Catholic strands in his spiritual make up, recently wrote of his first pilgrimage along the Camino de Santiago, as ‘both a religious and spiritual journey. My aim was to continue my discovery of purpose in life. I wanted to practice physical, mental and spiritual discipline and, in the process, attempt a better understanding of myself’ (Gilbert, Boodhoo and Carr, 2008). In 2007 I gave a talk on the recovery approach to mental health as a form of pilgrimage, in Santiago, and observed the foot-weary pilgrims staggering into the cathedral square. It is a hard road to enlightenment but often, nowadays, we feel the road should be easier. After all, isn’t the message of consumerism: ‘for every need there is a good, which you can purchase – if you have the money.’ Elizabeth Day, in *The Observer* (15 June, 2008) stated that: ‘The pursuit of happiness is a curiously obsessive modern pilgrimage.’ Richard Schoch, Professor of History and Culture at Queen Mary, University of London, points out that the Ancient Greeks spent considerable effort in considering what constituted ‘the good life’, where happiness was a civic virtue that ‘demanded a lifetime’s civilisation’. Nowadays, we equate happiness with ‘mere enjoyment of pleasure, mere avoidance of pain and suffering’. In a memorable line he suggests that: ‘Somewhere between Plato and prozac, happiness stopped being a lofty achievement and became an entitlement’ (Schoch 2007, p.1).

There are now many books on ‘happiness’ but one of the most searching explorations of the issue is, not surprisingly, through the medium of the novel. David Lodge’s *Therapy* (1996) has his character Laurence Passmore speaking of his loss of contentment:

‘The thing is, I wasn’t always unhappy. I can remember a time when I was happy. Reasonably content, anyway. Or, at least, a time when I didn’t think I was unhappy, which is perhaps the same thing as being happy. Or reasonably content. But somewhere, sometime, I lost it, the knack of just living, without being anxious and depressed. How? I don’t know.’ (p.16)

Now that Western ‘developed’ societies have put all their eggs in the consumerist basket, it remains to be seen what transpires from the credit crunch. If our identity is fundamentally tied in with materialist goods, then where does our journey in life, our pilgrimage ultimately lead to? In the Bible, Job expresses his hope: ‘you have granted me life and steadfast love, and your care has preserved my spirit’ (Job,10.12), and our pilgrimage needs to lead to somewhere more profound than *Sex and the City*.

## **‘There is no health without mental health’**

This strapline to the World Health Organisation expresses the concern over the rising epidemic of mental ill-health, well charted by people like the psychologist Oliver James (James, 2007 & 2008). In fact depression is set to be the world’s leading disease, overtaking heart disease and cancer, in the next couple of decades.

On a visit to Greece recently, a guide pointed out a narrow walkway heading out from the town into the sea where a small house was situated in the bay. This she said was called ‘the lazarette’, without apparently realising the reference to leprosy and the leper house as both of place of sanctuary, but also of isolation from the community.

Mental ill-health also has a stigmatising and isolating effect. In a recent article in *Guardian Society*, Dr Liz Miller speaks of coming from a high-achieving family, ‘with enough doctors to start a small hospital’, and achieving a lifetime’s ambition to become a neurosurgeon. When she suffered bipolar disorder (manic depression) it was a shock to her very identity: ‘In the past, I prided myself on my brain. I could get by on my wits. And suddenly your mind goes, and it actually goes to the core of who you are. It says something about you as a person. . . The thing about mental illness is the awful isolation’ (O’Hara, 2008). Erving Goffman recognised this when he spoke of stigma being a form of ‘spoiled identity’ (Goffman, 1963/1990).

Such depressive states suck the life out of mind and body and are a profoundly disconnecting experience for the individual. Because of the change of identity and the periodic unpredictability of someone with a mental illness, the community also withdraws; and even when there are the advantages of a strong faith, this can turn against one, as some Muslims from particular cultural groups speak of the stigma and shame that attaches to the family when a mental illness is diagnosed; and some evangelical Christians insist that mental illness is possession by the devil and will need exorcism rather than loving kindness.

In these matters, I profoundly identify with the scientist Lewis Wolpert’s description of depression as ‘soul loss’. It is a particularly powerful metaphor, as Wolpert describes himself as ‘a hardline materialist’, who does not believe in the concept of the soul, but nevertheless uses both the idea of ‘soul loss’ and the ‘wandering soul’ as capturing ‘the way in which we experience our own existence’ (Wolpert, 2006, p.3).

In addressing these concerns, Dr Sheila Hollins, then president of the Royal College of Psychiatrists, in her speech to the Catholics in Healthcare Conference, therefore spoke of the need ‘to be pro-life in respect of mental health. We need to bring life back into lives already affected by mental illness.’

## Community, What Community?

Gertrude Himmelfarb in her magisterial *The Roads to Modernity* (Himmelfarb, 2005) remarks that the 'passion for compassion' first arose in Britain and that the struggle to create and maintain a society balancing virtue, liberty and solidarity, predates modernity and is not superseded by post-modernity. 'We are', suggests Himmelfarb 'in fact, still floundering in the verities and fallacies, the assumptions and convictions about human nature, society' (p.235).

Similarly, the Chief Rabbi, Dr Jonathan Sacks (Sacks, 2007 pp.15,12) urges the need to 'reinvigorate the concept of the common good', and goes on to state that 'if we were completely different we could not communicate. If we were exactly alike we would have nothing to say.'

Yet historically, people with mental ill-health were often tolerated in agricultural societies, and sometimes seen as having special insights or powers. The move towards the enclosure of common lands and the industrialisation of society produced both a humanistic and a stigmatising movement towards the creation of the asylums with their impulse both to protect and to isolate (see Gilbert, 2003).

The moves towards care in the community were again driven by paradoxical impulses: both to provide more humanistic approach to mental care, and to save money at a time when the old asylum/psychiatric hospitals were costing an increasing amount of public funds. Some health authorities operated the policy in an imaginative and ethical manner; others used policy as an excuse to drive cost-savings, and ploughed the money into other areas.

Today we have a complexity of social policy drivers and societal images. For some 'community' appears to be a gang culture. Other communities are also attracting stigmatising responses, especially perhaps Muslims following 9/11 (see e.g. Ghannoushi). Again, sometimes the response is one of isolation both in protective and self-protective modes. But as the former head of MI5, Lady Manningham-Buller, stated recently: 'citizens must repose their trust in each other, not in the state for fear of each other' (quoted in *The Guardian*, 9 July, 2008).

In the interface between mental health and faith, a number of mental health trusts, such as Bradford and Birmingham, are using imaginative approaches to work with their faith and cultural communities to align the benefits of Western medicine and culturally appropriate approaches. We are likely to see major benefits from this in the years ahead.

As the Archbishop of York, John Sentamu, said recently: 'he who travels fast travels alone. He who travels far travels in company.'

## **'I wanna to tell you a story'**

Religion and spirituality are all about stories, whether these are the meta-narratives of the world religions, or the individual stories of people on their own, often solitary pilgrimages.

While Western, post-enlightenment approaches have a great deal to offer, research and major surveys of the public inspection bodies for health, demonstrate that people wish to be treated, not just with technical competence, but with due attention to their individuality, culture and social environment. They want to be able to tell their stories.

Imran Soobratty, a ward nurse manager with Camden and Islington Mental Health Trust, tells this tale of the service user who came to the hospital and left disappointed:

'I come to hospital because I have a story to tell you and you are here because you wish to hear my story. Yet I leave hospital without having told my story and you not having heard it' (quoted in Coyte, Gilbert and Nicholls 2007, p.229).

Following this sad tale, Imran and his colleagues produced a form of 'protected time', so that the ward was effectively closed off from emails, phone calls, visits etc, specifically so that staff and service users could engage in dialogue - so that they could spend time with each other.

If compassion is to be 'suffering with', walking together, creating community, rather than 'doing to' in an instrumental and mechanistic mode, then we do have to take time to sit and listen to people's stories.

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# FROM WELFARE STATE TO WELFARE SOCIETY: THE CONTRIBUTION OF FAITH TO HAPPINESS AND WELLBEING IN A PLURAL CIVIL SOCIETY

Rowan Williams

It is a privilege to be invited to speak on this occasion, marking not only the 60th anniversary of the Foundation, but also the centenary of William Temple's ordination as a deacon.

The title given me is comprehensive enough to keep us here for a couple of days, so I will attempt to limit its scope just a little. And I will begin with the word 'welfare' itself. We know that, in the last couple of decades, welfare has often become not so much a concept that we think about in itself, but a word tagged on to something else, frequently something rather negative. 'Welfare dependency', for instance, is one of those pairs of concepts that shadow much of our political discourse. During this lecture I want to address the question of how we properly define welfare and well-being. But as one way into that, I want to look first at why the association of welfare and dependency is thought to be a bad thing, and what has gone wrong with our understanding of the word 'welfare', if that is the kind of association it first arouses in us.

I suppose that the problem could be epigrammatically put in terms of the old joke: 'If we are put on earth to be good to other people, what are the other people put on earth for?' That is to say that for some people, thinking about 'welfarism' - let us qualify it in that way - seems to carry the assumption that humanity divides between the 'do-ers' and the 'done-to'. And when people identify a problem about dependency, it is because they rightly and reasonably say that human dignity is not simply about what is *owed* to us and what is *given* to us, it is also about what each has to *give*.

I now want to explore something of the theological background to thinking of human dignity in those terms, and how that does indeed leave us eventually with a far richer concept of welfare than simply ambulance work, gap-stopping and damage limitation. And to help me in this task, I turn to William Temple.

Stephen Spencer in his interesting monograph: *William Temple: A Calling to Prophecy*, quotes (p.70) from an unpublished article in Lambeth Palace Library, in which Temple sets out to define what he means by a welfare state: 'If the state recognises in every citizen something superior to itself,

we get the conception of the welfare state according to which the state exists for the sake of its citizens, both collectively and individually.’

Now that is a very searching and a fruitful definition of what a welfare state might mean. The state exists for the sake of its citizens, but there is a deeper dimension to that than simply saying that the state has the duty to *provide* for its citizens; it is more that the state recognises in the citizen ‘something superior to itself’. That is not an immediately transparent formula, but I take it to mean something like this: the state deals with human beings in their fullness, in their capacity for creativity, self-motivation and self-management. That is, the state deals with human beings in their *freedom*, not just in their *need*. And if the state recognises in human beings that dimension of creativity, of capacity for self-management and self-motivation, the state as Temple believes it ought to be will recognise in each person a unique contribution to a corporate enterprise. And by the time you have granted that, you have already somewhat dismantled the notion of the state itself as a monolith. You have already begun to see the state as the broker of different kinds of creativity: the state as *negotiating* with its citizens, not as a single block, a pseudo-agent providing for them. And to talk about human welfare only in terms of how needs are to be satisfied in emergencies, is precisely to be tied to the kind of passive account of humanity that Temple wished to avoid.

So if there is indeed a problem not with welfare but with welfarism, it seems to be in this kind of area. Welfarism is often used as a kind of abusive shorthand for that approach to human issues, problems and challenges which in the end – with the best of intentions – strips human beings of their agency, their initiative, and their creative capacity for dealing with themselves and one another in collaboration. We need to get beyond such a potential division of humanity between agents and patients; the ones who *do* and the ones who are *done to*. We need to have an account of justice and well-being which takes entirely seriously human freedom and human interdependence, the human capacity for internal change and movement, the human as *subject*.

So much by way of framing the problem: these are some of the anxieties that have been raised in association with the concept of welfare as it is developed, and some of the associations that the unpleasant word ‘welfarism’ has in many people’s ears. What I’ve suggested so far is that Temple himself clearly thought the opposite of this, and it is that opposite vision which now we need to explore a little further. But before doing so, let me just add one note to this introductory observation.

In the 1980s, when welfarism was so much a term of abuse, some people seemed to think that the alternative was to give people power and initiative through the market, to make them independent agents as purchasers. A moment’s thought ought to tell us that this is not an answer to an underlying

problem. It shrinks human agency to one particular mode and it certainly does not take us out of the polarity of the do-ers and the done-to. What its practical results are, if the market metaphor takes over the whole of our social thinking, I do not need to elaborate because I think that the negative effects of that hardly need spelling out to an audience such as this! So if we are looking for an alternative to an over-dependent picture of humanity, then the market is not the only alternative: but exploring what *is* will take a while, and still needs more work than a lot of social thinkers have given to it.

Let me step back a little and ask what it is about the perspective of religious faith that specifically begins to help us in addressing this question. Perhaps the first and most significant issue here is that religious faith assumes that human fulfilment is something that an agent, a human subject, *owns* – that is, something that is genuinely theirs, which is connected with the choices they make, the lives they live. Human fulfilment is the condition of human life when your happiness is not being defined for you by the power or agency of someone else. The religious perspective assumes that each of us is answerable for himself or herself; answerable for their relationship to that reality which is utterly non-negotiable, transcendent and universally real: God. Different religious traditions approach this in different ways; but every one of them still does take it for granted in some way that fulfilment – happiness if that is the appropriate word here – is about taking responsibility for where and who you are before God.

I have avoided, so far, speaking of the human *individual* doing this, because religious traditions also insist that, to do this ‘taking of responsibility’ before God, we need to be thoroughly embedded in corporate practices and common life (and I will come back to that in a while). But when all is said and done about *that*, it remains true that the religious conception of what it is that fulfills humanity is one that has inexorably to do with the sense that ‘I am an *agent*’, ‘I am answerable for myself’.

Larry Siedentop, in his interesting book on *Democracy in Europe* (Penguin: London 2001) (pp.194-5), noted how deeply this religious – and as he sees it specifically Christian – insight finds its way into the foundation of the sense of what Europe is about. And he criticises contemporary, secular liberalism – writing, himself, as a secular liberal – for its failure to explore this basis in religious conviction of *liberal* conviction; this basis in the sense of being answerable. For the religious believer, human happiness and fulfilment is not and can never be a commodity provided by another; something defined by a collective *for* you, something dictated by power *outside* you. It is something shaped, negotiated, discovered by agents with other agents in a flowing together of freedoms. There is one very bad way of understanding welfare, which has to do with fostering the illusion that the state has a duty to

make the individual happy. If my reading of what Temple's vision is about is correct, once again the absolute opposite is true. Welfare is not about someone else's responsibility to make me happy. Welfare is about releasing the self for well-being, to shape and discover that well-being with other selves and other agents.

Sometimes the most effective tributes to religious conviction come from the unlikeliest sources. And it is very interesting when a non-religious analyst like Larry Siedentop makes the kind of observation that he does. And I note another comparable, recent expression of this in an interesting book by the American, Jewish philosopher Susan Neiman called *Moral Clarity: A Guide For Grown-Up Idealists* (Harcourt: Boston MA, 2008). She tackles a number of what she thinks of as grave misunderstandings in the glib, secularist worldview, though she is still very critical of religion. But she notes the way in which some secularists very readily say: 'Oh, the religious person wants to yield their responsibility, they want to be relieved of the burden of making choices and being themselves. That's why fundamentalism is attractive: you're dealing with people who have given up on the struggle to be a *self*.' Here's what she has to say about that: 'Secular observers view fundamentalism as a way of making believers' lives both easier and more passive. It is a view that is both condescending and dangerous. It does not grasp the fundamentalist appeal. Its religions offer rules that make some decisions easier and no doubt that is one reason that many people are drawn to them. But there are deeper reasons that must be faced head-on. It turns out that part of what people often want is responsibility for their lives. Religion does not only make people passive by shouldering some of the burdens of decision; it makes them feel more active as well. The window of transcendence it opens on to the everyday, is an injection of spirit into a world of sluggish torpor' (p.94).

'Religion doesn't only make people passive.' I think we might want to put it rather more positively than that, and say that religion is profoundly about making people *active*. Active, not busy or obsessional; active, not anxious; because active on the basis of, and in harmony with, an agency believed to be eternal and triumphant: the agency of divine love. Religious faith properly understood, as Neiman reluctantly grants in that passage, is at the very least one element in keeping us attentive to the need to understand human dignity in terms of human agency: the need to recognise that this is part of a proper definition of human flourishing.

This requires something of a shift in the focus of much of our thinking. To think in terms of the state and the individual as two self-contained units facing one another – that seems a very inadequate way of characterising where we are moving to here. If authentic religious faith is something to do with understanding well-being in terms of agency being released – in negotiation, in conflict and harmony with other agents – then of course the social units which

matter will not simply be vast, large-scale, political ones. We need to think about those networks in which negotiation – the shaping-together of human dignity – actually happens.

Here I pick up a use of the word *pluralism* which is perhaps not all that common these days, but which was once, very properly, significant in British political thought – think of theorists like Harold Laski. ‘Pluralism’ in this sense is not an observation about ethnic or religious plurality in society. It describes a society in which a number of interlocking, intersecting communities (some voluntary and some not so voluntary) of interest, concern and intention, build up the actual density of social life. In these intermediate communities, as the American political theologian Frederick Herzog used to call them, we learn what it is to experience our human dignity in terms of an agency discovered along with other agents. We discover co-operation. Religious communities are of course not the only communities that speak for co-operation; but in a world where social pressures very often drive decisions to a higher or more global level; where local communities are more and more denuded of power; where there is always a tendency to look for top-down solutions; and where in the international scene, a global market – at least until very recently – appeared to trump the freedom of democratically elected governments – in such a world, the maintenance, robustly and clearly, of communities of faith as an indispensable part of the spectrum of co-operative communities, becomes of great significance.

Admittedly, the co-operative political tradition associated with one strand of British politics is one that has had a chequered career. There is one way of telling the story of 20th-century Socialism which could present it as a battle between the Webbs and the Morrisises – that is, the Sydney and Beatrice Webb model (the Fabian model in its early days) of highly controlled social provision; and that other tradition (a little more anarchic) looking back to William Morris and his circle, which was far more about agency, creativity and at times anarchy, or ‘anarcho-syndicalism’.

In many aspects of the post-war settlement in Britain, it feels as if the Webbs won. And even if the Webbs didn’t wholly win, those trends and currents in modern thought driving towards top-down solutions proved irresistibly attractive to people right across the political spectrum. I think that in our society at the moment we still need a robust defence of the non-Fabian, the pluralist vision of what a just society might be: a society in which what I call the interlocking, intersecting communities would all have a role in shaping the common good: where these communities would all be potential partners with statutory and government agencies, with the ultimate goal not simply of solving problems or meeting needs, but equipping citizens. I think it is only with a robust sense of what the co-operative tradition is about, what the pluralist model is, that one can actually have a proper sense of what *citizen* means. (I

refer to my initial quotation from Temple, and the phrase Stephen Spencer picks up, concerning the state *recognising* something in the citizen.)

Some of you may recognise in this a particular strand also in Anglican thinking, a strand anchored in the work of John Neville Figgis, at the beginning of the 20th century. He was a figure who had considerable influence on Laski and others. His systematic writings are slight, but his output overall offers a remarkably coherent, positive and suggestive picture of what a pluralist co-operative society – and for that matter a pluralist and co-operative Church – might look like. It is Figgis who very interestingly notes that you cannot be a co-operatist in your politics and an authoritarian in your ecclesiology or *vice versa*.

Mark Chapman of Ripon College, Cuddesdon, has developed this vision very effectively; first in a book called *Blair's Britain: a Christian Critique* (DLT: London 2005) and more recently in a follow-up, *Doing God: Religion and Public Policy in Brown's Britain* (DLT: London 2008). Here we find a development of that vision of what Figgis along with others called the 'community of communities' as the basic Christian political model: the community of communities, the network of networks, standing with, alongside, the state, not 'franchised' by the state or controlled by the state, but representing that (as Figgis would have seen it) inalienable liberty of the agent, the citizen, to work co-operatively and live and understand co-operatively. At the end of his book on *Blair's Britain*, Chapman has this to say about what we have lost and what we might need to see revived: 'A revival of the idea of functionalist democracy pioneered with the Whitley Report at the end of the First World War could transform social relationships and participation. It will be interesting to see [this was written in 2005] if some of the new government initiatives like Network Rail or Foundation Hospitals have the courage and vision to realise Harold Laski's tantalising idea of giving workplace groups real power against the supposed sovereignty of the omni-competent state. As he [Laski] put in 1921: 'The railways are as real as Lancashire. And exactly as the specifically local problems of Lancashire are dealt with by it, so could the specifically local problems of the railways be dealt with by a governing body of its own. A massive increase in the principle of democratic governance with partnerships of users, workers and owners, could give the non-governmental sector a real clout, but would at the same time threaten the oligarchic 'right to manage' and other such undemocratic slogans. This would be to take the stakeholder idea seriously' (*Blair's Britain* pp 96-7). I will not comment for now on the particular examples he chooses but the point, I think, is clear enough.

Now this is where we need to turn briefly to a few thoughts about the other and more common sense of pluralism, because there are questions looming up on the horizon here which can only be dealt with in that context. When we use the word 'pluralism' we are normally these days referring to the plurality of ethnic and religious communities in our nation at the moment. Pluralism goes very

often with 'multiculturalism' as a word that's thrown around rather unintelligently in debate about the kind of society we are. What I think the political pluralism I have been speaking about suggests is something like this: some communities in which we find our identity are communities we are born into, or communities that we do not regard simply as transient associations. They may be ethnic or linguistic communities. They may also be religious communities which are not best seen as just voluntary associations on the secular pattern. But those belonging in such communities draw their identity from other kinds of association and co-operation as well. No one is *simply* a Welsh speaker, for example. If you are a Welsh speaker, you need to *say* things in Welsh; and when you start saying things in Welsh you say them with other people who may be interested in corporate planning and shared agency with you. Likewise, approaching the public sphere as a person who belongs to a religious community as a Christian, Jew, Muslim, or Buddhist: you approach it not as someone whose entire horizon is determined by that identity, but as someone who brings that identity into a negotiating process. And I think this ought to help us in finding our way through the quagmire of current quarrels about multiculturalism and pluralism (of the other kind) in this country.

Very often both defenders and critics of multiculturalism seem to speak as if the given fact were that communities were impermeable. They were what they were, they are what they are, and that is it: therefore you deal with them as blocks. You deal with them slightly nervously, trying to find ways in which you can minimise the damage they might do and trying to subordinate their particularity to a particular model of public reason. But what if you thought of communities as constantly interacting and changing one another? I have in the past used the term 'interactive pluralism' to describe what I think is the healthy state of a democracy – one with communities which give strong identities to their members; communities which may be very different from mere passing associations out of common interest, but nonetheless are capable of challenging one another, impinging on one another, making demands of one another, negotiating with one another, and finding together what is good for them. And it is on the basis of this that I still believe strongly in the case that has been made for faith schools within the statutory sector – because these oblige religious communities to do some negotiating with others: to do some negotiating with the actual needs of a local community of a very varied kind; negotiating with nationally agreed educational standards and processes of accountability. I think in the long term this is for the good of everyone. And that sense of communities which are actively impinging on one another, dialoguing with one another and modifying each other's expectations in that process, is part of what makes an *argumentative* democracy, and I think *argumentative* democracies are *good* democracies. The worst kind of democracy is what you might call a consumerised democracy, where somebody decides what your options are. If my earlier account is right, then a consumerised democracy is exactly what *does not* make you happy and does not speak to human fulfilment.

So, in thinking about well-being, welfare, and the role of religious communities in a highly complex society and culture these days, my emphasis would be on these two elements: first of all, the sense in religious conviction of being answerable for yourself, so that human well-being is about agency – being able to exercise the appropriate, the possible, the fulfilling levels of agency that you can, along with others whose free agency likewise you want to affirm. And second, I would want to underline the role of religious faith and communities of religious conviction in this environment, on the grounds that it is those communities in which the habits of agency, the expectations of creative negotiation are actually matured. I have said that I do not think that religious communities are the *only* ones that nurture such a vision of what the human is. But at a time when so many traditional forms of corporate life and common life are increasingly under threat, the guaranteed persistence of religious communities which are not, in that sense, vulnerable to the popular vote becomes more and more important.

Now this is not simply a communitarian *laissez faire* picture of society. It certainly is not saying, ‘let a thousand flowers bloom in total isolation from one another, never mind the collisions that occur’: and it is not saying that we can do without the state. The state remains crucially significant in two ways: first and very obviously – and I refer you to Mark Chapman again – the state ‘brokers’ occasions of conflict or rivalry. The state is that body to which, in practical affairs, communities defer to help them sort out potential areas of overlap and conflicting priority. It is not only the state which does that, but that is one of the reasons that the state is there. But second, and in a way anchored to that, the state is also the institution that guarantees the ‘bottom line’ of liberty and dignity for all citizens. That is to say the state is the source of law. And without the sense of a law in relation to which all stand, guaranteeing for all particular liberties and a particular kind of dignity, we would indeed have a kind of dissolution into competing tribalisms. When earlier this year I gave a somewhat ill-fated lecture on the subject of law, one of the points I was trying to make was precisely this: the state remains the longstop guarantor of certain liberties, notably the liberties of those whose dignity may not always be affirmed very visibly by particular religious communities: women, for example. The state is indispensable as the guarantor of law. And yet the state in the operation of law is – not for any complex ideological or philosophical reasons but just practically – always involved in dealing with the actual practice of the communities that make up the state. For some of those communities, that practice involves elements of religious law. The state has to decide how far it can affirm or endorse those practices, and how it can most creatively and positively cooperate with them. That is to say the state in guaranteeing the law does not just assume that every citizen is related to the state *and nothing else*. The difficulty I was trying to open up was the difficulty about precisely how the state best works as a legal state with those intermediate communities of which the state is actually made up.



So we do need a discourse of law and universal law, and the implication of that is that we do need a discourse of human rights. That is another issue which would take a long time to explore, but I simply put down those markers as a way of noting that to speak about the state in terms of interlocking communities is not to yield the pass on certain issues of legal privilege, legal liberty and human rights.

I began by looking at the negative associations that 'welfare' has unfortunately acquired – associations to do with dependency or passivity, acquired, inexorably, by a process in which the provision of well-being and the guaranteeing of citizen's security have come to be seen as almost exclusively the business of large-scale bureaucracies. The alternative to this is not a market model in which the ideal is to make everyone a purchasing agent; the alternative is to understand a little bit of the sheer depth and complexity of the human agents who are at work in all of this. And to have that lively and vital sense of human agency, one needs as part of the mix that sense of being answerable for oneself to and before the transcendent which is essential to religious commitment. A. N. Wilson in his recent book *Our Times*, ends his final rather scarifying chapter about the decline of British society by noting that while it may be true that you do not absolutely have to have religious belief as a foundation for beliefs concerning human dignity, uniqueness and liberty, it is remarkable how quickly those things disappear if religious belief moves off the scene. I would want to say something similar, rather more strongly. That rooted sense of where the consciousness of responsibility comes from and which relates that consciousness to the religious awareness of a person, is indisputably one of the great motors or engines of the sense in modernity at large – not to say post-modernity – that the agent's liberty and uniqueness matter politically. Take that away and one of the main supports of such a vision undoubtedly disappears. There are other sources and other supports for such a vision but very few anywhere near as powerful, for the simple reason that, in the nature of the case, the religious perspective affirms that the dignity of the human agent is rooted in something utterly, radically, outside any changes of fortune or fashion or power in the human world as we know it. And that has to be the most drastic thing which can be said about human dignity, that which makes it not open to renegotiation or redefinition in any sense.

But I have also been underlining the fact that the health and creativity of small-scale intermediate communities is an essential part of democratic well-being and therefore a part of human happiness itself. Communities in which creative interaction is learned and in which agency and unique agents are taken seriously become essential building blocks in the creation of a properly interactive democracy, and a society in which it is assumed that people will constantly be arguing with, and co-operating with their neighbours for the good that they share.

Many centuries ago, when St Augustine wrote his great treatise on *The City of God*, the first systematic account of what a Christian social philosophy might look like, he said that the moral priorities, the spiritual vision, and the well-being of the family came from the well-being and the moral clarity of the society in which it was placed. Translating that into terms that might make a little bit more sense to us today, I think this means that well-being is something which humans experience in public as well as in private. There is proper demand for, and expectation of what I will call 'political happiness'; that is to say the sense of being able to make a difference in the public sphere. The kind of philosophy which I was caricaturing at the beginning, in terms of *welfarism*, is precisely what stands in the way of that kind of political happiness. It assumes that you can make a difference to other people but it does not necessarily assume that those 'other people' are then made capable of making a difference to you: and that is the weakness, the problem. So, the movement from welfare state to welfare society is perhaps as simple as saying that we understand well-being as something exercised not simply in terms of the state's responsibility for my happiness, but something learned and realised in human-sized communities with specific challenges and specific goals, in which people's dignity and distinctness is underlined, building together a framework in which we can indeed make a difference in our society as a whole. A 'welfare society' is a society in which people experience well-being. That well-being is experienced partly in relation to their ability to act and to act co-operatively. In that vision I believe religious conviction in general and Christian conviction in particular continues to have a unique and indispensable role. That, I believe, was the vision which animated William Temple's sense of what a society might properly be if it wished to be a moral society. That, I believe and hope, is the vision which has animated this Foundation for the last 60 years.

*Rowan Williams is Archbishop of Canterbury. The lecture was given in St James's Church, Piccadilly, on 5 November 2008.*

## BOOK REVIEWS

### **Transfiguring Capitalism: An Enquiry into Religion and Global Change**

John Atherton, SCM Press 2008, pp.328, pbk £30.00

There is a tradition in British Christian Social Ethics which originated in the work of Tawney, and was developed both by Demant and by Preston. John Atherton sees the enquiry described in this book as updating this tradition and constituting its fourth (but not its final) stage. Hence the title of his concluding chapter, 'Religion and the Transfiguration of Capitalism', echoing the titles of works by his predecessors. His subject matter, however, is much broader than Social Ethics, and not all the sources on which he draws are either British or Christian.

This book offers a very wide-ranging survey of contemporary research and reflection. Some of this will be familiar to many readers: Ferguson for example on American 'Imperialism' or Layard on 'Happiness'. But others of the authors whose work is summarised and evaluated are much less well known. Atherton is remarkably well-read. He brings together recent contributions to history, politics, economics, sociology, ethics and theology, making connections among them all. He provides a valuable bibliography and his text should encourage his readers to follow up the many references he provides.

Given its wide scope, and the difficulty of some of the literature on which it is based, this is a surprisingly readable and comprehensible text. We are carried along by the engaging enthusiasm of its author, whilst the persistent cross-referencing from one chapter to another helps to hold the disparate material together. Inevitably there are conflicts and contradictions within that material, but Atherton, as a proper 'post-modern' author, is sometimes content to leave them unresolved.

There is, nevertheless, a theme that runs right through the book: that religion is a powerful force for good. It contributes to individual happiness; it helps to hold society together; it is a support for economic prosperity. Secular opinion has been much too quick to write it off. It is a very important element in contemporary culture, not just as the 'furious' religion of the fundamentalists, but also as the 'residual' religion so characteristic of this country. It is, indeed, religion that offers the best hope for the future transformation of human existence. It is not stated quite as dogmatically as that, but that does seem to be the message.

Mostly the reader is invited to see religion, as it were, from the outside. Religion can be regarded as a social resource, referred to here as 'faithful capital', by

analogy with the more familiar concept of social capital. In other words, religion is seen as a factor of production, a means to the end of material prosperity. (One might say that religion builds up treasure on earth as well as treasure in heaven!) This is the way that religion might be presented to a predominantly secular society; the way, for example, that religious bodies might present themselves when they enter into contracts with government for the supply of education or social services. It is not, however, the way that believers, 'furious' or 'residual', generally see their own mission in life.

In the third part of the book there are sections that move beyond this and see religion much more as it is experienced from the inside. These sections necessarily become more explicitly Christian, because from the inside the commitment is necessarily specific to one's own faith rather than to religion as such. The Christian narrative of creation and redemption is told again. It is recognised that the fulfilment of human life cannot be confined to well-being that is visible or measurable. We are drawn into the discourse of theology, rather than that of religious studies.

This is especially true of the short final chapter where we meet, for the first time in the book, with the concept of transfiguration. This is also the most difficult part of the book to comprehend or assess. What does Atherton mean by 'the transfiguration of capitalism'? By 'capitalism' he must mean what most of us now call the 'free market', but probably something more than that. The implied contrast must surely be with 'socialism', although the word is not much used and does not appear in the index. Sometimes it even seems to mean 'the kingdom of this world', as opposed to the kingdom of God. Clearly Atherton's hope is that we can pass through capitalism to a better world order, rather than going back to any previous regime.

But what is meant by 'transfiguration'? Does it mean the same as 'the transformation of people and society' or 'the necessary task of transforming the global economy'? Both these expressions are used in this context. But 'transfiguration' is not the same as 'transformation'. So does Atherton mean that the true nature of capitalism is to be revealed, as the true nature of Jesus was revealed at his transfiguration? Perhaps what transfiguration means here is the revelation of a potential to be transformed.

In the final paragraphs of the final section, two 'narratives' are brought together, one being religious and the other neo-Marxist. They are found to have much in common. That would not be a new discovery. It has been made before now by many who have contributed to, or reacted against, the mainstream of British Christian Social Ethics. But much of the more recent literature surveyed in this book would not point in that direction.

*Andrew Britton*

## **Liberal Faith in a Divided Church**

Jonathan R. Clatworthy, O Books 2008, pp.280, pbk £14.99

Over the last decade, a small but steady stream of volumes has appeared self-consciously advocating the liberal theological tradition – enabling that tradition to be not defensive but confident in offering its truth (cf. George Pattison’s commendation in this book). Jonathan Clatworthy, the General Secretary of the Modern Churchpeople’s Union (the ‘main liberal Christian organisation in the UK’, as the back cover surely rightly asserts), has, in this book, made a solid addition to that stream.

Rather than narrate the recent history of liberal theology, Clatworthy takes sections of the whole Christian era, chapter by chapter. So chapter 1 looks at the bible and early church; chapter 2 at the Middle Ages; chapter 3 at the Reformation; chapter 4 at the Enlightenment; and chapter 5 at proponents of Anglican theology in the seventeenth century. Responses to this history are categorised in three ways, and the next chapters examine each in turn: so chapter 6 takes ‘dualist’ response; chapter 7, fundamentalism; and chapter 8, postmodernism. Perhaps by necessity such a broad sweep of Christian history is described through generalisations in the history of ideas, rather than through examples or racy anecdotes. Readers who need to be selective could pick up the argument in chapters 9 and 10, which gather the pace by finally applying the previous analysis to the contemporary church.

By this point, Clatworthy has established two approaches to ‘how we know things’: ‘foundationalism’ and ‘coherentism’. He defines the former as the acceptance of an absolute source of knowledge, whether tradition, the Bible or reason – the appropriation of certainty. He expounds coherentism as the acceptance of provisional and partial truths from all quarters, refined by new insights, open to others, and content with uncertainty. His coherentist champions are the classic Anglicans of the seventeenth century (chapter 5), whose theology flourished until, it is claimed, large minorities in the mid-nineteenth century disowned it in favour of foundationalist positions, such as the dualism which had first infected Christianity in the mediaeval period. Clatworthy is flexible enough to recognise that there are ‘moderate’ or ‘partial’ foundationalist positions, while he argues that these are internally inconsistent.

As this framework is applied to the contemporary church, its usefulness and insights become clear. Clatworthy recognises that it is an over-simplification to equate current conservatives with foundationalists on the one hand, and liberals with coherentists on the other, while he is able to regard conservatives and liberals as *tending* towards these positions. This shows why conservatives, for example, are reluctant to engage in ‘listening processes’ on human sexuality, for it would be quite wrong in their eyes to listen to an alternative source of knowledge when they already possess divine truth with certainty. It suggests

why there is such a battle for the soul of the Anglican Church and the Church of England. For there are two incompatible philosophies in operation; foundationalism having grown to the 'point where its supporters feel strong enough to lay claim to the Anglican Communion itself' (p.240), even though coherentism 'is the only theological tradition which can claim to represent the [Anglican] Church through the bulk of its history' (p.234). We can see how liberalism must necessarily have an 'illiberal' side, for inclusion cannot include those who would destroy it, if it is to remain inclusive (p.240).

We are partly driven to psychology. Why is there 'the Need for Certainty', to use the title of Robert Towler's book of 1984? Living with certainty may be a less mature thing to do, but it is certainly more comfortable and attractive (cf. p.217).

Skating over mild inconsistencies in the reference style, and short-titling in the footnotes of half-a-dozen to a dozen volumes which are given no further fuller reference in the notes or bibliography, I think that there is one point at which Clatworthy's comprehensive thesis could be pressed further. Is epistemology, 'how we know things', the most basic analytical category? Clatworthy hangs his differences between foundationalism and coherentism on whether God and truth are revealed in certain fields only, or in a more diverse sphere. But this distinction depends on a prior question about the nature of God: is God the sort of God to restrict Godself to the religious realm, or is God known more diffusively through the wider world? In short, what sort of a God are we dealing with? Coherentism presupposes a God who can be known in and through all things (panentheism), in contrast to the classical theistic God who restricts himself (and it is invariably himself) to certain foundationalist channels. In other words, Clatworthy's epistemological distinctions rest on a more fundamental distinction between different doctrines of God. This brings the outcome of the current struggle into focus: it is not that the triumph of foundationalism would be bad for mission (turning swathes of unchurched off Christianity, while attracting the few, p.239); it is that ultimately, it would be not be consonant with who and what God is.

*Michael Brierley, Tavistock*

### **Crying out for a Polycentric Church: Christ-centred and culturally focused congregations**

Joe Hasler, *Church in Society* 2006, pp.123, pbk 7.99

Joe Hasler brings 15 years' experience as a community development worker and a further 15 as a parish priest to the question of being church in white, working-

class, council-estate culture. The result is a passionate argument which exposes at the outset the middle-class, professional, managerial assumptions that underlie recent reports on the cities. The gap between research conclusions and the lived experience of working class communities provides the dissonance that drives a critical and creative agenda which seeks to model church out of the reality of contemporary life in one particular kind of urban context.

Hasler divides the book into two sections: the first starts in practice, the second in theology. Beginning with 'The Culture Gap', he lays out his agenda and addresses the alternative networks that are rooted in working class community life. Responding to *Mission-Shaped Church*, he uses examples from his own experience to demonstrate that people in working-class cultures tend to subvert the middle-class intentions of funded projects.

In the second chapter, Hasler critiques what he sees as the core concerns of contemporary British Urban Theology: geography, Liberation Theology, class, Christ and culture. Whilst these elements are undoubtedly present, Hasler's suggestion that social anthropology is notably absent from Urban Theology is unjustified in the light of the work of such theologians as Vincent, Green, and Northcott, for whom the social context is intrinsic. Basing his critique too heavily on a narrow selection of writing leads to a distorted view of contemporary urban theology, and undermines what is otherwise a useful thesis, that modelling cultures separately from contexts can be a useful strategy in developing urban theological and missiological practice.

The final chapter in the first section introduces Aylmer Shorter's 'Polycentric Church' model for mission in working-class communities. The model is useful, though Hasler's justification for using it is under-developed.

The second section opens with a long essay-like chapter which surveys ways that contextual theology has been modelled. Focusing on Orlando Costas and David Bosch, he goes on to present Niebuhr's Christ and Culture map. Under 'Other useful maps', Hasler summarises, somewhat uncritically, the taxonomies of Avery Dulles, David Ford, Hasselgrave, and Rommen, and Stephen Bevans. It is unfortunate that he uses the first edition of *Models of Contextual Theology* (1994) rather than the second edition (2002), and so misses out Bevans' sixth 'countercultural' model, which might have provided a useful counterpart to Hasler's own position. As a summary of key writings in this area, this chapter has some value, but its relation to earlier chapters is unclear, and the length is out of proportion in this slim volume.

The last chapter provides a cursory commentary on Chapter 4, and is as understated as the previous chapter is expansive. A brief final section entitled 'Summary - moving towards a polycentric church' acts as the conclusion to the whole volume, but both by its brevity and position, it fails to do justice to

Hasler's earlier passion. The relationship Hasler sees between theology and mission remains obscure in what should have been the climax of the book.

As the cover endorsements indicate, Hasler's argument is informed and thought-provoking. It is frustrating, therefore, that weaknesses in production quality, style and structure make this a less satisfying and authoritative book than it should be. Hasler excuses his stylistic inconsistency with reference to the different approaches of the two sections.

To marry the taxonomies which underlie context- and culture-specific theology with the insight and experience of an engaged practitioner is a significant achievement, and Hasler's book will inspire many who work in contexts which resonate with his own. His central argument, that white, working-class, council-estate cultures require models of mission and church that arise from the realities of their own lived experience, presents a challenge to the Church of England's middle-class discourse of recent reports. As a practitioner writing for practitioners, Hasler succeeds in conveying something that is theologically rational and empirically justified. What is needed now is a revised, expanded and edited presentation of his material which will appeal to those who also need to read it: academic theologians and middle-class church professionals.

*Debbie Herring, Urban Theology Unit, Sheffield*

### **Mission and Migration**

Ed. Stephen Spencer, Cliff College Publishing 2008, pp.192

This book represents selected papers from the 2007 conference of the British and Irish Association for Mission Studies in 2007, 'Strangers in Our Midst: Mission and Migration'. Papers are divided into three sections, interconnected by the need to negotiate aspects of migration and mission in the contemporary world. The first section offers a biblical perspective on the topic. The second, expanded section, 'Charting mission through migration', links the selected descriptive and analytical papers of the conference.

The topic of the conference is explored, in the third reflective section, by Tim Gorringer, who highlights the main concepts of the title, migration, 'in our midst' and mission. The inclusive concept 'in our midst' reflects the hospitality dimension of culture, which expresses an obligation to welcome the stranger, a burden not primarily on the Church, but on a whole culture. Gorringer reasons that no culture offers the exclusive norm of truth and no culture represents a full or perfect response to the Spirit of God. Further, mission cannot be done separately from the culture. Gorringer describes two approaches to mission: 'diffusion' and 'translation'. 'Diffusion' implies that new religion is implanted in



other societies primarily as a matter of cultural identity. The second approach tends to make the recipient culture the locus of proclamation. His own approach to mission is connected to the great Rublyev icon of the Trinity, in which God acts as both host and guest. This reflects the idea of engagement with people of other faiths at a time of mass migration and the mingling of populations. Gorringer's chapter serves as conceptual lens of the whole book.

The first paper explores biblical perspectives on the stranger in our midst, focusing on an unlimited human desire to travel, seen in the Old Testament exoduses and exiles. In the light of the New Testament, Tim Naish offers the metaphor of movement, rooted in Barth's description of the relations of Jesus Christ to God and to the world, where the polarity of Christ's incarnation appears as the divine-human axis. He challenges the reader to revise their sense of alienation from the contemporary secular world in the contexts of contemporary exoduses and exiles where we can find ourselves being 'Strangers to Ourselves'.

The book, particularly the second section, shares with Soja (*Thirdspace*, Blackwell 1996) the view that 'the West is painfully made to realise the existence of a Third World in the First World, and vice versa'. The chapter by Rebecca Catto reviews the theme of the non-Western Christian missionaries in England, 'reverse mission'. Catto offers a critique of the concept of 'reverse mission' as analytically empty and inadequate. She quotes Diana Witts's statement of mission 'from everywhere to everywhere' that captures something of the complexity of contemporary Christian mission. However, the increasing number of Christians from the global South coming to Europe and conducting mission here suggest that the notion of 'reverse mission' is not completely invalidated: it captures an observable and growing trend.

Susanna Snyder writes about asylum seekers in the UK. Recognising that asylum-seeking is one of the most contentious social and political issues in the UK today, Snyder offers two significant approaches to improving the cultural dimension of hospitality. First, this means expanding understanding about the experience of asylum seekers in the UK, creating a 'bigger picture' of the dynamics of forced migration. The second approach challenges us to engage with people's fear of asylum seekers. Snyder connects recognition of the stranger as life-bringer with growth in empathy, understanding that 'I am who I am in relation to the other'. She quotes Ignatieff, who points out that fulfilling people's needs is very different from helping strangers to flourish, something which involves the intangible qualities of love and belonging, dignity, respect and ultimate meaning. It is reasonable to suggest 'that helping strangers to flourish' is an ability of a decolonised mind, which embraces the essence of the equality expressed in the Rublyev Trinity.

Philomena Mwaura, in the context of mission from everywhere to everywhere,

considers the Nigerian Pentecostal Missionary enterprise in Kenya, which emphasises an individualistic understanding of salvation. Such ministry in Kenya today has potential to deal with the deepest desire of all African societies, which is the anxiety to eliminate evil, loosening and freeing human beings from evil spirits, witches, forces of darkness, and enemies. However, Mwaura expresses concern about the pressure on believers to deny their religious traditions, about their potential disconnectedness from their past. The situation of another African country is explored by Emma Wild-Wood, who looks at the Democratic Republic of Congo, where the process of migration has played a vital part in the expansion of the Anglican Church, which she sees as mission.

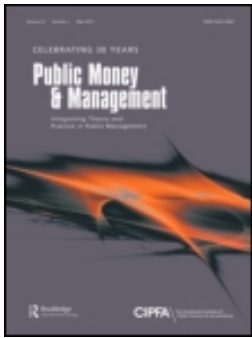
Like Mwaura, Janice McLean explores a Pentecostal missionary enterprise, but with a different location and approach. Again exploring South-North movement, she considers the West Indian religious communities in New York City and London. The focus is on re-evangelisation and the aspiration to integrate various aspects of 'other-worldly' and 'this worldly' mindsets.

The next paper by Israel Selvanayagam is about the Hindu diaspora in the UK. The chapter is special in the sense of being the only one which explores interfaith relations and reminds the reader of a sense among Hindus of being ignored and even hated. The paper considers the desire to create a more empathetic understanding of the 'other-worldly'. Sadly, Selvanayagam's evaluation is that Hindus and Christians have a long way to go to achieve minimum understanding of each other's faith, traditions and interpretations.

In the concluding section of the book, Nicholas Sagovsky makes distinction between voluntary and forced exiles. Talk of 'economic migration' as voluntary is over-simple, given the depth of suffering evident in all kind of exiles, he says. Sagovsky sees the situation of exile as a polarity, between destructive loss of hope, and the constructive settlement in a secure 'home'. This challenges us to think again about the divine-human axes, and the inner and outer human nature.

The last paper, 'Multicultural Worship: Theological reflections on experience' by Thomas R. Whelan continues the exploration of home and belonging. The final sentence of the book is from 1 Corinthians 12.13: 'For in the one Spirit we were all baptised into one body. . .' This acts as an open-ended statement, a sending-out to go and look for the one Spirit who heals all kind of fear, suspicion, hostility, and violence. The Spirit sustains also the hospitality dimension of culture, and expresses an obligation to welcome the stranger and to invite them to take a place 'in our midst' - in like manner to Rublyev's Trinity.

*Inese Budnika*



## Faith advocacy and the EU anti-poverty process: a case of Caritas

Francis Davis

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# Faith advocacy and the EU anti-poverty process: a case of Caritas

Francis Davis

*Caritas in Europe is both the EU's largest voluntary sector network of any kind, and also comprises Europe's biggest religious NGO. This article tracks the Europeanization of its advocacy as part of an European Commission-funded initiative to engage civil society networks in the improvement of national social inclusion strategy designs. Noting the impact of state structure and civil service actions on the form and impact of such faith-based advocacy, the article draws out fresh insights for the UK debate on the role of religious organizations in welfare reform and advocacy, not least the appropriate assessment of 'the local', 'motivating ideas' and the need for the development of a new and 'adaptive leadership' style by public managers.*

This article explores factors at the religious third sector–state interface drawing upon new research into the anti-poverty advocacy activities of the European wing of the world's largest NGO federation: Caritas (only the Red Cross has similar scale but also quasi-legal status). It is the only anti-poverty non-governmental organization (NGO) network active in every EU state and likely accession state.

In assessing a major faith-based federation with a normative articulation of its purpose, the article seeks to shed new light on conceptions

of 'the local' in the delineation of policies for and with religious third sector bodies. It also seeks to test the relationship, if any, between religious ideas, institutional design and policy impact with regard to poverty reduction in particular. In doing so it seeks to draw out some tentative insights regarding the broader state–religious voluntary sector interface.

First, I outline the context referring particularly to problems in the UK policy debate. Then I describe Caritas' contribution to EU anti-poverty advocacy activities. Finally, I draw out initial conclusions which might form the basis for future research.

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## Caritas

- \$5.5 billion global net worth and £2.5 billion global revenues.
- Active in every EU member state and likely accession state.
- Approximately £40 million revenues for Caritas members in the UK—of which around half in north west.
- 600,000 paid staff in EU, including 26,000 in Austria alone.
- 520,500 volunteers in Germany, Spain, France and Turkey.
- 1.3 million beneficiaries in Hungary, Czech Republic, Romania, Slovenia, Serbia.

## 'Doing God': in search of a leadership context

Many local and national civil servants experience engaging religious voluntary organizations in civic or policy renewal as a process fraught with difficulties of conscience, prudential judgment and social risk. Lacking profound religious literacy they seek to ground such efforts in evidence\*. However, they find little comfort in the limited data available on religious charities at the main UK charity regulator (Brennan, 2008), or in the NCVO's *Civil Society Almanac* (Reichhardt *et al.*, 2008). Neither are they encouraged when they see

\*From interviews for *Moral, But No Compass* (Davis *et al.*, 2008) and ongoing studies nationally, in Norwich and Hampshire on 'public benefit' of faith communities.

mainline faiths rejecting bureaucratic 'definitions' of what constitutes their religion (Archbishops' Council, 2008; Davis, 2008). Lastly, they find themselves in the double bind of being driven to address the needs of minority Muslim communities while simultaneously protesting their 'neutrality' (Davis *et al.*, 2008).

Guidance from the lead government department on 'faith' (Blears, 2008a)—the Department of Communities and Local Government (CLG)—has not clarified the matter. At least until recently the department's commitment to social cohesion has been underpinned by heavy reference to the social capital theories of Robert Putnam (CLG, 2009), while concurrently ministers have repeatedly claimed that the idea of 'faith motivates voluntary action', is a 'belief best expressed through a 'congregation' (Blears, 2008b) even 'ideally with Jesus at its heart' (Timms, 2009). And yet Putnam argues that *belonging* makes religious social capital more than believing (Putnam, 2007; Gerson, 2009). In a world of 'imagined communities' (Anderson, 1983) what participants in faith communities behave as though they 'belong' to then may be significant—a mosque or the ummah; a diaspora church; a congregation or a global communion; a mission to the present or a 'chain of memory' (Hervieu-Leger, 2000). Moreover, for policy-makers this 'belonging' may bring with it additional resources of know-how, funding and access to successful models of social innovation which are absent at the local level, or have been excluded from small-scale local studies.

This is a two-way process: those leading religious voluntary organizations also need to be able to 'read' the state and its policy frameworks. As aspects of social policy internationalize, such reading will become increasingly necessary.

European welfare state strategies since the Second World War have often been loosely typified as owing their roots to 'socialist' (Nordic countries); Bismarckian (central Europe); liberal (Ireland and the UK) and Mediterranean (Spain, Italy, and parts of south east Europe) models (Taylor-Gooby, 2004). While these typologies are not perfect, they do serve as a useful shorthand for demonstrating the *multiplicity* of means by which governments have sought to provide protection against the traditional social risks of the post-war era. They also serve to highlight the variety of needs, family, and economic structures, to which such policy actions were intended to respond. The Bismarckian model is said to rely strongly on a

'social insurance' principle for welfare provision; the Nordic model on a large state presence and income payments grounded in a high theory of 'rights'; the Liberal model on more markets and voluntary action; and the Mediterranean approach on a combination of strong family support with a basic social insurance (Taylor-Gooby, *op. cit.*). In the voluntary sector case, the models have had profound shaping effects too as varieties in law have significantly impacted third sector institutional forms and roles (Randon *et al.*, 1995). There is now an emerging view that the interaction of expressed principles, institutional form, resources and human engagement are as significant to impact and the concretization of values in states, markets and civil society as are convictions of 'believingness' at an intensely local level, or policy ideas at the national level (Redding, 1995; Hopgood, 1996; Migdal, 1998).

Because such variation nestles under many normative terms which are now under pressure, omitting to analyse them risks a new danger—in the speedy move to policy implementation little attention will be given to the appropriate design of a balance between ideas, institutions and strategies of governance in relation to faith communities, and especially with regard to the struggle against poverty. It is to this task that I now turn.

### **A singular narrative of Catholic social teaching?**

Many Western policy-makers find the Catholic Church hard to understand. Incomprehension may increase after meetings with formal Church representatives. Policy-makers live under tight deadlines, facing exponentially growing ranges of 'performance criteria' and demanding electorates. However, the Church prides itself on an ability to focus on the ultimate purpose of life (McCabe, 2005).

This formal Church extols a corpus of publications that together comprise the official 'Catholic social teaching tradition'. Normative in claims, these documents comment on the nature of capitalism, the state, the need for development, purposeful work and more (Walsh and Davies, 1991).

Crucially for the present study, this formal body of teaching is also deemed by the Church to be the theological basis—the theory of organization—upon which Catholic social welfare institutions should be governed. In empirical terms, this is a command to a huge number of charities, representing one quarter of the health care in Sub-Saharan Africa, a

million plus paid and unpaid staff in Europe and, globally, more welfare bodies (Froehle and Gautier, 2003; Campbell, 2009) than all Catholic parishes combined.

Official recognition as 'an agency of the Church' brings with it a strong discourse of participating in the single 'social teaching tradition'. In formal Catholic teaching, the distinction between 'believing' and 'belonging' is less sharp than in some analyses (Baker, 2009) even when Church-approved NGO bodies are decreasingly places where committed religious observance is sustained. The Dutch Caritas agency, Cordaid, for example runs introductions to Catholicism as part of its in service training and induction (see also Beyer and Nutzinger, 1993).

The largest of these officially recognized Catholic institutions is the Caritas International network. In the EU, Caritas is the only social welfare and justice network present in every member state and likely future member state (Caritas, 2008\*).

### Caritas in Europe

Caritas Europa is the umbrella body for all of the official national Catholic social welfare and development agencies in Europe. It is both like and unlike other civil society networks. It is like them in that it sees itself clearly as located in civil society—rather than confined to a 'religious sphere'. This mainstream presence makes it a service provider of domiciliary care and hospitals, community development and enterprise, homeless and refugee centres, older people's services, nursing homes, research institutes and more. This practical experience inspires Caritas to advocate for a 'preferential option for the poor' combining a strongly progressive approach to welfare rights with a dim view of the marketization of services (Caritas, 2008).

The Caritas Europa network harnesses hundreds of thousands of volunteers and paid staff. It is a major economic and social force. The four largest agencies have a combined income in excess of one billion euros and most

agencies match voluntary donations with statutory funding resources (Kramer, 2009). Meanwhile, in Lithuania, Caritas is at the forefront of work on combating human trafficking, while in Spain it is pioneering new models of 'personal accompaniment' to address chronic poverty (Caritas, 2008).

Caritas takes pan-European social innovation duties seriously. For example, Caritas Austria and Caritas Italy are significant funders of new work in south east Europe, while Caritas Germany supports social innovation in Poland and Ukraine. Caritas Europa sustains capacity building programmes for new and emerging agencies across the former USSR, and at the start of each EU presidency, sends a delegation to meet with incoming ministers and brief them on migration and other policy topics. Caritas sees itself as 'existing for the benefit of all and especially the most socially excluded' (Caritas, 2008).

However, Caritas Europa is unlike other networks in that it also has a complementary relationship with one of Europe's largest faith communities—the Catholic Church. This link could be downplayed as irrelevant to secular policy debates, but such a perspective would underestimate the current social contribution that arises from this interface and the striking scale of its presence. It would underestimate the way that the social and institutional location of the Catholic Church, in particular localities, influences the self-understanding of the Caritas agency as part of 'the Church' and its strategic options. For policy-makers, discounting the Church link might also inadvertently diminish options for successful engagement with the faith-based parts of the voluntary sector.

While Caritas has been very active in service development and advocacy at the national level, it is only since 2006 that Caritas Europa, has begun to work in a highly structured way towards engaging members at the European Commission (EC) and Council level. Because of historical limitations on the political authority of the EC to act on issues of 'social inclusion', this new phase was particularly linked to the so-called 'Lisbon agenda', which aims to accelerate the marketization of the European arena (Caritas, 2008).

From 2001, on a three-yearly cycle, every member state of the European Union was required to prepare a national anti-poverty strategy and submit this to the EC and the Council of Ministers responsible for social affairs. This initiative was intended to be a vital means to renew Europe's social responsibilities. Additionally, governments hoped that fresh

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\*'Caritas (2008)' here refers to three cycles of interviews and surveys carried out 2006 to 2008 across the EU by F. Davis, J. Stankeviciute and J. Rossiter with Caritas experts, chief executive officers and staff. Key aspects of the study are available as the working papers *CONCEPT—The European Social Inclusion Process, Civil Society and the Caritas Contribution* (Caritas); *European Public Value—An Interim Assessment* (Caritas and VHI) and the forthcoming *From CONCEPT to PROGRESS* (Caritas).

methods to improve national level policies, and support inter-governmental peer collaboration, might arise from this triennial planning exercise.

Because of concerns about the relative lack of third sector voices in policy-making in the first plan, by 2006 the EC agreed to partner with a number of civil society networks. It chose Caritas as its only faith-based partner. This partnership took two main forms:

- First, a dialogue on improvement and innovation began as part of what is known as the ‘open method of co-ordination’ (Büchs, 2007).
- Second, the partnership agreement provided two years’ worth of funding to enable Caritas Europa (and other selected European networks) to contribute to the EU social inclusion process at the European level.

### The CONCEPT project

This new partnership inspired Caritas to develop fresh models of collaboration at the EU level. Consequently, the primary aim of what became known as the CONCEPT project—‘Caritas Organizations Network to Challenge the Exclusion and Poverty Trap’—was to build a network of, eventually, 24 national experts on social inclusion within the Caritas Europa confederation of members (Caritas, 2008).

In the first year (December 2005–November 2006), CONCEPT’s main goal was to enable network participants to contribute to the process of developing the design of their own national social inclusion strategies. These gave rise to the *National Strategy Plans for 2006–08*. In pursuit of this goal, Caritas Europa used twinning arrangements whereby each of the 13 participating Caritas member organizations encouraged and facilitated active involvement by other European Caritas member organizations. This expanded the network, creating bilateral partnerships between Caritas member organizations in the field of social inclusion.

To engage effectively in the national strategy process, CONCEPT participants familiarized themselves with the first and second waves of their state’s National Action Plans (2001–2003; 2003–2005), their country’s chapter in the *Joint Report on Social Inclusion and Social Protection* and its assessment by the EC. They also contacted the ministries leading on national strategy design, members of their relevant social protection committee, and those national civil servants designated as ‘leads’ on the process at

the EU level. In most cases, this served to begin more or less effective dialogues with national governments enabling CONCEPT participants to contribute to the design and monitoring of the national strategies in their country for the period 2006–2008.

In the second year (December 2006–November 2007), participants, now representing 24 countries, aimed to monitor the initial implementation of the national strategies at national, regional and local level. To enhance capacity and facilitate mutual learning on a broader scale, Caritas Europa extended the ‘twinning arrangement’ idea by encouraging mutual working in geographical and thematic groups:

- Geographical groups sought to gather CONCEPT participants from countries with similarities in language, culture, state structure and social policy challenges. They focused on governance processes, and experiences and challenges in relation to implementation.
- Thematic groups sought to network on the grounds of expertise and organizational concern. This aimed to deepen reflection around the key social policy issues.

Group work culminated in joint policy recommendations for the EU, national and Caritas network level regarding civil society participation in the social inclusion process and key social policy fields. Recommendations ranged from the grounds for minimum income legislation, to the ‘European Welfare Model’, to funding home care. A consistent concern was the omission of ‘migrants’ from most of the social inclusion plans across the European Union.

Caritas Europa’s European-level policy proposals were of significance, but equally crucial were the *variety* of contributions that the CONCEPT process gave rise to in the advocacy realm. The examples that follow are emblematic, rather than comprehensive. Nevertheless, they provide insights into the complexity by which seemingly normative religious Catholic social principles were concretized at the local—meaning *national*—level. A single idea has had many consequences.

### Ireland

Ireland’s unique social partnership arrangements pre-date the national strategy process. They consist of four pillars: employers, unions, farming organizations and the voluntary sector. In total, 17 voluntary sector

organizations were involved in the process leading up to the national anti-poverty plan collectively representing 10 strands of social life: older people, children and youth, labour market, housing, poverty, disability and caring, local and rural, housing, gender, social analysis and the voluntary network.

The Caritas partner in Ireland, CORI Justice Commission, the only organization representing the social analysis strand, is 'unique in Ireland...for both its formal role and the informal high regard it is held in by those of all parties'. Both formal and informal routes to influence were used in this case and in others. This included brokering the resolution of a log jam in inter-party negotiations inside the coalition government (Caritas, 2008).

Moreover, CORI Justice was a key participant and influence in the national strategy process and was actively involved in the social partnership since 1996. CORI reminded government that Ireland is following a number of meta-strategies—the Lisbon strategy, the national development plan, the national spatial strategy, the national strategy for social inclusion—but that they are often overlapping and therefore have to be properly integrated. CORI, as part of the social partnership agreement, is now involved in monitoring the implementation of the national social inclusion strategy.

#### *Sweden*

Meanwhile, Caritas Sweden has been involved in a wide variety of social policy work, despite the limited size of the Catholic community in the Nordic countries. In Sweden, a 'Network Against Exclusion' has long been established, which includes representatives from NGOs, the trade unions and faith organizations, including Caritas. This network is the primary dialogue partner with the government, while Caritas sits on the national social partnership council which is the means by which government involves other sectors in policy improvement.

In 2003, the Swedish government established a commission for service-user influence on social development issues. Located in the Ministry of Health and Social Affairs, it is chaired by the minister for public health and social services. The commission includes representatives from the Network Against Exclusion, the Swedish Association of Local Authorities and regional and national boards of health and welfare. Its work focuses on particularly vulnerable service users and monitors the implementation of the national social

inclusion strategy. Between its four meetings a year it acts as a network. Caritas Sweden is, with others, continuously involved in the consultation and monitoring of the implementation of the social inclusion policy.

Inter-departmental and civil society collaboration in the implementation of the Swedish social inclusion plan has been strong. Consequently, most proposals tabled by Caritas and other NGOs were included in the plan. As participants in the CONCEPT process, Caritas Sweden were able to bring an EU dimension to discussions within the NGO network that 'added to negotiating traction' (Caritas, 2008).

#### *United Kingdom*

In Britain, Caritas was being restructured as the CONCEPT process started. Consequently, its experience was different again: while its Scottish wing contributed to the early parts of the project, its English and Welsh branches joined CONCEPT only half way into its first phase.

These factors were not a major obstacle from a Caritas Europa perspective. However, the UK government had already established its formal group of partners as part of the structured—and innovative—'Get Heard' project, which was organized by the Social Policy Task Force and ran from 2004 to 2006 (Get Heard, 2008).

Other civil society actors expressed reservations as to the appropriateness of the local Caritas agency joining the formal grouping at this stage. Some Church groups were already networked into the secular European Anti-Poverty Network also active in the UK. A plan was devised to formally involve Caritas at the civil service level at a subsequent stage (Caritas, 2008).

Meanwhile, Caritas developed multi-faceted strategies to put the national process on the UK map including circulating background briefings to faith-based community groups across the country; holding local discussions; publishing a pamphlet by a government minister calling for a new faith-based coalition to 'make UK poverty history' (which initiated new collaboration between the pamphlet's author and other anti-poverty groups active on the social inclusion process); lobbying senior politicians and the Prime Minister's 'faith envoy' (Lammy, 2006).

Caritas' critique of migration policy became the subject of a major article in the national Church press, a leader column in the *Independent*. It was also quoted on BBC's *Question Time* (Caritas, 2008).



### *France*

The French contribution to CONCEPT was slowed down by staff changes and issues of language, but moved forward when a senior member of the Secours Catholique management team took it on, acting to fully integrate the work located in France into the CONCEPT process. Notably this fresh networking drew a major Secours Catholique action research and advocacy programme into the CONCEPT level, both adding capacity to Caritas Europa and providing fresh insights at the EC level because of the quality of the feedback captured.

Involving a survey of 4000 adults and children with direct experience of poverty, the programme forms the basis for future mobilization with an emphasis on involving poor people themselves in advocacy. The programme report will underpin Caritas Europa's pan-European campaigns and will provide a platform for the whole of Caritas Europa. In addition, during the French presidency of the European Union (July to December 2008), Secours Catholique worked closely with Caritas Europa to advance recommendations regarding child and family poverty arising from its activities.

Secours Catholique's work is now regarded by Caritas Europa as an innovative 'national pilot project' with the potential to be replicated.

### *Romania*

Caritas Romania became involved in national strategy design for the first time through the CONCEPT process. This was also the first time that any civil society body had engaged in such a fashion with government policy development. This was a risk for both Caritas and the Romanian government (Caritas, 2008).

### *Austria*

During the national social inclusion process, Caritas Austria's health outreach programmes for asylum seekers were specifically praised as an example of good practice. The agency could equally have pointed to other social innovations in which it was key: working with the ERSTE Foundation, Caritas has founded a bank for the 'unbanked', providing routes to financial inclusion for the poorest. Each year Caritas, with corporate and NGO partners, runs a national day during which young people give time for which they are paid and their pay is then recycled to help fund social projects. This financial recycling helps with the sustainability of the projects and has been so successful that it is now being replicated internationally.

### **Questions of legitimate public action**

Caritas Europa's interim self-assessment saw its 'networked' co-ordination as:

- 'Church in action'.
- 'An embodiment of the Catholic social teaching tradition'.
- 'The kernel of an 'epistemic community of ideas across Europe to advance poverty reduction' (Caritas, 2008).

Within this formal discourse the CONCEPT programme is easily presented as a resounding success. After all, it is reported, the shared aspiration to develop habits in keeping with the normative social teaching traditions has seemingly been achieved. Advocacy has been delivered in the name of 'the Church' and in defence of the most excluded (Caritas, 2008).

However, wider issues are also at stake: while Caritas has engaged in active advocacy across the EU, how do we account for the huge variety of means by which different members of the same 'Church', with the same formally expressed 'idea' of mobilization, have participated in an increasingly integrated yet diverse polity?

In almost every country, this ecclesiastical institution has shaped and re-shaped its strategy, while simultaneously working to discern a 'common European position'; pooling its insights and even the governance of its advocacy. At the national level, Caritas agencies have perceived themselves as having a 'thick' conception of social justice, but in developing a European position this has become 'thinner' as the objective needs of Eastern Europe have been in dialogue with more subjective definitions of 'need' found in the richer West (Caritas, 2008).

Has this variety been a simple local strategic choice or the abandonment of principle? Is it likely that parts (rather than agencies) of other faith communities would experience such institutional morphing if they were to commit to an advocacy for and with the poor in a changing European environment?

In the UK, as we saw, an approach closer to a distinct discourse was adopted, but this was primarily a result of timing, the size of the local Catholic community and inter-religious considerations than of divergent convictions. Advocacy outside formal state governance processes was secured by enforced social irrelevance rather than the principled passion that some of the UK activists claimed for their 'social teaching' engagement (Caritas, 2008). In the Swedish case, authenticity was easier

because the design of the state allowed Caritas access on its own terms despite the marginal social position of Catholicism. In Romania, the national director of Caritas observed that the very act of conversation was 'miraculous'.

Even within a strong normative discourse, then, supported by rich horizontal information flows between parts of the religious third sector network, the vertical capacity, insights and impact of the religious third sector body are intensely variable. While the size of the agency matters so, too, does the size and form of the related extended faith community. Perhaps most crucially the quality and timeliness of policy-making was defining. How the state was designed, or what it did or did not do, had the biggest impact.

Aside from its own concerns, Caritas across Europe identified a number of patterns that had devastating effects on the role of third sector bodies in general. To name but two: state consultation that was undertaken too quickly, or which harnessed IT facilities out of kilter with third sector skills and capacity, destroyed civic initiative rather than building it. Meanwhile, constructive feedback from the third sector bodies which was then excluded from the country's final national anti-poverty action plan had similarly disempowering effects (Caritas, 2008).

### **Conclusion: towards an adaptive view of governance**

This article started by describing the confusion faced by many policy-makers as they address the challenge of engaging—or rejecting—the advances of religious third sector organizations in social reform or renewal. It noted that while the UK conversation with regard to these matters was increasingly locked into a view of religions as institutionally 'congregational', 'motivated by faith' and 'local', such definitions sat in tension with empirical realities. These included those between 'belonging' rather than 'believing', nuanced analyses of states which allowed for institutional variety, and organizations which found making clear demarcations between those 'inside' and 'outside' of religious affiliations problematic.

In describing the work of the Caritas Federation over two years, I have re-located the 'local' to the national level while also noting the emergence of an embryonic common European anti-poverty platform. In turn, this platform is the cause and consequence of new innovations at the sub-

national level.

Most significantly, this dialectic between various levels within the religious voluntary organization has been complemented by what can only be called an 'isomorphic' response to particular state structures. Despite shared and normative claims as to what might constitute the ideal state, market and even NGO, Caritas has morphed with great speed and detailed engagement when facing the advocacy task. As such its development of particular practices has been more vital to its work than the articulation of any motivating ideas.

For policy-makers, such an insight may come as both a challenge and a relief. It may be a challenge in that this initial study suggests that every 'local' engagement with faith communities will need an adaptive approach which seeks to tease out the horizontal networks and capacity of faith-based organizations, as well as their vertical ones. What the state-based policy-maker does to enhance this relationship may be more defining for success than the act of religious engagement itself. Either way, it will not take a one-size-fits-all governance structure to sustain success.

Meanwhile, for those leading religious voluntary organizations who are judged to be at risk of isomorphism (theological drift?) these insights will point to the need for hard-headed analysis as each reframing of the 'local' brings fresh institutional factors into play.

These insights may be a relief to policy-makers for they suggest the opportunity to spend less time learning doctrine and scriptural insights as part of 'religious literacy' and more of a duty to understand how religious voluntary organizations actually behave and are run. Such contextual adaptation is the raw material of creative public management (Heifetz, 1994; Moore, 1995) and the habits of a mainstream voluntary sector, rather than an esoteric religious leadership challenge that causes so much consternation among 'secular' civil servants. It also—helpfully?—relies on evidence rather than competing conceptions of the divine life.

Either way, it would seem that aspects of the UK debate regarding the role of religious third sector bodies lack nuanced detail, and an international dimension. It will take further research to ensure that ideas, institutions and potential social impacts with regard to faith communities are not set off in competing and confusing directions; just at the moment that policy-makers are protesting—and intending—the opposite. ■

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# Roman Catholicism and the Welfare Society: Catholic Ideas and Welfare Institutions after Labour<sup>1</sup>

FRANCIS DAVIS

The 2010 Papal Visit to England and Scotland has been described as 'the highlight' of some Catholics' lives. In addition to pastoral events, state dinners and private meetings it comprised a number of addresses in which the Holy Father exhorted those present to pay particular attention to the twin demands of 'reason' and 'faith'. A year later, in September 2011, Archbishop Vincent Nichols returned to these themes again claiming 'reason' and 'faith' as the ground of a common good. Speaking at Birmingham University on the occasion of the tenth anniversary of the city's faith leaders group he went further still citing these two complementary themes as essential to the very heart of a shared commitment to social action. But how might 'ideas' gain 'traction' in a rapidly changing environment? And how fit is the Catholic community for such a purpose?

This chapter explores aspects of the thorny question of the embodiment, the practice, of Episcopal calls to civic virtue. It draws on new research. First, I describe some of the sensitive issues that researching the Catholic community throws up not least for researchers who come from that community. Second, I summarise the findings of three recent inter-related studies. Finally I draw out some questions that this exploratory research may suggest for the case of the English Roman Catholic Church<sup>2</sup> in particular as it seeks to discern its relations with the 'welfare state' and 'the

big' or 'welfare society' in the Cameron/Clegg years and beyond.<sup>3</sup>

### *English Roman Catholicism: A Note of Caution*

The public history, role and civic contribution of the Roman Catholic community in England and Wales is highly contested academic territory.<sup>4</sup> That contestation is not reduced by reference to the still relatively tiny body of empirical work carried out on the community's habits, policies and attitudes since the 'restoration' of the English Episcopal hierarchy in 1850.<sup>5</sup>

Consequently, while rhetorical appeals may be made by some Catholic community leaders to the 'recusant', 'Brideshead convert', 'Irish' and new 'East European migrant' strands in English Catholic life the huge variations in physical resources, geographical location, political access, social class, educational attainment and numbers that these represent(ed) may be more empirically opaque notwithstanding their metaphorical significance to some. Indeed I have argued elsewhere that the instinctive Catholic reach for 'metaphor', untested by evidence, can enhance this opacity and may even cause a profound confusion between the 'is' and the 'ought' in the assessment of the community's position and its social context.<sup>6</sup>

Even when the effort is made to gather an evidence base to inform Catholic reflection the task may not be as simple as at first it may seem. Fr Andrew Greeley, for example,<sup>7</sup> has reported criticism of his studies from Church leaders when the findings have uncovered personal convictions among lay Catholics which do not conform to formal Church teaching. It would be better, his critics have suggested, to repeat the studies until the 'right' answer has been found (despite rigorous sampling techniques) than to publish findings that may cause scandal, or that come from those who have an 'axe to grind' (no matter their academic standing). Similarly, even in Britain and Ireland, the dec-

ades since the Second Vatican Council have seen a study of the needs of Irish migrants suppressed,<sup>8</sup> a study of the 'Renew' process in the Diocese of Arundel and Brighton met with 'concern',<sup>9</sup> and reported laments of the ethnic chaplains about their position in London treated with resistance<sup>10</sup>

### *English Roman Catholicism: A Context*

An awareness of episcopal caution in this regard is important for in the three years up to the appointment of Vincent Nichols as Archbishop of Westminster, and President of the Catholic Bishops' Conference of England and Wales, British Catholic advocacy took on a new urgency in its form and tone.<sup>11</sup> Opposing the proposed quotas for non-religious pupils in religious schools, the extension of legal rights to members of the gay community regarding adoption, the liberalisation of embryology and a possible change of law on abortion, key Bishops attempted with force to secure 'opt outs' from political discipline and public policy proposals arguing that they represented a threat to the moral life of their community, the health of the Catholic voluntary sector and an articulation of the virtues of 'the common good'. Proposing 'regularisation' for (im)migrants without legal papers to be resident in the UK, they named the plight of refugees, asylum seekers and migrants as a political and pastoral priority for the Church, and the nation too.<sup>12</sup>

Throughout this period a striking feature of the Catholic Church's manifestation of its civic presence were the very public voices of its senior Bishops. They claimed to speak 'on behalf' and 'in the name' of the Catholic community. While this may not surprise those familiar with Roman Catholic theology such a position takes on political overtones by providing a clear and central network of authority and representation for the Church in relation to the state's governance in these key areas. Such a node point of representation is largely absent in other faith communities<sup>13</sup>

and thus, in an era of exhortation to 'social cohesion',<sup>14</sup> is doubly notable.

But whereas the Bishops may ground such public authority in a theological reasoning their public utterances also give rise to a form of civil accountability whether it is sought or not. Political conversation is at least a two way process and the Bishops were engaged in making specific proposals. Consequently, in a liberal democracy the ability of the Bishops to evidence some of their principles and positions becomes a matter of legitimate public interest; indeed even a matter of the authenticity of 'reason' and what is judged to be 'reasonable'. These in turn can have a public impact on the credibility of ecclesial voices notwithstanding theological claims to legitimation. How significant then is the Catholic civic contribution? How 'cohesive' are its schools? Are its resources being redistributed from the top to the bottom of society rather as it suggests the state should do?

Later, in 2010 the Bishops themselves seemed to take aspects of this conundrum on board. The English Bishops Department for Christian Responsibility and its Caritas Social Action Network published a 'snapshot of the Church's social welfare contribution. However, the presentation of the figures—which were intended to clarify credibility—raised fresh questions again suggesting as they did that Catholic prison chaplains visited more prisoners every year than were found in the entire prison system; and that some Catholic charities had client loads in proportion to other resources that were up to 300% more effective than even award-winning secular counterparts. The need for extended research to underpin Catholic reflection could not have been clearer.

### *Three Studies of Exploration*

During 2008 and 2009 we undertook three inter-related but separately commissioned studies. In the first, we surveyed

one thousand five hundred Church going Catholics as to their attitudes to relationships, and their knowledge and understanding of key aspects of Catholic teaching. In the second study we sought to map the contribution to care and advocacy of Catholic institutions in the field of migration, refugees and asylum seekers. This was deemed especially important given the major public stand that the Catholic Bishops had taken in this area. This study included a phone interview with three quarters of the area Deans nationwide<sup>15</sup>, communications with every Bishop, and approaches to regional agencies and local projects. Lastly, we carried out an in - depth research enquiry into the work and current profile of one of the very largest Catholic voluntary organisations. The Bishops' advocacy had, after all, been at least partly an attempt to protect the 'unique' factors that such bodies were said to bring to society.<sup>16</sup> While it is not possible, in a single chapter, to describe the findings fully the overarching patterns that began to emerge were significant.

First, in our survey of Mass going Catholics, we discovered that while 84% of those who replied said that they would attend Mass weekly,<sup>17</sup> their offspring had much less regular patterns of attendance. Of those who had at least one child under 18, 55 per cent indicated that their children attended Mass once a week, another 23 per cent attended almost every week, 7 per cent once a month, and another 7 per cent on major feast days and/or several times a year. Confession, now often called the Sacrament of Reconciliation, and a cornerstone of traditional Catholic observance, had little place in many people's lives.

Despite these quite high levels of Eucharistic practise the knowledge of formal Church teaching — or a willingness to conform to its precepts — was low. Only 26% said that they were 'fully aware' of the Second Vatican Council. Nearly half of those who responded were unaware of *Humane Vitae*<sup>18</sup> while half had no awareness of the English Catholic Bishops' previous major advocacy initiative entitled 'The



*Common Good And The Catholic Church's Social Teachings*

<sup>19</sup>Given the formal public opposition to all abortion by the Bishops it was perhaps most notable that 15% of this Catholic sample 'wouldn't mind' using the morning after pill, and 10% already had done so, despite the fact that in formal Catholic eyes this acts as a concrete action of termination. A full 68.8% were using condoms in direct contravention of formal Catholic policy.

Turning from individual responses to the formal institutions of the Church our findings with regard to the Church's actual engagement in the field of migration, refugees and asylum were equally notable.

For example, it became clear that new patterns of demographic change effect all Dioceses nationally. Table 1 shows this clearly. This table reports the number of Deans who said, across England and Wales, that these topics were now impacting upon their work and life. For ease of reference the Deaneries are tabulated alongside the Diocese in which they are located.

However, the local expression of need did not tally with local responses: In the parishes 10% of Deans expressed 'no interest' in the topic while at least a third reported themselves as thinking negatively, or having had negative experiences, with regard to the new arrival communities. In some areas, for example Wales, objective need was very high but the practical response of the Church had been very low. While in some Dioceses, such as Westminster, meaningful action was taking place, it was still outstripped by need and comprised a very small proportion of ecclesiastical resources and assets invested in all activities despite the public assertion that this was a 'priority' area on the part of the Bishops. In a nation where migration is set to rise despite Prime Minister Cameron's attempt to impose a 'cap' on numbers, this makes notable reading.

*Table 1*

Diocese	Deaneries with significant presence of migrant groups †
Arundel & Brighton	4 out of 9
Birmingham	14 out of 17
Brentwood	10 out of 12*
Cardiff	5 out of 7
Clifton	11 out of 13
East Anglia	5 out of 8
Hallam	4 out of 5
Hexham & Newcastle	11 out of 16
Lancaster	5 out of 9
Leeds	14 out of 42**
Liverpool	13 out of 17
Menevia	3 out of 6
Middlesbrough	5 out of 9
Northampton	6 out of 8
Nottingham	8 out of 10
Plymouth	3 out of 4
Portsmouth	15 out of 24
Salford	8 out of 12
Shrewsbury	2 out of 4
Southwark	16 out of 20*
Westminster	15 out of 19
Wrexham	4 out of 6

† = Based on the number of deaneries from which we were able to get a response.

\* = Based on interviews with diocesan representatives.

\*\* = Based on interviews with parishes.

Seeking further data we turned to the Catholic Church's flagship voluntary agencies but here too the response was no more extensive: Two agencies—both small, and both in central London, had had to restructure their services to meet overwhelming demand from new arrivals. Nevertheless, only two other agencies nationally reported that half or more of their work was alongside migrants, refugees and asylum seekers. The largest agencies in the country use only 25% of their revenues in this client group area with only the St Vincent De Paul Society (SVP) reporting an active 'increase' in the range of services provided to migrants, refugees and asylum seekers. Even so, this still only represented 1% of the SVPs total expenditure.

A factor in this limited response to new needs was the high dependency of the Catholic bodies surveyed on statutory income streams. In some cases they were as high as 70%. Given that statutory funds in the migration, asylum, and refugee field are scarce this suggested limitations on the potential to innovate and a structural constraint too (not of the government's making) on any likely attempt by agencies, currently undertaking high levels of other work, to broaden their service provision. Overall then action, advocacy and provision was, at the least, patchy and would be sorely tested if the Catholic voluntary sector entered a period of public sector retrenchment.

Our third study sought to tease out how challenges may be constrained or affirmed by the issues faced by particular organisational factors. To achieve this we agreed to undertake an in-depth study of a charity that in this chapter I shall call *Angel*.<sup>20</sup>

*Angel's* self-description of its role and purpose is to be a 'Catholic organisation which is at the service of the whole community', and which seeks to relieve poverty. In pursuit of this aim it recruits 'thousands' of volunteers though local parishes. *Angel* has also established a number of special and professionalised social welfare projects across the country which employ paid staff, and are funded by a mixture of

statutory, foundation and national lottery funds to 'provide services to users of all backgrounds.' They include community enterprises, recycling projects, and residential provision for those who have found themselves homeless.

Over the last three years *Angel* has stepped up its own public role, enhanced its claims to be available to all, begun new work to establish branches in Catholic schools, and this process culminated in parliamentary receptions to promote its work to which MPs and Peers of all backgrounds were invited. Indeed, among *Angel's* patrons was one of the Archbishops most publicly associated with national media advocacy against the Labour reforms that had so upset senior Bishops. As such *Angel* is a useful exemplar when it comes to assessing Catholic-welfare state interfaces and the health of the community's civic action. This is especially the case when we turn to the evidence gathered within the organisation.

First, we discovered that the bulk of *Angel's* clients are aged in the 60 to 75 age group. Figure 1 shows the relative distribution of clients across age bands.

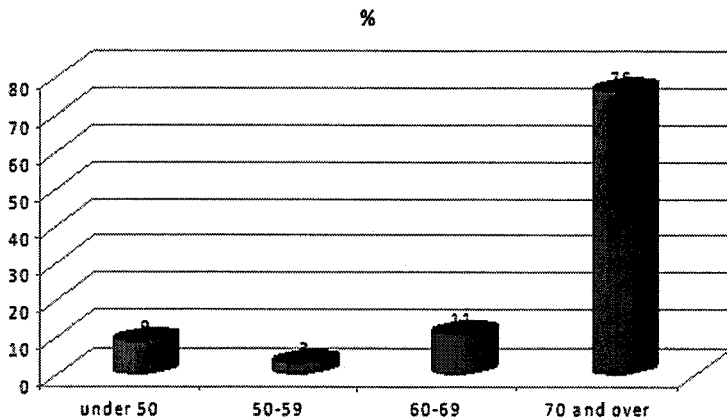


Figure 1: Age of the *Angel* beneficiaries (%)

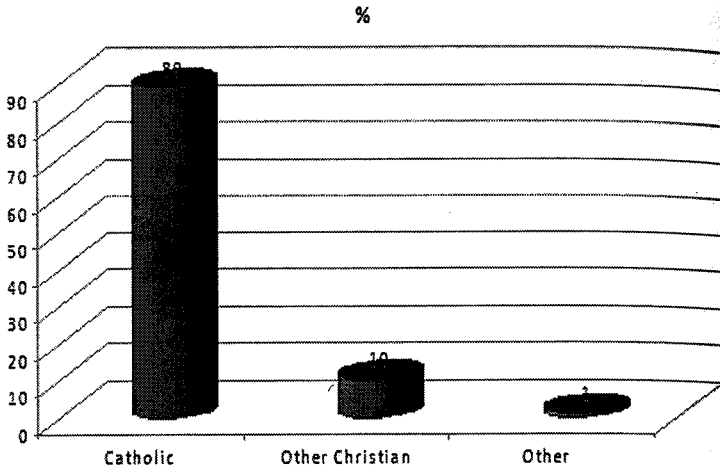
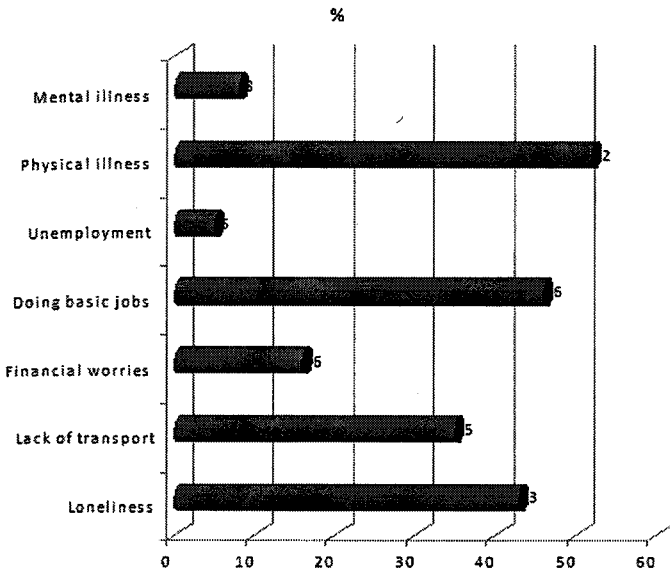


Figure 2: Religion of clients

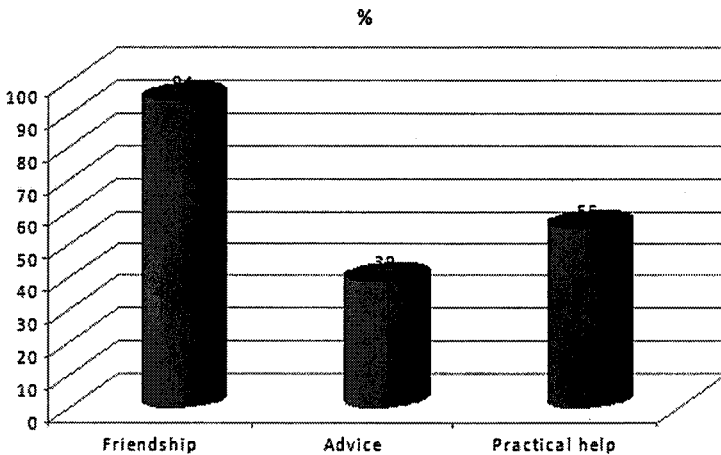
Figure 2 gives us further information by adding to an understanding of the age profile of *Angel's* clients and a knowledge of their religious affiliation. The chart reveals a clear client concentration among Roman Catholics with only 1% of all clients coming from beyond the Christian community as a whole despite *Angel's* diverse—and diversity encouraging—funding base.

However, this is not an un-needy group of people. More than half reported physical illness with just under 50% saying they were 'lonely' and had needed help with 'basic jobs'. Perhaps reflecting their age profile a full 94% said that *Angel's* workers were important to them for the 'friendship' they offer, followed by their 'practical help'. It would seem then that *Angel's* engagement is with an elderly and frail client group but a highly Catholic and almost wholly Christian one.

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*Figure 3: Responses to the question: Which of the following do you experience?*



*Figure 4: Does Angel provide you with help on the following?*

When we turn to the profiles of *Angel's* volunteers themselves the organisation's rhetoric of diversity comes under further pressure. 63% of all volunteers have been active in *Angel* for more than 10 years with a quarter of all volunteers active for more than 25. What is more, not only are they predominantly religiously observant as Catholics but, in contrast to the one thousand five hundred Mass goes surveyed for the study cited earlier, *Angel's* volunteers are strongly aware of spiritual figures associated with the relief of poverty, of the Second Vatican Council, and even of the English Catholic Bishops statement *The Common Good And The Catholic Church's Social Teachings*. Perhaps even more striking is the extent that they stay involved as a manifestation of their commitment 'to their parish', to 'spiritual reading' and their own search for friendship. 65% of them are in long term marriages.

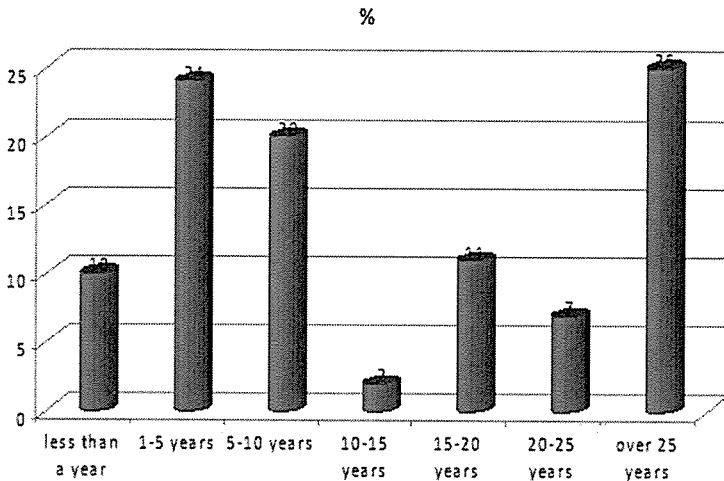


Figure 5: How long have you volunteered for Angel?

## Roman Catholicism and the Welfare Society

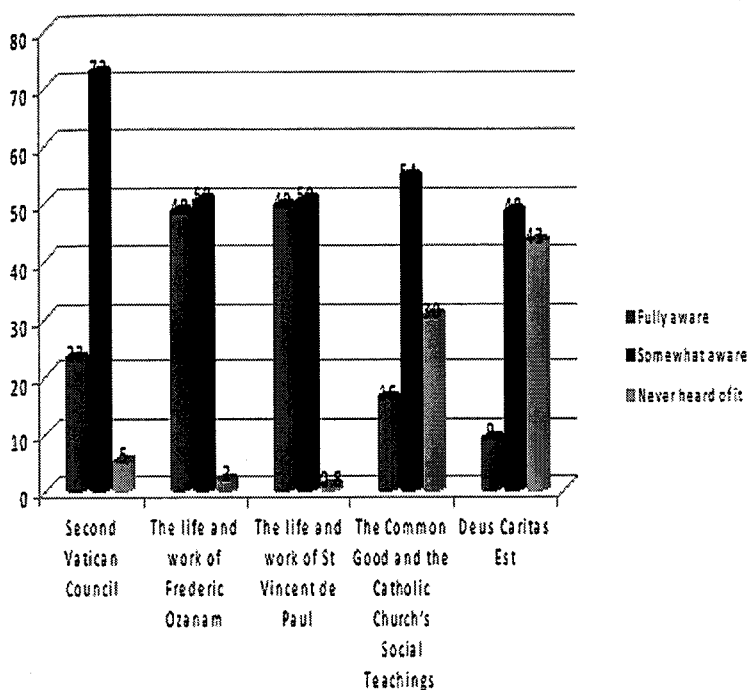


Figure 6: How aware are you of the following?

Of the organisation's paid staff 47 out of the 55 who replied said they would recommend working for the organisation while there was an almost uniform clarity of purpose to 'alleviate poverty' for all those in need. As with respondents to other surveys of Christian charities half consider their project 'unique' with a quarter suggesting they are 'better' than 'similar' voluntary sector bodies.<sup>21</sup>

In (Catholic) schools, despite rhetoric of modernisation on the part of the organisation, those who have not signed up to its groups said that they thought *Angel* 'a bit old fashioned', 'not really seen in the best light', or as 'admirable but basically the God squad'.



## Catholic Social Conscience

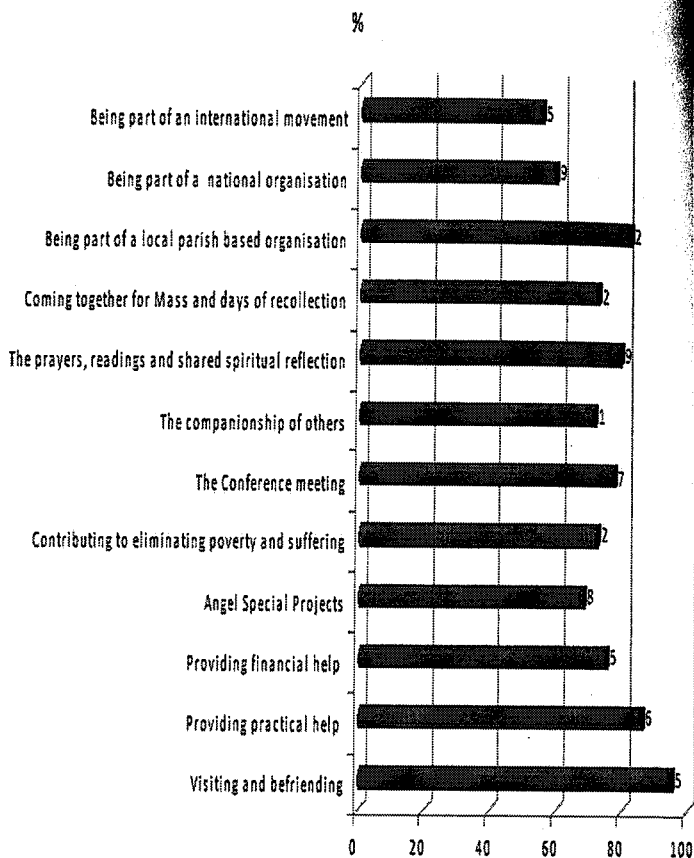


Figure 7: Reasons for being part of Angel

Meanwhile, all the Bishops we surveyed expressed 'strong approval', an affirmation of the agency's work with 'the youth, the migrant and the elderly' and thought that there was much hope for the future.

Notwithstanding such affirmation Catholic parliamentarians were less enthusiastic with regard to *Angel's* work. Surveying all Catholic MP's our response rate was high and so it was notable that all were aware of its activities, but not

a single parliamentarian thought it 'an effective agent for social change.'

### *Conclusion*

Taken together the three studies that I have described in summary here form one of the largest exploratory empirical research enquiries ever undertaken within the English Roman Catholic community.<sup>22</sup> Drawing as they do on findings at the end of the Labour era, and in a period of increased public stridency on the part of the Bishops that I referred to earlier, they also set the backdrop for the renewed English episcopal call to social responsibility following the Papal Visit and not least the context for the ears, hearts and institutions to which part of the exhortation to 'reason' and 'faith' with which I started are addressed.

A number of vital questions seem to emerge from the research. These are of significance for the English Roman Catholic Community in particular but may also suggest avenues for further enquiry for other denominations as ageing (and immigration) change the shape of British Christianity more generally.

First, a disjunct has emerged between the Church leadership's view of itself, its understanding of its public legitimacy, and the convictions of those ('the members') who may be said to give their words democratic weight or legitimation in a liberal democracy. While for Bishops this divergence between those people surveyed in parishes, and their own 'formal' positions, may suggest the need for renewed catechesis, harsher Church discipline, or simply be a matter of theological interest its demonstration effect to wider civil society and decision makers could risk undermining all Episcopal utterances.

Second, this mismatch of words and convictions between the Episcopal and the parochial level is matched by a further disjunct between an expressed priority of 'The Church' nationally and the actual number of people hours and

proportion of financial resources being allocated to that priority. As we have seen when it comes to the pastoral and social needs of migrants, refugees and asylum seekers the Catholic Church in England and Wales could be responding more consistently than thus far it has found itself able to. Again, public legitimacy and institutional authenticity is at stake in the context of public deliberation in a liberal democracy.

Last, the case of *Angel* points to the possibility of underlying demographic trends that could compound the first two patterns: *Angel* represents a large and loved Catholic voluntary agency which exists for the whole community. Based on our research though it has become neither and thus finds its members diverging from the new outlooks of parishioners in the parish life that its members hold dear and the needs of the wider neighbourhoods for whom it receives statutory, foundation and lottery funding. Indeed, *Angel's* elderly, and intensely devout Catholic volunteers, may receive so much episcopal approval because they are more akin in social and ideological profile to the kind of Catholics that Bishops globally might wish for in their parishes as opposed to those that we found in the parish study. Such a 'purer' Church—larger and elderly or, later, young and small may have theological attractions but will likely have reducing institutional capacity to concretise principles in action for a good wider than the Church's own.

This exploratory group of studies of the English Roman Catholic case may suggest contrasting patterns: Indeed, it may just be that at the very moment that the English Roman Catholic Bishops have found their public voice to engage in debates about 'civic virtue', 'social responsibility' and even very specific proposals on migration, abortion, embryology and equalities legislation, and are calling upon 'reason and 'faith' to shape the mission of their people and institutions, that the chairs are falling out from underneath them in terms of parish solidarity, the profile of their activists and the

ability to match any public exhortation and words to practical actions and habits.

For a theological call to the 'common good' this may have no impact on the authenticity of such an exhortation, nor its significance. However, if such research findings were repeated in wider and deeper studies they would in due course likely raise significant questions as to the fitness for purpose of Catholic institutions to respond in deed as well as word, and to act as a means by which ideas of 'reason' and 'faith' can be sustained. Ideas, as George Weigel often says, 'must have consequences'. In turn such a discovery may require a fresh approach on the part of both the Church and government as the former loses some weight/legitimation in the public square while the latter moves on to seek out civic allies embodying the social capital and habits that European societies in an era of austerity will so desperately need. To say so may be perceived as risky in some quarters but without risk mission, it could be argued, rarely endures.

## Notes

- 1 For other studies of the Christian interface with New Labour see, for example, P. Manley Scott et al (2009) *Remoralizing Britain?: Social, Ethical and Theological Perspectives on New Labour* (Continuum) by Peter Manley Scott (Author, Editor), Christopher Baker (Editor), Elaine L. Graham (Editor) and M. Chapman (2008) *Doing God Religion And Public Policy in Brown's Britain* (DLT).
- 2 England and Wales is used deliberately representing as it does a single Catholic administrative unit known as a Bishops' Conference, in this case comprising 22 Dioceses. Scotland and Ireland have their own Episcopal Conferences.
- 3 The full versions of these studies are available from the author on [lascasas@bfriars.ox.ac.uk](mailto:lascasas@bfriars.ox.ac.uk). They comprise *The Tablet Survey* published in part over two weeks in June 2009, see <http://www.thetablet.co.uk/article/11769>; J. Stankeviciute, F. Davis and J. Rossiter (2009) *A National Mapping Of the Roman Catholic Church's Work in England and Wales with Migrants, Refugees And Asylum Seekers* Caritas/Von Hugel Institute; J. Rossiter, J. Stankeviciute and F. Davis (2008), 'A Study of Angel' Von Hugel Institute.

- 4 For example, V. Alan McClelland and Michael Hodgetts (1999) *From Without the Flaminian Gate: 150 Years of Roman Catholicism in England and Wales 1850–2000* (London: Darton, Longman and Todd Ltd.) and M. Hornsby-Smith 2000 *Catholics In England 1850-2000- Historical and Sociological Perspectives* (London: Cassells)
- 5 See, for example, the work of Kieran Flanagan <http://www.bristol.ac.uk/sociology/staff/kieranflanagan.html>; Michael Hornsby-Smith (Surrey) <http://www.soc.surrey.ac.uk/staff/mhornsby-smith/index.html>, and A. Archer (1985) *The Two Catholic Churches: A Study In Oppression* SCM.
- 6 F. Davis (2001) *A Political Economy Of The Catholic Church* in N. Tiims and K. Wilson (eds.) *Authority and Governance in the Catholic Church* (SPCK).
- 7 See A. Greeley (2001) *The Catholic Imagination* Univ Of California Press and <http://www.agreeley.com/booklist.html>, but also F. Davis (2009) *Editorial : Religion Third Sector, Policy And Public Management in Public Money And Management Vol 29,6* Routledge.
- 8 This occurred in the early seventies and was Reported by the Pastoral Research Centre to the Newman Association Conference 2009.
- 9 The 'concern' came from the then local Ordinary and his Vicar General in conversations with the present author. See M. Hornsby-Smith (1995), *The Politics of Spirituality: A Study of a Renewal Process in an English Diocese* (Oxford: Clarendon Press).
- 10 This was a part of the 2008 report *The Ground Of Justice: A pastoral research enquiry into the needs of migrants*, Von Hugel Institute ([www.rcdow.org](http://www.rcdow.org)) that caused some ire. A subsequent study by the University of Middlesex, funded by the Catholic Bishops Conference Secretariat, that identified similar concerns among the chaplains is still to be widely circulated.
- 11 Archbishop Nichols was appointed Archbishop of Westminster on 3 April 2009, and subsequently, President of the Bishops' Conference.
- 12 For example, Catholic Bishops of England And Wales (2008) *Mission of The Church To Migrants In England and Wales* (CTS) and, earlier, calls from Cardinal Murphy-O'Connor for regularisation. See A. Ivereigh (2009/Oct to Dec) *Into The Light: The Strangers Into Citizens Story* in *Crucible* (SCM).
- 13 See F. Davis et al, *Moral, But No Compass: Government, Church and the Future of Welfare* (Chelmsford: Matthew James, 2008).
- 14 See Rt Hon John Denham MP *Faith And Government* <http://www.iengage.org.uk/component/content/article/1-news/592-government-and-faith-communities-speech-by-john-denham-mp>.

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- 15 A Dean is the lead Priest for an area normally including around six local parishes.
- 16 See, for example, the commentary of James Hanvey SJ, a key advisor to the Bishops: J. Hanvey, 'Charity which makes the Difference' in *Charity which makes the Difference* (London: Heythrop Institute for Religion, Ethics & Public Life, 2008), pp. 7–26.
- 17 Weekly Mass attendance is the formal minimum observance.
- 18 The official Papal Encyclical whereby the traditional Roman Catholic prohibition of artificial contraception was reaffirmed. For more detail (and the fall out) see P. Kearney (2009) *Guardian Of The Light: Denis Hurley—Renewing The Church And Opposing Apartheid* (Edinburgh/London: T and T Clark /Continuum).
- 19 Catholic Bishops of England and Wales (1997) *The Common Good And The Catholic Church's Social Teachings* (London: CBCEW).
- 20 *Angel* is a *nom de plume* given to the organisation in order to make it anonymous, in so far as is possible.
- 21 Again this was regularly stated by those we interviewed for *Moral, But No Compass*.
- 22 Although an even larger one will be completed for CAFOD's market research programme in late 2009. See [www.cafod.org.uk](http://www.cafod.org.uk).

# **Social Innovation and Enterprise as a Ground of the Common Good: The New Inter-Religious Frontier**

Francis Davis

This chapter is about collaboration and innovation. And especially innovation to address pressing social needs. I chose this subject because while in many religious, inter-faith and multi-faith contexts the struggle for justice will be lauded as a feature of our common commitments, the nature, form and impact of such a struggle can often remain flaky; worthy, but without institutional expression. And at a time when we can no longer turn to the state as we once did social innovation becomes key, for it will provide the roots to refresh and renew our future social enterprises.

First, I will turn to what I judge to be some key challenges in the area of knowledge creation and institutional leadership for faith-based social innovation and enterprise, especially in Britain. Next, I will argue in favour of redeveloping a tradition of a common search for truth through deliberate disputation. In doing so, I will suggest that faith-based institutions may discover a more profound rootedness in emerging trends in the social sciences and management studies than some forms of theology have allowed us in changing times. With this in mind I will argue, lastly, that faith-based institutions are now at a unique juncture, with an unprecedented opportunity to launch new institutions, both to re-energise and renew a fractured public sphere.

While I have discussed the chapter with those from many communities it is not an attempt to develop an inter-religious theology and will no doubt be read as significantly shaped by my own (Roman Catholic) community, although is intended to reach well beyond its increasingly inward-looking confines. It is a common call to action where any

examples given are intended to be morphed, developed, re-shaped and extended for contexts beyond those I have envisioned.<sup>1</sup>

### **Leadership, language and education**

It can be dangerous for a social scientist with an interest in management and leadership to write alongside contributors who include a number of those who would reach, first, to “faith” as an “idea.” For theologians of hope, social research findings can seem reductive or (with reason) to have passed into the realms of spurious “scientific” claims.<sup>2</sup> For religious historians, current practical questions of governance may seem trivial when benchmarked against the tides and challenges of time. For those from many other walks of life the very introduction of “management” discourse into the caring realm represents a form of treachery by risking, it could be suggested, the “commodification” of love, whose focus should be the ultimate destination of human flourishing.<sup>3</sup>

Others may respond with the much less nuanced allegation that high principles are delightful and desirable however funds are scarce, the external environment constantly changing and the institutional pressures enormous. Alternatively, institutional leaders – for most faith communities in Britain in the end take on legal personality – may hear such anti-managerialist complaints with a particular theological ear: they may then interpret a call for total purity by confining their institutions to clerical education or seeking out only those with whom they already agree. Add to this some local contexts in which states are weak, civil society fractured and poverty growing and there arises a recipe for conflict in the making.<sup>4</sup>

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<sup>1</sup> Earlier versions of this chapter were tested at an international conference of Vice Chancellors at Liverpool Hope University and in dialogue with Professor Philip Booth at the IEA.

<sup>2</sup> Robin Gill, ed. (1998) *Theology and Sociology: A Reader*. New Jersey: Paulist Press, especially the chapter by Timothy Radcliffe OP.

<sup>3</sup> This was the view of Michael Holman SJ in his annual conference lecture to the Catholic Education Services in 2007. It is also present in Gerald Grace (2002) *Catholic Schools: Mission, Markets, Morality*. Oxford: Routledge.

<sup>4</sup> I am thinking of two-thirds world settings here but, to an extent, the argument could be applied in parts of Eastern Europe. See Francis Davis, “Ideas, Institutions and Poverty Reduction in the EU: Questions for a Theology of Governance,” in *International Journal of Public Theology*, Vol. 3, No. 1, 2009.



Often, these tensions are not worked out in such explicit terms: instead, they are debated with a predilection towards “metaphor” or “imagination.”<sup>5</sup> A lay Vice-Chancellor may delight that a secular benefactor has just given a \$10 million gift to the university after three years of assiduous research and relationship building, but could find such celebration slapped down by devout board members who see the grant as “a sign.”<sup>6</sup>

We need to pay particular attention to language, the potential for interdisciplinary miscommunication and the need to persist in a common search for truth. “Community” is a word which is often used in religious mission statements<sup>7</sup> and yet it can hide an inward-looking culture and glacial governance procedure.<sup>8</sup> Sometimes it also acts as cover to a profound disagreement as to the nature and purpose of the institution itself. Likewise “values,” which, when examined more closely, may turn out to be equal opportunities statements much thinner in philosophical intent than even the claims to a normative justice made by some secular political parties.<sup>9</sup>

Conceivably, terms that may have had a common meaning in cultures gone by (or in one global region) may be unravelling in the face of secularisation or the pressures of the “accountingisation” of society that (arguably) characterise the modern age.<sup>10</sup> Even a term such as “preaching” may be contested: one outlook on Christian life may suggest that “preaching” is only undertaken by an ordained person at the Eucharistic service while others maintain it is a task of all of the baptised as they engage in communicative activities that contribute to the rebuilding of a public sphere hollowed out by the privatisation of

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<sup>5</sup> Andrew Greeley (2002) *The Catholic Imagination*. California: University of California Press.

<sup>6</sup> This is an example I give in the political sphere in Francis Davis, “A Political Economy of The Catholic Church,” in Noel Timms and Kenneth Wilson (2001) *Authority And Governance In The Catholic Church*. London: SPCK.

<sup>7</sup> Of 35 interviewees in UK, 34 came from institutions where “community” was included in a mission statement but all 34 understood it differently.

<sup>8</sup> Arthur Levine, “Higher Education As A Mature Industry,” in Philip Altbach, Patricia Gumpert, Donald Johnstone, eds. (2001) *In Defence of American Higher Education*. Maryland: Johns Hopkins.

<sup>9</sup> See Raymond Plant, “Socialism, Markets and End States,” in Julian Le Grand and Saul Estrin, eds. (1999) *Market Socialism*. Oxford: Clarendon.

<sup>10</sup> See Kathleen McLaughlin, Stephen Osborne and Ewan Fairlie, eds. (2002) *New Public Management: Current Trends And Future Prospects*. Oxford: Routledge.

discourse, principles and behaviour – including the search for sanctity itself.<sup>11</sup> In each community there is an equivalent challenge.

Confusion over terms can mean that in practice a religious institution is identical to any other, except for some of the language it uses about itself. At the other extreme, staff teams and stakeholders can feel radically disempowered because of the enormity of the brief they have been handed.<sup>12</sup>

A serious approach to language is vital, then, for strategic reasons: inside the metaphors of theology and religious language may be built a tendency towards an “ought” by which we might seek to order the institution but which distracts us, no matter how unintentionally, from the “is” of the practical challenges we face and the particular local conversations we need to pursue. How are we to align “community,” “vision,” “inspiration,” “mission,” “resources” and “impact” if the words have multiple meanings?

Such deliberate reflection is particularly important in secularising settings: “spirituality,” “faiths,” “faith motivation,” “justice” and “common good” are all terms used by religious leaders and Cabinet ministers when they meet but do these people share a vocabulary and grammar? In order to attempt to link theory, practice and delivery so that principles become not personal “beliefs” – the classical secularist close-down on the wonder of a full faith – but ways of life, rich habits of virtue, expressed through organisations as well as persons, are needed.<sup>13</sup>

In this environment, leading a religious social enterprise becomes a work of applied theorising – a hard-headed daily pilgrimage to authenticity between an unconditionally-marketised “social product” and an admirable (but fearful) “purity.”<sup>14</sup> This pilgrimage is carried out in the

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<sup>11</sup> The example of “preaching” arises from an interviewee. For the commercialisation of spirituality see Gordon Lynch, “Dreams of the Autonomous and Reflexive Self: The Religious Significance of Contemporary Lifestyle Media,” in Basia Spalek and Alia Imtoul, eds. (2008) *Religion, Spirituality and The Social Sciences: Challenging Marginalisation*. Bristol: Policy Press.

<sup>12</sup> The idea of a Christian education being for preparation for death comes from a former head teacher at Ampleforth Abbey. See Anthony Howard (2006) *Basil Hume: The Monk Cardinal*. London: Headline.

<sup>13</sup> And this is more than “managing as if faith mattered,” as my friend, Helen Alford OP, discusses in her book of that name.

<sup>14</sup> Interview with institution head.

context of religious communities of all kinds which can be increasingly polarised, and in societies which almost certainly are.<sup>15</sup>

The process of generating a common understanding for carrying out faith-based social innovation therefore needs to be grounded in an open enthusiasm for debate, involving all sides of the conversation. By this I am not suggesting a simple lurch towards “free speech” (important though that may be) but that a central feature of the formation of the resources of the institution should be encouragement of a rich disputation that opens up fresh spaces for argument.

Common meanings, common terms and a common vision are much more likely to emerge from a common life than from a fractious individualism or communitarian partisanship.<sup>16</sup> Faith communities need to model such a struggle towards a common culture – or community of character – to both the wider faith community and society as a whole, for, as we shall see in the next section, they are increasingly under threat.

Ironically, it is the new waves of management studies and the wider social sciences, disciplines which many people of faith have treated with suspicion, in which there are emerging patterns which might assist this process.<sup>17</sup>

### **A social enterprise that knows its place: context and analysis**

Among other activities, in 2009 my colleagues and I undertook two major pieces of research: the first was for the Church of England and concentrated on the Anglican contribution to social welfare.

The second study sought to quantify the scale of the English Catholic community’s work alongside asylum seekers and refugees. It was

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<sup>15</sup> See Antony Archer (1986) *The Two Catholic Churches: A Study in Oppression*. Norwich: SCM, and the discussion of “kingdom versus communion Church” in Timothy Radcliffe OP (2005) *What Is The Point of Being A Christian?*. London: Continuum.

<sup>16</sup> I am thinking here of Christian takes on “democratic capitalism” such as Michael Novak (2001) *The Spirit of Democratic Capitalism*. Amsterdam: IEA.

<sup>17</sup> There are several attempts to reframe the encounter with social sciences – but also to re-assess “secularisation” theory. For example, see Spalek and Imtoul, *Religion, Spirituality and Grace Davie* (2007) *The Sociology of Religion*. Thousand Oaks: Sage. Also, Gareth Morgan (1997) *Images of Organisation*. Thousand Oaks, CA: Sage.

striking for us that, at the outset, many Anglican Bishops reported that the Church of England's contribution "had declined" or "was no longer significant," and how this was a source of "sadness" for them. In fact, in the sphere of social welfare and voluntary action we found the opposite to be the case.<sup>18</sup>

In contrast, the Catholic Bishops had invested a good deal of energy in expressing publicly their undying solidarity with "the stranger" and yet we found that Catholic action in the refugee field was patchy or poor (to say the least) and did not match Episcopal rhetoric by any means. For example, the diocese of one of the unsuccessful candidates for the Archbishopric of Westminster is a peak area of asylum seeker dispersal, and yet there has been no response at all from the local church despite media comment from the ordinary concerned.<sup>19</sup>

Perhaps more controversially the formal Catholic position on relationships and sexuality is well known. Nevertheless, in a recent further survey of 1000 Mass-going Catholics that I led we found upwards of 80% of those interviewed had life practices at variance with the Church's teaching. A majority expressed disagreement with the formal position (even when they did not know what it was!).<sup>20</sup>

Meanwhile, as the Catholic Bishops of England and Wales were lobbying Labour politicians over the "Catholic" position on homosexuality, Labour advisors had a government opinion poll that suggested English Catholics were out of step with their Bishops in this sphere of relationships, too.<sup>21</sup>

Even with seemingly "fundamentalist" terrorists such a multiplicity of layers can often be in play as an enthusiasm for modern film and video

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<sup>18</sup> Workshop with Anglican Bishops. Subsequent findings in Francis Davis, Elizabeth Paulhus and Andrew Bradstock (2008) *Moral, But No Compass: Government, Church and the Future of Welfare*. Chelmsford: Matthew James.

<sup>19</sup> Jolanta Stankeviciute, Jenny Rossiter and Francis Davis (2008) *National Mapping of the Catholic Church's Work in Refugee, Migration and Asylum Rights*. Caritas Social Action/Von Hugel Institute.

<sup>20</sup> "Revealed: The Modern Catholic," in *The Tablet*, 19/26 July 2008, accessed March 2013: <http://www.thetablet.co.uk/article/11733>.

<sup>21</sup> Interview.

games or theatre clashes with other layers of awareness.<sup>22</sup> Recognition of the causes of political violence is key here.

It may seem trite to re-state it but Churches, and wider faith communities, influenced by competing pathways from modernity to post-modernity in fragmenting cultures, may share a written "vision," or even a self-description, which is out of kilter with the social reality within and around them. Linda Woodhead, writing in the *Tablet*, has called this the modern multiple layers of religious identity and meaning.

This can be addressed partly by the disputation that I have referred to above. Additionally, I want to suggest that, in truly discerning our place in local neighbourhoods, national polities and global societies even faith-based institutions that would seek to emphasise their orientation, or disciplinary priority, as "theological"<sup>23</sup> need to return to empirical research. In the 2009 study referred to above, my colleagues and I established that the UK state had no idea – nor intention of evidencing – the faith-based contribution to civic welfare despite claiming a coherent "faith and social cohesion strategy" by which to guide all government departments, and the allocation of financial resources. The Churches, and especially the Catholic Church advised by eminent theologians, had not even noticed.<sup>24</sup>

In a climate of "evidence based policy making"<sup>25</sup> our discovery of the lack of research in faith-based areas revealed the state-Christian institution conversation to be grounded in policy-making sand. Conversely, the government opinion poll referred to above suggested that sometimes "outsiders" know more about us than we (or at least some Christian leaders) dare admit to ourselves. Meanwhile, the Muslim community was being over-researched not least by using theologians

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<sup>22</sup> See Richard English (1999) *Ernie O'Malley: IRA Intellectual*. Oxford: OUP, and Richard English (2010) *Terrorism: How To Respond*. Oxford: OUP.

<sup>23</sup> Ryan Topping, "St Augustine, Liberalism and The Defence of Liberal Education," in *New Blackfriars*, Vol. 89, No. 1024, 2008.

<sup>24</sup> In the UK the Secretary of State for Communities and Local Government has "lead" responsibility on these matters.

<sup>25</sup> Harsh organisational conflicts were described by those advising the Bishops as "the NHS being the metaphor of the Good Samaritan" while the scale and purpose of the Christian voluntary sector had been under intense scrutiny during the passage of the UK 2006 Charity Act but had not registered in the core activity of the Bishops' Conference Secretariat.

rather than those rooted in the social sciences. The Prevent programme was a conservative Christian theological response to political radicalisation and violence that skipped most of what social policy and sociological researchers of any eminence had written in such fields.

More crucially still, if the Churches (in this case) could not provide – nor value – evidence about themselves either then might this not also suggest that their own planning for catechesis must be as unrooted as the state's policy judgements? Political witness, for example, would consequently be at risk of being muddled despite exhortation towards "social teaching," "political theology" or even generous secondments of higher education staff to ecclesiastical commissions to draft innumerable statements on the "ethics of society."<sup>26</sup>

While we renew our conversations about social enterprise, then, we also need to renew the means by which we discern the patterns of the "places" and networks that we serve. This could also help us be more honest about the potential – and limits – of our contribution.

In preparing such clarifications we may, if my interviewees are to be believed, likely discover that because of a "kleptocratic" state structure, destroyed civic sphere, or extreme consumerism we cannot any longer assume a rich "common good" as a starting point for our efforts. Instead, we may have to turn to faith communities as places of relevant institutional renewal in the new dark ages which are upon us.<sup>27</sup>

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<sup>26</sup> From a theological distance – and many episcopal observations – Europe may look uniformly secular (but with Christian legacies) and yet most of the pioneering sociological studies in the region suggest a huge variety of secularisms at play that merit attention. In the UK we have been described as "believing without belonging" as while 71% of our citizens say they believe in a Christian God a little under 10% of them find their way to church. This has been contrasted with a North European tendency to "belong without believing," leading some to suggest that religion in the UK is a "half way" case between the religiosity of the US and the barren lands of Scandinavia. However, these judgments may again be affected by the structure and culture of the local state and its policy making habits. It is ironic that, despite an explicit commitment to *laïcité*, the French state is one of those most interested, at the policy level, in establishing which are the "acceptable" religious voices in society. Meanwhile, I have argued elsewhere that the state's creation of social partnership councils, or "structured dialogue," in Europe can have more influence on theological authenticity – even of minority Christian communities – than any number of worthy papers, episcopal utterances, church-going numbers or levels of Christian presence in national cabinets.

<sup>27</sup> I am consciously using imagery here from Alasdair MacIntyre (2001) *After Virtue: A Study in Moral Theory*. London: Duckworth.

A question remains, however, as to what such an “institutional renewal” would look like. It is to this question that I now turn.

### **Ideas, institutions and the public realm**

Assessments of the rise of the New Right as a force to convert minds, hearts and cultures in the last century repeatedly note the profound seriousness with which that movement used organisations and institutions as vehicles to carry civic outlooks, cultural aspirations and policy habits.<sup>28</sup> Dionne even suggests that in the US neo-conservative case such a concern with right thinking about ideas and institutions arose from lessons learnt by neo-conservatives during youthful sallies into the New Left.<sup>29</sup>

Consequently, in a reversal of the “New Left” allegation that elite forces in society set out to “capture” the state for their own purposes,<sup>30</sup> the cultural New Right sought to take control of school boards, state level bodies and certain private and charitable entities. Just as friars invented the new institutional form of the mendicant preaching order to reach unchurched urban centres, so also did the New Right invent its own institutions to carry its principles, habits and vision into the public square.

New Right think tanks have been among the most entrepreneurial entities on the planet, working together to support common goals and continuing to reach out with an astounding focus: they share a commitment to the development of recognisable and “high quality” brands, and they identify clear “arenas” or “publics” with whom they wish to communicate. They develop, moreover, a deep knowledge of the patterns of life – and decision making – of those within these “arenas.”

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<sup>28</sup> In this section I am drawing throughout on Raymond Plant and Kenneth Hoover (1991) *Conservative Capitalism in Britain and the US – A Critical Appraisal*. Oxford: Routledge; Andrew Denham (1996) *Think Tanks of the New Right*. Sudbury, MA: Dartmouth; Diane Stone and Andrew Denham (2004) *Think Tank Traditions: Policy Analysis Across Nations*. Manchester: Manchester University Press, and interviews at various think tanks in Washington DC by the author (2005).

<sup>29</sup> Eugene Dionne (2004) *Why Americans Hate Politics*. London: Simon and Schuster.

<sup>30</sup> Ramesh Mishra (1977) *Society and Social Policy*. London: Macmillan.

Although they have a “clear line,” such think tanks are explicitly independent, developing particular gifts for transcending traditional boundaries between the private, public and voluntary sectors in order to maximise their personal networks and institutional impact on cultures.

To assist in all of this the neo-conservative movements also gathered around them new philanthropic resources. This included some foundations specifically focused on backing those who seek to launch fresh New Right institutions in Eastern Europe and Asia especially.<sup>31</sup>

In Rome, the Acton Institute has set itself the task of “converting” young seminarians, at Santa Croce and Gregorian universities to name but two, while at Washington DC’s Heritage Foundation “network coordinators” support ideological allies across the country, and match new donors with intellectual entrepreneurs wanting to establish fresh conservative think tanks.<sup>32</sup> Their approaches to dissemination, and highly targeted publication of research findings, can move public and private policy and culture at speed. It is an approach now being emulated by a new wave of “think” and “do” tanks on the moderate UK left,<sup>33</sup> and it is thus no wonder that, as Giddens has argued, neo-liberalism was, at least until the current liquidity crisis for banks, the only “revolutionary” ideology on the planet.<sup>34</sup>

The “successes” of the New Right are significant for reflection on faith-based actions because they locate ideas distribution in very specific settings (despite much normative core content) and link them to new “legs” by which to journey, namely niche networks within the full range of dominant institutions between state, business and civil society.

In the faith-based setting, certain communities may sometimes be at risk of giving inadequate attention to such institutional variety and focus. Especially in episcopal denominations in Christianity, huge claims can be made about the potential of a “congregation,” but when they begin new ventures these huge claims actually cause the congregation to start out with a sense of powerlessness. This can happen in the Muslim

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<sup>31</sup> For example, The Atlas Foundation.

<sup>32</sup> Interview at Heritage Foundation, Dec 2004, and Acton Institute, 2008.

<sup>33</sup> See, for example, [www.youngfoundation.org](http://www.youngfoundation.org) and its global network.

<sup>34</sup> Anthony Giddens (2004) *Beyond Left and Right: The Future of Radical Politics*. Cambridge: Polity Press.



community, too, when social work and health professionals assume that all mosques have the organisational capacity of the East London Muslim Centre, only to discover that prayer may be taking place on a Friday in a borrowed room, or a mosque which is a small terraced house.<sup>35</sup> Vision is not matched to the capacity of institutional vehicles.

In turn, this may hinder potential to distribute ideas – our words – and the embedding of habits that might arise from them. Dreams become detached from the means to sustain them, or fall back on existing structures while still claiming “newness.” Alternatively, “statements” or “resolutions” are released without a clear understanding of the “publics” to be addressed.<sup>36</sup> And so “advocacy” makes people of faith feel better without finding a letterbox through which to pass to actually change the system around them.

For example, an established church (and ours has) may seek out “fresh expressions” of mission<sup>37</sup> which, despite much fanfare to the contrary, mirror very closely the current geographical forms of mission work which have emerged in response to previous patterns of social and pastoral need. Likewise, in terrains where denominations have seen themselves as a “national” (albeit not established) church, the Christian reflex may be to sustain “the old” at great cost to that which is emerging; rather like a monopoly objecting to incursions from innovative small businesses. The authentic alternative is not, however, to suggest an unreflective escape but to find new ways to start again.

My contention is that the contexts in which the religious communities find themselves are constantly changing, and it is unlikely that new wine will be held by old wineskins. Moreover, as institutional pressures arise on the religious communities in general and the churches in particular, these groups can become the depository of all of the hopes of leaderships as they struggle to make sense of a difficult new missionary terrain.<sup>38</sup>

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<sup>35</sup> Interview 2009.

<sup>36</sup> See the sections on “Exit, Voice and Loyalty” in Davis, Paulhus and Bradstock, *Moral, But No Compass*.

<sup>37</sup> The “Fresh Expressions” initiatives of Dioceses of the Church of England that we visited as part of *Moral, But No Compass* were “all local ... all seeking to rebuild a local church” and had much in common with earlier attempts by the Methodist Urban Theology Unit ([www.utusheffield.org.uk](http://www.utusheffield.org.uk)) to make churches more community focused.

<sup>38</sup> “We cannot replace families, catechesis ... or turn round a whole society” says one interviewee educational institution head, 2008.

As hopes multiply, innumerable images of the faith-based social enterprise and innovation go with them. When those discourses run back into the communities concerned, the likelihood of strategic drift increases as metaphor is piled upon metaphor to defend an ever more inclusive brief.

In seeking to re-ground our common mission, then, we need not only to encourage common disputation and to root these debates in new social research about the role of faith in the society of today. Like the New Right, we also need common and compelling institutions and practical projects which mark out our niches and demonstrate our energy. Our new talk and fresh research could then be the basis of renewal and re-invention – not maintenance. It could be the basis of energetic ideas, institutions and impacts as strategic as the New Right but with a much deeper hope on offer for the dark ages in which new lights must shine.

### **Religious communities as social silicon valleys**

St John's College with Cranmer Hall, in the University of Durham,<sup>39</sup> can lay claim (with justice) to being the founding home of the UK Fairtrade Movement: from within its walls emerged Tearcraft, which subsequently divided to give birth to Traidcraft, which, in turn, has grown to become the closest thing to an ecumenical UK household name. At around the same time the college was educating others who would go on to make outstanding national contributions in the field of social entrepreneurship.<sup>40</sup>

Theologically, such an interlocking set of developments might have one description, but this may run the risk failing to recognise the attributes of religious institutions which enable them to renew their ability to, at their best, innovate. While the Fairtrade cause was being launched in Durham, in other parts of the UK the anti-homelessness movement was growing out of faith-led responses to social need. It culminated in the vital

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<sup>39</sup> See [www.dur.ac.uk/st-johns.college/durham.ac.uk](http://www.dur.ac.uk/st-johns.college/durham.ac.uk).

<sup>40</sup> For example, Rev Brian Strevens founded the UK social enterprise of the year, The SCA Group; and Rev Chris Beales (who went also to found the Inner Cities Religious Council under Mrs Thatcher's government) runs pioneering social enterprises generating revenues for Afghanistan.

religious contribution to the first ever British legislation to protect vulnerable homeless people.<sup>41</sup> Since then, the Jubilee Debt campaign emerged out of an evangelical seminar at Keele University, while the Make Poverty History campaign has been nurtured by faith groups. London Citizens, moreover, would never have emerged without collaboration across Jewish, Muslim and trade union as well as Christian entities, and even the committedly “secular” Amnesty International has its origins in liberal religion, with some describing the organisation as a form of “religionless” faith.<sup>42</sup>

What has changed since those pioneering days is that, on the one hand, we have learned a good deal about the effects of “clustering” on the potential success of new enterprises, while, on the other, a more structured movement for “social innovation” has emerged on the global stage.<sup>43</sup> It is in relation to this realm of enquiry and action that I want to propose a response to the crying need for new institutions in which we might embed habits of the heart (by which I mean those practices which we inculcate as at the centre of our lives and communities).

“Social Innovation” refers to new strategies, concepts, ideas and organisations that meet social and spiritual needs of all kinds – from working conditions and education to community development and health. They also extend and strengthen civil society.

Social innovation can take place within and between each of the public, private and voluntary sectors and can sometimes be seen as a process (e.g. open source technologies) or as a way of addressing a social problem (e.g. micro-finance).

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<sup>41</sup> The 1977 Housing (Homeless Persons) Act was taken through parliament by Stephen Ross MP with key advice from church-based groups.

<sup>42</sup> Stephen Hopgood (2006) *Keepers of the Flame: Understanding Amnesty International*. Ithaca, NY: Cornell.

<sup>43</sup> See [www.youngfoundation.org.uk](http://www.youngfoundation.org.uk). Also, <http://www.gsb.stanford.edu/csi/>, [www.socialinnovationexchange.org](http://www.socialinnovationexchange.org) and the Skoll Centre For Social Enterprise at Said Business School, Oxford. For a more passionate Christian take, see Alison Elliott (2006) “The Spirit Of Social Innovation,” a lecture for the International Futures Forum at the Scottish Parliament ([www.internationalfuturesforum.com/iff-publications.php](http://www.internationalfuturesforum.com/iff-publications.php)). Elliott is the former Moderator of the Church of Scotland and is based currently at New College, Edinburgh University.

As such, this is not a simplistic call for an MBA programme with a bit more "sustainability" in its non-profit track. Perhaps even more crucially, it is not an advocacy for a traditional extension of "service learning" programmes, nor stand-alone technology or enterprise accelerators.

Important though all of those strategies are my argument is that we have not sought to reflect adequately on sources of faith-based social innovation. In faith-based networks this has robbed us of the opportunity to develop as many common projects as we might have done.<sup>44</sup> In society, it has reduced recognition of what we contribute.<sup>45</sup>

There are now opportunities to develop physical and virtual faith-based social innovation parks – or what I have called elsewhere "social silicon valleys."<sup>46</sup> These would be "hubs" around which the rethinking of social and civic renewal can be grounded.

"Social silicon valleys" would go further than the more utilitarian models that surround us: first, there would be much more systematic learning about how to support social innovation from a faith base, and this would build on increasingly sophisticated understandings of social entrepreneurship, enterprise and the impact of mission innovation.

Second, such "valleys" would seek to proliferate better ways to spot, create, incubate and scale up good ideas, people and methods so that they can be embedded in existing, new and – crucially – scalable institutions.

Thirdly, they would seek to garner new sources (and methods) of support to make such a potential deliverable.

Although we think about religions in metaphors all the time, I know that some will only be able to imagine what such a "knowledge transfer" or "innovation explosion" strategy would look like if I offer concrete examples. So what might set our "social silicon valleys" apart?

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<sup>44</sup> Even in the USA adequate provision for members of Religious Orders did not come from "within" but from the uncomfortable questions of leading Catholic foundations "without." See Mary Oates (1995) *The Catholic Philanthropic Tradition in America*. Bloomington, IN: Indiana University Press.

<sup>45</sup> A key argument of Davis, Paulhus and Bradstock, *Moral, But No Compass*.

<sup>46</sup> Geoff Mulgan et al. (2006) *Social Silicon Valleys*. Young Foundation/British Council.

First, they would be led by those with direct access to senior management. Such a positioning would locate the mission of the “valley” at the heart of the institution and across all departments.<sup>47</sup> I will return to this matter in a later section. Faith-based parliamentarians could be key, here.

Second, the “valleys” would see themselves as effervescing centres of faith-based social enterprise, innovation and creativity and would look to attract energetic talent to them from across the region – and the planet. This is not to minimise the insights of spirituality and religious rationality. However, our “valleys” would be looking to launch new modes of action that can be internationalised or adopted by others for roll out on a larger scale. Such things may indeed happen “informally” or “by the grace of God” in many local places but the “social silicon valley” would structure them, back them and replicate them. It would help them to bypass some of the institutional nightmares that have been common even to clearly holy causes.<sup>48</sup> It would introduce them to the global Christian – and/or faith – community (and beyond).

Moreover, “social silicon valleys” would have a particular brief to contribute to the renewal of market relationships and voluntary- and public-sector innovation in these trying times. Despite condemnations in some “rational” economic quarters, there is still scope to bring together principle-driven family entrepreneurs, firms from the “Mutual top 300” and unique business forms, such as the international ecumenical movement Focolare’s “Economy of Communion,” in shared physical – and virtual – spaces. There they could develop new institutions and learn from the best social entrepreneurs in the world. The first target for the evidence gathering – to support an open source faith-based international social innovation network – would be the most successful models of practice developed by the faith communities globally. After all, religious communities run more educational and social welfare institutions than they do parishes!<sup>49</sup>

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<sup>47</sup> Interview, Southampton University Health Innovation Unit, 2008.

<sup>48</sup> The “constitutionalism” of the Dominicans as a contrast to the fragmentation of the Franciscans being a case in point. Even the anti-homelessness movement praised earlier encountered a series of striking “splits” as it grew from roots in the Society of St. Dismas in Southampton.

<sup>49</sup> Brian Froehle and Mary Gautier (2003) *Global Catholicism: Portrait of a World Church*. Maryknoll, NY: Orbis.

As new horizons are broken open, fresh forms of funding would be needed to pump prime and help scale the “valley’s” contribution. While some resources may flow from traditional giving, a new pooling of effort would give “social silicon valleys” a regional network, national links and international sources of funds.

These might include the younger generation of faith-based, high-net-worth individuals and family foundation members. They are (very often) exasperated by the lack of innovation shown by faith leaderships – not to mention the obsession with fixed assets! These young risk takers would be particularly attracted because it would be demonstrating a faith-based network at the front end of the innovation curve rather than playing “catch up.”<sup>50</sup> Either way, a skill of the institution would be to devise new packages of funding across the public, private, religious and philanthropic sectors to develop the “social silicon valleys.”

Combined, these new collaborations could also add a fresh focus to religious volunteering. They could be significantly channeled in the direction of helping the launch stages of new initiatives with *pro bono* skills and social networks.

Very concretely, then, a “social silicon valley” located in, or launched from, a faith-based institution should not simply debate the demise of “education,” the collapse of “finance” or the “decline of virtue” in silos. It would seek less to take on the woes of the faith-based theological task and more to be a locus of institutional renewal of both faith-based communities and society. In essence, it would become a social and religious research and development centre that would enable us to scatter networked, innovative and prophetic institutional fragments across a culture that needs saving.<sup>51</sup>

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<sup>50</sup> Based on interviews with philanthropists (2008) and the explicit comment from the Church of England Education Board that the “conundrum is the lack of compelling projects rather than a shortage of resources” (2008). See also studies in changing attitudes to Christian family philanthropy published by Foundations and Donors Interested in Catholic Activities, [www.fadica.org](http://www.fadica.org).

<sup>51</sup> I take this phrase from the title of Dudley Plunkett (2007) *Saving Secular Society*. Stoke on Trent: Alive Publications.

To concretise such “communities of character” even more they could look like, for example, a Zweite Sparkasse, a Cristo Rey/Studio School, the Cathedral Innovation Centre or the Economy of Communion.

### *Zweite Sparkasse*<sup>52</sup>

Die Zweite Sparkasse was launched in 2006 in a partnership between Erste Bank in Vienna and Caritas Austria. It is a “bank for the unbankable” and spread quickly to Austria’s regions. It is staffed wholly by volunteers from the banking sector who gain client referrals because the churches’ routes to local neighbourhoods and communities facing poverty are so strong. This experience could be repeated in, for example, the UK, where in urban priority areas clergy are often the only “professionals” that actually live locally, and where so many local churches have become outlets for the national Post Office.

Services offered by this new social bank include a basic account, a bank card, an investment account with interest and an optional building loan contract. In cooperation with a local insurance provider, cover is also available at a discounted cost. New customers are automatically able to access free legal advice on a quarterly basis. Crucially, the credit account is not a stand-alone product aimed at people in personal distress but forms part of a multi-faceted package of counselling and support services provided by welfare organisations and the churches. In the UK such support might prove timely as incapacity benefit is reined in and unemployment increases dramatically.

Fascinatingly, the model is now being extended to Romania where pyramid selling scandals had damaged the banks even before the current crisis. Here, in rural areas, the Erste Foundation is testing the use of mobile phone technology as a replacement for an excessively costly branch structure. This mirrors the use, in Ireland, of “pay as you go” cards to help African migrants send remittances home to their families.<sup>53</sup>

### *Cathedral Innovation Centre (CIC)*

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<sup>52</sup> See also: [www.guardian.co.uk/commentisfree/belief/2009/feb/02/religion-catholicism](http://www.guardian.co.uk/commentisfree/belief/2009/feb/02/religion-catholicism), accessed March 2013.

<sup>53</sup> Francis Davis, “Migrating Money,” in *The Tablet*, 27 Jan, 2007.

Founded in Portsmouth in 2011, the CIC was significantly inspired by the Jewish Innovation Hub established by the Pears Foundation in North London.

Portsmouth Anglican Cathedral made available some under-used office space and a new co-operative legal entity was registered with the Financial Services Authority. The CIC was then awarded “catalyst” status by the Royal Society of Arts. Those seeking to launch a new firm, social venture or entrepreneurial response to pressing need are able to become members of the CIC, where they receive a tailor-made package of finance, cheap to discounted office space, a mentor recruited from the RSA, local businesses and congregations and pooled marketing support. In 2013 a community share flotation will be launched to raise £150,000 of funding under the government’s SEED funding scheme, which attracts 50% income tax relief for those who pay tax.

Before being launched, the CIC is full, has a waiting list and has now been offered buildings across the country to replicate its model. For a total cost of £9000 it has opened 14 start-up desks (while a government-backed equivalent locally is still working its way through £2 million).

#### *Cristo Rey/Studio Schools*<sup>54</sup>

Cristo Rey schools originated in US inner-city areas as a response to the cost of a faith-based education in a setting where the state will not fund Church schools, and also as a means to combat teenage truancy.

Students attend on four days a week for vocational classes grounded in a strong faith ethos, and on the fifth day – still part of their school week – they work one fifth of a real job in a company which has committed to be a “corporate partner.”

The vocational skills are meaningful to the students, while the “real job” gives them references and social networks from organisations and addresses outside their stereotyped neighbourhoods. Moreover, the pay they receive makes their education 65% self funding and the sense of responsibility this conveys has slashed truancy rates.

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<sup>54</sup> Francis Davis, “The Government Borrows Another Great Catholic Idea,” in *Catholic Herald*, 23 Nov, 2007.



When the UK government heard about Cristo Rey Schools they copied it directly, including the possibility to develop new “Studio Schools” in a new education act.

### *Economy of Communion (EOC)*

Inspired by Chiara Lubich, “Economy of Communion” seeks to add a more “human dimension” into the marketplace. EOC businesses work in networks or come together in their own business parks. They commit to sharing a tithe of profits with community initiatives and reaching out in other ways.

While this may smack of idealism thus far, over the last ten years some 750 businesses in more than 30 countries have joined the movement.

Most are small to medium businesses with a turnover of less than 20 million dollars annually. In some parts of Europe, and in South America, the EOC businesses have formed a network and co-operate in publishing promotional material. More than 200 EOC businesses are in South America and 300 in Europe. Some 100 are focused on agriculture, some 300 in the service sector and the rest in manufacturing and industry. In 1997, 23 German business people established an EOC Merchant Bank, dedicated to the development of EOC businesses in Eastern Europe, the Middle East and other parts of the world.

### **Value, values and civic value**

Finally, I want to turn to the question of “measurement.” It is, of course, when we address questions of “demonstrable” value in education, and especially faith-based education, that we can run into the deepest problems of terminology that I referred to at the outset.<sup>55</sup> However, I want to suggest here that the avoidance of “measurement” that some in the religious communities (and especially the Churches) advocate is in fact a flight from reason and justice, and is likely to further complicate our relationships with the “secular” – and, increasingly, charitable donor – sphere.

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<sup>55</sup> And yet respondents in Christian organisations often talk of a “value added” in a faith organisation that is absent from their “secular” counterparts.

In the UK, a number of religious bodies have withdrawn from academic "league tables," objecting that they do not "represent the fullness of education of the whole person."<sup>56</sup> Others have complained – having entered students who have "not done so well" – that "targets measure the wrong thing."<sup>57</sup> In some cases, measurement in general has been condemned as mere "positivism."<sup>58</sup> These stances seem inadequate on at least three grounds.

First, there is a moral communication issue: we may seek to articulate an "idea of the common good," which all people of reason may espouse, but at the very moment that people of "good will" ask for evidence of such warm intentions the religious person often retreats too readily into the unknowability of all that they do. If it is a "common" good, can it not be commonly quantified without becoming subsumed into target-setting bureaucracy?

Second, the religious tendency to conflate "measurement," "utilitarian immorality" and "market values" is intellectually dishonest. Our colleagues should be able to remind us that the history of accounting,<sup>59</sup> along with the best of current developments in economics, offers us alternative vistas.

For example, current management accounting and audit methods are the product of negotiation, historical circumstance and the power of professions, not tablets of stone uncritically binding on all institutions. Additionally, for all of its weaknesses in relation to population, "Green" economics is developing new means by which to factor "future generations," "qualities of life" and other seeming intangibles into the assessment of "value."<sup>60</sup> This is without mentioning the work of Mark Moore on "public value," and others on "blended value" and the "social return on investment."<sup>61</sup>

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<sup>56</sup> Stonyhurst College in the period 2003-05 is a case in point.

<sup>57</sup> A repeated reservation among interviewed Catholic teachers in our sample.

<sup>58</sup> Archbishop Vincent Nichols, Chairman of the Catholic Education Services, has expressed this view.

<sup>59</sup> Keith Hoskin (2005) "Leading or Horses: History and Management," lecture at Warwick University. See also, <http://www.wbs.ac.uk/faculty/members/keith/hoskin>.

<sup>60</sup> See, for example, Partha Dasgupta (2001) *Human Well-Being and the Natural Environment*. Oxford: Oxford University Press.

<sup>61</sup> Mark Moore (1995) *Creating Public Value: Strategic Management in Government*. Cambridge, MA: Harvard University Press. See also Jed Emerson's work on

Instead of being caught in the wider ecclesial culture of complaint, Christian universities need to be at the forefront of conversations about who, what and how to “measure”: we need to develop our own reasonable and reasoned matrices of value – let us call them “civic value.”

One of the advantages of the “social silicon valley” model is that it allows “metrics” development to become one of the integrated but experimental features of the creation of new social institutions and innovations in which Christian principles are embedded. The “valley” becomes the accounting and economic laboratory in which new frameworks may be devised. And, once again, this presents the opportunity for rich inter-disciplinary conversation, common collaboration and witness in the public sphere.

## **Conclusion**

In this paper I have sought to begin to tease out a case for new strategies of “knowledge transfer” on the part of Christian institutions.

Influenced mostly by the European context, I suggested that we live in an increasingly fragmented culture – a new dark age. When such fragmentation is mixed with a lack of nuanced evidence on the part of the state and religious communities, these communities risk becoming fragmented themselves. They are also at risk of becoming depositories of excessive hopes or concerns.

In pursuit of a clearer identity I suggested that it is in a return to the rapidly-evolving social sciences that much hope could be found – even by institutions that consider theology or religious reflection to have prior (or superior) disciplinary standing.

In order to renew a reasonable understanding of ourselves I proposed a conscious culture of institutional disputation combined with new evidence gathering. I also proposed the development of new common

projects, not least of which would be a series of "social silicon valleys." These "valleys" would be structured centres where new institutions for dark times could be invented and scaled.

As hubs of energy they could not save a national or established church, or protect a community from anti-Semitism or Islamophobia, but they could become the bases from which might emerge new institutions linking ideas, community and impact to support positive action. By combining disputation, common talk, shared research and common social risk taking we would seek to make knowledge transfer a habit of the heart. In so doing we may just give rise to some hope in the midst of the enduring economic crisis upon us.

# God, Government, and Religion as a Feature of the Economy and Civil Society Insights from a Fractious UK Debate

*Francis Davis*

Alongside the rise of diverse religious voices in the British and wider European public realm there has been an equally enthusiastic increase in the number of secularisms in play.<sup>1</sup> Famously the eminent sociologist of religion Grace Davie observed that Scandinavia ‘belongs’ (to religious communities) without ‘believing’, Britain ‘believes without belonging’, while Poland, Switzerland, and France add to those spiritual, ideological, legal, and spatial geographies and complexities still further. Even those clearly ‘within’, or demonstrably ‘outside’, religious communities in each nation or region do not have singular paths of attachment or disengagement. This is perhaps symbolised in the First Minister of the nation of Wales observing that he knew ‘exactly which Church he did not go to’ and the lapsed Catholic atheist intellectual Terry Eagleton condemning many of the ‘new atheists’ for not treating some theologies with the seriousness they deserve.<sup>2</sup> In such contested contexts even the English Catholic Caritas development agency, CAFOD, can find itself simultaneously accused of being ‘too Godly’ by some in the mainline development sector and ‘inadequately authentic’ by fervent networks of the younger generation from its own community. CAFOD is ‘faith based’ but only one of its staff, the CEO, is required to be religiously observant.<sup>3</sup>

In Britain, Ireland, and parts of mainland Europe this interpretative context has been further complicated by debates surrounding ‘equalities’ and the emergence of arguments and laws to guarantee new ‘rights’ especially regarding sexuality, gender, civil recognition of varieties of relationship, child protection, and the significance of major life course events. Strident religious voices and intense secular advocacy have

<sup>1</sup> Basia Spalek and Alia Imtoul, *Religion, Spirituality and the Social Sciences* (Bristol: Policy Press, 2008). See also T. Modood: <https://discoversociety.org/2018/12/04/majorities-minorities-and-multiculturalism/> [accessed January 7, 2019].

<sup>2</sup> Grace Davie, *Sociology of Religion: A Critical Agenda* (London: Sage, 2013) and Terry Eagleton, *Culture and the Death of God* (New Haven, CT: Yale University Press, 2014).

<sup>3</sup> Interview with CEO.

extenuated disputes between ideas of ‘belief’ and ‘unbelief’, ‘choice’ and ‘autonomy’, ‘bad religion’ and ‘good humanism’ asserting powerful normative calls for recognition and exemption (or the reverse).<sup>4</sup>

In this chapter, reflecting on the implications of lessons from the UK context, I want especially to suggest that for policy makers, secularists, and religious leaders alike, this new landscape presents distinctive challenges that need careful attention and pro-active management. Indeed I wish to propose that those strands of religiosity which have emphasised these matters of ‘faith’, and those secularisms that have begun to privilege a stronger call for ‘equality’ and ‘*laïcité*’, share something in common: namely that while they pretend to normativity around ideas of ‘belief’, they both run from the particulars of concrete social practice. Normative appeals to ‘belief’, ‘equality’ or ‘faith’, I will suggest, seem to dematerialise the habits and consequences of religion causing the religious to *overstate* their significance to society but, crucially, policy makers, secularists, and legislators to then *underestimate* the variety and enduring public value of those religious bodies. Both habits, I will suggest, need to be addressed so as to support the proper conduct of religious voices on the one hand and to mitigate the risk to poor public governance and weak policy making on the other.

First, I shall turn to the questions of ‘motivation’ and agency. Second, I shall describe aspects of the empirical work that enquiries I have led in the UK have uncovered regarding ‘religion’s reach’. Third, I shall elucidate some implications for the debate regarding ‘religion’ in Europe going forward before drawing to conclusions.

## I. Motivation, Behaviour, and ‘Evidence’

When, in 2008, my *Moral but No Compass: Church, Government and the Future of Welfare* was published it caused a storm.<sup>5</sup> *The Times* and *Sunday Times* led with coverage of its findings and the BBC TV News as well.<sup>6</sup> Over the next days, the publication was the subject of leaders in every major UK daily newspaper, scrutiny via op-eds and lectures, and

<sup>4</sup> See for example the advocacy of <https://www.eauk.org/> [accessed December 10, 2018] and, by contrast, <https://humanism.org.uk/> [accessed December 10, 2018].

<sup>5</sup> Francis Davis et al., *Moral but No Compass* (Cambridge: Von Hugel Institute and Matthew James Publishing, 2008).

<sup>6</sup> <https://www.churchtimes.co.uk/articles/2008/26-december/news/uk/2008-the-year-in-review>; [http://www.thinkingfaith.org/articles/book\\_20080609\\_1.htm](http://www.thinkingfaith.org/articles/book_20080609_1.htm) [accessed

comment by the Archbishop of Canterbury, the Archbishop of York, and parliamentary debate. It then began its gradual percolation into the cycles of academic citation and discussion. What was notable throughout this period was that while those in the policy making community reacted pragmatically to the ‘empirical evidence’ we had gathered on Anglican volunteering, philanthropic cash flows, capacity, capabilities, and institutional reach, a variety of strands within the Churches reacted instead against what they perceived to be an implicit assumption the publication had made, namely that ‘data’ trumped theology. We were also accused of falling foul of ‘government’s tendency to want to ‘make use’ of the Church whose role is actually not to ‘do’ anything but to ‘be’ prophetic.<sup>7</sup> One current senior Anglican Bishop explains this as a reaction to a mirror being held up to the Church’s decision-making itself but, either way, what was also conceivably at stake was an older dispute between the relative veracity – and authority – of the ‘sacred’ and ‘social’ sciences as intense as the one that Christians and secularists may have explored in more depth elsewhere, namely that between ‘science’ and ‘faith’.<sup>8</sup>

It is a repeated claim in modern English – especially evangelical and some Catholic – Christian discourse – that ‘faith *motivates*’ social action.<sup>9</sup> This elucidation of a continuum between religious conviction, an idea of responsibility, and consequent behaviours is a constant theme in many fora. To question this linkage can attract furious Christian protest and accusations of being ‘unbiblical’ and even ‘lacking poetry’.<sup>10</sup> Thus while Joachim Jeremias,<sup>11</sup> in his classic study, may have given us an ability to interpret Jerusalem at the time of Jesus through an economic and social lens, the challenge we face now is our ability to make sense of present Christian claims in the context of the exponentially increasing scope of the social and political sciences. Disciplines such as geography, sociology

December 10, 2018]; <http://www.frankfield.co.uk/latest-news/news.aspx?p=102250> [accessed December 10, 2018].

<sup>7</sup> For example, this was a criticism angrily put to the present author by the Head of Mission and Public Affairs at a Conference of the Church Urban Fund, October 2010.

<sup>8</sup> The comment is made by the present Bishop of Durham in correspondence. See also [www.theos.org.uk](http://www.theos.org.uk) [accessed December 10, 2018] especially the work of Dr Nick Spencer.

<sup>9</sup> See for example the work of my colleague Dr Andrew Davies at Birmingham University but also [www.faithaction.org.uk](http://www.faithaction.org.uk) [accessed December 10, 2018] and the UK All Party parliamentary Group on Faith in Society. This is a repeated theme in several parliamentary speeches and contributors for example <https://www.stephentimms.org.uk> sometime Vice Chairman of the Labour party for faiths [accessed December 10, 2018].

<sup>10</sup> T. Radcliffe, “A Theological Assessment of Sociological Explanation,” in *Theology and Sociology: A Reader*, ed. R. Gill (London: Continuum 1996).

<sup>11</sup> Joachim Jeremias, *Jerusalem in the Time of Jesus* (Minneapolis, MN: Fortress, 1969).

which is rediscovering religion ‘after’ the secularisation thesis, epidemiology, and psychology offer insights today previously unavailable to the Churches and their scriptural scholars. Collectively they are as widely, if not more widely read, than academic theology and together they form a body of knowledge more likely to shape the perceived decisions of firms, governments, anti-poverty agencies, and even the accounting functions of the churches than ‘theology’ or ‘faith’ as such. This is not just a feature of secularity but a concrete question of confidence in interpretive power.<sup>12</sup> By avoiding the issue the Christian narrative gives the impression of attempting to over-reach itself for ‘facts’ can be given metaphorical values in theologies which are hard to ground in civic discourse.

By way of example in this context the energetic turn in government, business and the academy to behavioural science in general, and behavioural economics in particular, seems to present evidence which begins to undermine much of the way British Christians talk on poverty and public life. Behavioural economists contend that in contrast to linear relationships between ideas and behaviour, and *contra* rational choice theory of private choice or class preference – or for that matter ‘faith’ provoking or motivating ‘action’ – human decision-making and behaviours are the product of the intense aggregation of information conditioned by default perspectives on sources of trust, time, institution, and (s)pace. Thus, notably, at Schiphol exhortation to the common good, inspiration to higher social norms, and incentivisation applied to the problem of the cleanliness around male urinals of Amsterdam’s busy airport, had no observable impact on outcomes or choices of the male users of the facilities. Ultimately the painting of an ergonomically placed fly upon the ceramics seemed strikingly to provoke just such a fundamental change in behaviour as male users were ‘nudged’ to direct fluid flows to points in the urinal which would maximise liquid capture and minimise cleaning costs round and about.<sup>13</sup> In policy terms this is the source of the current requirement, while applying for a UK driving licence, to declare an intention or otherwise to become an organ donor. Likewise, text-based nudging schemes have in some evaluations landed

<sup>12</sup> Francis Davis, ed., *Public Money and Management* (London and New York: Routledge, 2009).

<sup>13</sup> Richard Thaler and Cass Sunstein, *Nudge: Improving Decisions about Health, Wealth and Happiness* (London: Penguin, 2009) and also <https://www.independent.co.uk/news/business/news/richard-thaler-nobel-prize-in-economics-winner-2017-behavioural-economics-nudge-theory-a7990291.html> plus <http://www.behaviouralinsights.co.uk/> [accessed December 10, 2018] and [www.wbs.ac.uk](http://www.wbs.ac.uk) [accessed December 10, 2018].



step change impacts on the self-management of young peoples' sexual health. In theological terms the success of nudge in the face of the failure of so many other approaches is a kind of decimation of the claim that 'faith motivates' (and trumps other variables) alone while undermining a raft of enduring Christian strategies to inspire behaviour change.

Indeed, modelling that which did not work at Schiphol, modern Churches trail-blaze exhortation as a biblical norm for idea change leading to behaviour change – they call it preaching. Meanwhile, much economic analysis emerging from Church headquarters regarding the 'common good' has a tendency to draw on classical economic frameworks even while claiming theological authority for new insights into human behaviour and flourishing.<sup>14</sup> It happens with 'fresh expressions'<sup>15</sup> too when language about the need for intense spiritual conversion as an optimum ontological opportunity is often unreflectively combined with success criteria for evangelism uncritically adopted from the performance standards of trading institutions.

What is at stake here is the very possibility and idea of 'believing' conversion leads to concrete action and thus the credibility of what Churches say about themselves. 'Conversion' might feel transformational but is it really as 'world-changing' as its proponents claim? Parishes may be, metaphorically, 'addressing the structures of injustice' but comprise forty elderly friends more likely to be subjects of economic patterns than dominating them. In short, what we have learnt in the social and political sciences is that our talk about the traction and agency of the Churches and other religions ought properly to be more measured.

And yet in making that empirical recognition a similar consequence arises for certain accounts of secularism which, while religion has over-claimed, have been unable to acknowledge much that they themselves have insisted on under-reporting.

<sup>14</sup> See most of the commentary issued by Church House and the Catholic Bishops Conference (2010) on David Cameron's 'Big Society' and also ACUPA (1985) Faith In the City CHP. For an extended discussion of this conundrum see Davis, *Moral but No Compass* but also [https://www.churchofengland.org/sites/default/files/2018-01/gst1804a\\_Nov10.pdf](https://www.churchofengland.org/sites/default/files/2018-01/gst1804a_Nov10.pdf) [accessed December 10, 2018] and also [https://www.thinkingfaith.org/articles/20110330\\_2.htm](https://www.thinkingfaith.org/articles/20110330_2.htm).

<sup>15</sup> This is a major initiative of the Church of England which seeks to 'reimagine' Church or 'reinvent' mission by holding worship in shops or bars, making liturgy more like night club culture or meeting without formal liturgy in tower block housing in poor neighbourhoods among many others. It can attract 'investment' unavailable to other forms of 'mission' <http://freshexpressions.org.uk/about/our-story/> [accessed December 10, 2018]. For a critical description and assessment see Andrew Davison and Alison Milbank, *For the Parish: A Critique of Fresh Expressions* (London: SCM Press, 2013).

For while, ‘faith’ may not always ‘motivate’ action it does seem to sustain civic habits which might be considered valuable. How does one explain a tendency noticed in some government surveys for those with religious habits to volunteer and vote at levels above the national average?<sup>16</sup> Or make sense of some surveys which suggest a correlation between regularity of Mass-going and greater tolerance of refugees and immigrants than the social norm or having a stronger sense of ‘nation’?<sup>17</sup> According to COMRES, the polling company, 36% of young Asian Britons are more likely to be religious than their white British counterparts, to UK Business Secretary Greg Clark MP British Muslims statistically more generous per capita than their non-Muslim neighbours, and to the scholarly literature Pentecostal Christians more likely to be early adopters of entrepreneurialism and open market economics than those with similar social profiles.<sup>18</sup>

What is at stake here is the manner in which some secular voices lament ‘faith’ views and reduce ‘faith’ to a number of very limited realms of human interaction.

For while behavioural economics puts religion under pressure, the reach for social evidence also brings into view vast impacts on the part of religions, the religious, and the connected but unconnected which have been too easily unremarked by those reaching for singular narratives of ‘belief’ and ‘unbelief’. Belonging to religiously affiliated institutions seems to shape capital flows and behaviours, where ‘believing’ may not.

<sup>16</sup> See full report of summary Department of Communities and Local Government Citizenship Survey (2008); also Davis, *Moral but No Compass* and the series of Faith Action Audits from the UK Government Funded Cinnamon Network <https://www.cinnamonnetwork.co.uk/cinnamon-faith-action-audit/> [accessed December 10, 2018]. Positive civic habits from those who ‘belong’ are also a recurrent theme of sociologists such as Robert Putnam, *Bowling Alone* (London: Simon and Schuster, 2000).

<sup>17</sup> Formal Catholic teaching is resolutely pro-migrant ([https://aplus.com/a/pope-francis-abortion-immigration-migration-american-catholics?no\\_monetization=true](https://aplus.com/a/pope-francis-abortion-immigration-migration-american-catholics?no_monetization=true) [accessed December 10, 2018]) and this plays out in the convictions of a rising part of religious observant US Catholics albeit that this remains highly contested within as well as between denominations. See <http://catholicphilly.com/2016/06/news/national-news/survey-shows-views-on-immigration-differ-among-catholics/> [accessed December 10, 2018] and also D. Massey and M. Higgins, “The Effect of Immigration on Religious Belief and Practice: A Theologizing or Alienating Experience?,” *Social Science Research* September 40 (2011): 1371-1389.

<sup>18</sup> A. Davies, “Reading Politics through Scripture: International Relations, the Bible and Conservative Christianity,” *Journal of the European Pentecostal Theological Association* 38 (2018): 1, 11 and Davies: <https://unherd.com/2018/05/moved-spirit-phenomenal-rise-pentecostalism/> [accessed November 13, 2018] For wider critical assessment see the work of Paul Gifford, for example, Paul Gifford, *Ghana’s New Christianity: Pentecostalism in a Globalising African Economy* (London: C. Hirst & Co., 2004).

## II. 'God' Has Legal Personality: Religion as a Realm of Institutions

For example, in Britain the debate about the 'idea' of God has served to point debates towards issues regarding the direction of political representation of 'religions' – for example in parliament's second chamber or as chaplains in public prisons and hospitals – and so distracted both religious voices and government away from adequately assessing the role, shape, form, and impact of institutions funded, managed, or owned by religious communities or governed with aspects of religious precepts in mind. Unlike almost any other 'sector' in national life, religion has been decommodified in an attempt to make it seem theologically 'pure' or ideologically 'loaded'.<sup>19</sup>

This is a striking matter at a time of economic scarcity: in the UK there are, according to one estimate, 27,535 Christian charities out of total of 45,352 faith-based charities. 45% of all human rights bodies are faith-based while in the case of charities working on overseas aid and development this increases to 49%.<sup>20</sup>

Religious institutions, organisations and causes in England are treated in varying manners in civil law. Cathedrals have, for tax purposes, charitable status allowing them to attract in tax reliefs around 25 pence in each pound donated and exempting most of their activities from local business taxes (but not necessarily VAT). They are not, though, governed by charity law. Diocesan institutions have separate charitable status again while all Roman Catholic Dioceses are registered charities which, in turn, have consolidated all their parish assets onto a single Diocesan balance sheet. Government backed church universities are what is known as 'charities by exemption' as are the non-governmental organisations and social enterprises launched from, sustained or governed by, people of faith. Indeed faith communities and backed action may then take several legal forms namely a Community Interest Company, a registered company, a registered charity, a social firm, or an industrial and provident friendly society, all of which are set apart either by their ability to trade commercially or their ability to do that with a legally binding asset lock on the distribution of their equity or other assets. In communities other than Christianity there is equivalent institutional diversity: the Nishkam Centre in central Birmingham, for example, is home to a

<sup>19</sup> Davis, *Moral but No Compass*, 49-50.

<sup>20</sup> See NCVO Almanac <https://data.ncvo.org.uk/> [accessed November 13, 2018] and also Davis *Moral but No Compass*, 50.

tradition within Sikhism with millions of followers globally as well as a thriving local community education, economic development, and social care centre. It sustains a civic voice, a government school in the English Midlands, a suite of adjacent social enterprises, further temples in London and a university in East Africa.<sup>21</sup>

Because of the variety of legal forms available to UK organisations the numbers quoted thus far are without a doubt a conservative estimate both of the number of charitable bodies and of the wider ‘faith based institutional sector’: For example, 20% of the nation’s state schools are provided in a formal partnership between local dioceses, religious orders, the Jewish community, and local and central government that dates back to the 1944 Education Act. Informally, new entrants have entered the same sector recently with Sikh Temples and Pentecostal Churches and networks creating ‘secular’ subsidiaries to successfully bid for government resources to establish ‘free schools’ which were made possible as a method to unlock ‘public-private’ partnerships on the Swedish model under the 2010 Education Act.

Within a single ‘legal personality’ there might in turn be great institutional diversity. Roman Catholic dioceses tend to consolidate their activities into single balance sheets incorporating parish, school, and other activity but in the process very often have the habit of understating the market value of their real estate holdings with at least one diocese showing an approximate estimated £200 million mismatch between the market value of assets and their book value. Anglican parishes, by contrast, are legally autonomous and when their turnover is below £10,000 are not required to register with the regulator of charities. This in turn can mean that while there are total estimated free cash flows in the 12,600 Anglican parishes of £0.2 billion the value of their estate remains ‘off’ the national quantifiable balance sheet of relevant assets.<sup>22</sup>

Some families and entrepreneurs, of course launch their own ventures where the founders’ culture forms part of the decision-making of the enterprise. In the past Quaker and Unitarian names such as Cadbury,

<sup>21</sup> <http://www.ncauk.org/> [accessed July 14, 2018].

<sup>22</sup> This is based on interviews (2018) with the Catholic Association of Diocesan Finance Directors but especially the Oeconimus of Portsmouth Diocese in the South. Diocesan and many parish accounts are publicly available on the website of the civil law charity regulator <https://www.gov.uk/government/organisations/charity-commission> [accessed July 14, 2018]. See also specialist advice from the accounting profession <https://www.icaew.com/library/subject-gateways/accounting/accounting-by-industry/churches-and-other-places-of-worship> [accessed July 14, 2018].

Colman or Fry would define this strand but, more recently, it would be found in the rise of the fortunes of the Brenninkmeijer family in the UK as well as mainland Europe, the Noon Family, Cobra Beer and the innovation of many Jewish philanthropic foundations and innovators with names such as Rothschild, Pears, and Sieff.<sup>23</sup>

The identification of this variety is significant for a number of reasons not least of which is the ability to begin to develop, from a policy based perspective, some kind of evidence base as to what ‘religion really is’, what its ‘impact’ is and what civic, social and economic benefits a nation’s (civic) economy might set aside were its legal treatment, exemptions, partial or core funding to be changed by law or government action in the future. How valuable to the nation are the variety of ventures and economic activities to which ‘God’ gives rise through the myriad manners in which (s)he/they gain legal personality? While many industrial strategies, local growth plans, and businesses would consider this to be a normal feature of planning by ‘sector’, identifying such ‘value’ has rarely been a feature of debates about religion partly because, for all their empirical impact, religions have wanted to talk ‘spiritually’ and partly, for all their empiricism, because some economists have been reluctant to treat religion as anything other than a ‘belief’. To be clear, this is not to suggest that religion should compete with, say, life sciences for investment attention but in the light of emerging evidence in the UK context there may be insights from which government bodies and parliamentarians in other contexts may helpfully gain insight lest they uncritically and riskily adopt what ‘believers’ and ‘unbelievers’ claim about themselves.<sup>24</sup>

### III. A ‘God’ Sector: Religion as an Economic Anchor

In order to exemplify the material significance of ‘God’ in the UK context I will focus here on the empire of civil society represented by the English UK civic sector and those parts of religious institutions with legal personality in civil law. My aim is not to record the social welfare arms of religious bodies which are so numerous the regulator of such

<sup>23</sup> I am indebted here to conversations with Professor Paul Valeyly who is currently writing a history of UK philanthropy.

<sup>24</sup> Interviews with civil servants but see also Francis Davis, “Catholicism and the Welfare Society,” in *Catholic Social Conscience – Reflection and Action on Catholic Social Teaching*, ed. Keith Chappell and Francis Davis (Leominster: Gracewing, 2010).

charitable bodies cannot even provide a definitive figure as to their number. Nor will I assess the third of UK government schools in trusteeship of religious bodies.

For example, aside from any theological significance attributed to them, cathedrals are, especially in poorer cities, agents of economic growth: two English cathedrals are among the two most visited tourist attractions in the UK with a combined visitor tally approaching 3 million people. The estimated economic gross value added of English Anglican cathedrals has been estimated at £0.11 billion with their combined in-house staff and supply chain impacts being responsible for close to 6000 jobs making their significance close to the impact, for example, of the well-known aviation company FlyBe.<sup>25</sup>

These figures do not capture any wider cultural impacts: According to the economic consultancy ECOTEC at least 364,000 children visited cathedrals for educational purposes in the year of their survey with themed educational work focusing on English history, conflict resolution, and inter-religious harmony depending on the local social terrain and particular history of each place. Other activities backed by cathedrals include IT and literacy classes, unemployment worker training, business start-up hubs, and even hospitality for a Madrassa so that it does not meet in risky surroundings. Cathedrals act as economic anchors and civic hubs not likely to leave a local economy as 'global market patterns move'. In addition, several cathedrals house major artefacts of literary, architectural, and historical significance. Notably, the data that is available does not include evidence from Roman Catholic cathedrals nor abbeys. The Benedictine house of Ampleforth, for example, is a major rural employer sustaining an elite private school, a cider company, and an Oxford university college, as well as wide-ranging retreats, conferences,

<sup>25</sup> This data come from studies by trade associations representing visitor attractions, for example, [http://www.alva.org.uk/visitor\\_statistics](http://www.alva.org.uk/visitor_statistics) [accessed July 14, 2018]; ECOTEC, "The Economic and Social Impacts of Cathedrals in England," London: Ecotec Research and Consulting, 2014 (Report commissioned by English Heritage and the Association of English Cathedrals and ECORYS, <http://www.englishcathedrals.co.uk/documents/2018/02/economic-social-impacts-englands-cathedrals-2.pdf>). See also <https://www.gov.uk/government/news/government-report-highlights-english-cathedrals-community-spirit> [accessed July 14, 2018] and the economic impact study of Leicester Cathedral funded by the Mayor and the Local Economic Partnership <https://www.leicester-mercury.co.uk/news/leicester-news/revealed-how-much-leicester-cathedral-607119> [accessed July 14, 2018]. See also [https://www.flybe.com/application/files/8915/3253/3125/Flybe\\_Annual\\_Report\\_2017-18.pdf](https://www.flybe.com/application/files/8915/3253/3125/Flybe_Annual_Report_2017-18.pdf).

<sup>26</sup> For Buckfast and its ventures see both <https://www.buckfast.org.uk/> <https://www.buckfast.com/> and for Worth <https://worth.co.uk/farm-shop/the-farm>.

and hospitality business. Worth Abbey has a successful organic farm and Buckfast Abbey exports its 'Tonic' worldwide from one of the poorest regions of the UK, namely the English South West.<sup>26</sup>

In the UK around £5.2 billion of investments are managed by the Church Commissioners which is the investment arm of the Church of England. Most of that – £3.25 billion – is invested in securities – bonds and shares – both in the UK and abroad. About £460 million is invested in UK Treasury bonds and bills. The remaining £2.8 billion is invested in stock markets, in major companies like Shell, HSBC and GlaxoSmithKline. Some £1.71 billion is invested in property – both directly and indirectly through third party vehicles. A further £96 million is tied up in woodland around the UK, in turn used to produce saleable timber. The church also has fixed assets at seeming book value worth £94 million, and cash deposits and debts worth a further £379 million. An entirely separate investment fund is run by the Church of England Pension Board, which is responsible for stewarding more than £1 billion on behalf of the church's numerous pension schemes. According to the latest figures available from 2011, £730 million of that is invested in equities, both in the UK and abroad.<sup>27</sup>

Meanwhile, the national Church Investors Group has sixty-seven members drawn not only from the Church of England but also from other religious denominations (dioceses, circuits, religious orders, congregations) with a total investment portfolio of £21 billion. The Methodist Board of Finance, for example, manages £0.5 billion while a special 'Catholic Fund' established by financial experts Blackrock/Merrill Lynch has £0.018 billion under management. Increasingly these bodies are playing a role as 'activist' investors attending both government briefings and the AGM and other accountability fora associated with corporate accountability to shareholders.

In these formal religious institutions alone then are to be found resources five to six times the size of the fishing industry, representing 10% of aviation's significance and dwarfing printing and other

<sup>26</sup>

<sup>27</sup> From annual reports of The Church Commissioners <https://www.churchofengland.org/about/leadership-and-governance/church-commissioners> [accessed July 14, 2018] and the Church of England Pensions Board <https://www.churchofengland.org/about/leadership-and-governance/church-england-pensions-board> [accessed July 14, 2018] and <https://www.methodist.org.uk/for-ministers-and-office-holders/finance/financial-accounts-trustees-report/> [accessed July 14, 2018] and <https://www.epworthinvestment.co.uk/> [accessed July 14, 2018].

manufacturing sectors. They are then complemented by the ability of diaspora communities to mobilise resources with remittances from the UK to the global South recorded as being more valuable than the entire aid budget.

Moreover, while I have focused here on exemplar assets which will have their mirrors in other European countries, to which then ought properly to be added the wider realm of health, civic and educational services facilitated, governed and/or funded by religious networks (think of Diakonia Werke in Germany, private schools in Ireland and Secours Catholique in France) I have not, for now, set out data that is also now central to UK debates namely the in-kind volunteering contribution of those ‘giving’ time and skills through religious institutions, religious charities, and associated activities. As accounting standards move to try and capture social, civic and environmental value added in addition to financial returns, these ‘gift relationships’ are attracting increasing attention not least because the UK evidence suggests that religious institutions are particularly successful at supporting or retaining both capital formulation and in-kind contributions in those regions and neighbourhoods which face the biggest social and economic challenges.<sup>28</sup> Some have gone further still in claiming that religious groups add a kind of additional ‘spiritual value’ or ‘spiritual capital’.<sup>29</sup>

#### IV. Race, ‘Faith’, Community, ‘Security’ and Institutions

At this point I want to turn from the economy to an example of a field of policy where the ‘beliefs’ versus ‘secularity’ debate has had very distinctive impacts from which other countries might in turn learn.

<sup>28</sup> In this section I have drawn on Francis Davis, “The English Bishops, Caritas and Civic Prophecy,” in *Catholic Social Conscience*; id., *Between Today and Yesterday: Evidence, Complexity and the Body of Christ* (London: T&T Clark, 2019); id., *Moral but No Compass*; but see also <https://churchinvestorsgroup.org.uk> [accessed July 14, 2018] and <https://www.epworthinvestment.co.uk/> [accessed July 14, 2018] and <http://www.morningstar.co.uk/uk/funds/snapshot/snapshot.aspx?id=F000003TMM> [accessed July 14, 2018].

<sup>29</sup> For example see Christopher Baker, “Spiritual Capital and Economies of Grace: Redefining the Relationship between Religion and the Welfare State,” *Social Policy and Society* 11 (2012): 565-576. From a theological point of view such an articulation is often welcome, chasing as it does an ‘alchemy’ unavailable to policy makers. In sociology though it has been contested by writers such as the University of Kent’s Gordon Lynch who reflect that in such conceptions of ‘spirituality’ there is an inadequate approach to intangibles such as modern ‘brand values’ and the commodification of cultural artefacts as encountered in some religious settings.



Britain's colonial history, for all its harms and benefits, is distinct from those of Belgium or China, Japan or the French. In the majority of those countries in the world where Britain once ruled, there have been particular consequences for subsequent state formation, relative health of civil society, and the (dis)continuance of elites from a colonial past to a post-colonial present. The colonial pathways to the world have also had profound and distinctive shaping consequences for (im)migrant, refugee, diaspora pathways into the UK: Irish arrivals in Britain, for example, were and have been shaped by enduring colonial occupation in the home country and a sometimes not so subtle racism – combined with a securitised discourse of 'Irish threat' – upon arrival. Caribbean arrivals came almost wholly invited by the UK state to fill jobs that 'English' workers would not, but themselves encountered racial prejudice and tough policing. What is more is that as they arrived, they were re-imagined as 'West Indians' and then as 'Afro-Caribbean' where before they had been Trinidadians, Barbadians (or not from the Caribbean at all but Ghana or Nigeria). In the 1950s they and the Irish would have something in common for it would be easy to find boarding houses with signs on the doors declaring 'no blacks, no dogs, no Irishmen'.<sup>30</sup>

Meanwhile Islam in the UK is incomprehensible without an appreciation of the role and position of Pakistan and Bangladesh and the partition of India, diaspora, and then subsequent waves of refugees and asylum seekers following military conflicts in Bosnia, Somalia, Afghanistan, and Syria. That and a strong strand of indigenous conversations from among the white community. Long before all this, a Jewish community had been established, invited centuries before for its commercial skills and habits of embracing what we might today term globalisation. Since 2004 and the accession of eight Eastern European countries to the EU this diversity has become more variegated still.

And yet amidst this variety between, within, and across immigrant, refugee, migrant, and very long-standing ethnic communities there has been a tendency to sustain singular policy approaches of 'multi-culturalism' and monolithic discourses for assessing the rise of 'religious violence' and 'extremism'. Before 2009, for example, the Labour government's policy to respond to perceived Islamist threat was predicated upon Muslim headcount among Britons and even included a

<sup>30</sup> Stuart Hall, *Familiar Stranger – A Life Between Two Islands* (London: Penguin, 2018).

government ‘theology team’ tasked specifically with ‘modernising Islam’.<sup>31</sup> Indeed the policy was so focused on ‘*theological motivation*’ and ‘*counter motivation*’ that management lessons from the wider anti-terrorist community were discounted and policy after 2010 removed government specialisms in race and neighbourhood to invest maximum energy in reaching out to minority groups through their religious networks notwithstanding any evidence of varieties of religious observance within such groups.

In reality, debates surrounding ethnicity became so securitised that Prime Minister Cameron took to suggesting the – now very wealthy – Jewish community’s behaviour and integration as the optimum example and preferred social norm for all groups no matter how stretched their ethnic or social profiles. This also means that some religious groups not typically associated with such debates were missed from conversations regarding the future of social integration.<sup>32</sup>

In the case of Catholic schools, for example, this was a notable omission for they are more than twice as likely as the UK national norm to have attracted pupils from black and minority (BME) backgrounds. For example, in the 170 schools overseen by the Catholic Archdiocese of Southwark in South London alone, a full 66% of all pupils are from BME backgrounds. Nearly 10,000 of those students receive the pupil premium which is a subsidy that indicates heavy family poverty. In the Westminster Archdiocese next door the social make up is not much different. What is notable is that both networks of schools bridge dimensions of race and ethnicity with a geographical reach into suburban and rural areas as well. This means pupils in the two Archdioceses schools are linked across neighbourhoods and social networks in ways that other inner city schools may not be, so possibly creating the potential to add value to the close to a billion pounds the government provides for their running costs.<sup>33</sup>

Beyond London, Church schools train and sustain outside the classroom over 30,000 volunteers of all ages and backgrounds and they

<sup>31</sup> Daniel DeHanas, *Brixton to Brick Lane* (Oxford: Oxford University Press, 2016). Daniel DeHanas, “Governing through Prevent? Regulation and Contested Practice in State-Muslim Engagement,” *Sociology* 50 (2016): 160-177.

<sup>32</sup> <https://www.gov.uk/government/speeches/community-security-trust-cst-prime-ministers-speech> [accessed July 14, 2018].

<sup>33</sup> <http://www.catholiceducation.org.uk/ces-census> [accessed July 14, 2018] for recent annual reports of the Catholic Education Service which represents state-backed church schools in England and Wales.

increasingly model collaboration beyond silos to do so: in the large girls' Catholic School in Southampton on the coast, Muslim cohorts of students are as large and lively as any active Christian or other group; in the primary school next door co-teaching for Polish pupils complements classroom provision. Students at the Catholic Loreto College in Hulme are impacted by and debate knife crime, young white male disaffection, societal racism, community policing, boring religion, and blocked social mobility.<sup>34</sup>

Overall then, from an evidenced based perspective, they are perhaps currently and potentially *the most* striking vehicles for successful 'one nation' social and spiritual outcomes and inter-racial collaboration, and yet while government has pushed the Muslim community hard on such habits it has been significantly quieter in making similar demands of the Catholic education sector.

Normative 'faith', the singular choice of a specific ethnic group as a 'good example', and the dematerialisation of concrete migrant journeys, capital flows, and diasporic experience, it would seem, has deracinated evidence-based policy-making to rely on 'ideas'.

## V. Implications and Conclusions

Drawing on debates over the last decade in the British context, I have suggested that there are, as multiple secularisms emerge, increasing risks to public discourse and the ability of societies and governments to properly order and shape their futures. This is because while the ideological intensity of some of those secularisms can dominate especially in elite networks, in reality they contribute to both sustaining and provoking an equally ideological and excessively dematerialised theological account of religion. The two urges combined obfuscate a social reality which is less strident, more variegated and regionally, socially, and ethnically diverse than 'structured dialogues' or traditional concerns with 'belief' can cope with.

Religiosity and secularisms which over-emphasise 'beliefs' at the expense of behaviour, institutions, resources, and demonstrable civic contributions both distract religions from the society in which they are located while increasing the risk that policy makers respond with policy choices unrelated to the actual realities of the societies in which they find

<sup>34</sup> Based on present author's visits and facilitation of discussion groups in each of the places named.

themselves because policy makers accept theological accounts uncritically or ‘secular’ accounts as though they are normative.

In the UK context, insights from behavioural economics have begun to suggest that religious bodies often claim too much for their ideas and their consequences. Empirical studies, however, of the social and economic institutions owned, run, and governed by religious communities have begun to note that they, secularist advocates, and government under-appreciate other aspects of economic and social value that they bring to society as a whole. In turn the miss-combination of social research with singular ideas of religion and secularity when applied to particular policy cases – the one I used here was migration, extremism, social integration – can actually accelerate policy failure because of their theological/ideological prism of interpretation on the one hand and by driving policy makers away from historical learning and previous failures and successes on the other.

The challenge here is to ensure that the data is robust, is meaningfully captured for policy use and to inform pastoral insight, and is not manipulated as a branch of ‘apologetics’ or as part of what could be perceived as an attempt to advance a neo-American articulation of ‘democratic capitalism’. The elucidation of ‘religious freedom’ as the defining driver of market wealth, for example, by the US Religious Freedom and Business Project has been well funded but attracted both academic and policy maker caution.<sup>35</sup>

A consistent and rooted public debate would, on this basis, be refashioned at the interface of belonging, institutions, economy, and social impact – of social practices – rather than concepts, beliefs, and the idea of what intense religiosities or secularisms might constitute. The flight from such an analytical struggle seems to be a unique tendency to policy that touches on religious bodies rather than the policy task as a whole, and as such both people of faith and those without demean each other’s causes in times where good governance is seemingly increasingly essential.

<sup>35</sup> Brian Grim is the leading voice in this regard, <https://religiousfreedomandbusiness.org/brian-j-grim> [accessed July 14, 2018], but has attracted much criticism from Monica Duffy Toft <https://sites.tufts.edu/css/about/monica-duffy-toft/> [accessed July 14, 2018], and caution from UK Foreign Office ministers.



# AGEING IN RWANDA – CHALLENGES AND OPPORTUNITIES FOR CHURCH, STATE AND NATION

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Full research report

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# AGEING IN RWANDA – CHALLENGES AND OPPORTUNITIES FOR CHURCH, STATE AND NATION

Francis Davis, Emmanuel Murangira, Madleina Daehnhardt

Forewords: The Right Rev Paul Butler, Lord Bishop of Durham and Nigel Harris, CEO, Tearfund

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# FOREWORD BY RT REV PAUL BUTLER

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I have been privileged to hold a long connection with the country of Rwanda and its people, for which reason I am moved to write in support of this research report.

My wife, Rosemary, and I were visiting a rural village in the Anglican diocese of Shyogwe. We were impressed by the work with families struggling with the loss of a parent, and the sheer grind of poverty. What we had never encountered before in our many visits to Rwanda was the activity that happened next. The church building filled with older people; some clearly very fit, others frail. Our estimate (though we admit to struggling with being able to age greying Rwandans) was that they ranged from mid to late fifties through to octogenarians. They proudly told us of how they had started their association for older people. They were clear that the primary purpose was to counter loneliness, and offer company. But they added words like, fun, support, encouragement, and skills. Some of the stories they shared of their poverty, their loss of family support, their hunger, their problems with leaking roofs and the abuse they encountered were sad and harrowing. Yet they sang and danced with us because of their delight in their weekly gathering.

I had often talked with my very good friend, former Anglican Archbishop Rwaje, of the problems clergy faced on retirement – no pension and no housing, so often serious poverty. Both in Byumba and Gasabo (Kigali), the two dioceses he served, he persuaded his clergy to join the state pension scheme and the local church scheme he established. He helped them think how they might provide housing for their future. For some this was not replicated everywhere in the Anglican church. However in 2015 the Provincial Synod made it official policy and now most dioceses have not only affiliated their clergy to the national scheme but also some catechists. It was, though, clear that such developed thinking or planning was not happening everywhere, let alone what most in Rwandan society faced in their future. So the reality outlined in this insightful, and courageous report, echoes my own experience of Rwanda. It is a very young nation. Yet it is also an ageing nation. The past 25 years have seen many wonderful improvements in health care, nutrition, housing, education and safety. So many more people are living well into old age. This trend is set to continue so the challenges of older people have to be faced head on.

This report is a preliminary step in the right direction. It is a clarion call to the Rwandan government, to churches and civil society, and should be to businesses that serious decisions need to be taken soon to ensure that this ageing nation continues its progress and development and cares properly for its elderly. There are many challenges for health care, housing and adequate financial provision through pensions. The church, in its many forms, is in every community in Rwanda. It is therefore well placed to take part at every level; providing support like that which Rosemary and I experienced, setting an example in developing sound pension schemes, continuing to encourage local savings programmes, and engaging with government in developing an adequate state pension scheme and ensuring health care develops to support the growing needs of older people (including dementia care and hospice provision).

This is a huge challenge. The international community can help. Rwanda could become a model for other ageing nations in facing up to this reality.

It is my sincere hope that this report will stimulate further and deeper research; that it will enable Tearfund and other agencies to examine how they work with the church and community on these issues; that it will aid the Rwandan government to develop new ways of supporting their ageing citizens. Above all I hope it results in the better well-being of older people in the beautiful land of a thousand hills that is Rwanda.

**Rt Rev Paul Butler**  
Bishop of Durham  
House of Lords  
London  
January 2020

# FOREWORD BY NIGEL HARRIS CEO, TEARFUND

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Tearfund's history has been intertwined with Rwanda's from our earliest days as an organisation. Our relationship with this beautiful country began in 1969, the year after we were founded. Our goal in Rwanda was to address extreme poverty by focusing on health, education and the environment and by partnering with the church – and our commitment has continued, unwavering, ever since.

In 1994 came the genocide, when more than a million Tutsis were killed in 100 days. Our longstanding relationships and reputation in Rwanda meant we were able to step up our engagement quickly, initially through a large-scale relief programme through partners. Thereafter, we supported the Rwandan church to bring rehabilitation, peace-building and reconciliation, as well to wrestle with issues such as HIV.

Today, we continue to develop innovative approaches which have the local church and integral mission at their heart. Since 2006, our flagship Church and Community Transformation approaches have been equipping congregations across the nation to mobilise their communities to end poverty. Specifically, this has meant setting up self-help groups – 10,783 small-scale community savings schemes in the last six years. Already, these groups have more than 1 million direct beneficiaries. Alongside this, our partners continue to work on long-term development issues such as agriculture productivity, market access and value chain development, livestock and dairy development, WASH, environmental sustainability and climate change mitigation.

Our mission in Rwanda is – and always has been – to seek out and support the most vulnerable people in society. And, as this report explains, an increasing number of them are elderly. The 'greying' of Rwandan society has been accelerated by its recent history – but its situation is not unique. In fact, the issues associated with an ageing population find expression everywhere we work – yet, collectively, as Tearfund we have been slow to respond. Some of the consequences of this inaction are explored in this report and may make uncomfortable reading.

We believe the local church, which has such reach, authority and influence in Rwandan society, is well placed to address this important issue. In commissioning this report, we are signaling our determination to improve our programming based on evidence and to include the evolving needs of older people. And we will continue to conduct research to inform our own response and to encourage church, states and nations to act too. We hope this report will trigger constructive debate and dialogue on our collective response – and responsibility – towards older people in our communities.

**Nigel Harris**  
CEO, Tearfund  
January 2020



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# EXECUTIVE SUMMARY

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## 1 Research subject and method

This study analyses the needs, hopes and agency of older people in Rwanda in the context of a planet that will soon have more older people than under 16s and a nation where the number of over 65 year olds is set to increase threefold to fivefold in the next 20 years. The research makes a small, though new contribution to a relatively scarce literature on ageing in sub-Saharan Africa where theories and practices of development, investment and change have traditionally focused either on younger age cohorts or immersed the 'greying' of development challenges, if at all, in a more generic language of 'vulnerable adults'.

The study assesses:

- The significant and distinctive needs and agency of older people.
- The multi-dimensional contribution – and significant gaps and new risks – that churches and Christian life contribute to supporting and responding to those social, economic, pastoral, psychological and spiritual needs.
- Aspects of Rwanda's state social protection and health provision – and their gaps.
- How narratives of a 'young church' in a 'young nation' that champions its young has an impact on the shape, extent and quality of those responses from church and state alike.
- How Rwanda's emerging landscape of care – the 'carescape' – of support that elders face today and in the future is changing and offering new pathways and old patterns in refashioned form.
- Challenges and opportunities for Tearfund's models and tools, such as the 'Light Wheel' walk model of analysis, Church and Community Mobilisation (CCM) approaches and theory of change to initiate, improve upon and sustain appropriate recognition and responses to the needs of older people identified.

The study was commissioned by Tearfund in Rwanda on the basis of an identified need and opportunity to respond to the challenges of old-age poverty. The overall research objective was to establish empirical evidence that will inform a church and community based model for interventions addressing challenges of old-age vulnerability and breakdown in social safety nets for older people in Rwanda.

The primary field research was undertaken in April–May 2019 in one urban and two rural districts of Rwanda. It comprised 14 one-to-one semi-structured in-depth interviews with older people in their homes, and 21 focus group discussions with older women, men, pastors and members of savings self-help groups (SHGs) in each survey area. In total, 121 persons were interviewed. In addition, an adapted observational 'Light Wheel walk' on older people in public spaces was undertaken in each research area by research participants. The researchers also interviewed national church leaders and policymakers.

## 2 Major findings

In summary, the findings of the study show:

- Profound vulnerability, invisibility and intersectionality of needs of older people, despite deep resilience, contributions and agency.
- Very challenging mental health gaps, trauma and stigma affecting older people.
- Gaps in social protection and health policy and WHO advice in regards to older people, despite Rwandan welfare successes.
- Significant faith-based good practice with a huge critical mass of existing progressive action to underpin a renewed strategy and fresh focus on Rwandan older people.

- Gaps in the churches' understanding of older people and their consequent response.
- Possible weaknesses in the traction of Tearfund's approaches, such as the 'Light Wheel' walk, Church and Community Mobilisation (CCM) and integral mission approaches when it comes to inclusion of older people.
- Local elder abuse and safeguarding risks within churches, and wider NGO safeguarding risks. Gaps in the development of relevant safeguarding policies and codes of conduct in the wider NGO sector when it comes to the distinctive needs of older people.

### 3 Conclusions and key insights

The traditional narrative of familial care is fragmented and broken, but not entirely replaced by any other coherent form of care or solidarity. A new carescape has emerged and is emerging which is made up of the old and the new. This new carescape in turn presents new pressures. There is everything to play for on the part of church, state and nation.

The report brings forth recommendations to Tearfund in Rwanda and more broadly, to churches in Rwanda and to government as well as to international donors.

There are implications of the findings of the report throughout for church, state and nation, including civil society, both in Rwanda and in membership of wider networks and even the wider sector – for example, Integral Alliance, Micah network, the Disasters and Emergency Committee, and even Caritas International and Missio – and for those supported and advised by DFID, the WHO and other international institutions.

# 1 INTRODUCTION – AN EXPLORATORY STUDY

---

## 1.1 Overview of the research: a rapidly ageing Rwanda in an ageing world

This research on ageing in Rwanda is published in January 2020, six months before the Commonwealth Heads of Government Meeting (CHOGM) in Kigali, and seven months before the start of the global Lambeth Conference of Anglican Bishops in Canterbury. It therefore feeds into debates in and around those gatherings, but also discussion further afield.<sup>1</sup>

The evidence recorded here focuses on Rwanda's elderly and intergenerational relations, identifies needs and raises questions of relevance to governments, civil society and churches of all denominations. It benefits greatly in this regard from the laudable openness that the researchers encountered in government, civil society, churches and business to the questions raised. A shared and instinctive commitment to 'wanting Rwanda to do well' provoked thoughtful and candid responses. This has enabled the study to identify the most testing problems and the most creative potential solutions. As such, the study seeks to provide context for decision-makers across church, state and nation, provoke further reflection and inform future action.

The contents are intended to be read as a whole, representing as they do the fruits of original work carried out in a fast-changing country on a rapidly changing continent. The report describes the agency, struggles, mental ill health, contribution and needs of Rwanda's older people. Their articulation of an emerging new landscape of care – or 'carescape' – that they and other generations face together sounds notes of both caution and optimism. The study is relevant to leaders beyond Rwanda as the issues it raises – from safeguarding to fragility – are not unique to one nation, or a single religious denomination.<sup>2</sup> It raises tough questions about how gaps in support for populations and safeguarding can emerge, how new needs can be missed or met by even 'new' approaches, what true solidarity represents in such contexts and so what 'integral mission' and 'leaving no one behind' really mean.

### 1.1.1 Structure of the report

The report has six parts.

**Part 1** sets out the context in which an ageing Rwanda finds itself.

**Part 2** delineates the research method and approach.

**Part 3** records the striking needs uncovered and the social policy gaps described.

**Part 4** sets out the joys, problems, and positive and negative habits – including failings – of the churches as they seek to extend their service with and for older people.

**Part 5** revisits and consolidates assessments of present and future carescapes.

**Part 6** offers conclusions and recommendations.

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1 Notably, CHOGM has taken a major sub-theme of 'youth' as one of its key strands.

2 The concept of 'carescape' (ie landscapes of care) is used and developed here and later in the report, drawing on insights from Obrist (2018). The concept assisted the researchers to identify the variety of institutions, social forces and relationships (both those at play and absent) in any given setting; which have implications for the recognition (or not) of older people and support provided (or not) to meet their needs. It also helped to examine how the interplay between those forces and relationships helps or hinders, reduces cost and risk, or increases burdens and stigma, within and between families and the social institutions around them. In Part 5 of this report, potential new Rwandan 'carescapes' are pictured.

The report will be of particular interest for:

- church leaders in Rwanda and beyond (the focus of Parts 3, 4, 5 and 6)
- those in government and institutional donors locally and further afield (the focus of Parts 3, 5 and 6)
- NGOs and wider civil society seeking to build social and civic renewal, and tackle elder abuse and safeguarding risks in Rwanda and beyond (the focus of Parts 3, 4, 5 and 6).

The recommendations in Part 6 are relevant to all of the above.

## 1.1.2 Africa in an ageing world

Every second, two more people globally celebrate their 60th birthday. There are now, in 2020, more than 1 billion people aged 60 and above. Ageing is gendered: on average, women live 4.7 years longer than men. They have less access to the benefits of inheritance.<sup>3</sup> They carry a larger share of the responsibility of caring for those who have become the vulnerable old. These female carers can include young children, grandmothers, mothers, nieces, daughters and neighbours.

These trends are only going to increase, with more than one-fifth of the world's population predicted to be over 60 by 2050. By this point, for the first time in history, older people will outnumber children under 14 years old.<sup>4</sup>

These forecasts have provoked some responses from international organisations. In 1982 the United Nations (UN) held its first assembly focused on older people as a rising factor in the life of developed societies. The Second World Assembly on Ageing, 20 years later in 2002, revisited the topic, this time shifting the emphasis onto developing countries.<sup>5</sup> More than 100 nations attended and signed up to what became known as the Madrid Plan of Action.<sup>6</sup>

The Madrid Plan of Action, according to former UN Secretary-General Kofi Annan, offered a 'bold new agenda' for 'handling' the issue of ageing in the 21st century.<sup>7</sup> It focused on three priority areas: older persons and development; advancing health and well-being into old age; and ensuring enabling and supportive environments. Global declarations, however, rely on the 'heavy lifting' of subsequent implementation.

Subsequent debates have been intense and commitments pursued in a demanding environment. Dominant development paradigms steeped in one or other theories of 'modernisation', 'dependency' or especially 'neo-liberalism' have been powerful.<sup>8</sup> Consequently, while older people's advocates advanced their needs, others were more likely to see them as 'unproductive' and merely adding to societies' 'burdens' and 'costs'.<sup>9</sup> Indeed, so much did traditional development models tend towards an instinctive economism or an uncritical rejection of anything perceived as 'less than modern' that at times, analytical tools developed to help governments and donors manage scarce resources, and especially health resources, came to value as somehow 'less' the lives of older people and children who were *not working*.<sup>10</sup>

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3 After the genocide, Rwanda introduced new laws to establish equality in inheritance practices which, before, privileged transfers to male offspring. However, enduring local custom and practice, in many localities, have made the law null and void. See Sabates-Wheeler et al. (2018).

4 Zaidi et al. (2019)

5 The assembly was preceded by much collaborative work, not least an experts' special meeting under the auspices of the United Nations Population Fund (UNFPA, 2002).

6 Rwanda was among those represented. Concerning the Madrid Plan of Action, see United Nations [UN] (2002) and the accompanying guide to implementation (UN, 2008), of which UK academic Peter Lloyd-Sherlock is the main author.

7 UN (2002)

8 Randall and Theobald (1998). These development approaches each have adopters in religious/theological debates. For instance, see Pope Paul VI (1967) on modernisation, Gutiérrez (2010) on dependency, and the work of the USA's Acton Institute ([www.acton.org](http://www.acton.org)), which embraces the New Right.

9 Aboderin (2004) shows how normative assumptions have often diluted nuanced empirical observation. In doing so, she sheds new light on the policy debate and, by implication, on classics in the study of older people in Africa, such as Apt (1996).

10 In policy terms, this can lead to minimal support being given to older people, or the factoring out of older people's potential altogether by the weighting of their 'value' in economic terms, so discounting their presence or contribution. See MacIntyre (2004). In 'mainstream' development, it can take the form of a prioritisation of investment in younger people, a narrative that sees older people as a hindrance to 'modernisation', or ageist assessment procedures that cause the distinctive needs of older people to be overlooked.



Belancilo, from Bugesera district, Rwanda, is a widow from the 1994 genocide. Photo: Edward Woods/Tearfund

Significant efforts to redress this balance have ensued. A Global Age Watch Index has been developed to begin to rank how nations perform in terms of inclusion of older people.<sup>11</sup> There have also been sophisticated attempts to design an Active Ageing Index (AAI), drawing on aspects of Sen's capability theories. The AAI seeks to measure the level to which older people live independent lives, participate in paid employment and social activities, and their capacity to age actively and positively.<sup>12</sup> The task, though, has seemed Sisyphean. The Chief Executive of Alzheimer's Disease International recently lamented: 'The stigma is huge (and) [...] at policymaking level, it is clear [...] older people's issues are not really on the radar of many countries.'<sup>13</sup>

Some have argued that these global ageing trends are bypassing Africa, owing to a significant 'youth bulge'.<sup>14</sup> However, despite projections that the continent will stay proportionately younger than every other region, sub-Saharan Africa is in fact seeing considerable segments of its population getting older. There are 40 million people in Africa over the age of 60 and that number is predicted to increase to 160 million by 2050.<sup>15</sup>

Alongside the pioneering work on this theme mentioned above, there are projects in South Africa and in East and West Africa, as well as the relatively new African Research on Ageing Network (AFRAN) based at Oxford University's Institute of Population Ageing. Yet, comparatively little is known about the lives, needs and roles of older people in Africa.<sup>16</sup>

### 1.1.3 The 'greying' of Rwanda: a distinctive context and pathway<sup>17</sup>

Rwanda is set to age faster than most African countries.<sup>18</sup> By 2050, it is predicted that Rwanda's total population will have doubled and the number of those aged 65 (Rwanda's official retirement age) or over will have increased threefold as a proportion of the population. By 2070, the number of over-65s will have risen fivefold.<sup>19</sup> Crucially, Rwandans age in a very unique context: they have endured distinctive 'shocks' such as famine, rapid urbanisation and intense economic growth, HIV/AIDS, displacement, migration and return. Many still face urban and rural poverty.

11 HelpAge International (2018)

12 United Nations Economic Commission for Europe [UNECE] / European Commission (2019). See also Zaidi et al. (2018) and Sen (1985).

13 Alzheimer's Disease International (2017) 3

14 See, for example, a keynote speech made by Sir Mark Sedwell (Head of the UK Civil Service) in June 2019, [www.instituteforgovernment.org.uk/sir-mark-sedwell](http://www.instituteforgovernment.org.uk/sir-mark-sedwell)

15 Hoffman and Pype (2018)

16 Concerning the African Research on Ageing Network (AFRAN), see the Oxford Institute of Population Ageing (2019a).

17 'Greying' denotes an increasing number and proportion of older people, and the implications of this change for political demands, social costs, new business sectors, and other wider socio-economic and cultural developments.

18 Ministry of Finance and Economic Planning / National Institute of Statistics of Rwanda (2012, 2014)

19 Sabates-Wheeler et al. (2018)



📍 Kigali Genocide Memorial. Hundreds of thousands of those who would be 'adult children', died during the genocide, and so are absent from extended families. Photo: Eleanor Bentall/Tearfund

The 1994 genocide against the Tutsi and its aftermath have added an extra layer of trauma, with profound effects on older people.<sup>20</sup>

- Genocide has disrupted intergenerational patterns found elsewhere in the region: as young men were the main target of the violence, hundreds of thousands of those who would be 'adult' sons are dead and absent from extended families. In addition, an estimated 250,000 rapes gave rise to 20,000 children. In 1995 these and other orphaned or separated children were living in various challenging conditions. This included 38,000 in government community centres and 135,000 living with foster families.<sup>21</sup> Now in their twenties, these are just one group – cohorts by age – of Rwandans navigating their adult lives against a backdrop of early trauma.<sup>22</sup>
- Genocide has quickened the wider statistical 'feminisation' of ageing in Rwanda, faster than in Kenya and Tanzania, for example. More women survived the genocide than men – and they live longer. By 1995, 70 per cent of the population was female: the 2012 census reported that there were 304,499 elderly women compared to 207,239 men.<sup>23</sup>
- Genocide has shredded public services: an estimated 80 per cent of health workers were murdered or left the country, for example. The formal legal system was overwhelmed by the huge number of cases brought in the aftermath of the genocide and, as a result, the government had to revive a traditional transitional court known as the *Gacaca* system.<sup>24</sup> Military demobilisation has also been costly and external and internal risks to government, civic bodies and community stability omnipresent.<sup>25</sup> While the government has made extraordinary efforts to (re)build state capacities, the sheer volume and depth of some policy problems have made the process akin to '(re)-building a ship ... at sea'.<sup>26</sup>

20 In relation to the genocide, the authors adopt the Rwandan government's formal language, for ease of reference.

21 See Kuehr (2015) and Graham (2018).

22 'Cohorts' are groups of citizens of comparable age. For example, those who were aged between 20 and 30 in 1994 might be described as a cohort. They are of relevance to this study because different cohorts will have different experiences of ageing, owing to and depending on a variety of factors, including the impact of genocide, displacement, family conflict and reunion, regional variations and wealth.

23 Ministry of Finance and Economic Planning / National Institute of Statistics of Rwanda (2012, 2014)

24 There have been several studies of this system. See, for example, the broad Longman (2017) and the more particular Ingelaere (2016).

25 As an example of an internal risk, one might look to the tensions associated with the many post-genocide court cases. As an example of an external risk, conflict in neighbouring DRC has caused many Rwandan families displaced during the genocide to return to Rwanda. Moreover, the UN has not facilitated the forensic identification of those who died during the genocide, as it has in Bosnia through the provision of forensic teams. This could be a source of continued community tension, enlivened whenever lost graves are discovered.

26 Elster et al. (1998)



- Genocide has fractured minds and bodies: 57 per cent of Rwandans witnessed a killing in 1994 and over 30 per cent saw extreme violence.<sup>27</sup> In 2002 a survey observed that 87.4 per cent of Rwandans were living with some form of Post-Traumatic Stress Disorder (PTSD).<sup>28</sup> The impact of these experiences on people's lifespan and lived experience has been seriously underestimated.
- Genocide has tarnished the reputation and credibility of several branches of Christianity as well as other major Rwandan institutions. Some religious groups were complicit in the creation of the ideas and classifications of communities that underpinned the racism that drove discrimination perpetrated upon the Tutsis and Twa before 1994, in the preparation and implementation of assassinations, in blocking the capture and prosecution of *genocidaires*, and in subsequent calls for clemency. In the Western churches it is often not commonly known how 'catastrophic' the failures of some Rwandan religious groups were.<sup>29</sup>

In a world where normative and broad-brush assessments have dominated the way we engage with older people, understanding this distinctive context is vital if we are to begin to comprehend the social position and human potential of Rwanda's older people in the future. In other words, over and above all its other public policy workload, economic pressures and civil society dynamics, Rwanda is 'greying' at a pace accelerated and complicated by genocide and its aftermath.

## 1.2 Honouring Rwanda's elders: a challenge and opportunity for church, state and nation

### 1.2.1 Landscapes of care, competing narratives and scarce evidence

According to formal tradition, any Rwandan in old age could rely on a landscape – or 'carescape'<sup>30</sup> – of practical help, solidarity and empowerment in which immediate and extended family and neighbours filled gaps in support. The traditional articulation of these 'carescapes' has been so powerful that it informs the African Union's formal approach to ageing and development,<sup>31</sup> dominates community conversations on the topic and underpins the public narrative supporting the Rwandan government's ambitious post-1994 social protection programme.<sup>32</sup> So confident have the nation's Reformed churches been of this depiction of old age, with its presumption of care that happens spontaneously and organically across the generations, that they have embraced the general narrative of a 'New (and young) Rwanda'. The church's discourse reflects the national one, focusing almost entirely on youth, growth and (physically) active opportunity.<sup>33</sup> In this, they have something in common with the World Council of Churches, of which many Rwandan denominations are members and which prioritises 'youth engagement' at the very heart of its core mission.<sup>34</sup>

However, contrary to this focus on the 'growing youth' of Rwanda, Tearfund in Rwanda began hearing anecdotal evidence suggesting emerging gaps in support, knowledge and skills when it came to the needs of older people. As Rwanda's pace of economic growth rose, child mortality rates dropped and urbanisation leapt forward, historic reports, fragments of research and summaries of field visits by Tearfund staff and

27 Ministry of Health (2018b)

28 Pham et al. (2004). See also an important study by Munyandamutsa et al. (2012).

29 The word 'catastrophic' is used deliberately, mirroring as it does the word 'Shoah' in Hebrew, which is commonly applied to the Nazi genocide against the Jews and other groups such as those with disabilities, frailties or belonging to gypsy or opposition groups. 'Shoah' translates as 'catastrophe' or 'disaster'. Impacts of religion on Rwandan racism, dissent and development have been myriad: with religious bodies, at times, competing with and capturing the state; at other times, social forces and the state capturing the churches; and at times, the churches being complicit in the worst of atrocities. See early chapters of Liebafsky Des Forges and Newbury (2011), Linden and Linden (1977), Gatwa (2005), Longman (2010) and Cantrell (2009). The Arusha Accords, which guided a Transition Government between 1994 and 2003, and later the 2003 Rwanda Constitution, outlawed any form of discrimination and set up far-reaching sanctions against those who violated them. The constitution placed an onus on the government to specifically uplift those historically discriminated minorities 'the Batwa'. It is highly contested whether this legislation has been successful or not.

30 Throughout this report, reference is made to the excellent collection of essays edited by Hoffman and Pype (2018). The idea of 'carescape' is developed here and later in the report, drawing on the essay by Obrist (2018) in that collection.

31 See, for example, African Union and HelpAge International (2003) and African Union (2016).

32 See the discussion that follows. Certain local activists and decision-makers, interviewed for this study, articulated this view.

33 Judging Rwanda's agricultural sector to be unsustainable, the current government focuses on 'transforming Rwanda from a subsistence agricultural economy to a prosperous knowledge-based economy', with 'education for all' – with particular focus on the technological sector. President Kagame is a thought leader in this regard and, notably, the language of digital literacy aligns with the articulation of Rwanda as a 'young country' and governmental policies to mobilise young entrepreneurs.

34 World Council of Churches [WCC] (2019). The WCC has often drawn attention to acute social issues, relating to racism and gender, for example, long before others raised their voices. For examples of WCC's radical edge, see Haslam (2016).

supporters began to illuminate new or unrecognised challenges faced by the nation's old people.<sup>35</sup> There are clearly competing narratives around ageing and development. For example, the First Lady established innovative 'Impinganzima villages' for (especially female) elderly people left destitute by the genocide and with no surviving family members. Meanwhile, the narrative of both the government and other development actors continued its bias towards the other end of the lifespan, celebrating the 'young Rwanda' as the key drivers of future development. Elderly people were excluded.

Notably, research into specific needs, contrasting narratives and, more importantly, responsive action is very scarce.<sup>36</sup> The literature that does exist provides contradictory evidence relating to the churches. Research in West Africa suggests that some expressions of Christianity are intimately bound up with traditional narratives about intergenerational responsibility and care. One such example is Aboderin's recording of the conviction that those young people who did not care for their elders would go to 'hell'.<sup>37</sup> One study in Ghana observed that as theologies become more goal-centred and individualistic – especially in the new Pentecostal churches – the principle of people having a duty to support their elders becomes diluted and is more likely to disappear.<sup>38</sup> Evidence from Dar es Salaam in Tanzania, East Africa, suggests the church is absent in practical care for older people, despite its being held in high regard by them: 'All older people considered religious faith and prayers as a source of strength and comfort, even if they could not walk to the church or mosque and take part in collective prayers or ceremonies [...] but concrete help from such organisations rarely materialised in older people's everyday experiences.'<sup>39</sup>

## 1.2.2 The strategic challenges of ageing at the time of Vision 2050

As Tearfund in Rwanda began to explore the issue of ageing, the complexity of needs became rapidly apparent. The new Rwandan realities of society's age structure and changing 'carescapes', or social landscapes for older people, the enduring impact of genocide and the focus and form of the country's economic development present a number of pressing questions for every social sector:

- **For citizens:** do traditional definitions and social narratives of the well-being, participation and empowerment of older people hold true?
- **For governments:** how is the design of social and economic policies suited to the specific, current and future needs of older people, especially where these needs are intersectional and resources are scarce?
- **For non-governmental organisations and civil society:** do assessments of older people's needs and interventions to build capability, capacity and solidarity reflect emerging forms of vulnerability and distinctive local pressures upon them?
- **For churches and other religious communities:** drawing on all of the above, how can existing approaches to pastoral support, training, outreach, critical spiritual and theological reflection, safeguarding and resource allocations be 'fit for purpose' as the 'greying' of society and the churches accelerates?
- **For business:** what new opportunities and fresh responsibilities does a longer lifespan bring for shareholders, employees and customers alike?

Ultimately, the needs and potential of older people deserve greater attention – as President Kagame looks towards Vision 2050 and the nation's new strategy for development, and as his country welcomes heads of government for an ageing Commonwealth in 2020.

Moreover, greater attention to older people's rights is warranted given that Rwanda became, in October 2019, a signatory to the Protocol to the African Charter on Human and Peoples' Rights on the Rights of Persons

35 These challenges were noted, particularly, by the Tearfund in Rwanda Country Director, who instigated this research project and is one of the co-authors.

36 For example, Rwanda is absent from the UN (2015) *Directory of Research on Ageing in Africa 2004–2015*. So far, AFRAN has an under-representation of those working on Rwanda (see Oxford Institute of Population Ageing, 2019b). Meanwhile, despite the exceptional work of Dr Isabella Aboderin (among others) and pioneers from South Africa, such as Professor Monica Ferriera and Dr Jaco Hoffman, the International Association of Gerontology and Geriatrics (IAGG, 2015) has found it difficult to expand its reach across all African contexts.

37 Aboderin (2004)

38 See Pype (2018).

39 Obrist (2018)

with Disabilities in Africa. The protocol includes the rights of older people with disabilities (article 30), and by signing it, the Rwandan government has committed to pursue relevant policies.<sup>40</sup>

Likewise, for the panoply of institutions that make up Rwandan society, the greying of communities, markets and population will have significant and vital consequences.

### 1.3 Tearfund in Rwanda: rooted locally, thinking globally

Established in 1968 by evangelical churches in response to human suffering, Tearfund started its work in Rwanda early in 1969, working alongside churches and church organisations in country. Over the years, Tearfund has continued to deliver relief and development to those in greatest need as part of a wider NGO network working in the Great Lakes region and greater East Africa (as well as in 50 other countries across the globe). Tearfund in Rwanda, the in-country office and team, benefits from external networks and capital flows, and also contributes Rwandan knowledge, skills, resources and insight to the regional and global Tearfund family.

Tearfund has a positive commitment to inclusion and this report feeds into wider strategic commitments and intent to develop the organisation's strengths and programming in this regard. A major disability review is under way. The fact that Tearfund in Rwanda, with support at senior level within the wider organisation, has initiated this study speaks for itself. And explorations of inclusion include the potential to make contributions to those networks of which Tearfund is a member. For example, Tearfund is a member of the Integral Alliance of NGOs, which is focused on humanitarian response, and the Micah Network, which focuses on development and theology. In the context of this study and at the time of writing, it is notable that Integral Alliance's standards do not mention disability or old age. As far as could be established, none of its members have yet adopted the 2018 Humanitarian inclusion standards for older people and people with disabilities, or developed an equivalent framework.<sup>41</sup>

Tearfund has a successful track record of working alongside thousands of Protestant church networks, congregations and associations to address pressing social and economic needs. Currently, in Rwanda, its reach extends to 1,800 local congregations in 11 districts across the country, and it has partnerships with three national denominations who work with a further 1,600 congregations. Its contribution in the country includes pioneering work on gender-based and domestic violence, saving schemes, HIV/AIDS and community empowerment.

Profoundly influenced by Christian theology and especially those accounts that emphasise a covenant with the poorest people, Tearfund seeks to work with and for those in greatest need, regardless of their background.<sup>42</sup> This is combined with a theory of social analysis and change called 'integral mission' (holistic development), which seeks to affirm the whole person. To this end, it partners with government, civic and other bodies – and most particularly the churches. In these regards, Tearfund in Rwanda has a unique specialism in unlocking and enhancing the potential of Christian communities and churches to address multidimensional needs.

This specialism can be summarised as:

- seeing churches as places and contexts whose theory and practice of organisation and agency – or theologies – can both constrain and raise awareness of aspects of congregational and wider agency, human fulfilment, meaning and purpose across the lifespan; also as settings from and through which local priorities and Rwandan futures can sometimes be contested<sup>43</sup>
- recognising religious congregations and networks as repositories of social capital and, consequently, as potential contributors of contexts, institutions, capacity and vehicles of participation and inclusion (and especially for and with those facing exclusion)

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40 See African Union (2018), p 22.

41 See Integral Alliance (2019), Age and Disability Consortium (2018) and Micah Network (2019).

42 See, for example, Murangira and Swithinbank (2020), especially the closing chapter.

43 Longman (2010, 2017) talks of 'hegemony'.

- acknowledging Christian congregations and networks as institutions that shape and are shaped by social forces; that are active in Rwandan social life, advocacy, mutual support, philanthropy and capital accumulation; and that are not there simply to transmit 'beliefs' and 'faith motivation' but rather are local community 'anchor' institutions<sup>44</sup>
- aiming to use avenues of 'social mobilisation' in and from the church space to engage church and community members in social action and positive behaviours to benefit the poorest.<sup>45</sup>

According to Tearfund, once the local church is mobilised, it becomes 'a facilitator rather than the provider'. The local church seeks to 'envision and empower community members to identify and respond to their own needs, rather than meeting those needs for them'. The local church therefore works with and as 'a facilitator of the community rather than an institution in control of the community's own social transformation process'. The local church can provide ongoing support to the community, and the community may call upon Christian organisations for technical support where necessary.<sup>46</sup>

For Tearfund in Rwanda, churches, as 'anchor institutions', are not in country for the short term. Rather, congregations are active and will endure in every locality, repeatedly making themselves accountable to their community. This gives them a competitive advantage over NGOs which can often come and go. Ninety-eight per cent of Rwandan citizens claim to have a faith; at least 1.2 million people in the country attend church each week. Faith-based, community-led action and social services have provided vital contributions to the architecture of social justice, care and social protection across the country. Individual Christians are part of every economic sector founding firms, ventures and organisations, and taking part in supply chains that include but are not confined to the churches. As such they contribute to the nation.<sup>47</sup>

Despite their influential role in Rwandan society, churches should not, in Tearfund's view, be predominantly advanced as sole actors or positioned as dominant ones.<sup>48</sup> Nor should churches uncritically collaborate with other social institutions. Rwanda's history clearly demonstrates that when faith groups become preoccupied with sectional needs or adopt poor practices, there can be dangerous consequences for both religious institutions and society. However, with good governance, transparency, a needs-led focus and sound practices, churches can be a vital source of support and positive contributors to people's empowerment and social and economic transformation.

### **Tearfund's potential scale of impact in elder inclusion**

Tearfund in Rwanda has the potential for significant scale of impact should it actively promote elder inclusion, given its reach in churches and communities, especially through self-help groups (SHGs). Since 2014, Tearfund in Rwanda has helped communities form and manage 10,783 SHGs, supporting 215,660 households. The total number of direct beneficiaries between 2014–2020 has been 1,078,300.

44 This view links closely to a variety of insights from the social sciences and historical studies including Lowndes and Roberts (2013), Putnam (2000), Gifford (1998), and Banchoff and Casanova (2016). Longman (2010) approaches churches as sites of struggle/politics. See also the work of the Ford Program at the University of Notre Dame (2019).

45 Daehnhardt (2020)

46 Tearfund (2019a) and Njoroge (2019)

47 Measurement of the economic value and impact of Christians and people of faith is a relatively underdeveloped academic and policy focus. During this study, researchers met Christians in every government sector, volunteer pastors who ran large companies, and Christians engaged in growth ventures. There is wide social, economic and environmental value to faith-based activity. See, for example, Davis (2019).

48 Longman (2017); Linden and Linden (1977)

## 2 WALKS, JOURNEYS AND CONVERSATIONS OF EXPLORATION

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### 2.1 Methodology and scope: national context and local need

The study involved a desk-based survey of literature and data on older people in the emerging Rwandan context, combined with interviews with opinion-makers, service-providers and decision-makers (see Table 1). Interviews with elderly Rwandans took place at the national, regional and local level (see Table 2). Research was supported by an observation walk of pastors focused on a situational analysis of public spaces and institutions in the three research localities.

**Table 1** Individuals interviewed at national and regional government level

District	Sector	Number of stakeholders
Kicukiro district (urban)	Government departments	3
	Health/care providers	4
	ODA	3
	Civil society/religious leaders	9
Bugesera and Gisagara districts (rural)	Government department/representatives	2

Three localities (see Figure 1) were chosen for further enquiry, to identify needs and potential:

- Kicukiro district in Kigali Province
- Bugesera district in Eastern Province
- Gisagara district in Southern Province.

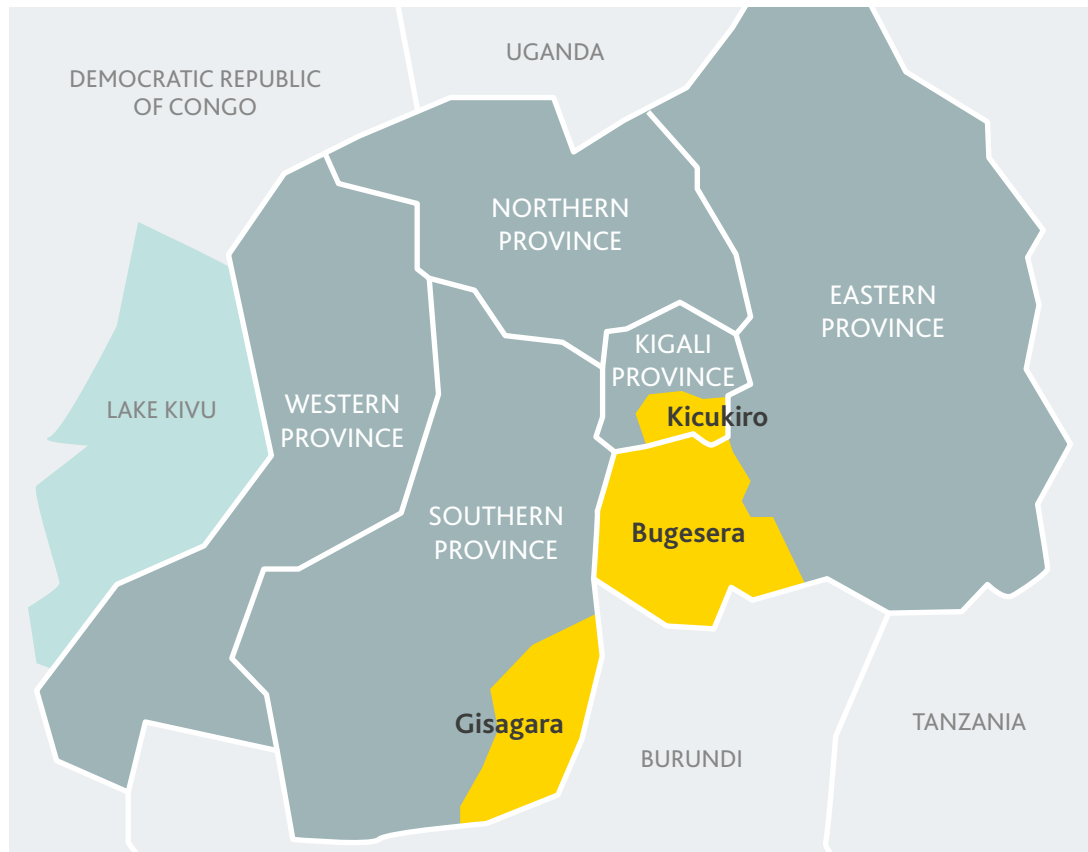
Purposive sampling included both urban and rural localities to compare experiences.

Significantly, each locality has been intensely impacted by the genocide. In addition, each area had the following in common: previous Tearfund work around gender-based violence education, the development of savings groups and other social action. This was unlocked through Tearfund's Church and Community Transformation (CCT) priority with its distinctive Church and Community Mobilisation (CCM) approach, which in Rwanda operates through self-help groups (SHGs).<sup>49</sup>

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49 Concerning Tearfund's approach to Church and Community Mobilisation (CCM), see Tearfund (2019a) and Njoroge (2019).

**Figure 1** Map of Rwanda's five provinces with districts of research localities highlighted in yellow



**Table 2** Total number of interviews by type and locality

District	Focus groups	Individual in-depth interviews/ life portraits	Pastors' groups observation walk/survey
Bugesera (rural)	6	6	1
Kicukiro (urban)	7	4	1
Gisagara (rural)	6	4	1
<b>Total number</b>	<b>19</b>	<b>14</b>	<b>3</b>

In total, the researchers conducted 19 focus group interviews. On average, each focus group comprised eight participants. Characteristics of the focus groups were as follows:

- three 'women-only groups' of people over 65 or identified as 'old' locally (one in each locality)
- three 'men-only groups' of people over 65 or identified as 'old' locally (one in each locality)
- three 'mixed-gender groups' of people over 65 (one in each locality)
- six 'young people's' savings groups, in membership of a savings circle/credit union association<sup>50</sup>

<sup>50</sup> These savings groups, also known as self-help groups, are a core feature of Tearfund's work in Rwanda. The report uses the terms 'savings groups' and 'self-help groups' interchangeably.

- three pastors' groups of different denominations (one in each locality) who also conducted an observation community walk including note-taking.
- one 'men's breakfast group' in Kigali of educated men over 65 or identified as 'old'.

In addition, in each locality older men and older women, some in work and some out of work, were also interviewed one-to-one to capture their life stories in-depth.<sup>51</sup> These interviews, 14 in total, all took place in people's own homes, with the additional component of participant observation. This contributed to a richer understanding of older people's varying contexts and life conditions.

Approximately 152 people were interviewed in focus groups, including 80 older people, 48 members of self-help groups and 24 pastors. In addition, 14 older people were interviewed in individual in-depth interviews, and some decision-makers at national and regional levels were also interviewed (see Table 1). Therefore, in total, more than 170 people participated in the research.

## 2.1.1 The profile of those interviewed

The older people were 58 per cent female to 42 per cent male, with an average age of 65. This included elderly people in their 70s and some as old as 100; there were also a few in their late 50s/early 60s who considered themselves or were judged by others to be 'old' because of their physical condition or lived experiences.

Reflecting some of the socio-historical changes in Rwandan life, most respondents were impacted by one or more of the following: internal displacement, departure and return, genocide/violence, resultant health problems, and HIV/AIDS. The researchers encountered those who had lost large numbers of family members in the genocide and those who had spent time in prison for various genocide-related offences following prosecution in local *Gacaca* courts after 1994. The majority of those we met were living in a district different from where they had been born.

Participants could be energetically open and give powerful accounts and opinions underpinned by their lived experience, but written literacy was not the social norm. In a survey the authors conducted, between 44 and 77 per cent of each group of older people identified themselves as being able to read or write. In most cases, participants' schooling had stopped before the end of primary school. Some owned a radio, but very few owned a TV or had access to one. During the course of focus groups and interviews, many identified how connections with the wider world, whether through radio or relationships (including receiving financial remittances of earning family members), were sometimes limited. Poor eyesight, high blood pressure and disabilities arising from fractures caused by 'falls', 'work accidents' and a 'bicycle accident' were just a few of the constrictions mentioned.

## 2.2 Observation walks: shedding 'grey' light on localities

Tearfund has developed an important analytical tool, the Light Wheel (Learning and Impact Guide to Holistic Transformation), in order to help local activists tease out patterns in their communities and assess the impact of their interventions in light of personal and community well-being.<sup>52</sup> This tool is organised around several themes or 'domains' aimed at supporting 'holistic development' and includes a quasi-ethnographic observation walk, among many other elements. The Light Wheel is intended to complement Tearfund's theory of change as expressed in Church and Community Transformation (CCT). The Light Wheel's aim is to help provide greater insight into what makes a 'flourishing individual and society', underpinned by the agency of the frailest, as well as their subject needs. It does this by setting out a series of interrelated fields, including: social connections, emotional and mental health, physical health, living faith, material assets and resources, and participation and influence (see Figure 2).<sup>53</sup>

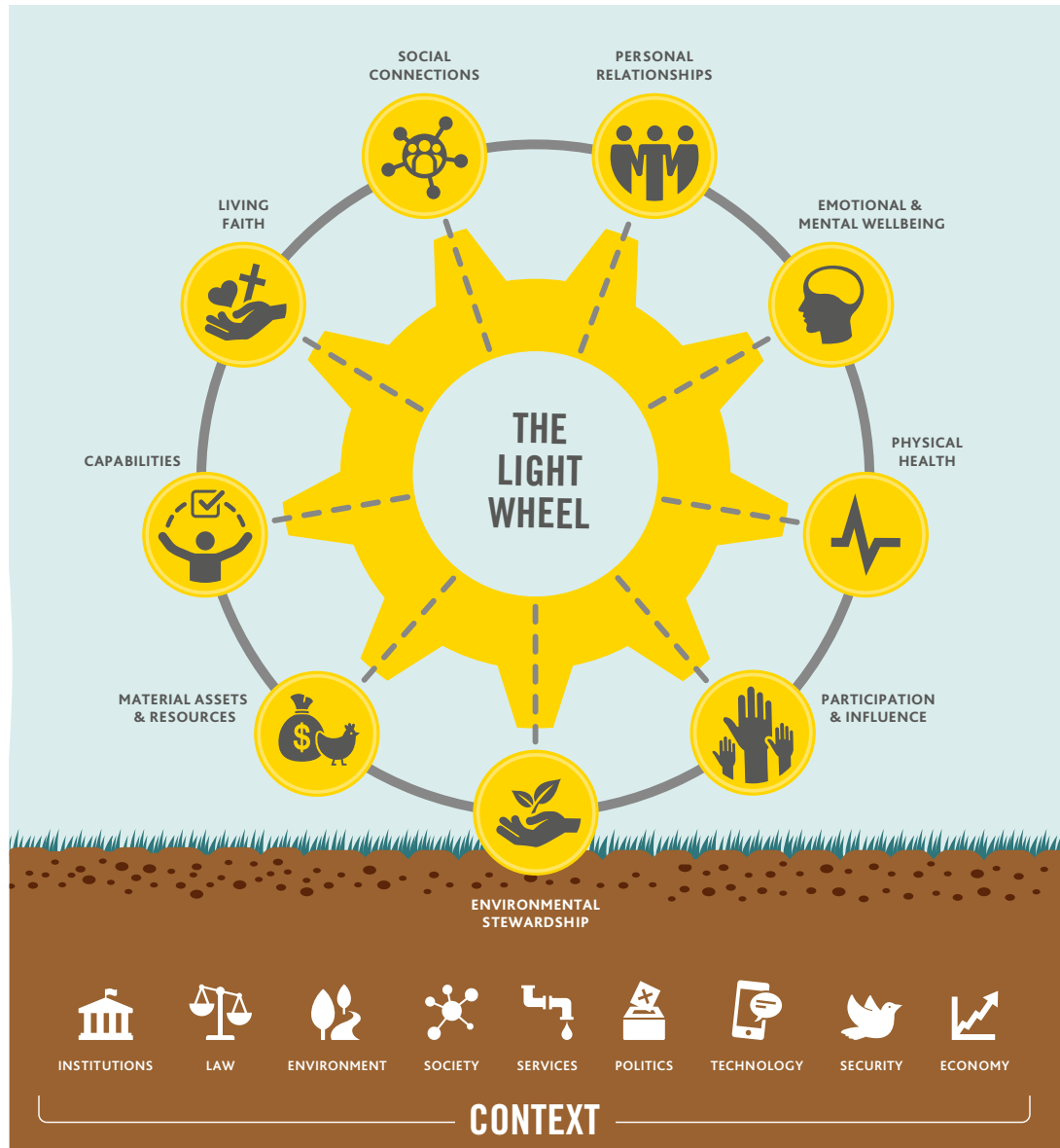
51 In two of these cases, participants were so vulnerable, owing to legacy disabilities and health challenges, that the interviews were cut short.

52 Tearfund (2019c)

53 Tearfund (2016)

The research brief began as an 'economic' one, steered towards service delivery for elderly people, but as the research explored ways to frame questions around that narrow focus, it moved towards embracing other Light Wheel domains and recognising some of the challenges and dimensions that it left unrecognised.

Figure 2 Tearfund's Light Wheel domains and context



The Light Wheel undergirds these domains by encouraging an assessment of the 'social context', to take into consideration the strength of institutions, the role of the law and legal systems, the environment, technology, politics, security and economy.

However, as Figure 2 shows, none of the domains currently specifies age, disability or mental ill health as factors worthy of priority consideration, observation or recognition. This could have implications for the reach of the CCT approach. While CCT has been evidenced to have highly positive impacts within the domains it *includes*,<sup>54</sup> older people, disability and mental ill health are not explicitly present in its approach. Therefore, some modifications to the Light Wheel exploratory walk and surveying method were necessary to take into account older people specifically. Rather than accept CCT at face value, a discursive approach was adopted in interviews, to tease out whether such an omission had concrete consequences.

54 James (2016)



The researchers asked pastors, all of whom had previously used or were familiar with the Light Wheel, to spend time on an observation walk – in a market, bus station or health centre, for example. The purpose was for them to record their insights pertaining specifically to the visibility and participation of older people in local public life.

## 2.3 Recording, translation and transcripts

The research team consisted of six team members: three pairs who went into each locality together and then split up to interview different groups and individuals. The principal investigator was joined by a Kigali-based translator, three Tearfund staff members, one from the UK and two from Rwanda, as well as one CCM area coordinator.

The transcripts of all these interviews were recorded using a digital device and the transcripts were translated from Kinyarwanda to English by professional translators. The individual notes of observation walks were similarly translated from Kinyarwanda to English.

## 2.4 A process that provoked advocacy

It is worth noting that the very act of enquiring about older people provoked reflections and responses among the participants. Thus, the research itself contained an important 'advocacy' element.

For example, all of the pastors reported that the simple act of being asked to undertake an observation walk specifically to consider older citizens changed their encounter with the locality. One group of Christian businesspeople and pastors began to discuss the challenges of old-age provision for pastors over and above existing pension schemes where they existed. Some admitted that they had never given or heard a sermon on old age, nor considered the topic in any way in 'young Rwanda'. In central government, officials observed that it was the first time they had thought of churches as employers in the 'formal sector'. They had not previously seen churches as potential partners in encouraging citizens working in the 'informal' sector to join some of Rwanda's developing pension and old-age-related savings initiatives to help them in later life.<sup>55</sup>

## 2.5 Stigma, language and reframing conversations about age

During the course of this study it became increasingly apparent that the way that social norms, stigma, bureaucratic categorisation and descriptions emerged often involved the nuanced use of words. In languages other than – but including – English, how these were worked out in practice had direct impacts on the inclusion and exclusion of older people.

It is beyond the scope of this study to develop such assessments extensively. However, there is much to be learnt from the tendency of disempowering categorisations to become attitudes that reproduce exclusions. Responding directly to the way that linguistic nuance could be part of the challenge in seeing older people's need in the neighbourhoods, policies and debates touched on in this report, the authors approached related terms with caution. These terms have significant implications in the Rwandan case and upon further inquiry are likely to have implications in other national contexts. *'The elderly'* and *'the aged'* are not used for this reason.

Words matter, and they matter especially where a term such as 'the elderly' could mean anyone above 50 years old for the World Health Organisation (WHO), anyone over 65 years for Rwandan and other governments, or any point in time when the body got tired or could not work, as was suggested to us in some villages.

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55 Interview at the Rwanda Social Security Board (RSSB), Kigali (April 2019).



## CASE STUDY 1

### Research inspires an 'elderly festival'<sup>56</sup>

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Before conducting the field research, the research team held a preparation day for Tearfund's partners at the Kigali office, introducing the research project and fieldwork methodologies. Among those attending was Jean de Dieu Munguyiko, the CCT coordinator at AMU (Association Mwana Ukundwa) and a member of the research team. During the research, he interviewed pastors and local government staff, and also led observation walks with pastors in the community.

Jean de Dieu was so inspired and challenged that, ahead of the field research, he arranged a day to celebrate older people at the church where he serves on the leadership team. Jean de Dieu recalls:

*'I was challenged after the [research] preparation day. I had no courage to go and ask what churches do to honour elderly when myself, as one of the church leaders, I did almost nothing with my church to honour them.'*

He shared the vision of increasing church engagement with often neglected elderly people with his senior pastor who agreed to host a festival for 40–50 elderly people. A well-known retired pastor was invited to speak: there was a meal, a performance by a children's choir, prayers and small gifts of appreciation for those who had come. The many conversations people had with older people in the community were enlightening. Before this, the senior pastor said:

*'I had never imagined how lonely [some] elderly feel and I hadn't any idea of what the church should do for them except supporting those without people to care for them.'*



📷 A festival celebrating older people at a church in Gikondo, Kigali. Photo: Jean de Dieu Munguyiko/Tearfund

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56 This case study was originally written by Nikki Harrison for an interim update report to the Elise Pilkington Charitable Trust. It has been adapted by the authors for this research report, with input from Jean De Dieu Munguyiko.

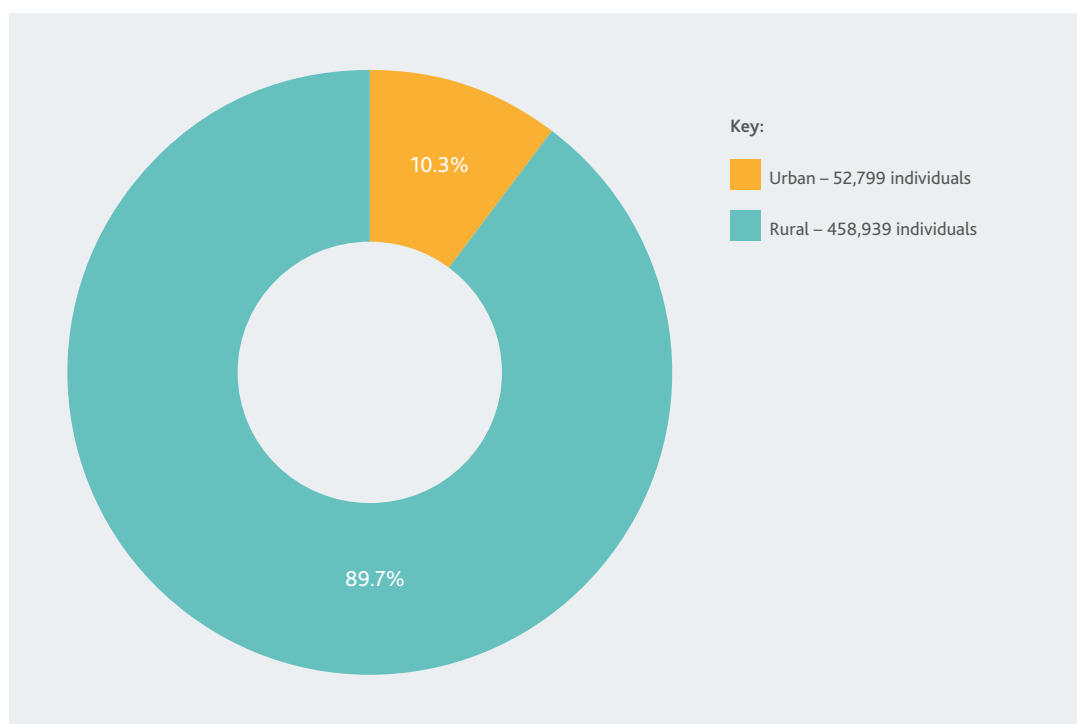
# 3 OLD AGE IN RWANDA – PROFOUND NEEDS DESPITE RESILIENCE AND AGENCY

*'Here in Rwanda, we grow old very early. I do not know if it's because of poverty but I think that around 50, someone is considered old [...] one's thoughts become limited [...] one is unable to think big.'*<sup>57</sup>

## 3.1 A predominantly rural phenomenon

Certainly, there are many achievements to celebrate in Rwanda's recent history, such as the country's steady economic growth (of around eight per cent per annum), representation of women in parliament, and innovative health insurance.<sup>58</sup> With its plans to build an urbanised high-tech society, the government's future ambitions are equally notable. But social pressures, especially in rural Rwanda, are already great.

Figure 3 Urban-rural split of the older Rwandan population<sup>59</sup>



In Rwanda, as Figure 3 shows, the proportion of older people is higher in rural than in urban areas. The largest proportion is found in the Southern Province (29 per cent), followed by the Western and Eastern Provinces – both 23 per cent. The Northern Province and Kigali City have the smallest population share of older people (19 per cent and 6 per cent respectively).<sup>60</sup> Due to high migration rates, this does not necessarily reflect where

57 Older working man in an in-depth interview, Bugesera (3 May 2019)

58 Clark and Kaufman (2009) and Gourevitch (2000)

59 Ministry of Finance and Economic Planning / National Institute of Statistics of Rwanda (2012, 2014)

60 Ibid.

the elderly population was born. Rwanda's civil war and genocide (1990–1994) created a gender imbalance: approximately 70 per cent of the population were female in 1995.<sup>61</sup> As mentioned in Section 1.1.3, data from four Rwandan censuses confirms that the elderly population is currently composed of more women than men, with 304,499 elderly women compared to only 207,239 elderly men.<sup>62</sup>

Since the genocide, a majority of older people (68 per cent) live with working-age adults, especially in urban areas, and over half live in households of three generations which include children. For some, this is a choice, but for others it reflects their care duties or family disruptions. In rural areas, older women are much more likely than men to be living with working-age adults, but this begins to change as the younger adults marry or remarry. This creates new risks as older people move to late old age. Later sections explore in greater detail how being on one's own can add to elder risk (see sections 3.4.5, 3.4.7, 3.4.8, 4.5 and 5.1).

In global debates, large households would often be seen as pointing towards improvements in family conditions because of the opportunity to secure economies of scale. In Rwanda, though, the opposite seems to be the case. Households with an older person seem uniformly to struggle with food scarcity, and overall consumption is low. Because of disruptions to age structure, extreme needs and vulnerabilities, older people in large households are very likely to be the head of the household.<sup>63</sup> Tri-generational households are almost certain to 'lack' a male breadwinner.<sup>64</sup>

Most older citizens have been married. Men are much more likely still to be married in later life: this indicates a habit on the part of men to remarry after being widowed. It also reflects the fact that women tend to live longer and, in Rwanda, many women were widowed in the genocide.

The density of older people in rural areas, shifts to urbanisation, genocide impacts (not to mention impact of HIV/AIDS) all have subtle, and not so subtle, effects on social and family norms.<sup>65</sup>

These factors add to the complexity and challenges of older people's lives. Before turning to those challenges in detail, it is worth emphasising that, throughout the research process, it was clear that interviewees sought to affirm the contribution they had made in the past. Furthermore, they wanted to assert the contributions and places where they still had agency and were still making a difference, and to emphasise the resilience and search for participation with which they approached their everyday lives.

## 3.2 Older people's agency: contributions to family, church and society

Traditional gradations of the ageing process in Africa have often meant that as age advances, respect and honour are undimmed. As this tradition has possibly become diluted, one of the consequences is a deepening view of older people as 'being dependent' rather than contributing even though they may be more or less active economically or in other ways.<sup>66</sup>

Again and again, interviewees wanted to reaffirm their own 'resilience': the sense of seizing, sustaining or seeking agency was palpable. Even the most vulnerable older people expressed their intense wish to retain their dignity, to make a contribution and to belong to the wider task of what was often called 'building the nation' or 'building the church'.

For example, one housebound woman would receive young couples who were planning to get married, to talk them through the practical aspects. Others reported counselling each other or younger generations. Rwandan

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61 Ibid.

62 Ibid.

63 The 'age structure' of a country refers to the concentration or otherwise of population groups in particular age cohorts. Rwanda's age structure has been disrupted by genocide, while other African countries may see gaps in certain age groups due to the impact of HIV/AIDS.

64 Sabates-Wheeler et al. (2018)

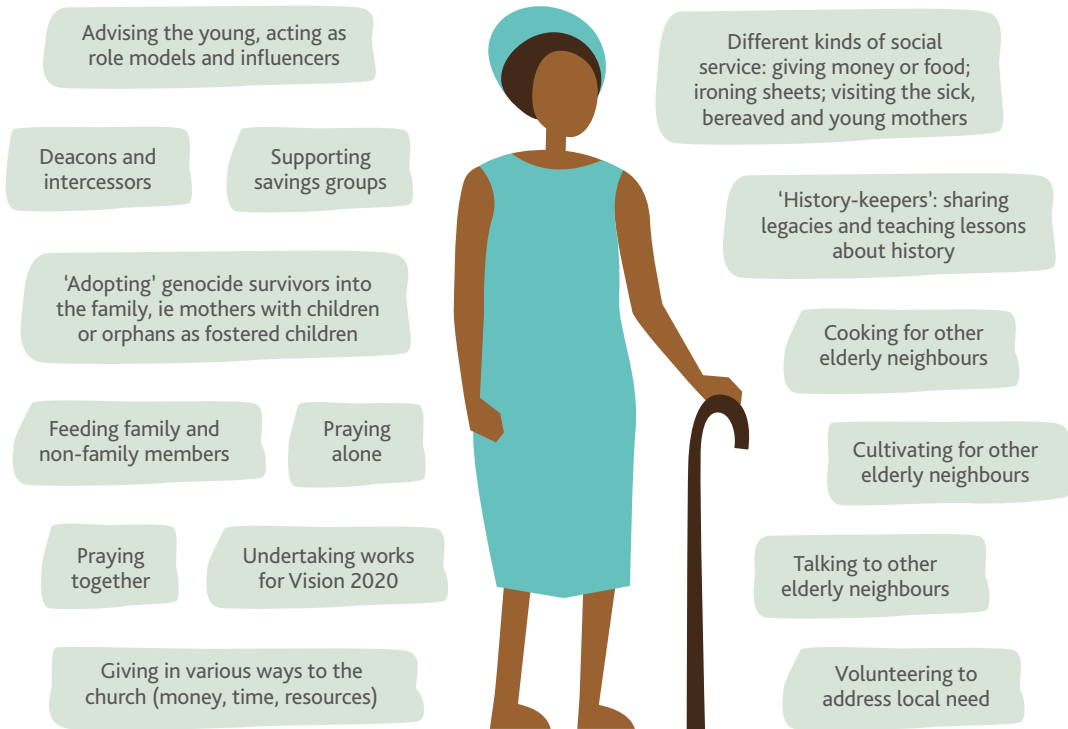
65 Ibid.

66 A subtle discussion of language and relationality, and the impact of assessment of age and respect, can be found in Pype (2018). Similar gradations and cross-use of terms is present elsewhere in sub-Saharan Africa. For example, in northern Zambia's ChiBemba, *bali baka* means tired and old; *umkote* means old man and old woman; and *umloshi* means witch but is most-often directed towards older people.

older people contribute economically too and there is evidence that they are more likely than their aged counterparts in other countries to work late in life.<sup>67</sup>

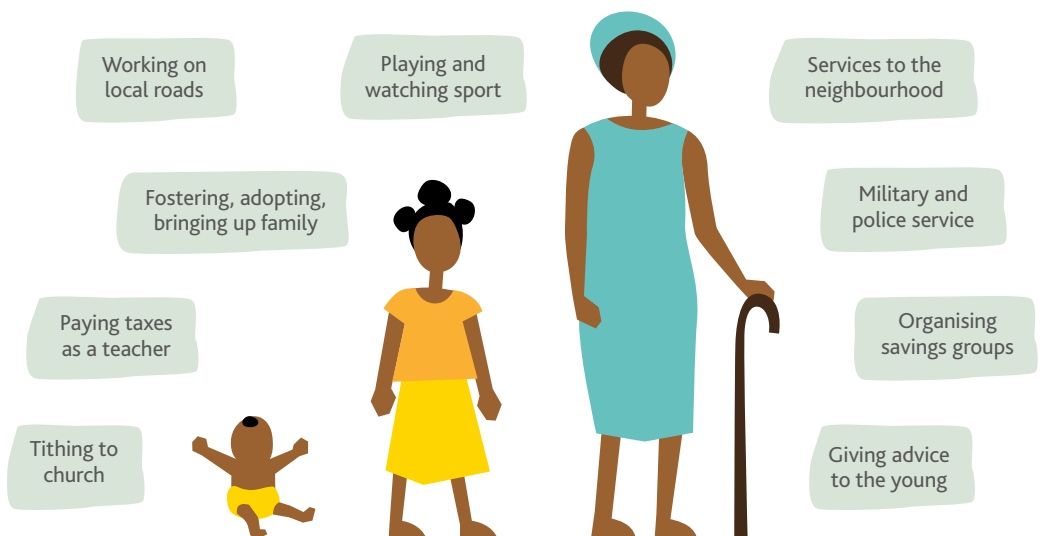
Figure 4 below sets out some of the themes that emerged in interviews in terms of contributions listed by older people.

**Figure 4** Multiple contributions that older people are making in old age



These contributions, of course, complemented those across a lifetime of contributions to national life. These included, and where possible continued to include, the contributions outlined in Figure 5.

**Figure 5** Contributions of older people to national life across their lifetime



67 Sabates-Wheeler et al. (2018)

### 3.3 Vulnerability and invisibility of older people

While the research team recognised the participation and agency that older people have had and are having, the observation walks immediately revealed their civic invisibility. Despite all the strengths identified within Rwandan older people, they generally have a very low public profile.

Subsequent sections in the report give more detail on different aspects of the insights gained. In summary, those undertaking the observation walks noted variations in recognition of older people's physical and mental health needs, the absence of social and health services geared towards them, and the invisibility of older people in the public sphere. They also highlighted the presence of multiple definitions of what constitutes 'being healthy', 'being active' and 'old age', even in the same community.

The near 'absence' of older people in busy places where the wider community had gathered and the presence of the young were a dominant feature. Even in health centres, they were a very small proportion of the total number of those present, when waiting patients and carers were counted. The few older people were 'sitting down resting', 'lying down under a tree resting' or 'sitting waiting for (medical) treatment'.

Older people were not being treated badly, but they were not easy to find or to see at all, suggesting they were mostly at home – if indeed they had a home. Even where local decision-makers were acutely aware of severe needs, they expected even the frailest older people to come to them to collect resources or receive support.

Subsequent enquiries and interviews began to reveal the personal stories behind these observation walks – and very significant poverty and isolation.

As interviews progressed, it became more and more apparent that the bare essentials were often or almost entirely absent from the lives of those being interviewed in local neighbourhoods. These included: clean water to drink, easily accessible water to wash, light and electricity, regular food with some variety in diet, psychological support, medical services, company, accessible help nearby and freedom from the fear of abuse. There was clear evidence of the intersectionality of needs and particular vulnerabilities for widows and others living alone.

### 3.4 Insecurity, exclusion and basic needs unmet

#### 3.4.1 Water for drinking and personal hygiene

*'If I were young again, I would go clean the house of the elderly, fetch them water so that they don't lack water, I would get firewood for the elderly and put it close to them so that they would not lack [it].'<sup>68</sup>*

Water supplies can be at some distance and when water is collected it can be 'the colour of a dark tea'.<sup>69</sup> Those too frail to fetch water, or without surviving family members to help them, must rely on neighbours who are themselves often under pressure. In a very few cases, the local church has positioned a rainwater-capture tank next to their home. Alternatively, entrepreneurs have established water-collecting companies but they charge for their services, even from families who have no cash. This can mean households having to choose between eating their own cultivated goods themselves and bartering them for other goods, health care or water.

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68 Older woman in a focus group discussion, Gisagara (7 May 2019)

69 Older woman in a focus group discussion, Bugesera (2 May 2019)



☐ Speaking to older research participants, it was apparent that many of them lack essentials including independent access to clean water. Those too frail to fetch water, or without surviving family members to help them, must rely on neighbours' or paid help. Fear of neglect was found to be widespread. Photo: Will Boase/Tearfund

### 3.4.2 Scarcity and lack of food

*'I can say this is a general problem in Rwanda. We have people who are not productive but need to eat [...] if you add the number of the elderly to the number of children who are not in age to work, and it is not easy.'*<sup>70</sup>

Older citizens are possessed of great dignity, ingenuity and resilience and have overcome huge challenges of history, poverty and family damage including, but not only, loss. Food, though, can be scarce and lack variety; its availability and price can vary greatly across the seasons and harvests. It is limited to what older people have had the means to grow or can afford. Even those able to cultivate may have no land, or only have access to land of very low quality, making nutrition a pressure and the hope of growing excess cash crops a faint one. Without cash income, older people are then unable to cover, among other items, health insurance premiums and often have to offer up crops as in-kind payment for other transactions.

### 3.4.3 Light and electricity

*'As you can see we are in our old age, and nowadays people no longer use kerosene lamps, homes are lighted by electric power. But we do not have the means to connect our home to the network. We would be happy if we could get electricity in our house.'*<sup>71</sup>

Access to electricity came up in self-help group interviews as one of the improvements achieved through savings schemes.<sup>72</sup> At the same time, as the above quote indicates, some of the older people interviewed could not afford to pay for electricity, although their area was connected to the grid. In other cases, where older people had electricity, they would express gratitude to 'the president' who had made the supply

70 Focus group discussion with members of a savings group, Gisagara (6 May 2019)

71 Older man in a focus group discussion, Bugesera (3 May 2019)

72 Focus group discussion with members of a savings group, Bugesera (2 May 2019)

possible. Where electricity and consistent light were not available or affordable, this added to the physical strain of basic tasks and presumably to the likelihood of falls.

### 3.4.4 Psychological support and medical services

*'I live like a disabled [person]. I have ulcers, I have back problems, kidneys, and there is another thing that is painful in the back.'*

Someone else replies:

*'We all have it.'*<sup>73</sup>

Psychological support, despite the trauma of the past, is almost absent. It is also widely misunderstood, feared, has low take-up where it is offered and held in low regard. As a later section records, mental health budgets conflate psychological health with neurological conditions, and public services are overwhelmed (when they are accessed at all).

Immediately after the genocide, attempts were made to increase the availability of psychosocial support, but after a transitional phase, funding dried up. Reports to the research team suggested that some who had qualified in clinical psychology could not work as much as they would like and that working outside the capital was not viable for most.

Where health services are working, access is patchy because of distance, disability, absence of insurance, or the cost over and above insurance. Respondents repeatedly reported self-managing severe loss of eyesight, post-break bone pain, high blood pressure, diabetes, respiratory troubles and other ailments. Others lived with severe mental ill health, PTSD and depression, without access to support.



📷 A couple look out over Gisagara district, in Southern Province, where they live. Photo: Marcus Perkins/Tearfund

73 Older woman in a focus group discussion, Kicukiro (10 May 2019)



### 3.4.5 Company as a defence against loneliness and a source of help

*'Yes, we get visitors and we visit others. We meet our elderly friends and have conversations with them. We talk about how we can build our nation. We also discuss how the things that happen in this country should not happen again.'*<sup>74</sup>

Interviewees loved company and being together, and a value for them in church life that was often cited was the chance to meet. Women laughed merrily as they described gathering to say a few prayers, to share woes, to comfort each other. Visits from pastors' wives were appreciated, as were those of children, grandchildren or neighbours. One man described how he was able to visit his friends because, if he got stuck as the light faded, his children would come with their bicycle and give him a lift home. Others described how, frailer than others, they might go for days or weeks without speaking or receiving help of any other kind.

### 3.4.6 Elder abuse and neglect<sup>75</sup>

*'I would pay someone to cultivate my land but they would cheat me, tell me that they finished the task, when in reality he hadn't done anything and I would pay that person without [him] having done any work.'*<sup>76</sup>

Fear of abuse or exploitation was widespread. This was most often expressed with regard to neighbourhood relations and particularly the risk of help being offered in return for payment but that help never materialising. This could include water not being collected or cultivation of basic food remaining incomplete. Some also mentioned a fear of 'poisoning'.

A 'new' feature of care in the Rwandan context is the contribution of those paid in cash and in kind for the support they provide to frail elderly people. In the context of 'long hours worked', 'new financial pressures' and the vulnerability of family members themselves, it is a new profession. Indeed, it is a growing economic and professional sector that families with means have found ways to access.<sup>77</sup>

For now though, arrangements are ad hoc: in one house researchers visited, a young man lived in and was paid to bathe, cook, lift and support a very vulnerable older woman. His previous experience had been doing the same for one of his own family members and he had then come to this household on recommendation by word of mouth. It is becoming socially acceptable because it (can be) the only choice. These roles are entirely unregulated and these carers untrained.

One man had paid for a live-in carer to look after his father. For four years, this was the arrangement. During that time, three care workers had been employed and all seemed well. One of them was 'nice' but only afterwards did it emerge that 'the other guys, he told me, pinched him, and beat him or didn't feed him'.<sup>78</sup>

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74 Older man in a focus group discussion, Gisagara (7 May 2019)

75 The literature on elder abuse in Africa is underdeveloped. See, for example, Lloyd Sherlock et al. (2018).

76 Older woman in an in-depth interview, Bugesera (4 May 2019)

77 For a discussion of the value of the care and disability economy, assistive technology, and its relationship to industrial as well as social policy strategy, see Davis and Booth-Smith (2017). This discussion has a nascent Rwandan counterpart; see Kalinganire and Rutikanga (2015), for example.

78 Focus group discussion with older pastors, Kigali (4 May 2019)

### 3.4.7 Widows' vulnerability

*'Before we opened these homes [...] we used to go in different places to visit women who were widowed by the genocide. We used to find these older women who were left with no children. They were in bad conditions because they were living alone in their houses. For instance, in some cases [...] the person was sick and there would be no one to take her for treatment. We also used to find those who are very elderly facing challenges like not having anyone to fetch water or get firewood for them and they were really struggling. Yes, the government used to help them and give them allowance for the vulnerable elderly but, they [...] were unable to go to the market for shopping or do anything else with the money [themselves].'<sup>79</sup>*

In what appears to be a break with traditional Rwandan family and village conceptions of social care, a small number of specialist residential homes for the *incike*, the most vulnerable of all widows, have been established by the First Lady, Jeannette Kagame.<sup>80</sup> Better resourced than any other provision identified, these 'Impinganzima village' homes are run by AVEGA and funded by FARG and the Imbutu Foundation.<sup>81</sup> They benefited from a high-profile launch and attract visits from national and international figures. During the annual mourning period in 2019, the British High Commissioner and head of the UK Department for International Development (DFID) visited the programme's Kigali home.

However, the needs of elderly widows remain striking. Even these centres, with their powerful elite patronage, have a waiting list of 600, despite the tight criteria of extreme destitution that marks qualification for entry. Residents in these centres, unless they have severe disabilities, must be over 65, be survivors of genocide and now be deemed by the authorities to have no family member, broadly defined, to care for them. There will be many more in the country who only partly meet those criteria.



#### CASE STUDY 2

### A widow's struggle for survival

One elderly woman who shared her story is now a resident in one of the *Impinganzima* homes. Her husband and all but one of her 12 children had been slaughtered in 1994. She had been set alight by the same attackers.

Living in a rural area, she had somehow got by. But, years later, her last child had come home from work feeling unwell and had passed away in her house. She had been stuck there on her own, with no one to call. The grief and the pain of losing this son triggered sadness and overwhelming trauma. She began to wander, extremely unwell, and had found herself destitute and far from home in Kigali. At night, she snuck into latrines and stinking outhouses to sleep. Early, in the morning, she would attend church seeking consolation. She won a prize for the regularity of her church attendance, without the morning congregation ever learning of her desperate plight.

Only by accident did she eventually find a faith-based NGO who helped her access a place at an *Impinganzima* home. After years of being unable to use her arms because of burn scars, she could now move them once again, thanks to the medical care she received. She rejoiced that she now had access to the essentials that had long been absent in her life.

The one constant in her life was spiritual comfort – prayer and the consolations of her faith. With regular opportunities for prayer and chaplaincy in the home, she had this in common with our other interviewees.

79 Coordinator of one of the widows' homes visited by the researchers (interview 4 May 2019)

80 *Incike* refers to an individual who does not have a child, or has lost all of his/her children. The word, more deeply, evokes the experience of having no legacy, and of knowing that one's death 'really is the end'. However, these individuals are also known as *Intwaza*, which means courageous or resilient: for even though they lost all their children and relatives, they themselves survived.

81 FARG stands for The Genocide Survivors Support and Assistance.



Older women, widows of the genocide (whose immediate families were wiped out), living in Impinganzima hostel, Bugesera district. Photo: Francis Davis/Tearfund

### 3.4.8 Intersectionality of needs

Beyond the recurring absence of these core needs, a further array of concerns were commonly articulated:

- falls, accidents and illness in isolation
- dizziness<sup>82</sup>
- unsafe or unusable roads and paths, making movement difficult
- fear of being poisoned or 'bewitched' or of being accused of being poisoners or witches
- addictions, especially alcohol.

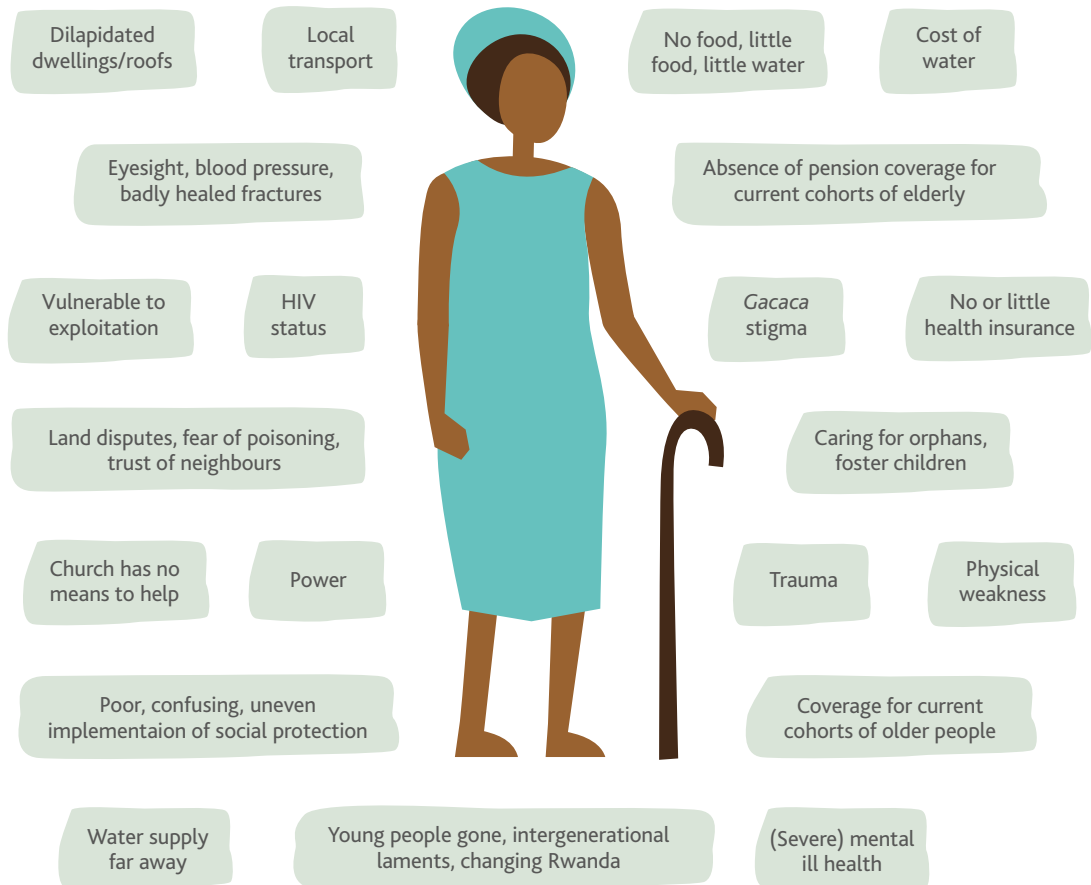
In many cases these challenges interlock and intertwine: repeatedly, participants mentioned older people who had not left their dwellings for days while neighbours had thought they had gone out to cultivate. Or others, after falls, who had struggled without water or food for long periods, either alone or as other household members looked on – because they themselves were too vulnerable to help. Even if people were insured for health support, they very often lacked the financial means and physical and psychological capabilities to travel to a health centre.

Figure 6 seeks to represent some of this moving and challenging variety of needs that older people described. Not only does each factor impact the other, but they are also impacted by issues such as changes in weather, interpersonal relationships, local governance, local success of government policy, falls, accidents or illness, among many others.

Cutting across them all is the powerful, widespread and intense pressure on mental health and well-being that Rwanda's context has generated. The next section addresses this intersectionality more closely.

82 This sounded like a symptom of hypertension.

**Figure 6** The multitude of needs that older Rwandans experience



### 3.5 Lifespan, loss, bereavement and trauma

*'[My not talking] [...] this is what causes us heart problems [...] All people who have heart problems developed them after the war [...] Prior to the war we were healthy.'*<sup>83</sup>

#### 3.5.1 'The body keeps the (psychological) score'<sup>84</sup>

Not everyone who experiences poor mental ill health is old and not everyone who has reached old age without mental ill health will continue without struggles. Interviews pointed to the prevalence of mental ill health in society, a ticking time-bomb of breath-taking suffering that is likely to increase as more Rwandans reach later life, and live through the normal wear and tear of life's uncertainties.

Coleman, Johnson and Burnell's work explores the impact of past life experiences on the ability of older people to maintain meaning and sense-making and sustain coping as they face late-life challenges and change. They suggest that as later phases of age trigger periods of 'life review', there can be a reassessment of the past which in turn shapes perceptions of self, role and meaning in the present.<sup>85</sup> Positive reminiscences can emerge and help, but when life review includes moments that are not recalled as positively, 'biographical pain' can have adverse effects. 'Biographical pain', to explain, relates to feelings related not only to a specific (traumatic) event – significant though that can be – but may also arise from the cumulative review of a hard

83 Older non-working woman in an in-depth interview, Bugesera (2 May 2019)

84 Van Der Kolk (2015)

85 Coleman (2011), Coleman et al (2019), and Burnell et al (2011). See also Johnson and Walker (2016), especially the chapter by Johnson (2016).

life or a life in which feelings of struggles, failure, loss, bereavement or regret of various kinds, sometimes seemingly trivial to onlookers, are present.<sup>86</sup> Even without major social disruption, mental ill health may increase in old age if support is not present and 'biographical pain' crowds in on minds that have thus far not experienced such concerns.

There are an estimated 2.13 million people living with dementia in sub-Saharan Africa. This figure is expected to rise.<sup>87</sup> Alzheimer's Disease International reports huge stigma in the region, an association of the disease with 'bewitching' and an explicit crowding out of older people's needs by a development community overly focused on reproductive rights, communicable diseases and early-life interventions. These trends also exist in Rwanda.<sup>88</sup> Those with dementia are found in many Rwandan villages – often living in isolation.

Meanwhile, those who study severe trauma specifically suggest that when lives have been characterised by intense shocks, the body-mind-spirit distinction can be overrun.<sup>89</sup> An individual's 'physical' ailments become both the cause and consequence of psychological stress, while past lived experience actively shapes current perceptions and assessments in distressing (or not so distressing) ways.<sup>90</sup> The past can always be present and present physical challenges can define current perceptions. Examples of this are numerous: on the one hand violent trauma may return through sights, smells or voices that may not be present. On the other hypertension or bone pain might add to low mood or other psychological factors. 'Biographical pain' may merge with physical pain as diminishing capabilities interface with spousal loss or disabilities or even the seemingly most basic of regrets.

Most Rwandans have lived experiences of fragility and social and economic struggles and vulnerability. Many have grown up in families formed, broken and remade by poverty, accident, illness and urbanisation, as well as life's normal opportunities and setbacks. Thousands more were impacted by the genocide, directly and indirectly. A girl who lost her parents at 15 in 1994 is now 40. A mother who lost her son in the genocide at 30 is now 55. As Rwanda's over-65s cohort triples in size over the coming decades, cohort after cohort entering old age is likely to bring unique pressures to their experience of 'life review', sense-making and physical coping.<sup>91</sup>

### 3.5.2 Loss, bereavement and 'biographical pain'

Within focus groups, as well as more informally, enquiring about loss, bereavement and mental health was clearly highly sensitive. There were various recurring explanations for this given in interviews, such as the the burden being 'too great', and the need to 'look forward' instead. In addition, more controversially, it was suggested that tensions still exist within communities, even many years on from 1994.

Nevertheless, most respondents in every locality described periods of 'despair', 'feeling suicidal', 'having nothing' and getting by with no one.

*'What made me sad was losing my family (in the genocide),'<sup>92</sup>*

said one.

*'The war did not choose [...] I lost many [...],'<sup>93</sup>*

recounted another. One parent who lost five children explained:

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86 A related example is noted by Apt (1996). Apt cites Arth, whose 1968 study pointed to a rise in mental ill health among elderly members of the Igbo ethnic group in south-eastern Nigeria, triggered by a loss of 'elderly prestige' as a consequence of their recently urbanised sons making sufficient money so as not to have to request bride wealth.

87 Alzheimer's Disease International (2017)

88 See Shyaka (2017). One elderly individual, interviewed for the present research, disclosed that they lived with dementia.

89 Obrist (2018) links mind-body-spirit-place.

90 Van Der Kolk (2015)

91 'Old age' itself has different phases, including third age (represented by those who are old but active or working) and fourth age (those who are not or unable to be active or working). Merchant (2017), in his work on the church in an ageing UK population, referred to the third and fourth age as more representative of the differing experience of older people, regardless of their actual age. In fact, for many people, their lived experience sits in between these two phases: people whose resilience means that they strive to remain active, but whose vulnerability means that they move in and out of frailty, capability and dependency. These variations and this variety are at the heart of the work of Coleman, Johnson and others already cited.

92 Older woman in a focus group discussion, Bugesera (2 May 2019)

93 Ibid.

*'We were living here but some of my children were killed in Butare. That's where they were murdered. Others were murdered in Kabgayi and Kigali [...] They were killed everywhere.'*<sup>94</sup>

For some the pain was almost unspeakable. 'It is best not to ask' was a recurring response by participants to some interview questions.

In all interview settings, evidence of these pressures and dynamics were clearly spoken, subtly referred to and/or visibly obvious. Several respondents explained that they had lost very many relatives in the genocide.

One younger person observed that...

*'older people can face mental problems because of loneliness'*<sup>95</sup>

'Loneliness', the young person observed, 'isolation' and 'being in pain all the time' were all drivers of frailty. These were all embodied in the intersection between physical and emotional pain, as well as the intersection between consequences of 'normal' ageing processes and results of the genocide –and this reflected majority opinion across focus groups.<sup>96</sup>

One woman set out her suffering, how it endures and her attempts to cope:

*'When I feel sad [...] I keep quiet and leave it alone [...] We don't talk about it but during the night it all comes back to me.'*<sup>97</sup>

### 3.5.3 Mental ill health, severe mental ill health and stigma

Many interviewees were visibly struggling. One explained:

*'There is something in my head that is very painful to me. I often [...] hear loud noises in my ears [...] There are sounds, some like people talking, loud sounds, even now I feel it. This side of the head, it is painful and sometimes swollen. My breasts become so heavy [...] the noises come down all the way from the head to the breasts and the breasts become heavy.'*<sup>98</sup>

Another elderly person described his journey as a carer. His wife had become mentally ill and broken everything in the house. After admission to hospital, she stopped taking her medication because it was making her weak, and she relapsed. She was now at home but he had to be constantly vigilant for her safety. They no longer owned furniture, clothes or any other item for in her moments of peak anxiety she had broken and burnt them all.<sup>99</sup>

Another woman explained:

*'If the [church] had not helped me, I would have lost my mind [...] My neighbours sent me three young ladies and told me they could stay with me [...] They stayed for six months [...] I had so much sorrow and great pain. It's a lot; it would take the whole night if I was to share my story.'*<sup>100</sup>

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94 Elderly non-working woman in an in-depth interview, Bugesera (2 May 2019)

95 Focus group discussion with members of a savings group, Bugesera (2 May 2019)

96 Respondents reported 'shocks', such as famine before 1959, the 'persecution' from 1959, drought, flight (and in some cases, return) from the country in 1994, and the violence of the genocide and war itself. Some respondents told us that contracting HIV made them 'sad'. Others had struggled with addiction, including alcohol addiction, and still others were or have been carers for those who suffer from the same.

97 Elderly woman in a focus group discussion, Bugesera (3 May 2019)

98 Elderly woman (not herself a survivor of the genocide) in an in-depth interview, Gisagara (7 May 2019)

99 Elderly man in a focus group discussion, Kicukiro (9 May 2019)

100 Elderly woman in a focus group discussion, Bugesera (3 May 2019). This woman had lost her husband and children to 'poisoning'.

Hearing this, another woman, her friend, replied:

*'I know her story [...] She spent a year without talking [...] a year without sleeping.'*<sup>101</sup>

These patterns are all remarked upon by those with professional responsibilities for counselling, psychiatry and well-being.

According to a Kigali-based mental health specialist, who was at the city's national stadium during the official mourning period in 2019:

*'In the course of the commemoration a woman became uncontrollably distressed [...] She was shouting, crying and she had to be removed [...] I was concerned so I followed and there was medical support available [...] She was heavily sedated and then I understood the plan to be that she would leave with those who had come with her (without further treatment or referral).'*<sup>102</sup>

The annual mourning period is important but, as one international health professional observed, 'for some, it is like the picking open of wounds that seep all year round without attention', adding that 'mental ill health of whatever cause is still a matter of great stigma'.<sup>103</sup> As if to confirm this, when researchers visited Ndera, the country's only specialist mental health facility and itself the focus of some 'fear',<sup>104</sup> it was 'surprising' to some staff that any interest was being shown at all in their client group. The pressures on their services were visible.

Ndera's psychiatric ward was over-subscribed, its large waiting area filled with more than 200 people. It has only two resident psychiatrists who also facilitate community outreach 'when possible' and contribute to the training and development of the next generation of specialists 'on a new course (recently started) [...] because there is a shortage'.<sup>105</sup>

Interviewees reported that epilepsy, drug and other addictions, brain injury and learning disabilities constantly run the risk of being conflated in common and policy parlance. These conditions and disabilities can in many contexts be rolled into a singular category of 'mental health' or 'mental disorder' and then be conflated with needs arising from loss, bereavement, trauma, psychosis and other severe pressures, by omission or through scarcity of resource.

According to the Rwanda Mental Health Survey of 2018, 225,000 people annually seek mental health help from public services but of these over half are for epilepsy and this figure also includes some learning disabilities. And yet depression is running at 12 per cent of the population, with 36 per cent of genocide survivors facing this illness. Only two per cent of those attending government services present with PTSD, although it is estimated that as many as 35 per cent of the country may be suffering with PTSD. A 2002 survey of genocide survivors found 87.4 per cent to be living with PTSD, with more research revealing the national figure for all Rwandans to be 30 to 35 per cent. By comparison the UK figure is five per cent, rising to 7.4 per cent among those who have seen military service.<sup>106</sup>

Across the lifespan as life review and transitions in meaning of self, work and family roles, and financial and physical insecurity play into the ageing journey, old shocks can re-emerge or existing ones become amplified. As early-onset and other dementias accompany the ageing process, it is likely that these will increase demand for psycho-geriatric support over and above trauma.<sup>107</sup>

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101 Ibid.

102 Interview with a mental health professional, Kigali (April 2019), who requested anonymity.

103 Ibid.

104 This comment was made to us by staff of this facility, but also by NGO professionals.

105 During the annual mourning period in April each year, existing (limited) resources are stretched further still, placed under significant pressure from the central government. At Solace Ministries, time is set aside during services for weeping, in a kind of collective outpouring of grief. Counselling is made available to visitors to the Genocide Memorial in Kigali, who may be experiencing distress. Moreover, the Council of Protestant Churches has, with German partners, run training workshops on mental health care for church volunteers.

106 Baker (2018)

107 The Rwandan government does not deny the prevalence of mental ill health. Indeed, it has a national Mental Health Policy, and mental health is addressed in the Ministry of Health's (2018a) *Strategic plan*. At the time of writing, new government initiatives are under development. However, greater precision is needed in order to clearly define the needs, design appropriate responses, and address stigma and fear, across all social sectors and in all localities.

Faced with this demand, just 2,000 psychologists and 14 psychiatrists serve the entire nation of Rwanda. This is one psychiatrist per 17,857 patients of the current patient load across all conditions and disabilities reported. This is despite the very low presentation rate by patients in the mental health category. And with most care being provided 'at home', these lived experiences intensify by class, life journey and locality.

As those currently aged 40 to 64 pass retirement age, pressure – or unmet need – may increase significantly. Either way, reflecting the trend of a 'greying of Rwanda', the total population of over-65s is set to increase threefold by 2050; by then, at present staffing levels, this would mean about 205,000 over-65s per psychiatrist.

There are clear current needs and a clear danger that mental health services will either fail or be overwhelmed in the next two decades.

### 3.6 'Home-grown solutions' for social welfare: successes and gaps<sup>108</sup>

*'The president instructs them to support the elderly. He loves people but in the local administration, at lower levels, people are not cared for in the same way. I think at the top leadership they believe that every old person in need gets support from the government but only a few [actually] get it.'*<sup>109</sup>

The priority focus of this report is how the church is responding – and could respond – to elder needs and potential. So, it was not part of the brief to undertake a full and systemic review of all of the energetic efforts made by the Rwandan government to build social protection and health safety nets for its citizens. Nevertheless, interview responses so often indicated that volunteer help, church thinking and need were regularly shaped by the local implementation of social welfare and health reforms that it ought properly to merit an initial assessment. Interview comments also shed helpful light on how that local implementation was faring. The picture that emerged was of heroic efforts, muddled narratives and an urgent need for education, training and additional support.

#### 3.6.1 Government reform

At the outset it was noted that the design of government policies to meet social needs in sub-Saharan Africa can often be characterised as 'who gets what, when and how'. Policies can also be characterised in relation to the manner in which they adopt, or otherwise, particular outlooks on development, with modernisation, dependency and neo-liberalism having more or less traction over time. A fourth dimension of this contested arena has been the call for an 'African Renaissance' and the attempt to reclaim indigenous narratives of very strong instinctive mutuality and reciprocity, over and against the rhetoric of 'catching up' with the developed world.<sup>110</sup>

By tradition and of necessity, the needs of elderly people, as set out above, have come to be particularly associated with intergenerational responsibility, 'African' narratives and Rwandan traditions of mutuality.<sup>111</sup>

Since 1994, the Rwandan government has made extraordinary and laudable efforts to build a social protection scheme with accompanying pension, health and other reforms. Pensions, as will be described, are relatively recent; health reforms have been at work longer. Today, the definition of individual vulnerability within the Vision 2020 Umurenge Programme (VUP) social protection scheme codifies the authorisation of entry points to both health insurance and care, in addition to a wide array of other public services and resources.

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108 There are strong home-grown features of Rwanda's reconstruction efforts. These are both contested as having been adopted for 'political legitimisation' and being qualified by ideas flowing from international consultancies and especially models of work developed by Partners In Health. For the purposes of this study, though, we accept the government's main narrative because it was strongly reflected in local discourses.

109 Elderly widow in a focus group discussion, Gisagara (7 May 2019)

110 Aboderin and Ferreira (2008)

111 The researchers had an extended discussion, on this topic, with anonymous church leaders in Kigali (4 May 2019).





❏ A majority of Rwandans are supported by agriculture. Those who have access to a pension to support them in old age comprise just 0.7–5.9 per cent of households. Photo: George Cuffley/Tearfund

These three strategies of pensions, social protection and health are central features of the government's pro-active attempts to mitigate the impacts of the deep poverty that faces so many citizens. Assessing their progress gives us important insight into the balances to be worked out between social institutions and between local and external approaches to priority-setting and policymaking. They also shed light on regional variation, pace of change, survival of enduring principles of duty, and the role of the traditional Rwandan narrative of older peoples' care.

### 3.6.2 Pensions

The government has worked hard to develop pension infrastructure, consolidating its efforts in 2015–16 regarding pension contributions for those in formal employment. According to the Rwanda Social Security Board (RSSB), the pension scheme originally aimed to:

- help the worker who becomes old and incapable of working for a salary or becomes invalid and incapable of living by working
- help the survivors of the deceased worker.

Individual workers are eligible for a monthly pension at the age of 65 years.<sup>112</sup>

About 48,363 Rwandans were receiving retirement pensions in 2006, roughly one-eighth of the over-65s. The amount of the pension paid is calculated, the government said, 'according to a formula that takes into account the level of wages earned and number of years of service in the formal sector'. The average monthly pension then was 3,477 RWF (4 USD).<sup>113</sup>

In 2019 a voluntary pension initiative, supported by short-term incentive funding for individual contributions, has been made available to the informal sector. Uptake has been slow.

112 Uwera (2013). An individual in the pension scheme can retire early, after the age of 55, if he/she has made pension payments for at least 15 years (Art. 124 of the Law on General Statutes of Rwandan Public Service).

113 Ministry of Finance and Economic Planning / National Institute of Statistics of Rwanda (2014). See also, Nyayieka (2017).

Overall, at present national adoption of all pensions by contribution is well below ten per cent and concentrated in younger-working-age cohorts.<sup>114</sup> Those who currently have access to a pension in old age comprise only 0.7 per cent to 5.9 per cent of households, depending on household type.<sup>115</sup>

Because pensions are relatively new and the financial sector is not yet diverse, annuities and equivalent financial products are hard to find. This means that pension payment generally takes the form of a one-off lump sum payment rather than acting as a long-term source of income in old age.<sup>116</sup> In turn this drives up the risks of resources running out early in the life course and ageing process, and poverty ensuing.

As new age cohorts enter old age, there is likely to be a lag of decades before even contributory pensions, where they exist, are able to meet projected demand. Meanwhile, debates in the Rwandan media have urged the government to bring the retirement age down from 65 to 55 so as to open up jobs for the young. Given the size of the informal sector, such a proposal would have no impact on the bulk of citizens entering old age while accelerating the likelihood of financial insecurity for those close to that age. If the government were to fund payments in perpetuity, it would advantage those in younger age cohorts over and above those in intense need in older cohorts. It might trigger large numbers of one-off payments being drawn, leaving those in their 50s at grave risk a decade or more later, as people lose the physical capability to cultivate and earn, to top up limited pension funds. It would also not address the underlying proportionate bias in VUP and health funding away from those who have contributed so much and are already 65 or more.

Unless they are very well established, older people who are currently unable to (continue) to work then face immediate scarcity, partly because support, especially from pensions, is not huge but mostly because the bulk of citizens were not and are not covered. Other than a very few who had served in the military or had a short spell working for a government body, pension income among this study's sample was entirely absent.

### 3.6.3 Social protection and the Vision 2020 Umurenge Programme (VUP)<sup>117</sup>

After the genocide, 80 per cent of Rwandan health workers were dead or had fled the country. Public services had collapsed. Courts were overwhelmed, civil society fractured. USAID described children, the infirm/disabled and elderly as 'exceptionally vulnerable'.<sup>118</sup> Facing this internal emergency the Rwandan government has sought to deliver exceptionally bold policy ambitions.<sup>119</sup>

The overall policy programme has been underpinned by social protection commitments to Rwanda's welfare needs. These, like the related health programmes described in the next section, have used community engagement as a source of labour and reach beyond the capital, but also as a means to legitimise reform and the approach adopted.

This government flagship interlocking social protection strategy, entitled Vision 2020 Umurenge Programme (VUP), was introduced in 2008.<sup>120</sup> It combines neighbourhood community mobilisation to identify and categorise social needs, with devolved local-level decision-making as to how protection resources are then distributed to households. The strategy is modelled – it is claimed – on the mutuality and support that were once sustained by 'traditional', pre-colonial Rwandan social institutions. The formal narrative of VUP is to build on the deep Rwandan cultural commitment to family and village welfare, care and mutual aid. In other

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114 Interview in central government (April 2019)

115 Sabates-Wheeler et al. (2018)

116 Ibid.

117 Lavers (2016), Ezeanya-Esiobu (2017), Food and Agricultural Organisation [FAO] (2016), and interviews with a number of local and international sources, who wish to remain anonymous.

118 Ezeanya-Esiobu (2017)

119 Elster et al. (1998) have described the task of designing policy in post-communist societies as 're-building a ship at sea', whilst attempting to stay afloat. The Rwandan government's work – across economy, war, diplomacy, refugee pressures, transitional justice, and social protection – might be described in similar terms. For a consideration of the external pressures upon Rwanda, see Power (2008), especially Chapter 10. There are, of course, dissenting voices that question the extent of the governments' achievement, such as Ingelaere (2016).

120 Under *Ubudehe* – a process of mass community mobilisation said to be rooted on long-standing Rwandan traditions of collective action – local government authorities are mandated to gather community members together and, with the help of facilitators/trainers, identify and place local households into different economic categories. According to the *Ubudehe* guidelines, the established steps of the process are as follows. Local volunteers receive training to conduct a survey of their community, which is meant to establish the level of poverty among them. The volunteers, with facilitators/trainers, consider the potential or likely root causes of poverty, and then construct a social map of the community, which displays the names of heads of households and the social/economic categorisation to which they assign each household.

words, it seeks explicitly to associate itself with the dominant narrative of familial and village care that is Rwandan and deeply African, rather than one of modernisation, globalisation or individual autonomy.

The VUP comprises a mix of support, including: paid public works; unconditional direct support for those unable to work; and a financial services component that promotes financial literacy and provides credit.<sup>121</sup>

The level and form of support to which beneficiaries have access is managed through a categorisation of local households. In practice, local volunteers are trained, sent out to undertake community surveys at the most local level, and then feed back a proposed category. Local government decision-makers then decide on the veracity of that proposal. Since 2015 a streamlined set of four categories has replaced the previous six for government use.

Where a household is categorised on the VUP scale has consequences well beyond that programme. Over time, the four VUP categories have also come to be the criteria by which families gain (or do not gain) access to the government's support across a wide range of complementary schemes. A household's VUP categorisation dictates where it sits in relation to the Girinka programme to provide households with cows, government subsidy for higher education fees, and charging levels when using the Rwandan mutual health insurance scheme.<sup>122</sup> The VUP has led to the creation of an integrated database to enable sharing of information between government departments and is the subject of strong international donor support.

Unofficially, in 2015 it was recognised that VUP's reach was not as widespread as had been hoped.<sup>123</sup> The wording of especially the 'top' category *Abatindi Nyakuja* – a Kinyarwanda term for 'those without hands and feet' – had attracted stigma to its beneficiaries.<sup>124</sup> Some older interviewees who were unaware that this phrasing has been changed still feared being placed in this first category.

At the time of writing, the government is again reviewing its VUP categories but also considering how mobilisation and allocation procedures for the whole policy might be improved.<sup>125</sup> Informally, there is recognition of concerns about petty corruption, the number of appeals against categorisations and centre-local issues in cashflow management.<sup>126</sup>

### 3.6.4 VUP gaps in recognising old-age vulnerabilities

What, to interviewees, seemed a rational policy at face value has so many challenges of implementation as to make it part of the very complexity that older Rwandans have to manage.

Interviewees repeatedly advised that entry into old age is directly and primarily associated with decline in economic productivity and decreasing physical capacity. Across government, church, young people and older people themselves, physical capacity stood out clearly as the dominant marker of what constituted 'old age'. Other forms of frailty, or age-related rights, are discounted.

Even so, in the top category of poverty, respondents said that even if VUP help was offered, they may not be able to collect the support due to them, because of their physical incapacity or because they did not know anyone who might collect it for them.

A local government leader closely involved in VUP implementation reflected perhaps a bias towards placing more households into categories that demand work for social protection payments when he observed that, when it comes to needs and provision...

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121 See Rwanda Agricultural Board (2013). VUP had a number of goals that suggested a risk mitigation approach to social protection, combined with one that aspired to create conditions under which those living at one level of poverty might be 'graduated' to less economically stressed positions and, in due course, out of the need for support altogether. For many families, military pensions, and preferential access for former soldiers and public servants to micro loan capital, add to the mix of what comprises the VUP.

122 This discussion draws upon Ezeanya-Esiobu (2017) and Chemouni (2018).

123 By 2014, *Ubudehe* coverage was running at six per cent of the country.

124 Notably, a recent study by Sabates-Wheeler et al. (2018) observed that 'quirk' in the survey tool used by community volunteers for economic categorisation, which conflated old age with physical disability, leading to older people being missed.

125 Reported in national media and confirmed in a private briefing by an external government donor (2019). This review will help shape a new Vision 2050 for the Kigali government.

126 Private briefing by an external government donor (September 2019)

### *'we are interested in those who can do things'.<sup>127</sup>*

Similarly, a 2018 Sussex University study observed a 'quirk' in the Rwandan survey tool used for the classifications in the VUP which conflated old age with *all* forms of physical disability. Sussex discounted the materiality of this 'quirk', though, because they felt the government surveys of older Rwandans that they saw bore comparison with other countries east of Rwanda that have 'more nuanced' survey tools.<sup>128</sup>

The findings of this study, however, suggests that any seeming 'quirk' is actually likely to be rooted in deep social norms that shape its discussion and use. The (stigma-free) differentiation of economic productivity due to age, mental ill health, disability, dementia, physical incapacity, household structure and entry into the years post-65 is a highly skilled task requiring extensive community and professional training. In Rwanda it is done by community mobilisation in localities where widespread stigma and rich linguistic variety are in play.

In Kinyarwandan, someone can be over the age of 65 and still be *umusaza* (male) or *umukecuru* (female): in other words, older but active. Before 65, some Rwandans can be physically or mentally incapable due to disability or mental ill health but still not be *abakambwe*, meaning old, frail and having parental responsibilities.<sup>129</sup> Parental responsibility in turn can play into definitions of 'age', irrespective of illness or capability.

Discerning these nuances to ensure classifications are correct has implications for training, for government support, and for making sense of households' ability to cope with the scale of the particular need they face. If nuance is absent, those in dire need of support can be categorised as not needing help or pushed into a lower category. It also has bearing on the question of who else might safely become involved in providing assistance. For local pastors and church leaders, it is developing as a pastoral concern which they often feel ill-prepared to address.

Based on the needs expressed in this research, and participants' lived experience of the VUP, older people live in social realities where their needs may be greater than in other East African contexts because of their prior experiences. The fact that these are not recognised is made worse by the survey tool and is then compounded by skills gaps, language nuance, informal stigma and needs that go beyond just the physical. These were clear in the needs and narratives of the older people interviewed.

In 'lower' VUP categories, interviewees reported facing further blockages. Payments to these older people are often 'by results' and in return for works undertaken in the neighbourhood. The more vulnerable the older person, the longer the work takes: hypertension-related dizziness, bone aches, headaches and low mood all militate against allocated tasks being completed speedily. The more vulnerable the elderly person, the more the work adds to health burdens. The slower the work is done, the later the payment and the more likely a cashflow problem for the older person. Payment typically comes, interviewees explained, two weeks after work has been completed. The resulting extreme pressures on elder-led households in the VUP were everywhere, so even those in lower categories could move in and out of more severe need without formal recognition of those pressures.

Despite huge progress overall, our respondents described a conundrum at the heart of the VUP and associated schemes to date, a severe 'grey gap' that will need to be filled. Among other consequences, this impacts on the likelihood of their accessing critical health services and the timeliness or likelihood of support.

### **3.6.5 Health *mutuelle***

Payments by patients were always a feature of the pre-1994 Rwandan health settlement. For a short time after the genocide, health care was free but tight government budgets meant that the option of charging had to be re-examined. Impressed by the success of insurance schemes trialled in Zambia, the government opted to establish a pioneering *Mutuelle de Santé* – an insurance-based approach – involving compulsory contributions, community mobilisation and exceptional political support across departments of state.

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127 Interview with a government official during an observation walk (2 May 2019)

128 Sabates-Wheeler et al. (2018)

129 Pype (2018)

Pitching the innovation to international donors as a crosscutting initiative aimed at a step change in health coverage in the face of poverty, it secured funds to roll out its pilot phase nationally.<sup>130</sup>

Locally, as with the VUP, the government sought to emphasise Rwandan traditions of self-help: ground-breaking combinations of small-scale technology use and community mobilisation have been aligned with successful collaboration with international donors. Physical health indicators and child mortality improved dramatically, and very significant relocation of orphans from institutions to community settings was set in train. Backed by strong ministerial encouragement, the appointment of 44,000 community health workers across every locality and some very forceful local action, the scheme expanded and health outcomes improved.<sup>131</sup> In 2011, community-based health premiums were linked to the categories of the VUP.<sup>132</sup> By 2016, it was the highest enrolment health insurance by coverage in sub-Saharan Africa, 'setting Rwanda on the path to universal health coverage'.<sup>133</sup>

Developing the government's vision further still, the latest Rwandan health strategy was launched in 2018. It aimed to build on original progress and was designed around the contributory insurance model, with a system of decentralised health centres with upward referral rights to regional and national centres of excellence. While insurance coverage had risen to 95 per cent, according to government claims, 17 of 30 sectors of the country still had no health facility.<sup>134</sup> The strategy expressed an ambitious desire to lift national per capita health spend from 36 to 60 USD over the subsequent six years, while reducing the percentage of household incomes spent on health to ten per cent. Moreover, in a country where car ownership is not the norm, the government was anxious to reduce the walking time to the nearest health facility from the 56 minutes of its baseline (2016) to 45 minutes by 2024. Ground ambulance coverage would remain at around one per 50,000 of the population.<sup>135</sup>

And yet in all of the elderly people's focus groups and interviews for this research, there were respondents without health cover for themselves or their household.

Those outside Category 1 of the VUP are required to pay a premium of 3,000 RWF (3 USD) per annum for each household member. Under current policy, if one member of the household has not paid their premium, the whole household is not insured. In other words, the whole family is required to pay *mutuelles* premium for any single family member to be covered.

This household approach militates against cover for many key groups of elderly people interviewed including:

- the many older people heading a household where they are the carer for working-age adults seemingly able but actually too mentally unwell to work
- those older people acting as carers in other ways for informal foster children, the children of now-absent siblings, and children and neighbours
- those older people who live in areas where VUP implementation has not been successful so as to help their household income, or where the levels of appeal against categorisation are very high.

A large number of respondents hobbled on makeshift walking sticks; limped; had badly healed bone breaks, poor eyesight and high blood pressure; and could not even cross a room in their dwelling. For these people, even successful insurance coverage or payment would make no difference because of the absence of the capability, means or resources to travel to clinics and hospital, or to fund medication upon treatment.

Many households visited, even those beyond VUP Category 1, had no financial income at all and literally relied on neighbours, ad hoc funds from distant relatives or neighbourhood whip-rounds. When health needs arose, lack of resources combined with the other factors above could provoke extreme panic when support was needed at speed.<sup>136</sup>

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130 Ezeanya-Esiobu (2017) and Chemouni (2018)

131 The pressure on local officials to maintain high *mutuelle* membership has led to the use of swift, and at times harsh, methods, including arrest, confiscating livestock, banning entrance to local markets, or denying administrative documents to the non-bearers of *mutuelle* cards. In one instance, local officials did not hesitate to steal money from a community health workers' cooperative in order to pay for the population's CBHI and keep the enrolment rate high (Ezeanya-Esiobu, 2017).

132 Ibid. See also Ministry of Local Government [MINALOC] (2011).

133 Chemouni (2018)

134 Ministry of Health (2018a)

135 Ibid.

136 Based on feedback from respondents across all interviewed groups.

### 3.6.6 WHO support, the 'OneHealth Tool' and the new national health strategy: deprioritising older people?<sup>137</sup>

In developing and planning its post-2018 phases of innovation, the Rwandan government followed over 40 other countries in adopting a planning software package commended by the WHO. Named the 'OneHealth Tool', it is significant for a number of reasons:

- In its development for launch in 2012, OneHealth sought to 'lever [...] the best components of the different tools that currently exist'.<sup>138</sup> This meant that the launch version was focused on maternal and child health interventions (including malaria and nutrition), HIV/AIDS treatment, TB, and water and sanitation. This meant that it did not include highly developed detail with regard to older people and, at the time of the development of Rwanda's plan, its modules were incomplete.
- More sensitively, OneHealth uses 'disability adjusted life years' (DALYS) assessments to calculate whether health spend to secure positive impacts is 'worthwhile'. DALYS are widely recognised as a health metric sitting at the heart of the Global Burden of Disease survey. However, DALYS have been widely criticised when they are weighted for age insofar as they are seen to discount the value of interventions to improve elder (or some child) health because of the likely lifespan or productivity limitations that beneficiaries are said to offer in return.
- The WHO officially ceased to use age-weighting in 2010. At the formal level, OneHealth's team advise that their tool does not use age-weighting either. However, its technical manuals seem to suggest that the emphasis in its underlying direction of travel is not consciously inclusive of a positive view of older people, their contributions and their needs. And in writing up the recent development of the tool's module for non-communicable diseases, the team responsible provided links to evidence and data sets on the WHO website that enable those using the tool to include age-weighted assessments in their planning, should they so wish.

The role of OneHealth in relation to older people across several countries merits further detailed study, which falls beyond the remit of this report.

Nonetheless, something seems to have happened locally, at the planning stage, to give immediate cause for concern in the case of Rwanda. While the narrative for the nation's new health strategy for 2018–2024 talks up investment in older people for the first time – especially through palliative care – the accompanying financial plan allocates the bulk of its financial priorities to those in the youngest age cohorts.

In the same strategy, the description of a new 'life course' approach to health policy is welcome. But it then seems to suggest that the best health spending for a healthy life after 65 should be achieved by concentrating investment almost exclusively in the early and middle parts of the lifespan. Indeed, the most explicit strategic reference to old age explains how early investments in health will enable older people to work longer (than ever) into old age.<sup>139</sup> Even planned investment in non-communicable diseases, which might often be used as a proxy for some conditions faced especially by older people, is heavily focused on those under the age of 40.<sup>140</sup>

As civil society contributions, the VUP and the health strategy are further refreshed in dialogue for the period beyond 2024 and towards Vision 2050, there are significant learning and conversation points in these findings.

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137 This commentary draws upon WHO (2019a) and WHO (2019b). For applications of the OneHealth Tool, see Chisholm et al. (2017) and Cantelmo et al. (2018).

138 See Avenir Health (2019). More than ten attempts were made to contact the OneHealth team(s), with zero response.

139 Ministry of Health (2018a)

140 Ibid.

# 4 LAND OF A THOUSAND HILLS AND THOUSANDS MORE CHURCHES

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## 4.1 Critical institutional mass for an ageing future

The previous sections described in detail the social needs reported in the course of interviews. They then assessed aspects of the social and policy environment, and recorded the lived experience of those using those schemes.

Aside from providing insight and learning into the extent and nature of older people's interactions and struggles, the research provides churches with material for ethical, theological and practical reflection: Which policy gaps are of ethical concern for the nation? Which might benefit from church support at the national as well as the local level? How might national church networks and national church headquarters be better prepared and better trained to become partners, agents and advocates in their own right as Vision 2050 is moved forward and as the number of older people in Rwanda increases?

The process of such reflection is significant in its own right, but also because of the potential positive critical institutional mass bound up in the variety of Rwandan Christian bodies. For example, Kigali Anglican Diocese, a Tearfund partner, has 30 schools with 400 staff and 26,000 students.<sup>141</sup> In addition, the Anglican Diocese sustains a vocational training college, and 408 saving groups with 7,289 group members (2,358 male and 4,931 female); these groups have a total of 35,263,851 RWF saved (38,000 USD) and 38,394,481 RWF (40,000 USD) in loans, with 68,698,759 RWF (75,000 USD) of investments made in livestock, land and other small business. The Presbyterian Church of Rwanda runs 117 schools, has a training centre for street children and has engaged in campaigns to bring water and electricity supplies to some of its 153 parishes.<sup>142</sup> The Seventh Day Adventists are one of many denominations with a university that is running or under development.<sup>143</sup> Tearfund has done outreach and capacity building in congregations of these denominations and others, including growing Pentecostal, Baptist and independent churches. So this concentration of engagement represents a significant starting point of community access, goodwill, social capital and willing partners from which to build savings, education, advocacy and practical assistance campaigns for those who are old and those who want to plan a sustainable old age.

Part 4 concerns the churches themselves: their strengths, current contribution and weaknesses. The following sections explore older people's experience of the churches, their support and pastoral care. It identifies very many congregations and individuals making hugely valuable contributions, while also describing others struggling to make sense of, and address, gaps in their own role and performance. At times, this performance is inspirational; at others, it is a source of grave concern, even at times presenting direct safeguarding risks to older people.

Like aspects of government performance, it needs to be celebrated and it needs to be improved. The worse elements need to be halted altogether. To recognise more fully the current position is an important place from which to begin to plan and discuss anew.

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141 Anglican Church of Rwanda (2019)

142 See Eglise Presbyterienne au Rwanda (2019).

143 See Adventist University of Central Africa [AUCA] (2019).



☐ Dancing in a church in the Kigali diocese. Across focus groups, church emerged as a community in which to take part and be noticed, and as a gathering of people who offered conversation, laughter, practical help and song. Photo: Marcus Perkins/Tearfund

## 4.2 Trust, hope and the church<sup>144</sup>

Interviewees strongly expressed the view that churches attract very high levels of social trust: they can be vehicles that bring great hope through their pastoral work, community links, and spoken words as well as written scripture. They are locations and channels to maintain and encourage consolation and mutual support, for well-being, and a means to take part in local life. They are facilitators of reminiscence and conversation.

*'When I am sad, I read the Bible. When I have sleepless nights, I read the Bible and when I am tired, I can sleep.'*<sup>145</sup>

and,

*'If I didn't pray, I would lose my mind. When I feel lost it is the Bible that gives me hope, otherwise I would lose my mind [...] There are days when I feel I am going to lose it.'*<sup>146</sup>

*'In the genocide, all my family was wiped out and I was left alone: my children, my in laws, everyone [...] so I worked much in the church. I was a preacher, and we preached the gospel.'*<sup>147</sup>

Respondents described 'feeling lonely' but overcoming 'so much pain' by discovering 'joy' in faith. One elderly blind woman described how Jesus was now the person with whom she shared 'everything' because:

*'I (now) cannot even see what is coming in front of me [...] I see many people, who are in a dark place. I have become blind. Apart from praying to God, I am no longer able to do anything.'*<sup>148</sup>

144 This section focuses on hopes and needs in community contexts and not on the governance of churches. With regard to the latter, we identified very particular issues relating to clergy pension provision and church finances, which are described and have significant implications for local development and international development action.

145 Elderly widow in a focus group discussion, Gisagara (7 May 2019)

146 Ibid.

147 Older man in a focus group discussion, Gisagara (7 May 2019)

148 Ibid.



*'The one thing that made me happy and satisfied my heart is to receive salvation through Jesus Christ. I was a widow with no husband, but it protected me.'*<sup>149</sup>

*'Knowing Jesus [is] [...] the greatest joy.'*<sup>150</sup>

The combination of scripture, prayer and singing clearly brought great psychological benefits to many individuals who were interviewed:

*'Every Sunday when I go to church, I always feel young because I sing, even though I am not in the choir [...] When I am talking to God, I feel young again.'*<sup>151</sup>

*'If I were to tell my entire story, it wouldn't end, I wouldn't end. Before I used to be a person living in depression but through the church, I have been set free, transformed. I no longer live in pain.'*<sup>152</sup>

*'We get visitors and we visit others. We meet our elderly friends [many are speaking at the same time] and have conversations with them. We talk about how we can build our nation. We also discuss how the things that happen in this country should not happen again.'*<sup>153</sup>

*'We feel welcomed. They give us seats as elderly people. We are respected.'*<sup>154</sup>

Church emerged across focus groups as a place to visit, away from cramped or empty dwellings, as a community in which to take part and be noticed, as a gathering of people who offered conversation, laughter, practical help and song. Scripture offered solace, Bible reading groups comfort and company, and 'salvation' – a form of hope that many interviewees described as having been absent from their lives.

It was noted above that observations have been made regarding 'mind-body-spirit-place' distinctions converging in the outlook of studies of older people and mental health. This interplay was present in all focus groups. It was often the basis for legitimization of churches and pastors as friends, allies and potential helpers in times of need. It was the mode through which pain was expressed when joy had entered lives or when the church was perceived to have failed its members and neighbourhoods.

The *potentiality* of the churches – subject to removing occasional weaknesses and failings – to do more with, for and alongside older people was consequently strongly affirmed.

The challenge, respondents asserted, is for the church to understand those hopes and needs and fulfil the richness of that potential.

### 4.3 Song: stories and spiritualities of consolation

Each individual interviewee and focus group was asked if they had a favourite Bible verse. Despite all they had experienced, there was little if any talk of 'hell' as a disciplining force for mutual support, care or fear such as that Aboderin had found in her study mentioned above.<sup>155</sup>

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149 Elderly widow in a focus group discussion, Kicukiro (9 May 2019)  
150 Elderly widow in a focus group discussion, Gisagara (7 May 2019)  
151 Older working man in an in-depth interview, Bugesera (3 May 2019)  
152 Elderly woman in a focus group discussion, Bugesera (3 May 2019)  
153 Older man in a focus group discussion, Gisagara (7 May 2019)  
154 Ibid.  
155 Aboderin (2004)

Again and again, scripture was used by interviewees in distinctive ways, very often as a means to reclaim tranquillity, assert identity and articulate hope and empowerment.<sup>156</sup> In the case of elderly people this was not in any way related to ambitious goal-setting or to any underpinning theology of prosperity or expectation of financial rewards for their faithfulness, as had also been observed in previous studies recorded above.

One woman interviewed was unable to walk, housebound, isolated, bereaved, disabled by beatings during the genocide, widowed, and remarried to a man who was also vulnerable and with no income. She said:

***'God is my only friend [...] because there is no friend of people like us.'***<sup>157</sup>

It is not an understatement to observe that, in the way respondents articulated their favourite scriptures and prayers, they showed:

- deep discernment of the struggles, trials or tribulations that they had or were facing
- a need for comfort, consolation, liberation and hope
- that scripture, song and conversation provide reasons to meet
- the means by which elderly women had learnt to read, and the value of these passages in helping them talk of the past and interpret the present.

The Bible was the only book in most houses the researchers visited. They spoke of the loss or deterioration of sight or the breakage of spectacles as much more than the loss of an ability to read the text: rather it represented the loss of a lifeline of immense value.

In one group where there was a shared love of a verse describing survival in the 'valley of death', there was also an affirmation that came from the promise: 'Call upon me and I'll answer you.'<sup>158</sup>

***'I thank God he took me out of alcohol addiction and gave me salvation [...] It's a big thing [...] Nothing makes my life miserable anymore.'***<sup>159</sup>

Respondents described depths of despair, struggles towards meaning, narratives of hope, and feelings of desolation and sheer resilience through these scriptural texts. It was clear that for all the wrong turns that parts of the churches may have taken in the past – including petty corruptions and indifference to discrimination and genocide – faith and religious observance were still part of the song by which elderly people made sense of their lives and their nation. There was a strong sense that elderly people pressed deeply into personal faith irrespective of – and sometimes despite – any failures of local church leaders or the wrongdoings of the churches as community institutions. They did so despite also the gaps in social and other support that they faced:

***'I do not lose hope or sink in desperate thoughts because I know that God helps me in everything, and he does everything for me. There is a Bible verse, Isaiah 41:10: "So do not fear, for I am with you; do not be dismayed, for I am your God."'***<sup>160</sup>

This deep identification and consolation heightened their solace. As a subsequent section records, it could also add to their vulnerability when it is abused.

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156 For example, in a focus group discussion in Kicukiro (10 May 2019), participants shared their favourite verses, which included "'Call to me and I will answer you'" (Jeremiah 33:3), and 'So do not fear, for I am with you; do not be dismayed, for I am your God' (Isaiah 41:10). In addition, one participant shared verses from Psalm 23: 'The Lord is my shepherd, I lack nothing [...] Even though I walk through the darkest valley, I will fear no evil' (Psalm 23:1, 4).

157 Older woman in an in-depth interview, Bugesera (2 May 2019)

158 A focus group discussion, Kicukiro (10 May 2019), who referenced Psalm 23:4 and Jeremiah 33:3.

159 A focus group discussion, Kicukiro (9 May 2019)

160 Elderly non-working woman in an in-depth interview, Bugesera (2 May 2019)

## 4.4 Participation: Church and Community Mobilisation (CCM)

### 4.4.1 Early adopters: pastors and churches engaged with older people

The Tearfund Church and Community Mobilisation (CCM) programme in Rwanda works with more than 2,000 churches nationwide. It takes the form of an intensive community development approach channelled through, and integrated with, the worship, prayer groups and practical strategies that local congregations sustain. It identifies needs, provides training to build capacity, facilitates action and long term creates the conditions where congregation members and the church can act as a local community resource and anchor for the whole community.

Although CCM and the associated Light Wheel tool are not deliberately designed explicitly to do so, it was discovered that in some localities the needs of older people had been so pressing that as the church had set about the CCM process, older people's needs have been highlighted and driven up the agenda. In one place this had happened deliberately and in others it had occurred spontaneously as the gravity of needs was recognised.

In one church older people had been identified as an essential constituency for representation on the church council. There were examples where congregation members had deliberately been mobilised to build houses, repair roofs and undertake cultivation for vulnerable older people, as well as bringing them cooked food.



#### CASE STUDY 3

### Awareness-raising of older people in CCM processes

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One of the effects of organising events for older people (not just the youth) in church is increased awareness of their importance in the congregation and community. This is exemplified in the festival for older people organised by one church (see case study 1). After the festival, the church board decided to organise a similar event at the church every six months. Tapping into community resources, some people with cars committed to volunteer to pick up those older people who could not walk to church. According to CCM coordinator Pastor Jean de Dieu, who had initiated the festival:

*'Everyone at church realised the importance to recognise elderly [people] because everyone will eventually get old.'*<sup>161</sup>

One church member said:

*'If the church does not nurture a good culture of honouring [the] elderly, and neglects them, myself I will regret [it] when I get old.'*<sup>162</sup>

Another church member said:

*'Why do we neglect them when they are the ones who laid the foundation of everything we are proud of?'*<sup>163</sup>

One of the older people participating in the event reflected:

*'I knew Jesus loves children, but I also see that through his church, he loves the elderly too.'*<sup>164</sup>

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161 Email exchange between Jean de Dieu Munguyiko and one of the authors.

162 Ibid.

163 Ibid.

164 Ibid.

In another locality older people had come together in a self-help savings groups to pool their resources. The revolving loan and savings approach they had adopted had created the situation where a few had been able to accumulate enough to cover their health insurance premiums.

Choir members described how, after rehearsals, they would adjourn to cook elderly people a meal or fix their roofs. Other said they appreciated mothers groups as places to share concerns.<sup>165</sup> Others told how, during periods of family illnesses, intercessors would spend the night with older people who were acting as carers to offer assistance. During the daytime they would help them cultivate. Elsewhere some had got together to establish an older people's saving scheme, which today has 93 members.<sup>166</sup> One extremely vulnerable woman told the researchers:

***'Because I survived the genocide there is a period when they organised to come and visit with food stuffs. A few days ago, I did not have a toilet, the church members came, and they built it for me and gave iron sheets for the roof. Yes, the church respects and honours and takes care of the elders.'***<sup>167</sup>

Other participants said:

***'In our church, we decided to help someone who didn't have a house. We made mud bricks and people from outside came to support that initiative and the local administration supported us with iron sheets for roofing [...] We partnered with government leaders.'***<sup>168</sup>

For older people, whether a church-going member or not, the appreciation of practical help extended by the church was immediate, and for the church there was an impact on thought and practice too. Older people described how the 'transformed' church was more pro-active in its support. Some of this support was life-changing, not least as older people described how they had been supported through problem drinking, relationship collapse, financial crises or illness.



Alphonsine, Augustin, Frida and Diogene look over the accounts of their self-help group at Kagarama Parish Anglican Church. One way in which the group have used their collective savings is to pay for health care for all members' families. They hope to be able to do the same for vulnerable people in their community too. Photo: Tom Price/Tearfund

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- 165 A focus group discussion, Bugesera (4 May 2019)  
166 Older man in a focus group discussion, Bugesera (3 May 2019)  
167 Older non-working woman in an in-depth interview, Bugesera (2 May 2019)  
168 Older man in a focus group discussion, Bugesera (3 May 2019)

*'I lost my husband and children. Had it not been for the church, most probably I would have been a mad woman on the streets [...] It has changed our lives.'*<sup>169</sup>

Among the many one-off, spontaneous and repeated practical modes of help arising from congregations or organised within and beyond them are those listed in Figure 7 below. At times, these were described as literally life-saving.

**Figure 7** Areas of practical help extended through church members to older people



Often, pastors described these achievements nervously, and amid joking and laughter, almost as if they were surprised at the positive impact they had been able to have. However, there was a recognition that the CCM process had caused them to be more aware and to pick up on vulnerabilities that they otherwise might not have recognised. This had led one pastor, as noted, to include older people on the church council, another to bring them together for mutual support, and others to be much more aware of the isolation and loneliness that could be felt even by those who attended services.

In conversations, each act of naming a concrete positive response in one locality shed additional light on the absence of a response in another, even in the work of the same pastor, not to mention the wider church and neighbourhood. Conversations could be difficult amid realisation and counter-realisation that needs were being addressed or were still unmet.

#### 4.4.2 Empowerment across generations: CCM, self-help groups and the future of ageing

A very substantial and core feature of Tearfund's CCM Rwandan programme is the mobilisation, training and support of hundreds of self-help groups (SHGs) which act as savings groups.

SHGs work by bringing together people from congregations within one cell and sector, or across several. They meet for prayer, Bible study, skills training, financial literacy development, mutual support and company. They carry within them an openness to save – and, as the research gradually uncovered, to save for old age – to volunteer and to build relationships and shared cultures of collaboration. So, they are conceivably a key element in how churches might facilitate a variety of actions to mitigate old-age risks in the decades to come.

SHG members interviewed were young and made their livings from a wide variety of trades in the informal sector. These included: masonry, drilling, sorghum-dealing, sorghum-beer-selling, cultivation, growing bananas for sale, and mining. Some were young mothers or fathers, several were carers for disabled siblings.

169 Older woman in a focus group discussion, Bugesera (3 May 2019)

All set out the scarcity of their means and the 'hard' struggle to make ends meet. Their responses, however, suggested they were developing habits and behaviours that may mark generational change.<sup>170</sup>

Each of the groups described how together they sought to save 'the coins we waste'. Other quotes pointed to this thrift:

***'[It is a] little money but now we save it and when it's time to collect the money, it's a lot of money.'***<sup>171</sup>

***'The reason why I got involved [...] is because I give money in instalments (to save) but when I get it, it is a considerable amount. For example, with 50 000 RWF I can buy a goat and make a profit. I wouldn't have got the money together at once [...] For someone in the savings scheme, even one coin is not wasted.'***<sup>172</sup>

Some had saved small sums over time but had been able to make very significant purchases. One young woman shared how she had saved enough to be able now to build a house:

***'When I joined, I didn't own a house. Later I bought a piece of land.'***<sup>173</sup>

Another said:

***'At the end of the year (of saving) I managed to pay the community health insurance for my whole family and me.'***<sup>174</sup>

A mixture of savings and loans made this possible and differentiated the group from other lenders who would not provide funds for health insurance.

***'The group is very important for us. We might wait up to nine months for our turn to use the money but when your turn comes you can take your child to school, you can pay school fees, use it for other problems at home. For example, some of us had no electricity and dirt floors but after getting the money, we got connected to the grid.'***<sup>175</sup>

The teamwork and encouragement deep within these groups make a significant contribution to their success. In one group that meets weekly and where members seek to save in multiples of 500 RWF (0.5 USD), there had been personal breakthroughs:

***'It's because they encouraged us [...] It changed our lives [...] It took us from poverty [...] We can now think bigger.'***<sup>176</sup>

The benefits of membership, though, were not only financial. Because members are not all from one congregation but from churches across a sector, belonging to a group also built friendship and social capital and created networks of encouragement beyond immediate localities:

***'If you're not a member of the group, you can't know all these people. It's brought us together.'***<sup>177</sup>

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170 Examples taken from across the SHG focus groups.

171 Young person in a focus group discussion with members of a savings group, Bugesera (2 May 2019)

172 Ibid.

173 Ibid.

174 Ibid.

175 Ibid.

176 Ibid.

177 Ibid.



☐ A meeting of a self-help group in the Gasabo district of Kigali. Most of the self-help group members interviewed for this research (not pictured here) were young. However, they expressed an openness to save for their own old age, and to build relationships and cultures of collaboration that could encompass older people in their communities. Photo: Maggie Murphy/Tearfund

*'It's also in the spiritual dimension we grow. When we meet, we first learn the word of God so I can say that I make progress in tangible things but also grow spiritually, socially, intellectually, emotionally.'*<sup>178</sup>

For some, belonging to the group was the equivalent to extending their family, and members would bump into each other at weddings, church and community events.

One woman spoke of having lost self-confidence in the face of domestic travails only to rebuild her life and her marriage and to secure a modicum of financial independence with the group's support. 'Our life at home,' she said, 'has improved so much.'<sup>179</sup>

Sometimes membership of the group had provided the conditions for the wider church to help collectively and individually.

*'Especially for us women, it took us out of loneliness [...] We learnt a lot and acquired much knowledge.'*<sup>180</sup>

*'I used to be very poor; I could not afford to even have soap [...] I had no house, I was living in a tent [...] The church supported the savings group and because I was a group member, I built a house and I'm still working on it.'*<sup>181</sup>

Many group members were volunteers in the community. Others were active in church and others provided support for extended family members.

*'In the group I lead, we like to visit the elderly, we send children to get firewood for the elderly and we go to cultivate.'*<sup>182</sup>

178 Ibid.

179 Young person in a focus group discussion with members of a savings group, Bugesera (3 May 2019)

180 Young person in a focus group discussion with members of a savings group, Bugesera (4 May 2019)

181 Ibid.

182 Ibid.

While SHG members, on balance, were not convinced that older people were consistently honoured by the church, they were sure that young people are. Most of them knew old people who were working long after 65. And they were keenly aware of how much older people can struggle even if they (the young people) had little or no awareness of pensions, pensions-saving or how they might access such opportunities.

One participant said they had not joined a pension scheme because they didn't 'have enough information about it'.<sup>183</sup> When asked if pension education, training and saving should be added to the work of the SHG, there were expressions of interest and enthusiasm, and no opposition.

*'I didn't know I would be alive today [...] By [God's] grace, I can do savings today so that I will have a period of retirement.'*<sup>184</sup>

*'We are healthy, whole, we have both arms and legs, we also have a church and we are saving, preparing for the future. In our old age we'll be sustained by what we did when we were young.'*<sup>185</sup>

One or two had an awareness that the wider Christian family beyond Rwanda might assist in building on this hope:

*'You know the church is a large institution and it also has programmes that are sponsored from outside the church and so all those projects supporting the church can also support the elderly.'*<sup>186</sup>

That said, they felt responsibility for theirs and others' old age should be the responsibility of 'the family', 'the church', 'neighbours' and 'government'.

The idea of partnership was a recurring theme:

*'When the government honours [the elderly], the community follows that example.'*<sup>187</sup>

With their strong roots and reach in the informal sector, and their close alliance with congregations at the grassroots, the large number of self-help groups are a powerful force for positive support and behaviour change in the future. Combined with the wider critical institutional mass of Christian institutions, they are a significant Rwandan asset.

## 4.5 The financing of the church: weak governance, training and elder abuse

The research team had plans to explore pension provision and the role of churches in supporting congregational members in old age. However, the conversational pathway of enquiry that interviewees opened up spontaneously led to a series of sensitive topics, issues and concerns which the next sections now record. Rwanda's churches were affirmed as having great potential but within that potential are some areas for improvement.

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183 Young person in a focus group discussion with members of a savings group, Bugesera (2 May 2019)

184 Young person in a focus group discussion with members of a savings group, Bugesera (4 May 2019)

185 Young person in a focus group discussion with members of a savings group, Gisagara (6 May 2019)

186 Young person in a focus group discussion with members of a savings group, Bugesera (4 May 2019)

187 Young person in a focus group discussion with members of a savings group savings, Gisagara (6 May 2019)



## 4.5.1 Narratives and practices of church 'growth', clergy income, authority and governance<sup>188</sup>

Rwanda's churches, like its economy, are seeking to grow. In this aspiration they have a shared vision with especially evangelical and Pentecostal churches across the continent of Africa, and globally.

One church leader explained that while the family and community of his denomination was growing across the country, it was doing so at a pace that was outstripping resources. In response it had adopted a model of sending pastors to open congregations to build churches in new areas where they would be expected to stay for a long time. This enabled them *'to acquire land and to have an ability to farm'* but also meant that for any financial means they were entirely dependent on their congregation who in turn might be among the most vulnerable.<sup>189</sup> In another denomination pastors reported that repeated changes of assignment reduced their ability to cultivate, sometimes compromised their pension provision and ability to provide for their families, and required them to seek more resources from congregation members who are themselves already under pressure.

In some denominations, the further the researchers travelled from the major cathedrals and church headquarters, the less likely it was that pastors worked full time. This was because the local church clearly could not sustain the cost of a full-time minister. S/he would have to spend time cultivating or earning a living, for example by boring water holes and doing building to make ends meet. It was clear in these circumstances that pastors and their families could also struggle to make the domestic books balance. Some did better, to the extent that they were even able to run a car or have small businesses on the side.

Church headquarters required them and their congregations not only to fund local apostolates but also to make heavy contributions to the church's central offices from their local congregational giving as a matter of course.

## 4.5.2 Tithing, offerings and elder abuse

This is not to say that regular giving by even the poorest of Christians was not accepted as being a welcome opportunity to contribute, to play a part in building a community, and to signify service to Christ himself. More than acceptance it was described as rewarding, a joy, a duty and a necessity, and as giving a deep sense of belonging and participation as well as spiritual fulfilment.

Tithing was fully accepted as a duty. Crucially, it was seen by the respondents as a method by which they could express their agency, their belonging to the church and their gratitude to God who was often seen as their prime ally. Its implementation, though, also provoked argument, anger and terror among elderly respondents. Conversations revealed that, when badly or inappropriately managed, the practice of tithing, along with other forms of fundraising and offerings, could in some instances become an unbearable burden for congregations and their pastors alike.

In at least one church or congregation in every locality visited, older people interviewed expressed their sadness, anger, frustration and grievance, sometimes very explosively, regarding their treatment with regard to money and the church. This fury was unsolicited and, as in cases of elder abuse in families, it was accompanied with profound fears of there being repercussions if it was discovered that they, the older people, had even raised the topic.

The three areas of concern that were raised with regard to Reformed, independent and Pentecostal denominations related to practices of tithing in general, expectations of additional gifts for denominational capital projects outside of the area, and the role and purpose of one-off or regular giving for the needy. In each case, reservations were expressed about:

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188 Although 'ecclesiology' is referenced below, the decision has been taken not to use the term here generally. For those in development debates, 'governance' is a common term; for those with backgrounds in management the discussion might look like one about theories of organisation. Every idea, metaphor or structure of church, however, is linked to ecclesiology – the application of theology to church structure – and there is a 'politics' as well as a safeguarding set of questions that arises from its omission and inclusion. See Borer (1998). The Dutch organisation Porticus ran a major project on these topics in the mid-1990s under the leadership of Rev Dr Kenneth Wilson at Birmingham's Queen's Foundation.

189 Anonymous church leader, interviewed in Kigali (4 May 2019)

- pressure being exerted horizontally (by others in the church) and vertically (by ministers) to give *financially* even where households had almost no financial income
- clarity of purpose for which some gifts were being solicited
- scarcity of reporting, financial information or other communication on where and how the money had been spent or invested or what returns or impacts it may or may not have had and for whom.

Some respondents – provoking focus groups to effervesce with comment – trusted church leadership, saying:

***'We cannot tell them how to spend it [...] It is their right.'***<sup>190</sup>

Others wanted the funds to be used to...

***'build the church (locally) [...] so we have a nice sanctuary.'***<sup>191</sup>

Respondents reported, at times, feeling under such pressure to give that they had gone without food to do so:

***'Yes, we were depriving ourselves in order to contribute [...] Up country, people sold their hens and goats to contribute.'***<sup>192</sup>

Elsewhere, they had found a little each week to give but then the local church had faced intense demands to assist with a regional or national capital project and more had been expected and demanded. One local church had fallen behind central expectations so badly that it took out a commercial loan to pay off the centre's demands and had passed on the pressure of repayment for the expensive loan to congregants. In such a situation, the denominational arrangements not only created pressure on elder households but conceivably added to financial scarcity in the very poorest localities. It is a moot point whether expecting tithes from households with no income is acceptable and the authors have encountered conflicting debates upon enquiring in country and beyond.<sup>193</sup> One anonymous national church leader accepted it as a necessary feature of church planting in modern Rwanda. Others described it as financial abuse. This is why the report returns to the matter of 'adults at risk' later in the narrative.

In another locality, everyone agreed that because as 'sincere believers' they gave offerings and the tithe, they hoped that in their times of struggle the church might help them.

Instead, mystery surrounded other resources that had been gathered – and pointed towards the possibility of explicit abuse. Respondents in the case of one church spoke of having supported savings schemes to help buy soap, clothes and other basic goods for the vulnerable (including older people) in that church. Yet, led by pastors, these pooled funds had allegedly 'disappeared' upon the rotation of clergy – an old man – to a new locality. When congregation members had asked successor clergy where the funds were, silence had reigned, even when the sums were as large as 20,000 RWF (22 USD – approximately 9 to 14 times the local monthly household income).

The experience of these research participants resembles that of family members in elder abuse literature whose relative had abused them, whose trust had been exploited, whose goodwill had been taken for granted. They felt they had no choice, as interviewees asserted:

***'That money [...] has been a real stumbling block for us [...] but because we love God's work, we didn't want to leave the church.'***<sup>194</sup>

190 Participant in a mixed-gender focus group, Kicukiro (9 May 2019)

191 Ibid.

192 Anonymous church leader, interviewed in Kigali (4 May 2019)

193 Interviews with anonymous church leaders and at University of Birmingham.

194 Older man in a focus group discussion, Gisagara (6 May 2019)



📷 The research team and a group of older men in a focus group discussion taking place inside a church. Many of those interviewed clearly press deeply into a personal faith. Photo: Madleina Daehnhardt/Tearfund

There was a deep appreciation of spiritual care and the power of prayer, and the not insignificant number of examples of successful practical support already described (see section 4.4). Yet, there simmered a quiet (and often loud) anger, strong feelings of disillusionment and a wish that the church and others could do better.

*'No, the church has never helped me at all. But the church honours its elders. They care for us by preaching to us and teaching us the word of God and we live like that.'*<sup>195</sup>

This was not confined to any particular kind of denomination:

*'I am a Catholic [...] I live with my grandchildren whose parents passed away. They don't help me, they don't respect me, and I am like a stranger to them. No one brings water at home, no one brings firewood and except one girl I have [...] no one can help.'*<sup>196</sup>

This experience caused people to feel devalued while being at the very heart of their Christian community.

*'No, no one bothers me at church. Some can pass by you and not even greet you.'*<sup>197</sup>

Some explained this by saying the church lacked the means, while some said that the church was entirely 'focused on the youth'. Others still said that...

*'the church has its own problems [so] we cannot expect it to support.'*<sup>198</sup>

One community, though, when asked if the church was spending the money they themselves gave in a manner of which they approved, exploded with energy.

Everyone speaks:

*'Yes, we do [help the church with money].'*

195 Older working man in an in-depth interview, Kicukiro (9 May 2019)

196 Elderly widow in a focus group discussion, Gisagara (7 May 2019)

197 Older non-working woman in an in-depth interview, Bugesera (2 May 2019)

198 Participant in a mixed-gender focus group, Gisagara (6 May 2019)

Interviewer:

**'When you give money to the church where would you like the money to be spent?'**

Everyone talking and shouting:

**'They don't feed us.'**<sup>199</sup>

Another participant said of the church congregation and leaders:

**'They visit us but there is nothing else they do for us.'**<sup>200</sup>

These arguments are noteworthy most especially in a Rwanda where attention has already been focused on ecclesiastical leadership lapses. Before the genocide there is evidence that congregational leaders would behave as part of 'hegemonic' local elites acting as gatekeepers to resources such as educational scholarships, food and practical support.<sup>201</sup> More recently, in 2017,<sup>202</sup> members of the Rwandan Pentecostal federation ADEPR called for a 'Restoration Commission', expressing concerns that congregants were being 'forced' to give to church projects. During 2018 President Kagame closed upwards of a thousand churches and mosques in and near the capital – with another 6,000 shuttered up further afield. He expressed concerns about their health, safety and governance and called for better regulation of the burgeoning religious sector.<sup>203 204</sup>

While awareness, then, of the weakness of church governance in the region is not entirely new, the particular impact of generic priority setting and bad practice on older people 'greys' the problem in a fresh and pressing manner. What is new is the identification and naming of this development as 'abuse'. There has been reluctance to do so and in turn this has hindered people from coming together to improve and weed out bad practice where it does exist.

The sheer variety of arrangements within and between denominations that were observed, and the varying levels of skill, capability, transparency and approaches to accountability, support and training are so great that they cannot all be addressed here. Based on the responses of the interviewees, though, it is clear that in some denominations in some places some of the time, and in some denominations all of the time, there is without doubt abusive practice. This includes practice of which some national leaders may be fully aware but without having fully registered so far how distressing its impact can be. This gives rise to immense distress and serious safeguarding concerns.



## CASE STUDY 4

### An example of how bad giving, offering and tithing practices can cause elder abuse

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Tithing and gifting was not the only source of pressure, nor Protestant denominations the only source of elderly anxiety. In (Roman) Catholic canon law, it is permissible for 'mass stipends' to be used by clergy for their living costs. A 'stipend', though, is not intended to become a commodified transactional payment for, say, a requiem mass, marriage, or a mass celebrated in memory of a loved one or in favour of a particular cause. Canon law specifically excludes the permissibility of 'charging' or expecting gifts, most especially where the means to make an offering are absent. Notwithstanding these internal stipulations, respondents described pressurising behaviours on the part of their clergy, fixed demands for 'fees' and even an arbitrary hike in

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199 Focus group discussion, Kicukiro (9th May 2019)

200 Older non-working woman in an in-depth interview, Bugesera (2 May 2019)

201 Longman (2010)

202 KT Press (2017)

203 See Ssuuna (2018) and News24 (2018)

204 In 2019, a Kenyan Catholic archbishop had to deny that his fellow Bishops' Conference members were receiving large sums from 'corrupt politicians'.

required 'mass offerings' for those seeking solace by those means.<sup>205</sup> The sums were often not small as a proportion of household income. Without payment, even a funeral mass could be refused.<sup>206</sup>

One older woman described how, as she was planning to bury her mother, she had asked the local priest – a young man – for a requiem mass. He had demanded 10,000 RWF (the equivalent of three times the health *mutuelle* premium that so few can afford). The same priest has recently increased his requirement for the standard mass offering from 1,000 RWF to 1,500 RWF.<sup>207</sup>

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### 4.5.3 Ecclesiastical governance: clergy pensions, donors and extreme clergy poverty in old age

Unlike their parishioners, current working pastors interviewed were almost uniformly full members of the government's health insurance *mutuelle*. In many cases the premiums are paid by the church. Their churches are also making pension contributions, in the main, into the government compulsory pension scheme. In some cases, as mentioned above, pastors top up on their church income with cultivation, or with paid work. The pressure to do this arises from a variety of factors:

- the extent of poverty in their area and the health of their church's finances
- whether they may have inherited or bought a small plot of land
- their family situation and the aspiration to pay school fees and support kin
- their denomination, its policy on movement between congregations across a lifetime, and the manner in which it has gone about making provision, if any, for clergy retirement
- the sense of responsibility that the region and the centre takes for local staff/pastors in theory and practice.

One anonymous national church leader advised that coverage by his church of the health *mutuelle* payment was the exception rather than the rule.

A senior clergy person in the UK from a diocese with close historical links to Rwanda observed that in that person's experience, funding requests from visiting Rwandan prelates typically focused on the needs of the nation's 'young and growing church and the consequent cost of funding the training for a rising tide of new clergy'.<sup>208</sup> At the other end of the lifespan, this research uncovers a reality that a significant number of clergy are approaching retirement with trepidation. An equally significant number are experiencing it as a hardship. One East African archbishop reportedly starved to death for the lack of an income in old age within living memory.<sup>209</sup>

No donor interviewed could recall having had Rwanda or East African clergy retirement or elder needs raised with them.<sup>210</sup> One wondered out loud if this reflected not only Rwandan interest in the 'young church' but also an alignment between Western narratives of 'growth' with 'youth' and an assumption that pensions were a reality throughout the Anglican communion and other denominations.

Although they carry social and spiritual standing as an asset, pastors, especially in the rural areas, share a large part of the vulnerabilities faced by their parishioners, as has already been described. In some established denominations, clergy salaries will be a maximum of 250,000 RWF (approx 260 USD) per month, with a pension – for those who have one – a maximum of 150,000 RWF (approx 165 USD) per

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205 Under a new canon law, which is coming forth in June 2020, a legal document has been issued by Pope Francis, saying that such instances of required 'mass offerings' are to be reported to appropriate church authorities.

206 Briefing by the Canon Law Society of Great Britain and Ireland (May 2019) and interview with an anonymous canon lawyer and judge of Portsmouth RC Diocese (September 2019). See also, <https://canonlawmadeeasy.com/2010/01/14/canon-law-and-donations-to-the-church/>

207 Older woman in a focus group discussion, Gisagara (10 May 2019)

208 Interview with a representative of Winchester Diocese (May 2019), who requested anonymity. In the UK, the two Anglican dioceses that maintain most active links with Rwanda are Winchester and Ely. In addition, denominations and churches in Northern Ireland, the Nordic countries, Germany and the USA, keep strong links with the country.

209 The life story of the archbishop, and his name, were shared by senior church leaders who requested anonymity.

210 Interviews with representatives of Winchester Diocese (May 2019) and two mission support agencies based in the UK (June 2019).

month in pension income after the age of 65. Even in urban areas, pastors in less established denominations and new churches can attract salaries of 50,000 RWF (approx 54 USD), with a pension payment of 30,000 RWF (approx 32 USD) per month after 30 years' service.

***'Only the Adventist church has put in place a provident fund to top up on the gap between what the government pension might pay and what the pastor and family might need.'***<sup>211</sup>

To this information, one church leader replied:

***'Some don't even earn that, brother.'***<sup>212</sup>

One senior figure said:

***'You cannot plant a church with everything [...] It begins with nothing [...] so for this reason we could not plan for how the older pastors might retire [...] The government even suggested the pastor should have a pension [...] but few churches can do that.'***<sup>213</sup>

Another denomination said that their policy was not to move clergy, to allow them to stay in the same place...

***'so he can have a farm, and cattle [...] and [...] the parish can give the tithe and the offering as usual and that way the pastor can be helped.'***<sup>214</sup>

Housing can be problematic during active ministry and can be lost immediately upon retirement.

Some denominations in some places make no pension provision for their clergy at any time. Kigali Anglican Diocese has a stated strategic goal, over time, to lift pension coverage to 100 per cent of its existing clergy. For now, one clerical respondent observed:

***'I am an Anglican [...] The big problem with our pension system is, if you are going to get a continued pension, you need to have contributed for at least 15 years.'***<sup>215</sup>

The consequence, then, of having had to live abroad or having been assigned to care for Rwandans abroad then returning, was likely to be poverty in old age. Likewise, those becoming clergy later in life and therefore accumulating limited pension contributions, or those needing to spend time away from ministry because of family caring responsibilities and therefore also missing out on pension contributions, are all at greater risk.

For those already retired in 2019, or for those close to retirement, work or cultivation remains essential. When not possible, contributions that have been made are very often too little too late. One pastor described this as an experience whereby clergy are worked hard and valued until their retirement, and then they are ignored until their death, after which the living throw a joyful and expensive funeral party with food and other things that the minister has gone without for years.

In this category, significant existing, varying and emerging needs were encountered at every level of religious hierarchy.<sup>216</sup>

Some denominations had noted this risk and have sought to create additional provident funds to fill gaps but these were still stretched. In others, the region and the centre assume little responsibility for local staff/pastors so that many retirees have no pension cover at all and no plan in place to share in their support.

As in the case of giving, the sheer variety of arrangements observed within and between denominations, and the varying levels of skill, capability, resources, and regional and international linkages were so great that that they cannot all be addressed here.

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211 Older pastor in a focus group discussion, Kigali (4 May 2019)

212 Ibid.

213 Ibid.

214 Ibid.

215 Ibid.

216 The focus was on Reformed, independent, Episcopalian and Protestant churches.

Suffice to say that, based on responses received, these varieties could very regularly leave retired pastors in housing but still farming with little income, with scarce income, with very low income and few assets or destitute, and feeling that the church has 'abandoned' them and their families. One said they felt like 'sugar cane' where...

*'they chew out the sweetness and after that spit the rest'.<sup>217</sup>*

## 4.6 Theologies of authority, leadership and governance: worst practice, best practice and the potential of Rwandan churches and Tearfund

### 4.6.1 Inclusive leadership and authority: ensuring truly 'integral mission' without safeguarding gaps

There was agreement that as Rwanda ages, there is new work to be done by all Rwanda's churches to develop shared standards, guidelines and good practice to reduce the risk of elder abuse and of clergy being left uncared for in old age. More substantially, the literature on ageing and inclusion identifies that if such commitments are not consciously upheld, they fall by the wayside.

What is at stake here – and elsewhere where churches with similar or identical structures are active – runs to the heart of the authentic development impact and potential of 'the church'. It is also key to the coherence and rigour of the development model of 'integral (or holistic) mission' and CCM, and any management, quality and evaluation frameworks that grow from them or are commended to them.

Without the development of approaches to, and safeguards of, ecclesiastical governance policy and practice that reflects the possibility of financial transparency and elder and disability inclusion for all of Tearfund's partners, their authenticity could be permanently compromised. The problem of exclusion, abuse and resource dissipation could remain unchecked, thus threatening to call the whole project into disrepute.

In Christian assessments such a fresh – or refreshed – approach would ordinarily flow from a theology of authority and leadership<sup>218</sup> that takes the organisation of the 'visible' church as seriously as that of the 'invisible' church. This requires having robust methods to 'read', 'manage' and develop ecclesiastical governance. It also means recognising varieties in understanding 'church' by reference to its organisation, decision-making and the theological terms used to defend and criticise alternative practices and structures. There is some evidence that in Rwanda theologies of leadership and governance have emerged that are neither entirely congregational nor entirely episcopal but where decision-making is in either case definitely not 'local', nor 'national', and cannot simply be defined as 'networked' or 'para-church'. This development is partly theological but may also be a product of the civil law regulation of churches being based on generic associational law so that churches tend to register as denominations with branches where they have more than one outlet for their mission.<sup>219</sup> So, even if they tell a story of localism, they are not able to practise it in reality. Tearfund's intense commitment to empowering the local has left parts of this shift unattended to. It has inadvertently promoted theological assumptions that divert it from robust analysis of its partners, from joined-up support at every level and from adequately assessing the crucial authorising environments that 'local churches' have to mobilise and manage.<sup>220</sup>

217 An older pastors' focus group in Bugesera (2 May 2019) drew the comparison with sugar cane pulp. It resonated with subsequent interviewees and focus groups. For instance, in a focus group discussion in Gisagara (6 May 2019), an older pastor said, 'The churches abandon you when you are no longer working.'

218 In some traditions, this is expressed in terms of 'ecclesiology'.

219 Briefing by a local NGO

220 An established and widely adopted strand in mainstream public service leadership literature shows that a deep understanding of authorising environments can facilitate maximum impact but also reduce risk while increasing innovation. For example, see Moore (1997), Heifetz (1994), and the work of the Ash Center at the Kennedy School of Government (Harvard Kennedy School, 2019). For ecclesiological dimensions, see Davis (2001) and the other essays in that collection.



Older women who participated in a focus group discussion. Some people considered it 'surprising' that older people should be the focus for research and interest was being shown in them. Photo: Peninah Kayetisi/Tearfund

Tearfund's training materials for activists and managers do not currently recommend including models of church or structures of church that are not considered local, in the analysis of how change can happen or how change can be blocked. This has potentially serious implications too for understanding and assessing fully how safeguarding could be advanced – or blocked – by parts of the church that do not conform to a pure narrative of 'the local'.

Thus Tearfund's influential ROOTS series suggests the 'church' is '*believers*' gathered together in a place, or believers in a place '*even where they are not meeting*'. It specifically is '*not the building*'. 'This "local church" is God's primary agent of transformation (which) is an outpost of God's kingdom and is used by God to transform communities.'<sup>221</sup>

Moreover, any 'structures' beyond the local have no 'purpose', it is suggested, other than a utilitarian one. They are advanced and affirmed as merely administrative: 'Denominations and networks can be useful for pastoral accountability, sharing of learning, resources and gifts, and useful for enabling local churches to be heard at national level.'<sup>222</sup>

More significantly still: 'Christian leaders have argued over whether different structures are right or wrong, but history shows us that God can bless people through any Christian structure and that the godliness of the leader is far more important than the position they hold.'<sup>223</sup>

Consequently, for example, the following are discounted as irrelevant to practical leadership decisions, authorisation allocations or resource control: raging conflicts about theologies of governance and leadership and their impacts during the Reformation on the sale of indulgences and episcopal privilege; the reservation of pews for elite families and races; the prioritising of some kinds of pastoral duties over others: the appropriate balance between local action and wider oversight or mutual accountability, between collective decision-making and decision-making that is more concentrated; the rise of radical theologies of prosperity. Likewise, it may hinder learning that flows from Roman Catholic institutions being led, in some instances, by men who were so 'holy' that it never occurred to others to enquire about safeguarding or good governance in their part of the church. This kind of oversight in analysis points to a potential weakness and potential barrier

221 Blackman (2007), especially Section 2

222 Ibid.

223 Ibid.



to effective CCM work and to being able to discern where blockages and opportunities lie for safeguarding, governance, authority, authorisation and leadership in Tearfund partners carrying out, in this case, CCM and also other work. It is possibly particularly significant given Tearfund's specialism in church-related development, especially when it comes to mitigating the risk of abuse of elderly people, adults at risk and/or other vulnerable adults.

In Tearfund's materials relating to good governance and the stewardship of resources, this tension is present too. Here, there is a marked absence of critical engagement with the way in which what universities call 'ecclesiology' can powerfully shape institutional and cultural norms within churches, both spoken and unspoken. Likewise, there is little critical reflection on how ideas of 'godliness' and 'position' can become intertwined. In fact, very often the informal habits of ecclesiological theory – the idea of church – do not fit within the codes of civil law when personal holiness will compensate for any gaps in good policy, process, government or management competence.

The combination of this utilitarian view of 'usefulness' of 'structures' with this foreclosing of concrete theological arguments about good decision-making or of theologies of structure on different levels beyond the local, has potential serious pitfalls. It ignores the urgency of the impact these matters have on institutions, skills and resources in very low-resource settings, including the churches examined in this study. In this study the researchers observed how new local and hybrid understandings of church, theology, and governance could drive up the risk of elder abuse in congregations. All the local Tearfund teams the researcher met were informally alert to such threats but as yet their integration into mainstream Tearfund policy and training is underdeveloped.<sup>224</sup>

#### 4.6.2 Misreading the relationship between theology and church behaviours

The best and worst practice encountered by this research arose directly from theologies of leadership, authority and governance that affirmed 'church' as more than the local meeting or presence of believers. In the case of good practice regarding clergy pensions, this arose because of a conviction that the church 'as a whole', beyond the local, shared in responsibility of support. In the case of the worst cases of intense pressure for gifts from congregations who could not afford to make them, greater theological and structural value was given to missions abroad and outreach in the capital than to the poorest of believers in Rwanda's villages. Whether a denomination or community's theology of church considered 'church' to be more than 'local' was thus a defining feature of this balance and could both unlock and destroy even the best of local intentions, missions and service in localities – as well as safeguarding.

The parallel literature on elder abuse – like that of domestic abuse and a good deal of gender-based violence – shows how intimacy, interpersonal relations, trust and governance can open up situations and occasions that make abuse more likely, when safeguarding is not consciously mainstreamed, or where it is poorly undertaken, and inadequately thought through. Deep love and a sense of responsibility to family – for which also read as church family or community, locally but also more broadly – can intimidate and silence those who are vulnerable or 'at risk'. This is because power relations between members, 'friends' and spiritual mentors in varying roles and positions of 'authority', not necessarily within hierarchies, have significant force or power. Absenting serious theological reflection from those dynamics and related management standards only aggravates the problem. Failures in such contexts put older people, and especially frail elderly women, at high risk of abuse.<sup>225</sup>

That churches in low-income contexts can be fragile institutions is not surprising. Yet, when that fragility is combined with specific leadership policy choices that do not consider the specific vulnerability and position of older people, and the specific governance of very common forms of church, they can exacerbate exclusion.

224 If an NGO or other partner assessing or supporting a church denies theories of church that are not 'local' as outside their realm of interest, or always not salient when it comes to planning local action, then it is not responding to the social reality being encountered. Rather it is responding to an *a priori* theology or imagined idea that it is imposed onto a reality that is different. When repeated, it could 'absent' from view places and spaces where good and very bad practice could be occurring and/or might occur, be supported, or be blocked.

225 Interview with Anita Nayar (CPsychol) (September 2019). See also Lloyd-Sherlock et al. (2018), Morgan (2009), and Kotza (2018). While literature on elder abuse in US and African-American churches has been identified for the purposes of this report, the authors would, in future, welcome contact from others who are interested in or have published on the subject of elder abuse in religious organisations in Africa.

Churches with problems such as those identified must urgently be helped, across all their mission(s), to arrest the sorrow, pain, fear, psychological anguish and physical hunger that poor self-governance and practice unlocks on all levels.

### 4.6.3 Rwandan best practice and cascading Rwandan learning globally

That said, there is learning to be drawn from best Rwandan Christian practice.<sup>226</sup>

Examples of good practice deserve some reflection in this space. Some of the Rwandan churches visited for this study permitted labour and in-kind contributions in lieu of financial offerings where families were facing hardship.

In 2019, the Anglican St Etienne Cathedral in Kigali introduced a habit of setting out transparently how funds will be used before they are raised and then reporting back to congregation members how they have been dispensed. Cathedral clergy reported that the approach *'had been very popular'*.<sup>227</sup>

The national Council of Protestant Churches informed the researchers that they shared the study's particular concern for vulnerable older people. In addition, following the government's concerns about some churches and denominations, they said they had begun to develop and implement a registration scheme that would contribute to raising the quality of local governance.<sup>228</sup>

Wider church history also points to coherently Protestant and creatively effective ecclesiastical options. Early Methodism, for example, sought to minimise clergy costs to poor rural communities by maintaining networks of itinerant preachers. To conserve funds it tended to convert or borrow existing buildings and barns for church use rather than build new ones. Churches as barns or new buildings often integrated reading rooms into their design for literacy work. Only as the denomination grew did Methodism's funding of pastors allocate resources to enable pastors to settle and support families. Moreover, John Wesley, with the support of wealthy allies of the church who were often not necessarily members, also established a central investment fund which provided long-term loan capital to those mission areas where there was a shared view that a new church building and activities were needed but where resources were not yet available. By earning a modicum of return for those investing from the centre, financial risk was spread but also the funds were revolving. In turn, the option of giving by gifts of time and labour were very often practised where families were too poor to make financial offerings.

Tearfund itself is demonstrating reflexivity and goodwill to engage with matters of inclusion more seriously. Crucially, as Tearfund in Rwanda responds to the findings of this piece of research, new critical thought, and practical training, as well as increased resources and staffing to implement CCM with a focus on ageing, it will have new insights to share with the Tearfund family in all these regards. And as Tearfund more widely considers these new vistas of risk and potential mission reward, it has the capacity to cascade best practice, including an integration of local action with ecclesiastical analysis, across partners and networks.

226 Interview with Clive Norris (October 2019). See his important 2017 work (Norris, 2017).

227 Conversation with clergy of St Etienne Cathedral in Kigali (April 2019). It was apparent that such policies were less consistent or absent in other congregations visited by the researchers.

228 Interview with the General Secretary of the National Council of Protestant Churches (April 2019)

# 5 NEW PARTNERSHIPS FOR A NEW CARESCAPE

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Part 3 set out some of the intense needs faced by older people. It described the government's energetic attempts to build a social protection and health support framework in as many regions as possible. Part 4 showed how some local congregations had begun to respond to these needs; noted the existing extent of church-based social action; and assessed the potential to build on the positive elements that were already present. Part 5 turns to the symbiosis between all of these patterns.

The traditional paradigm of seeing older people's inclusion as solely the preserve of extended families might tend towards a view that locates the churches as the primary – or a dominant – agent to improve older people's lives going forward, given the close proximity of family life and local neighbourhoods. Conversely, an uncritical adoption of 'modernisation' in development could default to an unreflective statism that positions the state as the sole actor in what good progress looks like and what inclusion could be. However, as has been noted, the Rwandan reality today, and the reality emerging for the future, is more complex than easy 'silos' would suggest. For example, if pro-active local church action to support older people to access the VUP encountered petty local corruption or stigma, both church and state would be the lesser for it. Meanwhile, if government more actively 'greyed' its prioritisation of needs to the very poorest areas, only to discover that local tithing or gifting abuse was undermining out-of-pocket assets, both would be compromised. In turn, neither question looks to the future potential for a wide variety of institutions and associations, including business, to play their part in ensuring care, solidarity and empowerment in the years to come. The conscious choices that could flow from such a collaboration could be crucial.

## 5.1 Optimism, pessimism and Rwanda's new carescape

With so many moving parts in play, what kind of carescape do Rwanda's older people find themselves navigating? Having to juggle all of the demands and opportunities, hopes and sorrows described above, how do they manage and what is the map of threats, risks and opportunities that they have to assess?

When it comes to discussions of Rwanda's intergenerational bonds and ideas of reciprocity, *optimists* argue that cultural norms of family responsibility are stronger in developing countries than in developed countries. Consequently, so the argument goes, they can be relied upon in the future. *Pessimists*, meanwhile, suggest that new urbanisations, family decay and an increasing materialism will necessarily destroy such bonds.

Elderly respondents in this study, while articulating positive views as to why the intergenerational bond was good, and ought to be followed, or could be legitimated, did not mention fear as a driver of that commitment. Rather they referred to a culture of duty:

- rooted in pre-colonial Rwandan traditions
- reflecting the best in Rwandan values
- arising as a form of solidarity in response to the real risks and absolute needs that life before and – especially – after the genocide presented.

An older woman explained:

***'Since the ancient times, in our Rwandan culture, when you had neighbours, [...] when you could see that things are not going well with someone, you had to approach this person.'***<sup>229</sup>

Very many of the older people, as has become evident through the research, described positive experience of self-help, of assistance from family and neighbours and of other practical signs of the tradition in action. Where older people had made explicit mention of their needs in church, there often had been a response:

***'We have youth in the church and inculcate values in them [...] We exhort them to cultivate for the elderly in church. So that when they grow up, the young ones will treat them the same way they see them helping the elderly.'***<sup>230</sup>

Younger respondents also approved of the traditional narrative, often advancing an equivalent view. However, whereas the older people who expressed a view tended towards language that was closer to 'gift' relationship and historical legitimation, the younger respondents could at times reject intergenerational care as outside their responsibility. Alternatively, younger people could sound more transactional: the likelihood of receiving care in old age, it was suggested, would be directly associated with one's earlier performance as a parent. For example:

***'My opinion is elderly people who can no longer work and who have grandchildren should be supported by their children, paying back what their parents did for them when they were still young.'***<sup>231</sup>

In practice, however, many of the younger people had helped others with funds or taken full responsibility for grandparents, ageing parents, foster children, nephews and neighbours, so that siblings could work or because of illness in the family.

***'I have a child living with me who's 12 years old; he's a relative I fostered. I feed him and I pay for his education.'***<sup>232</sup>

And:

***'My old mother-in-law, we don't live in the same house. She lives alone. We're the ones that take care of her. We are neighbours [...] We are the ones who do everything for her.'***<sup>233</sup>

This can have knock-on effects:

***'My father's disabled [...] so [my] mother and [I] are taking care of the grandchildren and the father and the siblings [...] It's why I can't go to university.'***<sup>234</sup>

Pastors almost uniformly linked the duty to care for older people to Christian precepts, but in all cases had never preached on the topic to their young congregations.

These carescapes can be located in the discourse of Africa as a 'young continent'. Rwanda's president makes time each year to meet with large numbers of young people, telling them to work hard, locating them in powerful narratives of the future.<sup>235</sup>

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229 Pastor in a focus group discussion, Bugesera (2 May 2019)

230 Older man in a focus group discussion, Bugesera (4 May 2019)

231 Young person in a focus group discussion with members of a savings group, Gisagara (6 May 2019)

232 Young person in a focus group discussion with members of a savings group, Kicukiro (9 May 2019)

233 Young person in a focus group discussion with members of a savings group, Gisagara (6 May 2019)

234 Ibid.

235 As, for example, in August 2019. See [www.youtube.com/watch?v=SP0-kXwT5CE](https://www.youtube.com/watch?v=SP0-kXwT5CE)

For the churches and pastors we met, this national call was mirrored in intense articulations of 'growth', 'a young church' and an equally 'young' future.

However, as the research has revealed, Rwanda's future is not only 'young', nor is the church's. It is significantly 'grey'. One respondent observed:

*'It was the power of youth that destroyed this nation.'*<sup>236</sup>

So even in 'young Rwanda', ideas of solidarity, duty, reciprocal gift, reciprocal obligation, care and support, are by no means dead. Indeed, they are powerfully present across all focus groups interviewed. Nevertheless, they are matched with concern that they may be diluted or sustained by reference to multiple ideas and narratives of the duties that undergird them. In this way, there is continuity and change, stability and diversity, just as is noted above in the varying way that needs and responses are articulated between and within government departments and contrasting parts of the churches.

There is a conundrum here: this is not a simple story of economic growth leading to social change, but rather a variegated horizon of habits and views. First, those habits and views vary locality by locality and seemed also to vary by intensity of need. Second, some of the variety of outlooks (un)intentionally clash with each other. The intense focus by the government and the churches on the young in society is perceived to be adding to the pace at which intergenerational and familial ties are loosened. Yet, at the same time, the VUP and health mobilisation exhort a return to a rootedness in traditional approaches to intergenerational solidarity, and older people affirm the importance of such values. The trailblazing work of the First Lady in bringing the attention of the nation to the honour with which destitute widows should be treated exists alongside the OneHealth Tool and the 2018–2024 health strategy, which culminated in a plan to invest most effort in those population groups who are least likely to be elderly. Likewise, when churches think about older people, they instinctively value them – but they do not think about them consciously or consistently.

There is no simple single cause of this changing carescape and the flux in ideas and practices of duty. On the one hand, it could arise from omission: our respondents could both hope for the traditional way to endure and then admit that they had rarely, if ever, spoken about it to the next generation. On the other hand, demographic, health, social and economic forces were said to be chipping away at its foundations; some of the factors identified as threats (recorded above) look set to accelerate rather than slow down. In turn, the 'thin' nature of social trust in so many localities described by respondents means that even government schemes to help can be radical sources of division. This in turn may open up new vistas of action for churches that attract very high levels of trust.

## 5.2 Civic conversations, advocacy and partnership

Cutting across all that has been described, what comes into view are not only the particular strengths and weaknesses in particular policies and actions but also a deeper existential question. As Rwanda ages, what kinds of pathways do all of its social partners wish to sustain, choose or protect in the future? The old way is not totally dead: the new way is not fully born. This means that partners across society have the opportunity to shape and improve what comes next.

Many have mistakenly assumed that the 'carescape' is still present, while many more have wrongly decided it has been destroyed for all time. If this disconnect is not given active attention, it is increasingly likely that a tattered and even more structurally damaged set of relationships will be the result in the future.

Even with continued growth, government will struggle to meet all the needs that are now in play. Despite goodwill and with a fresh energy to act in solidarity with older people, there will be gaps in what the churches can unlock. Aside then from any specific actions or programmes, there is an education task to be undertaken, to help Rwandans understand how their society is moving. There is a preaching, political and

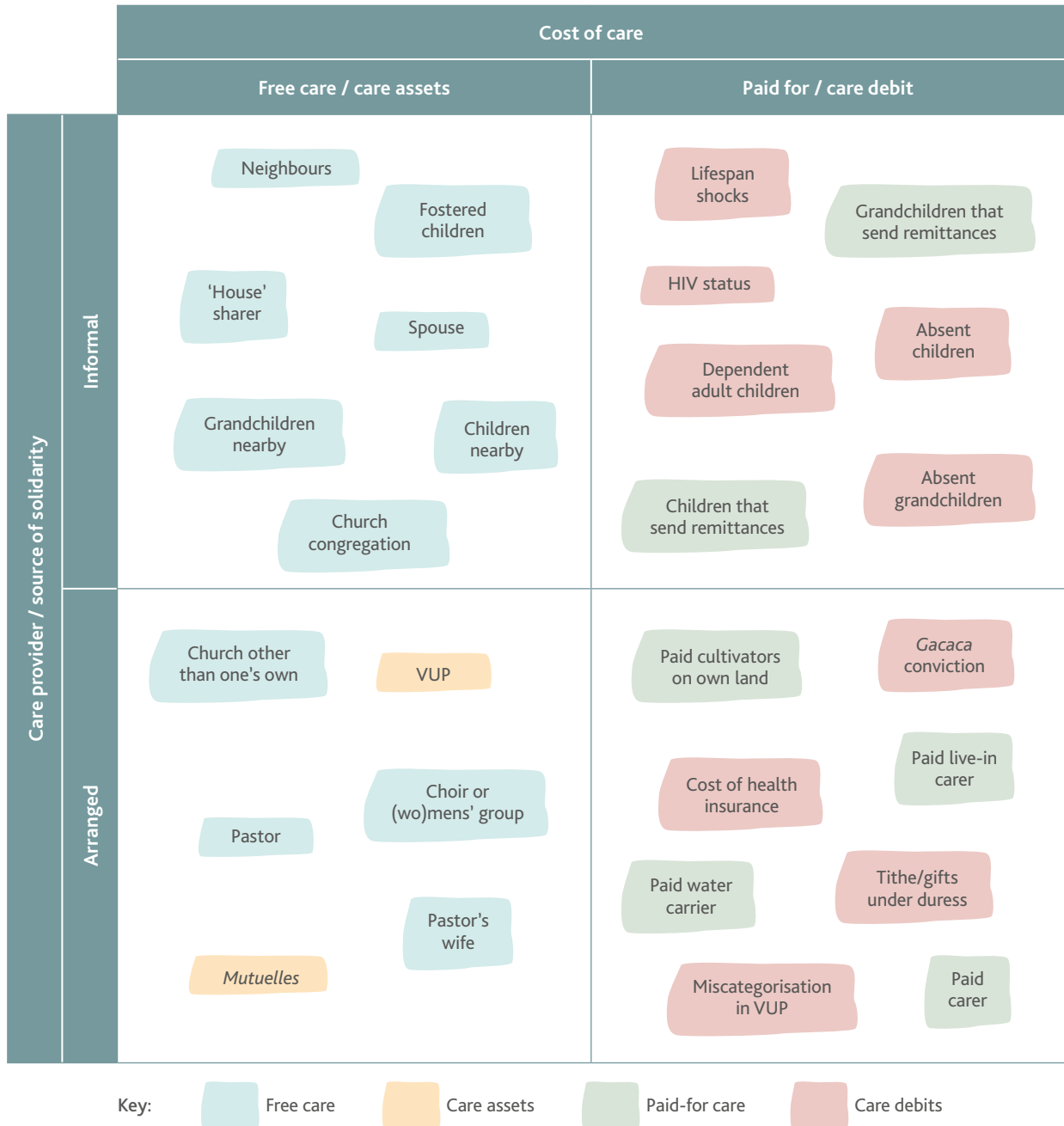
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236 Participant in a mixed-gender focus group, Bugesera (2 May 2019)

wider civic conversation challenge which is simply to make sure that older people's needs, rights and potential are debated.

New partnerships, fresh collaborations and a wider civic conversation of need, citizenship, agency and inclusion are now essential. And as much as any policy proposal or pastoral plan, this will need proper structuring and to start from where the 'carescape' is today rather than where it is imagined to be by optimists or pessimists.

Figure 8 New carescapes



# 6 UNLEASHING DEBATE AND ACTION: CONCLUSIONS AND RECOMMENDATIONS

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This research set out to explore if anecdotal evidence suggesting a rising need among Rwanda's elderly people pointed to deeper or wider questions than were commonly being discussed or admitted in nationwide and regional discussions in Rwanda. Growing from, and working through, Tearfund in Rwanda's track record and deep engagement with the nation's churches, it wanted to begin to tease out some of the urgent and longer-term challenges that may be coming in to play in this context.

This practice-led research was aimed at the Rwandan churches, but also to consider the church as a social partner with the reach and potential to partner with state and nation to address some or many of those needs, if Tearfund's hypothesis of an important gap in the inclusion of elderly in development practice were confirmed.

In the new post-genocide Rwandan context, the question remains as to whether the old narratives of traditional Rwandan mutual aid are adequate to meet the needs that are already present and are rising. What will the 'carescape' of the future need to comprise? And in responding to that present and future, what tentative and initial conclusions, conversations and recommendations are needed next and what can be drawn from reflecting on the voices of older people and other Rwandans set out in this study?

Part 6 consolidates a description by the research respondents of Rwanda's current carescape and reiterates the continuities and discontinuities from that which has gone before. It then looks towards future carescapes, teases out wider conclusions and makes recommendations for further action.

## 6.1 New evidence and new conversation for changing times: the 'grey gap' in NGO and government approaches

An exploratory study cannot touch on every issue, nor resolve every matter uncovered. In this regard a conclusion of this work would be that, as Rwanda's population of over-65s increases, more research will be needed across the economy, social protection, health, civil society and the full variety of the country's faith and religious communities. While the researchers here visited varying geographies – both rural and urban – and heard a wide variety of voices, research in other less-developed countries emphasises that simplistic 'nationwide' assumptions are to be treated with caution. This is due to the multiplicity of ageing pathways which different localities of a country can entail.

Worse still is the manner in which mainstream development theories and practice, funding priorities and approaches to safeguarding seem imbued with a preference for the youngest at the expense of the oldest. This research contributes to scarce data with added paradigms of insight and planning which compound the already multi-dimensional pressures that, as has been seen, older people face.

Based on those other studies, it is likely that at the very least, the needs, abuses and best practice described here are replicated in other regions and that some of the most severe need is replicated with even deeper pressure on other people's lives.<sup>237</sup>

Crucially though, as was intimated in Part 5, there is relatively little conversation, debate or discussion of the data of the kind that has been recorded here, or may be needed for the future, not to mention the urgency of the needs as they are set to grow. The new data here needs to support not only detailed policy and leadership

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237 Regional variance is a consistent theme in the work of Peter Lloyd-Sherlock (for example, 2010).

planning but also form part of a fresh, wider conversation that puts 'young Rwanda' and the old carescape firmly in its place.

## 6.2 New models and action amid scarcity: raising the bar

There is a pressing need to develop even more understanding so that examples of excellent practice are protected and extended, and existing and emerging needs are not overlooked. In addition, there is an urgent necessity to rapidly increase the number and quality of practical examples of action. This is in order to improve older people's lives, but also to provide examples of what is possible.<sup>238</sup>

Help Age International's in-country partner, Nsindagiza, has bravely worked to bring the position of Rwandan older people to the attention of policymakers and civil society bodies.<sup>239</sup> A more secure footing for their work, and that of other advocacy groups, will be essential to ensure that voice and choice emerge as norms in welfare provision in its widest sense in times to come. The First Lady's initiatives are exemplary and deserve attention from international donors.<sup>240</sup> A fresh way of acting needs to be encouraged among major companies as wide-ranging as the one that shaped their behaviour regarding health, employees and HIV/AIDS to unlock their backing for pensions, micro-savings and retired staff and family benefits.<sup>241</sup>

For the churches in general, and the thousands of congregations with which Tearfund in Rwanda works, the excellent examples of care, support and consolation that have been recorded in this piece of research need to be consolidated. They also need to be complemented by new initiatives and fresh education, theological work and practical capacity building, to iron out and remove abuse and bad practice where it has become a norm. This can best be achieved in the short term by the design, development and delivery of a pilot programme of work which would add to learning and social impact in Rwanda but also offer up insights to social partners in – and beyond – the country.

## 6.3 Local elder abuse and safeguarding civil society beyond Rwanda<sup>242</sup>

As the researchers had not prioritised either questions of church governance or abuse, it was a major discovery of the study that these topics should have arisen with such intensity and significance. It appears later in the study that the mitigation of elder abuse is urgent and has very concrete implications for a wide range of stakeholders in country and beyond Rwanda.

The suggested pilot project flowing out of the research could begin to address immediate risk.

Interventions though will need to be aligned with action by all Rwanda's denominations, including the Rwandan Catholic Bishops' Conference and the Council of Protestant Churches. This matters for those partners who stand with these networks, such as Tearfund itself, and also Integral Alliance, Missio, Caritas International, International Union of Superiors General and also the World Council of Churches, Lutheran World Federation, and other Protestant funders.<sup>243</sup>

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238 Examples include the work of the Cathedral Innovation Centre (2014), the Disability Innovation Hub at University College London [UCL] (2019); and Social Innovation for Ageing, a project of the AGE Platform Europe (2019).

239 Mugabowishema (2019)

240 Representatives of the UK Department for International Development (DFID) and UK High Commission visited during the mourning period in 2019, but this can only be a beginning of learning from, and growing the reach of, similar works. The attention on older people needs broadening to other donors and alongside it those of mental ill health, building on very recent work by the Royal African Society (2019) partnering with the Wellcome Trust among others. [www.royalafricansociety.org/event/mental-health-africa-innovation-and-investment](http://www.royalafricansociety.org/event/mental-health-africa-innovation-and-investment)

241 Best practice has included provision of antiretroviral treatment for staff, sector engagement and outreach, such as roadside clinics in the transport sector. See, for example, Bendell (2003) and the International Bank for Reconstruction and Development [IBRD] (2009).

242 As far as could be established, very few NGOs have signed, adopted or adapted ADCAP's (2018) minimum standards for elder and disability inclusion or an equivalent (Small, 2018). This in turn seems to reflect the culture of safeguarding omission that underpins the much more generic category of 'vulnerable adults', which runs, for example, across most of the codes of conduct and safeguarding policies of the DEC's members (see below).

243 Rwanda's denominations include the Catholic Bishops' Conference (GCatholic, 2019) and the Council of Protestant Churches (Conseil Protestant du Rwanda, 2019). Partners that work with these networks include Caritas Internationalis, Missio, Tearfund, Lutheran World Federation and the World Council of Churches.



It matters in another way because the issue of elder abuse raises deep questions about the nature and quality of safeguarding policies within the churches but also well beyond.

For example, in the UK, all members of the Disasters Emergency Committee (DEC) commit to the Common Humanitarian Standards, but these in turn do not mainstream elder abuse mitigation as forcefully as they do the risks to children. The codes of conduct and safeguarding policies are not consistently strong in this regard either. While the statement of intent that flowed from Kenya and the UK hosting the 2018 Global Disability Summit is forthright in including elder needs in disability rights, the joint statement of Bond members that emerged from the UK child safeguarding crisis is not as powerfully explicit about elder risks as it is about children.<sup>244</sup>

It is true that some of these policies are strong on 'vulnerable adults' but, as the learning from Rwanda has shown, broad-brush categorisations risk excluding older people once more. There are also many definitions of what 'vulnerable' means. Some believe that the term puts the onus on the 'vulnerable' themselves to demonstrate or evidence their vulnerability, thus adding to disparities of power and absolving government, NGOs and others from taking proper responsibility. A contrasting professional view prefers to frame safeguarding as responding to 'adults at risk', with responsibility resting clearly with the organisations, institutions and others before they engage in communities, not with the individual.<sup>245</sup>

Age is not the same as disability and is not the same as the worthlessness of age-weighted DALYS (disability adjusted life years, see 3.6.6). The 'power' of the pastor in asking for resources from those with none may not be the same as that of the senior pastor or a neighbour or a child. Mental ill health is not the same as growing old, or dementia or disorders such as epilepsy. Omitting nuance drives up safeguarding risks in very concrete ways, especially where distinctive and changing forms of sexual, interpersonal, familial or financial abuse may be present.<sup>246</sup>



❏ An older woman stands in church. Implied elder abuse due to poor tithing practices, and the consequent importance of good church governance, arose as acute, unexpected themes in the course of the research. Photo: John Appleton/Tearfund

244 Bond (2018)

245 The UK Care Act (Department of Health and Social Care 2015) settled on 'adults at risk', putting the onus for safeguarding on the provider of care not its recipients.

246 Western Cape Government Department of Social Development (2019)

There is an opportunity for Tearfund here to further develop and adapt its own theories of change, modes of exploration (such as the Light Wheel tool), safeguarding policies and practice to be more rooted in empirical realities and also more than 'best in class'. In turn, this presents an opportunity to mainstream the needs of older people in the quality standards of the wider family of institutions that Tearfund cherishes more broadly, such as the Tearfund family, the Integral Alliance and the Micah Network. This also applies to the DEC and Bond, of which Tearfund is a member.<sup>247</sup>

Halting elder abuse and stigma in NGOs, church and public bodies is as urgent a cause as the other safeguarding risks that some agencies have highlighted more strongly.

## 6.4 Leadership and governance: significant learning for Tearfund

An exploration of the question of elder needs, the gaps in ecclesiastical pension provision, the risk of elder abuse and the need for best practice to address pension omissions and abusive practice (all discussed in Part 4 and forming part of the pattern of the new carescape set out in Part 5) is revealing. It indicates a blind spot in both the CCM methodology and Tearfund's wider approach to 'integral mission'.

In terms of internal division of labour, Tearfund as a whole develops its strands of work on mobilisation in at least three ways. Firstly, thinking and principles around 'integral mission' are developed and resourced to work with 'national' and international church bodies, partners and charities, to deepen and strengthen their **development and adoption of integral mission principles and behaviours**. Second, publications and learning resources are developed to assist churches, 'church-related' communities and partner organisations to **improve their governance and leadership**. Third, in-country national offices are tasked with working with **local congregations to build community transformation and mobilisation**.<sup>248</sup>

These strands relate to each other, but this research suggests that as African and wider ecclesiological / organisational/governance expressions of Christianity expand in their number, shape, variety and form, stronger alignment and better coordination between Tearfund's programmes of work are now essential. For example, if an NGO assumes that congregations have primacy, they are making a theological assumption rather than a comprehensive assessment of the actual situation. This is because some Christian groups say that congregations take priority, but in their behaviours that is not the case. It is also because many parts of the Christian family, including Reformed and Pentecostal traditions, hold ideas of church where church includes structures beyond the local congregation that are as important to ideas of church as the local congregation is. There are lessons in theologies of structure to be drawn here. There may also be insights available in those parts of management studies that focus on the ideas of organisations.<sup>249</sup>

Tearfund in Rwanda has identified with some clarity how the absence of a conscious focus on elder and disability rights can add to exclusion of key population groups. It has also identified how theologies of church – which elsewhere would be termed theories and design of organisation – which are not simply local or congregational can disrupt its theory of change by, possibly, imposing elder abuse on the one hand, or positive pension provision on the other. The question that arises is: how can the principles and standards that are embodied in such theologies of church and result in practical decisions, be developed to establish or improve safeguarding and inclusion?

As has been observed, an emphasis on intense capacity building at the local level risks putting elder inclusion and governance protections achieved by Tearfund's CCM process under threat or depriving it of support from other parts of the church – unless there is simultaneous investment in reading, understanding and capacity building of theological, organisational and structuring authorising environments beyond the local or congregational. Local congregations that pass safeguarding tests may actually be at grave risk of failure because of authorising environments and governance which have material impacts upon them from beyond their locality. These impacts may not only be about hierarchy but may also relate to the method of sharing

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247 Integral Alliance (2019) and DEC (2018)

248 Interviews with Tearfund staff and review of public working papers, such as the ROOTS series (Tearfund, 2019b)

249 For the way that metaphors of organisation both empower and distract from the current reality, see Morgan (1986).

skills, experience and a view of the duties of pastors and/or elders that is horizontal or multi-geographical. When such thinking is highly underdeveloped and actively discounted, it puts the whole development task at risk – and is likely to create an environment where abuse can creep or leap back in.

The weakness of learning materials to date in these regards compounds the problem and also restricts Tearfund's ability to improve practices within its other key collaborations such as the Integral Alliance.

Tearfund's quality and management standards, and its published commitments to other common codes of good practice in the NGO sector, include no specific commitments to elder, disability or mental health inclusion, as far as this study has been able to ascertain.<sup>250</sup> Across the rest of the sector there is interchangeable or contrasting use of terms such as 'vulnerable adults', 'positions of power' and other safeguarding terms and criteria.

The UK Care Act offers a pro-active definition of 'adults at risk' in the UK domestic sphere which may help clarify some of this confusion and support a process towards shared approaches in the future. Those using it have already observed that 'cold calling' for philanthropic giving, if carried out without reflection, has parallels with 'cold calling' by salespeople who target adults at risk.<sup>251</sup>

As part of other changes these are changes that need rapid attention and advocacy.

## 6.5 Social protection and the Rwandan health budget and strategy

As has been described in this research, the Rwandan government has been creative and inventive and taken extraordinary strides forward in developing a hyper co-produced model of social protection and health improvement. Its impact has been positive despite the management, delivery and resource pressures that have been faced. Interviewees expressed confidence that the president especially wanted and is seeking to do better and better in this regard.

As part of that improvement process, recognising that the VUP's methods of classification and capacities for allocation have in-built biases against older Rwandans will be an important next step. Survey tools, community training for mobilisation, and design all need elder-friendly adjustments.

The use of the OneHealth Tool needs to be revisited to make sure that it has not inadvertently weighted investment almost entirely towards the young, at the expense of the proud, active and committed older Rwandans the researchers met. Either way, the balance of strategic budget allocations in the health strategy need re-visiting because of their focus away from elder needs. It may be a 'young Rwanda' but citizenship, lived experience, active contribution and substantial elder needs merit attention too.

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250 Tearfund (2018)

251 Private briefing by UK major national charity safeguarding department, November 2019



☐ Valerie, a 65-year-old widow (in green), stands with younger fellow members of the 'Lifting each other' self-help group in a church in Kigali. When Valerie joined, the group used their pooled funds to buy a mattress for her and her three grandchildren to sleep on. As the 'greying' of Rwanda advances, a coalition of support, advocacy and solidarity for older people will become essential.  
Photo: Marcus Perkins/Tearfund

## 6.6 Immense resilience and needs requiring positive action

The needs uncovered in this report are devastating and life-changing for those who face them: resilient elder Rwandans will do all in their power, jointly and individually, to make do and get by. Yet, a new coalition of support, advocacy and solidarity from church, state and nation will be essential as the 'greying' of the nation advances.

The researchers encountered great hope and resilience among interviewees, which are an impressive part of those fresh possibilities and a testament to Rwandan values, culture and spirit. They also are evidence for the distinctive and vast contribution that Christian communities make to sustain mind, body and soul so well. On their own, though, they are already not enough.

This is because the Rwanda that will welcome Commonwealth Heads of Government, whose churches will observe Lambeth Palace, and whose wider social institutions are at the forefront of the ageing journey, has a new carescape to navigate already.

It is no surprise, then, that so many elderly respondents expressed appreciation for what 'the president' had set out to do with and for them, but also clearly expressed hopes that things could yet be further improved by church, state and nation.

## 6.7 A clarion call to conversation and action – DFID, DEC, Bond and beyond

This study has been motivated by a desire to explore the breadth and depth of the needs of older people in Rwanda today. It also sought to begin to identify places and spaces where a better equipped Christian church might more substantially and creatively engage with those needs in partnership. Involving wide-ranging research interviews with decision-makers, community members, pastors, local government officers and many more, it has recorded that those needs are greater than expected. It also identifies that traditional Rwandan approaches to meeting them will not be enough on their own in the future. It concludes that the steps taken so far in that direction are not unhelpful but, by accident and by design, they leave huge challenges still to be considered and addressed. And it also identifies that those needs, challenges, changes and future pressures are relatively undiscussed or misunderstood.

It is consequently a resource to provoke further conversation, research and study on the part of church, state and nation. It is particularly apposite as Rwanda moves from being solely a 'young' country in a 'young Commonwealth' to taking its place among those parts of Africa and the world who wish to honour their elders by making sure that they too are actively included in the narratives, policies and resources that shape local and global life.

## 6.8 Recommendations

### To the Rwandan government

- Consider the creation of a national presidential commission of enquiry themed around 'honouring the elders'.
- Consider the encouragement of local festivals and public events to celebrate older people's past, current and future contributions to the life of the nation.

### To Tearfund in Rwanda in partnership with Rwandan churches

- Through the interactions with the research seek out opportunities to sensitively work with the Rwandan churches on their responses.
- Bring to the attention of national denominations and church leaders actual elder abuse, and potential risks of elder abuse, in some local approaches to raising funds and resources in churches, as a matter of urgency. Underline the need for new (national) guidelines, training, safeguarding and practice.
- Design, develop and trial a pilot programme that combines a refreshed elder and mental health inclusive and integrated approach to CCT, integral mission and the Light Wheel tool for the Rwandan context and beyond, developing and expanding on themes from this report.
- Facilitate a process of dialogue, education and development between churches and government to enhance the VUP and health strategy in the context of Vision 2050 so they will work in partnership towards greater pension coverage among the young and increased elder inclusion across all policies. This dialogue and advocacy should be at both national and local levels.
- Organise a cross-sectoral side colloquium and event showcasing Rwandan best practice and advancing the needs and potential of older people globally to coincide with the Commonwealth Heads of Government Meeting in Kigali 2020.
- Appoint an additional member of staff to work full time on mainstreaming older people into Tearfund in Rwanda's work, support the national denominations in improving their own practice, and to mobilise government, business and wider society with regard to elder needs.

### **To the Tearfund family**

- Take time to consider this report at the most senior strategic levels as part of the wider strategic commitment already in place to enhance Tearfund's existing skills and capabilities in inclusion.
- Mainstream ageing, disability and mental ill health inclusion in its CCT and CCM processes, integral mission, education, emergency response, advocacy, theology and wider strategies, training and work plans.
- Integrate elder and disability inclusion in management, quality and safeguarding standards where these are currently not prominent or absent, as a matter of urgency.
- Support the work of mainstreaming elder inclusion, through its theology, education, training and evaluation teams, not least by developing resources at the interface of 'the local church' and the 'wider church'. Also, mainstream elder inclusion through managing its design, theories and theologies of organisation, governance and structure.
- Consider the implications for elder inclusion, 'vulnerability' and/or 'adults at risk' of its recruitment, fundraising, theological and communications work in its national offices and in its UK headquarters.

### **Tearfund's network and partner organisations**

- Work across different networks and partner organisations to consciously mainstream elder inclusion in its development models.
- As a priority seek to mainstream work on safeguarding, funding criteria, quality standards and agendas, and explore any gaps regarding wider questions of vulnerability and adults at risk with those networks with whom Tearfund works, to develop and draw down its own quality standards and statements. For example BOND, Integral Alliance, Micah Network and other partner organisations, for example in membership of the DEC.
- Advance the need for elder inclusion in the quality standards, work plans and strategies of other faith-based networks and alliances and other international humanitarian standards.
- Advocate across the development sector for improved policies, practice and training that intentionally consider and include older people 'at risk' and the intersectionality of old age, disability and mental ill health, alongside positive views of old age at a time of agency, empowerment and participation.

### **To Tearfund, UK Christian churches and church leadership**

Advocate to donors and institutional bodies such as DFID and FCO that:

- In investing in Rwandan process, they should give additional consideration to its elder and mental ill health needs, both now and going forward.
- Mainstreaming elder and mental ill health inclusion should be demonstrably enhanced by reference to a clear development plan by donors and policymakers in developing future investment strategies.
- They should include in their existing safeguarding programmes explicit strands of work to ensure elder and disabled safeguarding are key standards in procurement, grant allocations, equality impact assessments and performance reporting.

### **Next steps**

- Tearfund in Rwanda to devise, develop and deliver a pilot programme response in Rwanda, and to recruit someone with the necessary skills to take this work forward.
- The principal investigator, Professor Davis, working with Tearfund and colleagues at the Oxford University Institute on Ageing and Population and beyond, to develop additional publications and outputs harnessing unused data and new research. This should include accompanying any trial/pilot adopted by Tearfund in Rwanda.
- Tearfund to engage in widespread dissemination of the report findings in Rwanda, and Tearfund in the UK to support by engaging in dissemination to appropriate strategic and operational leads, with the broader Tearfund family and other partner organisations such as those already referred to.
- The researchers and authors of this report to engage in widespread dissemination activities within church, academic, policy and civil society contexts.

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'I was challenged after the [research] preparation day. I had no courage to go and ask what churches do to honour elderly when myself, as one of the church leaders, I did almost nothing with my church to honour them.'

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JEAN DE DIEU MUNGUYIKO, A MEMBER OF THE RESEARCH TEAM, WHO WENT ON TO ORGANISE A FESTIVAL TO HOST AND CELEBRATE OLDER PEOPLE, AT HIS CHURCH IN GIKONDO, KIGALI

'Before this, I had never imagined how lonely [some] elderly feel and I had no idea of what the church should do for them except supporting those without people to care for them.'

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SENIOR PASTOR OF JEAN DE DIEU'S CHURCH IN GIKONDO, SPEAKING DURING A FESTIVAL FOR OLDER PEOPLE

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