



A CASE STUDY

# Catholic Sisters in Zambia

The Conrad N. Hilton Foundation's  
Catholic Sisters Initiative

*“Give aid to... the sisters, who devote their love  
and life’s work for the good of mankind, for  
they appeal especially to me as deserving help  
from the Foundation.... It is my wish... to have  
the largest part of your benefactions dedicated  
to the sisters in all parts of the world.”*

— Last will and testament of Conrad N. Hilton



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Center for Religion and Civic Culture  
University of Southern California  
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## Introduction



### *Unique Role of Catholic Sisters*

This case study seeks to illuminate the unique role that Catholic sisters play in Zambian society and the communities they serve. It also highlights why it is so critical for the Conrad N. Hilton Foundation's Catholic Sisters Initiative to support them. When sisters were asked what differentiated them from others who provide health, education or other social services, they responded that:

“We embrace the whole person.”

“We bring Christ to the people.”

“We have a commitment that goes beyond the average person.”

“Sisters never retire from service.”

“Our presence inspires confidence in other people.”

“We unify. People drop political differences around sisters.”

Zambian sisters see themselves as spiritual workers embracing the poorest and most vulnerable members of Zambian society. Sisters go to parts of Zambia where others refuse to serve and provide strong spiritual witness through their work. They have a unique perspective on the needs of Zambian communities and vulnerable populations because they live side-by-side with people and intimately understand the challenges that they face on a daily basis. In turn, communities trust sisters and see them as honest interlocutors with larger state and private institutions. Zambian sisters truly represent Conrad N. Hilton's vision of sisters as those who “devote their love and life's work for the good of mankind.”

## Methodology

The Conrad N. Hilton Foundation's Catholic Sisters Initiative launched its first five-year strategy in 2013. As the measurement, evaluation and learning (MEL) partner of the Sisters Initiative, the Center for Religion and Civic Culture (CRCC) at the University of Southern California has been documenting and analyzing the Sisters Initiative's grant-making strategy since 2014.

At the request of the Sisters Initiative, CRCC is conducting research to support the development of the second iteration of its strategy for 2018-2023. In order to understand the needs of Catholic sisters and their missions in Sub-Saharan Africa, CRCC was tasked with developing country case studies for Zambia, Uganda and Nigeria.

CRCC's methodology is based on the country assessment model used by development organizations. Such assessments can provide a landscape analysis in a particular field (e.g., education), a risk analysis, a list of key partners, and/or the identification of particular regions with the most need. They are typically based on a literature review and at least 2-3 weeks in country, with time to interview a wide variety of stakeholders. They can provide field-level, real-time information to make decisions on whether to invest time and resources into tackling an issue in a country, as well as to develop an initial country strategy so that an intervention has the highest chance of success.

Rather than focus on a particular field, this case study is unique in that it seeks to understand the ability of one set of actors—Catholic sisters—to meet the needs within the country. It responds directly to the Sisters Initiative's request for information on five sectors that it is considering funding through its second strategy (see section 4, Country Priorities): food security, education, maternal and child health, human trafficking, and entrepreneurship and microfinance. In each of these areas, which align with the UN Sustainable Development Goals (SDGs), the report documents the needs, the role of sisters, key players that could serve as partners, challenges and opportunities.

Based on a literature review, data review, focus group discussions and interviews, food security emerged as a primary issue in Zambia. This report should be considered the beginning of a conversation on how the Sisters Initiative's next strategy can be implemented at a country level, and not a full-fledged country assessment. CRCC's relatively brief time in country (four days) and limited access to stakeholders constrain the conclusions that can be drawn from this report. Sectors beyond those that CRCC explored during this preliminary investigation may be priorities for Zambia as well. If the Sisters Initiative decides to invest in Zambia, it could employ a consultant who is an expert in a particular sector to broaden and deepen the analysis available here and to provide more specific recommendations on how to have the greatest impact on that sector in Zambia. Nonetheless, this report concludes with an initial assessment of Zambia's strengths, weaknesses, opportunities and threats, along with recommendations for the Sisters Initiative to consider as it crafts the second iteration of its strategy.



## Country Background



Neighboring eight other nations, Zambia is a landlocked country in Southern Africa with a population of more than 16.2 million people.<sup>1</sup> Zambia has 10 provinces that are further divided into 106 districts. The majority of the population lives in the Lusaka and Copperbelt provinces. About 60 percent of the population lives in rural areas.

### **Economics**

Zambia is considered a lower-middle income country with a Gross National Income per capita of \$1,490 in 2016, down from a high of \$1,750 in 2013.<sup>2</sup> Despite the fact that 85 percent of Zambians work in agriculture, Zambia's economy continues to be heavily dependent on its copper exports.<sup>3</sup> Developing the infrastructure required for a modern economy is also a challenge. Only 3.8 percent of the rural population has access to electricity. The Human Development Report of 2016 ranked Zambia 139 of 188 countries surveyed on the basis of the Human Development Index.

### **Politics**

Formerly known as Northern Rhodesia, Zambia achieved its independence from the United Kingdom in 1964. Zambia was ruled as a one-party state under the United National Independence Party (UNIP) until the 1991 elections. Since 1991, the country has become a multi-party democracy.

Zambia is often regarded as part of the "Zone of Peace" (including Malawi and Botswana) in the Southern African region, resilient in terms of having limited internal and external conflicts compared to many of its neighboring countries, where armed conflict has been prevalent.

Because it is one of the poorest countries in the world, the persistence of peace in Zambia is especially noteworthy. Analysts have proposed a number of potential reasons for





Zambia's relative stability. Urbanization may ease ethnic tensions among the 73 ethnic groups that co-inhabit Zambia's cities.<sup>4</sup> With 40 percent of its population in urban and peri-urban areas, Zambia is one of the most urbanized African countries south of the Sahara. Zambia's first president, Kenneth Kaunda, engaged in a policy of social engineering during the 1980s that specifically aimed to nurture harmonious ethnic relations.<sup>5</sup> Zambia's struggle for independence was based on civil disobedience rather than armed insurrection.<sup>6</sup> Finally, compared to many of its neighbors, Zambian political history has been relatively stable since it gained independence in 1964. Notwithstanding a number of failed attempts by the military to overthrow the government, political tensions have generally been resolved through nonviolent means, mostly through the courts, whose decisions are generally accepted by a majority of stakeholders.

Still, tensions around issues related to constitutional reform remain high. These tensions started in 2003 and have increased since the death of President Michael Sata in October 2014 and the slim win by his predecessor, Edgar Lungu, in 2015. In July 2017, Zambia's parliament imposed a 90-day state of emergency. An opposition leader, Hakainde Hichilema, was jailed in April 2017 on a treason charge, and 48 opposition members were suspended from the government for boycotting a speech by President Lungu.

## Religion

The religious demographic composition of Zambia is largely Christian, with 95 percent of the population identifying as such. Catholics represent 20 percent of the population, with most Zambians identifying as Protestant (Figure 1).

Christianity is a huge part of many Zambians' lives, and Christian institutions exert a very powerful influence in the country. The largest institutional bodies of Christianity in Zambia include:

- Zambia Conference of Catholic Bishops (12 Bishops represent the country)
- Council of Churches in Zambia
- Pentecostal Evangelical Fellowship of Zambia

Cooperation between Catholics and Protestants in Zambia tends to be good, with strong ecumenical harmony among the major church bodies. A major step forward in terms of ecumenical cooperation came in the 1970s, when Anglicans, Catholics and the United Church of Zambia recognized each other's baptisms.<sup>7</sup>

Christianity came to Zambia in the footsteps of David Livingstone—a British Congregationalist, pioneer medical missionary with the London Missionary Society and an explorer in Africa. Approximately 14 churches and religious groups were established between 1880 and 1910 in order to spread the Christian message among indigenous peoples.

Today, Christianity is the official religion in Zambia. At independence, Kenneth Kaunda, Zambia's first president, identified Christianity as one of the pillars of Zambia.<sup>8</sup> A 1996 constitutional amendment during the presidency of Frederick Chiluba, a Pentecostal Christian, declared Zambia "a Christian nation while upholding the right of every person to enjoy the person's freedom of conscience and religion."



Pentecostal Christianity in Zambia saw modest growth during the Kaunda era and grew substantially following the election of Chiluba, who described himself as “born again.” Pentecostal Christians were at the forefront of Chiluba’s campaign to oust the long-serving incumbent Kaunda during the 1991 multi-party elections. Zambians with links to Charismatic and Pentecostal churches in North America founded many of these local “born again” movements.

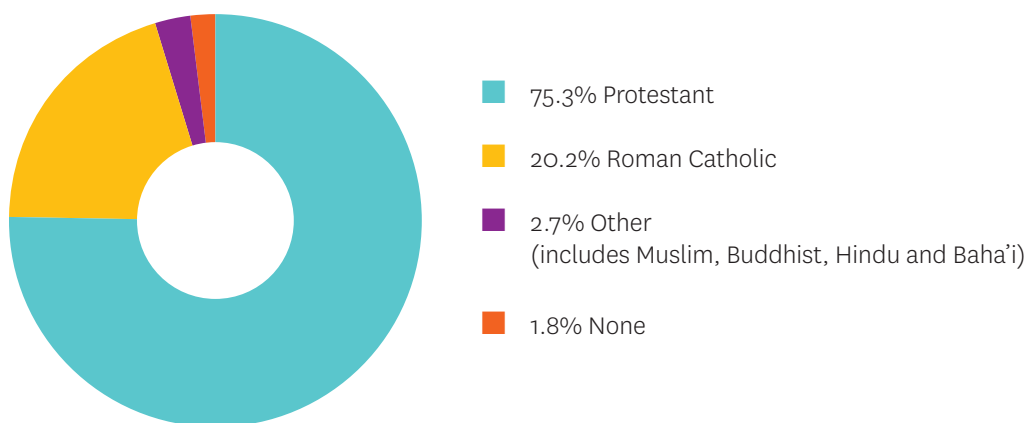
President Lungu, also a devout Pentecostal Christian, formed the Ministry of National Guidance and Religious Affairs in September 2016, re-affirming Chiluba’s declaration of Zambia as a Christian nation. Many Zambian churches, particularly the Catholic and Protestant umbrella organizations, opposed the establishment of the Ministry. The Zambia Conference of Catholic Bishops and the Council of Churches in Zambia released a joint statement warning that the establishment of the Ministry risked turning the country into a theocracy, extending state control over religion. The appointment of Rev. Godfridah Sumaili, a Pentecostal pastor, as the head of the Ministry may have increased church leaders’ concerns about “Pentecostal nationalism” in Zambia.<sup>9</sup>

On the ground, some Catholic sisters approve of the Ministry’s measures to curb the growth of informal churches and “prophets” in the country through the implementation of a formal registration process for church entities. Zambian sisters working in impoverished rural areas are concerned about the proliferation of “false prophets” who claim to be able to heal HIV/AIDS through prayer and holy water, and who urge congregants to prove their faith by abandoning their prescribed HIV medications. The trend is particularly prominent in Southern Zambia, which is one of the most impoverished regions in the country.

There is also a small but growing Muslim community in the east of the country. Sisters report that young people in their communities have converted to Islam because local mosques offered them food and a free education (recognizing that this evangelization tactic was also deployed by Christian missionaries in Zambia during the late 19th century). Sisters also voiced concern about the perceived lack of interfaith dialogue between Muslim groups and the three mother churches in the region.

*fig. 1*

## Religious Demographics of Zambia



## **Zambian Catholic Church**

Although Catholics comprise only 20 percent of the population, the church retains a strong institutional influence in political and social affairs. Constitutional reform is one of its major agenda items, particularly proposed revisions to the new Bill of Rights that would incorporate social, cultural and economic rights into a new constitution.<sup>10</sup>

The Zambia Conference of Catholic Bishops is part of an influential coalition of civil society actors called the Oasis Forum, which includes the Law Association of Zambia, Council of Churches in Zambia and the Non-governmental Organization Coordinating Council. This coalition actively participates in political debates.

Caritas Zambia was founded in 2001 to promote the work of the Catholic Commission for Justice and Peace and the Catholic Commission for Development in Zambia. The focus of the agency is to promote integral human development in Zambia through the Catholic Church. Caritas focuses on several key programs in Zambia, including HIV/AIDS prevention, agriculture, governance and human rights, organizational development and emergency response and preparedness.

## **Funding Landscape**

Zambia is considered one of the world's most aid-dependent nations and has been working to eliminate its debt dependence and reduce its reliance on foreign aid since the late 1990s. Zambia is also a large recipient of loans from the World Bank. Loans began at \$12 million per year in 1976, growing to \$55 million per year in the 1990s and now ranging from \$85 – 199 million per year (all data is in U.S. dollars).

The funding landscape in Zambia is varied, and both government and private funders play key roles in economic and human development. Major funding program areas include:

- Economic Development/Sustainability
- Poverty Reduction
- Malaria and HIV/AIDS
- Literacy and Gender Equality in Education
- Agricultural and Food Security
- Democratic Governance
- Climate Change and Environmental Degradation

### **Foreign Aid**

Foreign aid began in Zambia through the International Monetary Fund in 1976, climbing to 11 percent of real GDP by the late 1980s. By 1992, foreign aid reached an all-time high, representing 36 percent of Zambia's GDP.<sup>11</sup> Major aid donors to Zambia include the United States, Norway, Sweden, The Netherlands, Germany, Japan and Ireland (see Figure 2 for donors in 2010).<sup>12</sup>

fig. 2

## Major donors to Zambia 2010

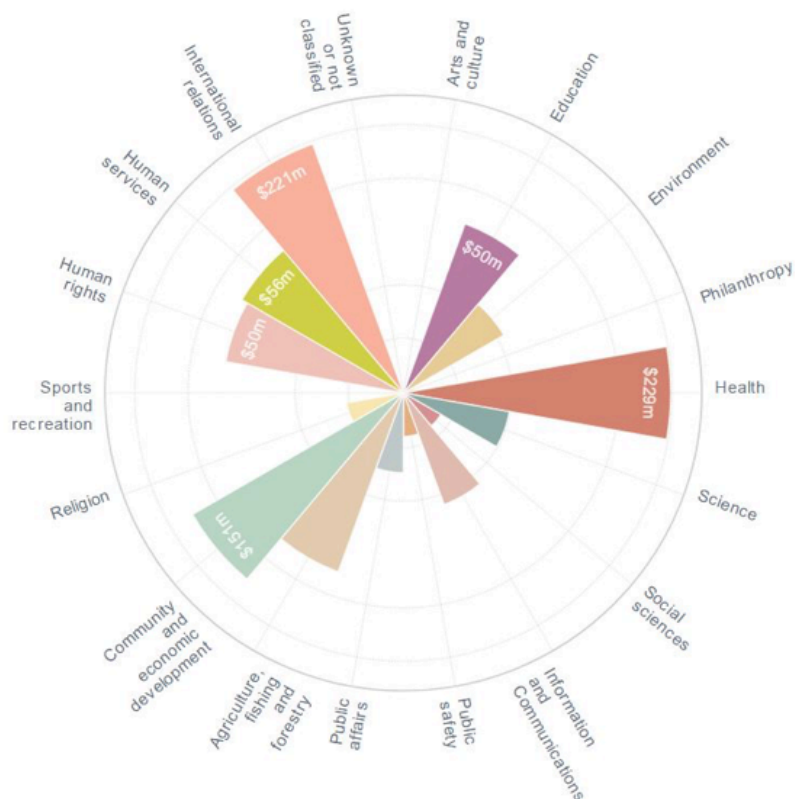
Aid scheduled by donors  
for disbursement in 2010  
(USD m)

|                            |            |
|----------------------------|------------|
| African Dev. Bank          | 85         |
| Belgium                    | 1          |
| Canada                     | 0          |
| Denmark                    | 46         |
| EU Institutions            | 96         |
| Finland                    | 26         |
| GAVI Alliance              | 8          |
| Germany                    | 39         |
| Global Fund                | 14         |
| IFAD                       | 12         |
| IOM                        | 0          |
| Ireland                    | 22         |
| Japan                      | 37         |
| Netherlands                | 48         |
| Nordic Dev. Fund           | 8          |
| Norway                     | 36         |
| Sweden                     | 44         |
| United Kingdom             | 66         |
| United Nations             | 79         |
| United States              | 139        |
| World Bank                 | 76         |
| <b>Average donor ratio</b> |            |
| <b>Total</b>               | <b>883</b> |

**SOURCE:** Organization for Economic Co-operation and Development

fig. 3

## Grants by Activity since 2006



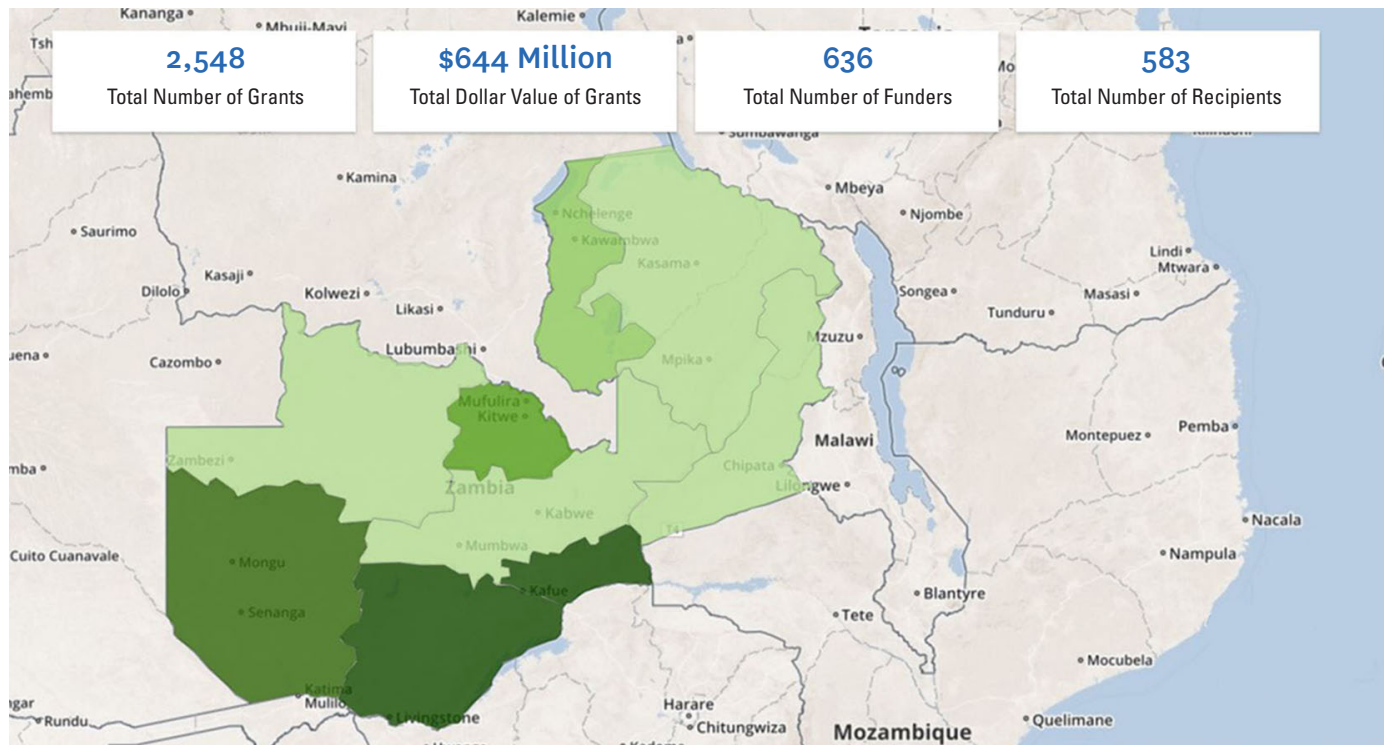
**SOURCE:** Foundation Center

Grants are coded for multiple categories.



fig. 4

## Map of Funding in Zambia since 2006



SOURCE: Foundation Center

### Philanthropy

CRCC conducted a landscape analysis of major philanthropic funders in Zambia, focusing on funding from 2006 to 2016. The analysis focused on grant-makers giving in-country and pulled data available from public sources and the Foundation Center search tools. Since 2006, more than 2,000 grants have been made in the country by more than 600 funders, totaling more than \$500 million dollars (Figure 4). Grant-making in-country has focused on a few key areas, with the most philanthropic dollars going to health and international relations (Figure 3).

The Foundation Center includes both private and public grant-makers. In addition to private foundations, the United States Department of Health and Human Services is on its list of top grant-makers in Zambia (Figure 5). The Bill and Melinda Gates Foundation tops the list of private foundations with more than \$180 million in grants from 2006-2016.

*fig. 5*

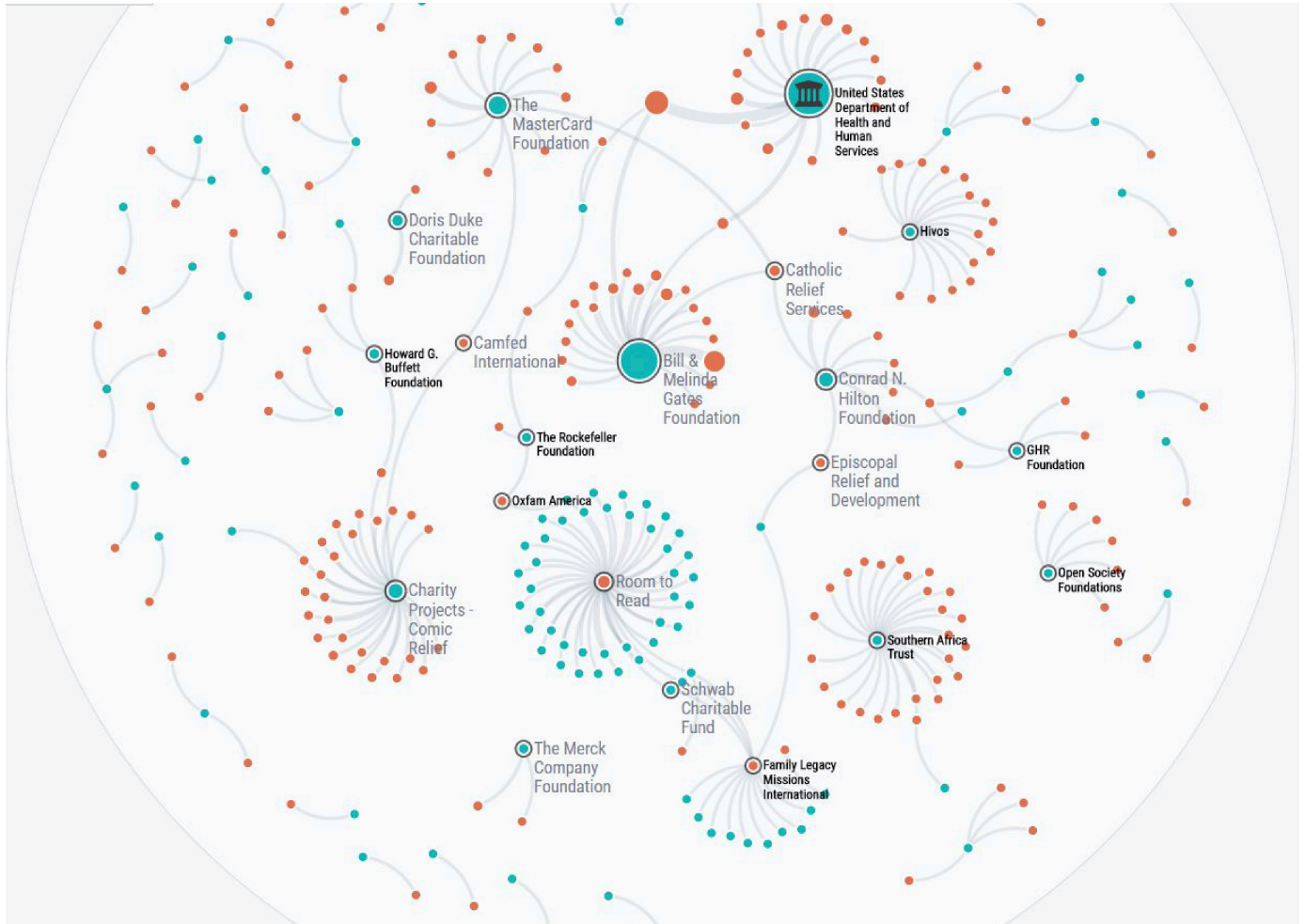
## Top 10 Grant-Makers in Zambia

|    | <i>Funder</i>   | <i>City</i>   | <i>State</i> | <i>Country</i> | <i>Total Grant \$</i> | <i>Total # Grants</i> |
|----|---|---------------|--------------|----------------|-----------------------|-----------------------|
| 1  | United States Department of Health and Human Services | Washington    | DC           | United States  | \$211,456,336         | 123                   |
| 2  | Bill and Melinda Gates Foundation                     | Seattle       | WA           | United States  | \$181,218,553         | 37                    |
| 3  | The MasterCard Foundation                             | Toronto       |              | Canada         | \$60,823,760          | 26                    |
| 4  | Comic Relief  | London        |              | England        | \$36,524,830          | 31                    |
| 5  | Conrad N. Hilton Foundation                           | Agoura Hills  | CA           | United States  | \$34,511,000          | 25                    |
| 6  | Doris Duke Charitable Foundation                      | New York City | NY           | United States  | \$13,499,300          | 9                     |
| 7  | Howard G. Buffett Foundation                          | Decatur       | IL           | United States  | \$6,999,247           | 6                     |
| 8  | Southern Africa Trust                                 | Midrand       |              | South Africa   | \$6,190,750           | 76                    |
| 9  | The Merck Company Foundation                          | Kenilworth    | NJ           | United States  | \$4,401,761           | 5                     |
| 10 | Hivos   | The Hague     |              | Netherlands    | \$4,071,390           | 63                    |

**SOURCE:** Foundation Center

fig. 6

## Cluster Map of Top 10 Funders in Zambia



**SOURCE:** Foundation Center

While major grant-makers in the country tend to fund in similar program areas, they are not very well connected to one another within the larger funding network. The cluster map (Figure 6) illustrates grant-making by the top 10 grant-makers (in teal) to organizations (in orange) in the country. Larger circles indicate a larger amount of funding, while the greater number of connection signifying funders' spheres of influence. Major funders operate in their own spheres with only minimal linkages through organizations with shared funding sources.



UN SDGs Philanthropy Platform

The United Nations adopted a comprehensive set of 17 United Nations Sustainable Development Goals (SDGs) in 2015, aiming to end poverty, fight inequality and protect the environment on a global scale by 2030.

In Zambia, the UN SDG Philanthropy Platform was launched in 2016, aiming to introduce the philanthropic sector to the UN’s agenda. The overall goal of the UN SDG Philanthropy Platform is to create multi-stakeholder collaboration in the planning, implementation and monitoring of the SDGs. The platform launch included representatives from government, the UN, the private sector, faith-based organizations, non-governmental organizations, academia, foundations, and bilateral partners (Figure 7 includes a list of central partners). Philanthropic research centers such as Foundation Center and the European Foundation Centre, along with giving networks such as Global Giving, are also included in the Platform.

Philanthropic synergy and network development will focus on the well-being of children under the imperative of leaving no-one behind. Main areas for the platform include the health and the well-being of children, early childhood development and education, and sustainable livelihoods for families.

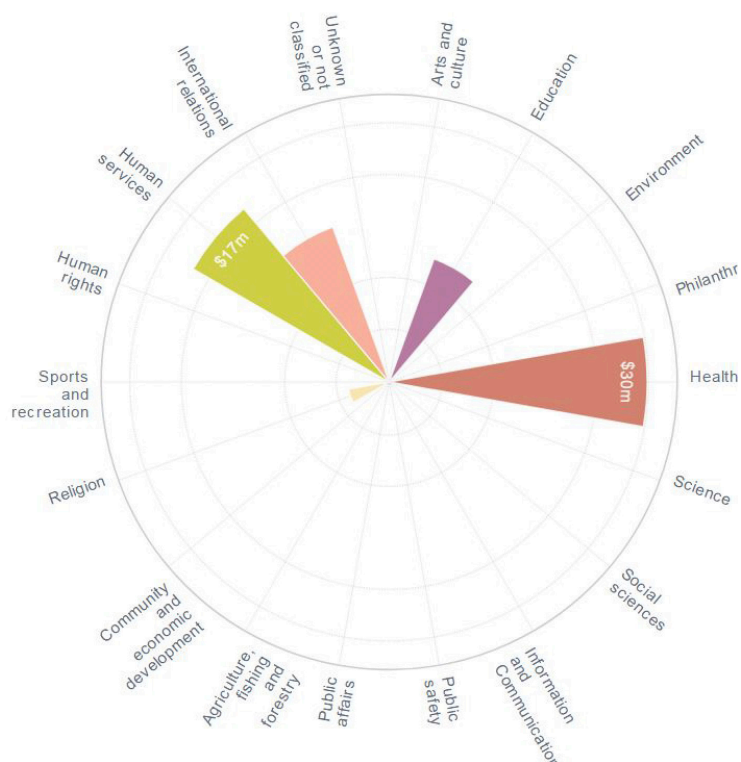
The Zambian government is drafting its 7th National Development Plan, which will place the SDGs into existing government policies around economic diversification, poverty reduction, baseline inequalities and human development. According to Maybin Nsupila, the SDG Philanthropy Platform Coordinator, any interventions must take into account the rural-versus-urban gap in levels of human development, as well as the acute needs of vulnerable populations such as women, children and the elderly. Food security was at the top of his priority list for Zambia.

fig. 7  
Central Partners in Zambia  
UN SDG Platform Launch

|   |
|---|
| The Rockefeller Foundation                            |
| Conrad N Hilton Foundation                            |
| Ford Foundation                                       |
| The MasterCard Foundation                             |
| Asociacion de fundaciones empresariales (AFE)         |
| Avasant Foundation                                    |
| Brach Family Charitable Foundation                    |
| CAF America   |
| EAAG  |
| Filantropi Indonesia                                  |
| The Humanitarian Forum                                |
| Oak Foundation  |
| World Congress of Muslim Philanthropists              |
| Foundation Center                                     |
| Council on Foundations                                |
| European Foundation Centre Global Giving              |
| Worldwide Initiatives for Grantmaker Supports (WINGS) |

fig. 8

## Grants by Conrad N. Hilton Foundation in Zambia by activity



**SOURCE:** Foundation Center

Grants are coded for multiple categories.

## Conrad N. Hilton Foundation in Zambia

The Conrad N. Hilton Foundation has been a funder in Zambia since 2009 and has primarily concentrated funding in the health and education sectors. Specifically its grants have focused on HIV/AIDS and early childhood intervention, the latter through the Sisters Initiative (see “Country Priority: Maternal and Child Health”). Figure 8 illustrates the Foundation’s giving in Zambia by sector area since it began its grant-making in 2009.

The Foundation is the fourth largest private grant-maker operating in Zambia, with nearly \$35 million in grants as of 2017. It also is among the top five grant-makers focused on Catholic activities in Zambia. The other four include the Koch Foundation, Raskob Foundation for Catholic Activities, The Loyola Foundation, and the Community Foundation of Greater Fort Wayne.

As one of the primary funders in Zambia, the Hilton Foundation has been highly involved in the development of a funding strategy to help Zambia meet the UN SDGs. The Foundation participated in the development and launch of the UN SDG Philanthropy Platform in Lusaka in 2016. Under the direction of Ed Cain, Vice President of Programs, and Shaheen Kassim-Lakha, Director of International Programs, the Foundation has steadily progressed from supporting individual grantees (most often civil society organizations) to crafting “mapped” portfolios—clusters of grantees that include civil society, government departments, UN organizations and sometimes social enterprises—with a view toward encouraging collaboration on a goal, sector or theme. This collaborative, SDG-focused approach to philanthropy will affect how the Sisters Initiative works in its sector priorities in Zambia.



## Catholic Sisters



There are more than 2,000 Catholic sisters in 42 congregations across Zambia.<sup>13</sup> These congregations include indigenous and international orders of sisters. The number of congregations in Zambia has varied over time since the arrival of the first Catholic missionaries in 1890. For example, there was an upsurge in the number of international religious orders in the 1980s. Recently several international orders—including the Missionary Sisters of Our Lady of Africa, who have been in Zambia since 1902—left the country. Dwindling vocations and an increasing number of elderly sisters in the global north have forced several international congregations to consolidate and shift resources away from their missions in Zambia.<sup>14</sup>

Zambian congregations work in a wide range of ministries including health care, education, agriculture and other social service and income-generating activities. These ministries are located across all regions of the country, with a higher representation in the more urbanized Lusaka and Copperbelt provinces.<sup>15</sup> Sisters are known for serving in remote areas where the government has a difficult time recruiting and retaining staff for health care, education and other state-run services.

Sisters are represented through the Zambian Association of Sisterhoods (ZAS), a national religious conference founded in 1958 that includes the majority of congregations in Zambia.



## ***Sisters and the Catholic Church***

Sisters generally view the relationship between themselves and the Catholic Church to be harmonious, particularly when they compare their situation to the experiences of sisters in neighboring countries. Bishops historically have had a strong working relationship with ZAS and generally appreciate the contributions of the sisters. Some sisters commented that there are difficult secretaries at the diocesan level, and that they are often kept out of the loop on major issues affecting the local church. For the most part, they were able to communicate about and resolve problems with their bishops—such as incidences of local representatives of the church trying to take control of congregations’ property. However, they were not sure how to address other issues (e.g., poor remuneration) in a meaningful way outside of their annual meeting with the bishops.

Sisters could be better stewards of their resources and interests with potential partners, whether in the church or outside of it. A local lawyer with a relationships with ZAS suggested that fiduciary relationships could be more clearly defined and set out in writing from the beginning so that sisters and their congregations are not taken advantage of, whether through under-compensation by a local diocese or in an exploitative partnership with an unscrupulous NGO.

## ***Sisters in Society***

Although the Catholic Church—particularly through the Jesuits and the Dominicans—has a strong institutional voice at the political level in Zambia, Catholic sisters have limited political influence, according to a scholar who has worked extensively with Zambian sisters and their congregations. He suggested that this due to the patriarchal nature of the Zambian church and society at large. The lack of higher education among sisters in Zambia is also a factor. One key informant noted that if more sisters were to obtain post-baccalaureate degrees at the Master’s and Ph.D. levels, they would gain the confidence and capacity to participate in political forums.

Sisters spoke of working with the Ministry of National Guidance and Religious Affairs. They reported having established a good dialogue with its director, Rev. Godfridah Sumaili, directly airing some of their concerns with her. This relationship shows that sisters exercise independence from the official church structures, as the church opposed the Ministry and Rev. Sumaili’s appointment.

As trusted interlocutors in their communities, sisters also could play a significant role in establishing a strong dialogue between Muslims and Christians in the regions that they serve.

## ***Sisters and Non-Governmental Organizations***

Currently sisters have limited involvement in local civil society. They tend to engage with faith-based non-governmental organizations (NGOs) that share similar cultural values, such as Catholic Relief Services, Caritas and the Churches Health Association of Zambia. Sisters’ limited engagement with non-Catholic NGOs is likely rooted in the misperceptions of both sisters and NGO leaders.

Sisters tend to perceive NGOs as entities having monetary and material resources but no moral vision. Therefore, sisters overlook non-Catholic NGOs as potential collaborators, even though they may possess useful expertise that sisters could leverage to amplify their impact and extend their own apostolic work.

Sisters also are wary of simply being service implementers for NGOs rather than fully engaged partners. Sisters gave examples of past collaborative projects in which they felt that their congregations were merely asked to provide frontline services instead of being involved in the design, management and evaluation of the projects.

According to some sisters, secular NGOs also perceive sisters as rich with resources because of their links to international congregations. According to some sisters, NGOs often expect sisters to pay high fees for the programs or workshops that NGOs offer.

From the other side, NGO leaders report that they are aware of the presence of sisters in the regions where they work, and many have interacted with sisters at some basic level. Sisters may have stopped by an NGO's office to discuss working on a project, or sisters were implementing a part of a project developed by a particular NGO. Still, very few NGOs reported interacting with sisters in a truly meaningful and collaborative way. Even the NGOs that work with sisters have little understanding of the cultural and political dynamics of congregations and religious conferences. Some NGOs have tried unsuccessfully to recruit sisters for positions on projects, receiving little response to their overtures.

Each party tends to view the other simply as a repository of financial or material resources, rather than as a source of specialized expertise that could be complementary to their own goals. Sisters have in-depth grass-roots knowledge of the complex, micro-level conditions faced by the vulnerable populations they serve. NGOs, on the other hand, generally possess macro-level expertise, with the best of them having technical know-how in development models that would be useful for crafting the kinds of interventions that many sisters would be eager to undertake. Furthermore, most in-country NGOs possess broad-based networks with their international counterparts, which could also prove useful for sisters.

## ***Challenges faced by ZAS and Congregations***

Interviews with the ZAS executive staff and its members identified key challenges that the organization and sisters in Zambia face: financial sustainability, human resources, formation, data and networking.

### **Financial Sustainability**

A major theme that emerged from the in-country assessment was the challenge of building long-term financial sustainability for ZAS and its member congregations and apostolates. The ZAS executive team and senior members of congregations involved with ZAS discussed the need for a sustainable business model for ZAS. ZAS currently has no income-generating activities. All activities are project-based and do not support ZAS directly. Sisters had limited ideas about income-generation and mainly focused on expanding the Kalundu Study Centre so that it could generate more income from tuition (e.g., laity attending catechism courses). In order to expand the existing infrastructure at Kalundu, however, ZAS would have to generate or raise a large sum of initial capital.

Sisters want ZAS to help individual congregations figure out ways to leverage their existing assets and generate income to sustain their missions. Sisters are aware that congregations need to move past the traditional charity model of funding and become self-sustaining to meet the growing needs of their sisters (e.g., early formation and supporting elderly sisters) and ministries.

Concern for the financial security of religious conferences and congregations is echoed across the region. The Association of Consecrated Women in Eastern and Central Africa (ACWECA) and Catholic Relief Services held a social impact investing workshop after the ACWECA plenary in August 2017 to assist major superiors and leaders of national religious conferences in leveraging the existing assets (e.g., land, buildings, human resources) of their congregations and conferences to create long-term investments and financial security.

## Human Resources

ZAS meets once per year. The executive team expressed a desire for the heads of congregations to share best practices and discuss pressing needs more frequently. In order to do so, ZAS would need both more staff to organize the meetings and funds to help congregations meet and communicate. Many of the poorer congregations cannot afford to travel and stay at Kalundu even once a year. The lack of staff also affects ZAS's ability to provide more responsive programming and ongoing education for leaders and future leaders of congregations. The human resource problem, therefore, is closely linked to the ongoing financial challenges facing ZAS and many Zambian congregations.

Several informants also connected the challenges facing congregations and ZAS to a lack of long-term thinking and strategic planning when it comes to financial and human resources. When congregations are under financial duress, its leaders may go after random opportunities in the hope of earning extra income. On an ad hoc basis, the leaders may assign a sister who has been trained (e.g., through the African Sisters Education Collaborative) to a mission that has the potential to generate more income but requires capacities outside her skillset. This has resulted in low morale among some younger sisters. It is worth noting that this a challenge also faced by younger sisters in the global north.

## Formation

The executive leadership of ZAS and congregational leaders spoke of the need for revitalizing the ongoing lifetime formation for sisters and strengthening the training of formators. As one sister said, "Upgrading education is good, but it cannot be the only thing [for sisters]." The spiritual needs of sisters, from early postulancy through retirement, are not being met, and "without this we cannot do anything."

Older sisters went through a successful communal formation program when they were young. The program pooled resources and brought young sisters together from various congregations to further their spiritual education and early formation. In a recently published study on women's religious life in Zambia (sponsored by the GHR Foundation, UISG and ZAS), researchers found that the current Kalundu formation program is very basic, and "more is needed in spiritual accompaniment, counseling and in information technology."<sup>16</sup>

Congregations also expressed a willingness to support ongoing inter-congregational formation courses to strengthen sisters' skills and spirituality.<sup>17</sup> ZAS has no data on the number of sisters who leave congregations or the reasons for their departure. Sisters, however, raised the concern that the lack of ongoing formation makes sisters more vulnerable to outside pressures. Sisters report two major concerns: 1) younger sisters often leave their congregations around the time that they receive their college degrees; and 2) middle-age sisters are stressed by their responsibilities for their apostolates and congregations as well as their families. Sisters are often the only educated members of their families and are perceived to have access to financial resources. Many sisters have lost family members to HIV/AIDS and are trying to take care of nieces and nephews.

ZAS members also discussed how ZAS could work with congregations on lifetime formation support for older sisters. This would include spiritual, health and wellness support tailored to the needs of middle-age and elderly sisters. Sisters claim that they never really retire and that even elderly sisters have an apostolate of prayer or simple tasks to support their congregations. ZAS members are concerned that their experiences are beginning to echo those of congregations in the global north regarding lifetime formation and support for the spiritual and health needs of their elderly sisters.

Financial resources are the underlying challenge to ZAS and its member congregations in developing and supporting lifetime formation for sisters. According to sisters, international or pontifical rite congregations have significantly greater resources than local or diocesan rite congregations. International congregations, however, may lose these resources as they are directed toward supporting aging congregations in Europe and the United States.

## Data and Research

The lack of data on the health of congregations and their ministries, as well as the inability to analyze that data, is a major challenge for ZAS and potential partners. For instance, CRCC did not find information about the numbers of postulants, fully professed sisters, former sisters or retirement liabilities. Nor did it find information on ministries. The data that are available come from grantees such as ASEC and CRS as well as field reports from Global Sisters Report.

One key informant reported that ZAS had not conducted a census of sisters and their congregations in years. Even a survey to capture basic information—such as the number of congregations currently working in Zambia—resulted in conflicting data. ZAS has a list of 42 congregations, but the actual number might be 42-50, as some congregations do not fall within ZAS. In the most recent ZAS survey of its 42 congregations, only 19 responded to their request for information. The ZAS team expressed frustration that superiors of congregations are not sharing information with ZAS, and it is possible that their congregations are not even gathering it. Sisters say that help was needed at the congregational level to have data collected and sent to ZAS. Even if congregations collected data, ZAS does not have the capacity to centralize and analyze it.

If collected and used, data could allow ZAS and congregations to tackle challenges in a strategic way. For instance, data on why and when sisters leave congregations could help inform how those congregations respond or when they need to channel more emotional, spiritual and educational support to sisters. Such data would also help the Sisters Initiative team and other partners understand the impact of interventions.

## Networking

The ZAS team and Zambian sisters identified a need to expand meaningful connections between sisters, their congregations and key stakeholders. Creating stronger networks would allow sisters to develop sustainable resources for their congregations and ministries, and influence policy development for the betterment of the communities that they serve. Sisters and congregations would like assistance developing inter-congregational networks as well as strategies to connect sisters with organizations and government ministries.

Sisters suggested that ZAS could organize sisters who are active in certain sectors (e.g., health care or education) into working or interest groups. It could also be useful to organize sisters around solving multi-factorial issues. For instance, areas such as maternal and child health, environment, agriculture and education play a role in household food insecurity, and sisters bring frontline knowledge of these challenges to the table.

Several sisters cited Catholic Relief Services' SCORE-ECD grant as a successful example of how outside funding can help generate a network. SCORE-ECD was a catalyst for information-sharing and networking among sisters and across congregations in the area of early childhood development services (see "Maternal and Child Health" in Country Priorities).

Many potential partners for Catholic sisters may come from beyond the Catholic world of NGOs, the church and funders. These include secular NGOs, government ministries and private-sector businesses (e.g., banks, pharmaceutical companies, investment and financial service firms, etc.). The misperceptions between NGOs and sisters, however, often hinder the development of productive partnerships. Sisters are perceived to be downstream service deliverers rather than the developers or leaders of service-delivery projects. Even in discussions with NGOs that have worked with sisters, there were no mentions of sisters developing or leading projects. Sisters could be supported in ways that elevate their leadership, and partnerships could be encouraged through funding. By moving beyond the traditional Catholic silo, sisters could magnify the impact of their work.

# IV.

## Country Priorities



The Catholic Sisters Initiative is committed to supporting sisters in their work to advance human development. The Conrad N. Hilton Foundation has taken a leading role in the United Nations Sustainable Development Goals (SDGs) Philanthropy Platform, both in Zambia and globally.

With the second iteration of its strategy, the Sisters Initiative is considering supporting sisters in specific sector areas that align with the SDGs, including food security, education, maternal and child health, human trafficking, and entrepreneurship and microfinance. Of these five areas, food security emerged as the top issue in Zambia from both the literature review and in-country interviews and focus groups. A wide variety of stakeholders from several fields—including maternal and child health, environment, education and agriculture—agree that Zambia’s greatest priority is food security. They report that it is hard to educate or economically develop a community when people are hungry and malnourished.

The following section provides insights into the needs, role of sisters, key players, challenges and opportunities for these five sectors. These insights may be useful in developing the Sisters Initiative’s overall strategy, but should not be considered definitive. CRCC did not consider other sectors in which there also might be great needs. It is noted where there are gaps in CRCC’s knowledge of these sectors or in the information available. A more thorough analysis by sector experts could help the Sisters Initiative craft an in-country strategy and implementation plan.



## Food Security and the Environment

### Need

fig. 9

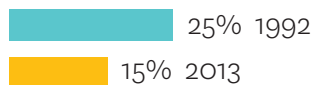
## Food Security Statistics

Percent of children under age 5 who are...

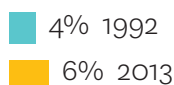
Stunted (all children)



Underweight (all children)



Wasting (female children)



**SOURCE:** World Bank

Zambia is one of the breadbaskets of Southern Africa. Despite a record, 35-year-long drought in the region, Zambia and Tanzania experienced a corn surplus in 2016. Zambia has a current ban on corn exports in order to ensure that domestic needs are met before corn is exported to its neighbors, which are also experiencing severe drought.<sup>18</sup> Despite the recent corn surplus, rural Zambians struggle with food insecurity and poverty.

Between 1991 and 2008, four acute periods of drought and two floods wreaked havoc on Zambia's food production and electricity supplies (the Kariba Dam supplies most of the electricity for Zambia and Zimbabwe). It is estimated that more than 350,000 people in the country currently lack a regular supply of food.<sup>19</sup>

Food insecurity has severely affected the health of Zambian children, with around 40 percent of children between 6 months and 5 years considered stunted.<sup>20</sup> No progress has been made in reducing stunting or wasting since the early 1990s (Figure 9). The four provinces that are hardest hit by stunting are Northern, Luapula, Eastern and Western, with an average rate of 50 percent of children being stunted.<sup>21</sup>

### Role of Sisters

Due to the lack of data on sisters' ministries, there is no quantitative information about how many sisters work on food security or how many people they reach through their work. It is clear, however, that sisters are already actively engaged in food security, nutrition and environmental missions across the country. From 2012 to 2017, the Conrad N. Hilton Fund for Sisters gave 10 grants (\$174,200) to Zambian religious congregations for work on clean water, food and agriculture.

Sisters are involved in both producing food and feeding people directly. One example of the latter is a feeding program that Franciscan sisters run in Chililabombwe, Copperbelt Province. According to *Global Sisters Report*, "Students were fainting from hunger during their classes.... Lack of funding forced [the sisters] to cut the feeding program for the older students, so now they just feed children in elementary school."<sup>22</sup>

Other examples include sustainable agriculture projects. The Comboni sisters, for instance, run a moringa tree plantation. The moringa is considered a "miracle tree" that could help address malnutrition in many rural part of Zambia.<sup>23</sup> Zambian sisters say that congregations have been experimenting over the years with various agriculture and nutrition projects to serve the needs of local communities and model best farming practices that are rooted in local food norms. Sisters also talked eagerly about using their congregational land as model or commercial farms if they could access technical expertise, capital, agricultural inputs and machinery.

## Key Players

Numerous organizations work on food security, reaffirming the centrality of this issue in Zambia. These organizations could partner with sisters on both feeding and agricultural programs.

IrishAid and Self-Help Africa currently work with sisters. IrishAid is built on the long history of Irish missionary and development work in Zambia, as male and female Irish congregations have provided many of the country's social services over the past century.<sup>24</sup> IrishAid funds the government of Zambia as well as NGOs that work with sisters, including Self-Help Africa.

In agriculture, Self-Help Africa focuses on production and access to crops and small livestock. It is active in seven provinces and more than 70 percent of its beneficiaries are women. Self-Help Africa partners with sisters, organizations that are rooted in communities and the Zambian Ministry of Health. It currently works with sisters on a project with the local Catholic organization Households in Distress and the Kauma Fund Development Project, funded by the Allan Kerins Foundation (Ireland). The Kauma Fund Development Project aims to make sisters' orphanages more self-sustainable by increasing the productivity of their farms.

Other organizations expressed an interest in working with sisters in the future. World Vision directly supports and monitors more than 120,000 children in Zambia, including their nutrition. World Vision has experience partnering with a wide variety of organizations, including government ministries, international and local NGOs, and faith-based organizations such as local dioceses (e.g., the Diocese of Ndola) and Catholic Relief Services. The organization stated that it could partner with sisters across a wide range of issues, but livelihood development and food security at the household level are its top concerns in Zambia.

Sisters could find a role in an existing NGO and private-sector collaboration between Musika Development Initiatives and Silverlands-Zambia. Musika is a local NGO owned by six Zambian agriculture-related institutions and affiliated with the Zambian National Farmers Union. Silverlands-Zambia is an agricultural development company that is part of Silver-Street Capital. Their goal is to develop markets for livestock and crops. In order to do so, these organizations see the need for working capital in communities, marketing and financial skills for farmers, and better infrastructure and transportation. Catholic sisters have approached Musika about collaborations in the past, and the NGO indicated interest in forming strategic alliances with both sisters and World Vision. Sisters could be a source of home-grown solutions, since they live and work in rural communities, while Silverlands could drive investment into these markets from the private sector. Sisters, in the mind of these two organizations, could undergird a holistic platform of responses that includes food security, livelihood development, nutrition and financial literacy skills.

CRCC did not speak to representatives of the following programs, but they are also key players in food security in Zambia. The World Food Programme runs the Rural Resilience Initiative for households cultivating less than two hectares of land and the Home-grown School Feeding program to give children access to nutritious food. The Japan International Cooperation Agency is assisting the government of Zambia with several agricultural programs, such as providing training in irrigation and rice production and supporting research into locally produced fertilizer. USAID supports agriculture-led economic growth through programs that support crop diversification, increased food production among small-scale farmers, green energy and the sustainable use of natural resources. The Zambia Land Alliance is a network of seven NGOs working for just land policies and laws. Its seven members include Caritas Zambia, Justice for Widows and Orphans, the Association for Land and Development, Women for Change, the Zambia Alliance of Women, the Zambia Civic Education Association, and the Law and Development Association.<sup>25</sup>

## Challenges

In addition to drought, key players in food security in Zambia report that systemic issues hinder the country's ability to reduce hunger. Representatives from Musika Development Initiatives and Silverlands-Zambia said that the Zambian Food Reserve Agency (FRA) had destroyed traditional agriculture in Zambia with its focus on white maize. Farmers lost agricultural skills, particularly the ability to produce a variety of foods. The surplus of corn combined with a ban on corn exports have brought low prices, middlemen and corruption, destroying markets. Farmers need working capital and marketing and basic financial skills to help them move from subsistence agriculture to entrepreneurial farming that employs others. Additionally, the country's main distribution centers are all near rail lines, but it is challenging to move goods beyond these transport junctures due to poor infrastructure. The lack of transportation hinders local market development.

Drought is an acute problem in the south of Zambia, but water access affects the entire country. Water pumps will not serve the needs of the whole population. Crop storage, irrigation, fluctuating commodity prices and farmers' expenses also pose challenges.

Finally, tightening international development assistance and donor fatigue affect food security in Zambia. In its February 2017 brief, the World Food Programme reported that it received only one-quarter of the \$33 million needed for its Zambia initiatives.

## Opportunities

Zambian food security and related environmental issues affect a broad swath of sectors, from gender equity to education and health. So much of the work that sisters do touches on food security as well. This presents an opportunity for the Sisters Initiative to support sisters in this critical area of need in Zambia. The Sisters Initiative could develop a set of grants to address food security and the social and health factors that contribute to the problem.

These grants could operate at two levels: building the capacity of sisters and their congregations to work on food security or integrating sisters into system-level changes with large multi-partner grants. In terms of capacity building, these grants might include developing a partnership/mentorship program that connects sisters with professionals in the private and public sectors. The grants also could engage sisters in meaningful leadership roles, and not just as service providers. By carefully identifying partners that could walk with sisters as they expand their networks and navigate worlds beyond the church, the Sisters Initiative could amplify the impact of sisters' human development work.

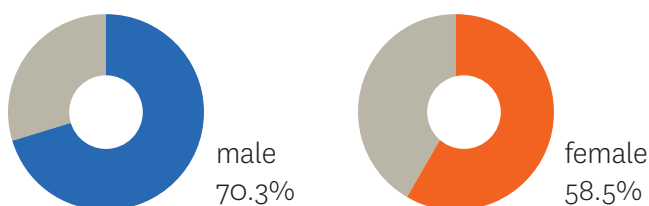
At the systems level, grants could be targeted to help sisters and communities deal with the storage of food and crops, create markets and address logistical challenges, identify soil issues, and/or experiment with drought-resistant crop or livestock techniques.

## Education

### Need

**63.4%** overall literacy rate, compared to 86.5% in Zimbabwe

Youth (15-24 years) literacy rate (%) 2008-2012\*



**6 million children** under the age of 18, of which 4 million children are of primary school age (7-14)

**SOURCE:** CIA World Factbook, 2017 & UNICEF

Since the introduction of Zambia's free basic education policy in 2002, enrollment in basic education programs has steadily increased. However, children from poor households, rural children and girls are the last to enroll in school and the first to drop out, and are significantly underrepresented in the upper grades of basic education as well as the secondary level.<sup>26</sup>

A wide variety of stakeholders—NGO workers, sisters, academics, a UN representative—pointed to the gap in literacy levels between the rural and urban populations as a major issue. The lack of literacy in rural Zambia is a stumbling block to household food and economic security. A National Assessment survey in 2015 found poor reading levels across all school grades in Zambia.<sup>27</sup> Interventions in health, environment, agriculture and other development areas have failed in Zambia because of the lack of basic literacy and critical thinking skills that are inculcated in primary education. The Ministry of Community Development has documented high illiteracy levels in rural areas. Poor education is a hindrance to developing new crop practices and taking care of livestock because farmers need basic critical thinking skills, the ability to read and financial know-how in order to risk change and incorporate new practices.

### Role of Sisters

As in many other countries in East and Southern Africa, the Catholic Church plays a major institutional role in educating Zambians. In colonial Zambia, the school served as a primary driver of Christian conversion and church growth. During this period, the provision of education was almost the total preserve of Christian missionaries. At Zambia's Independence in 1964, missionaries operated 66 percent of the primary schools, with Catholics running about 30 percent of all schools. After Zambia gained its national independence, the state desired to control the educational system. In Zambia's case, this was achieved not by a direct take-over but through legislation (the Education Act of 1966). In the aftermath of this legislation, Catholic schools became state-supported and controlled by the Ministry of Education in terms of curriculum, admission of students and the employment of staff.<sup>28</sup>

This development impacted the composition of Catholic schools' administrators and teachers. In 1969, religious personnel constituted about 33 percent of school staff; by 2005, religious personnel were a mere 3 percent of staff. Laity with little religious training took an increasingly larger role in school administration.<sup>29</sup>

As of 2015, the church claimed in *Statistical Yearbook of the Church* to have 96 Catholic elementary schools serving 46,433 students, and 89 Catholic secondary schools serving 577,246 students. Higher education institutes and universities had 3,844 students enrolled.<sup>30</sup> It is unclear how the church determined these numbers, or what they represent, considering the often blurred lines between Catholic and government schools in Zambia, a common theme in the region. For example, the *Statistical Yearbook of the Church* would imply nearly 6,500 students per Catholic secondary school, indicating a need for better data.

Of all the sectors, the Conrad N. Hilton Fund for Sisters has given the most grants and highest amount of funding to Zambian religious congregations for education and communication: 15 grants for a total of \$184,300.

Sisters also require education in order to perform their work in this and other fields. Zambia and other African nations have increased national requirements for teachers and principals. The African Sisters Education Collaborative (ASEC), a grantee of the Sisters Initiative, has been instrumental in helping sisters gain new skills, and most of their graduates in Zambia are in the field of education. ASEC's Sisters Leadership Development Initiative (SLDI) trains sisters in finance, administration and other key skills they need to run their congregations and ministries. Higher Education for Sisters in Africa (HESA) provides funding for sisters to obtain college degrees in education, nursing, agriculture and other subject areas. In Zambia, these programs have produced:

- 170 SLDI alumnae in Phase I, II, and III (2007-15)
- 54 unique participants in SLDI technology workshops in first year of Phase IV (2016)
- 62 participants in superior workshops (2016)
- 29 unique sisters enrolled in HESA, 1 of whom has graduated.

## Key Players

In addition to the Catholic Church, major players in Zambian education include World Vision, UNICEF, USAID, Room to Read, Plan International, the Forum for African Women Educationalists (FAWE) and the Ministry of Education. All these key players—whether funders, NGOs or government—identify childhood literacy as a key educational issue in Zambia. Childhood literacy, particularly for girls, is seen as a cornerstone of human development in Zambia.

## Challenges

Brendan Carmody, a Catholic priest and associate professor of education at the University of London, has argued, based on extensive primary research on the Catholic education sector in Zambia, that Catholic schools in Zambia have contributed greatly to the nation's educational system. But in so doing, Catholic schools have also become embedded in the state educational apparatus, blurring sacred and secular and thereby compromising the church's prime mission. Carmody

contends that this has happened largely because Catholic schools deeply valued their cooperation with the Zambian state. But as the national education system began to create ever greater division between rich and poor, Catholic schools faced a major dilemma: continue their involvement in an institution that was working against Catholic ideals of equality and social justice, or disentangle themselves from that institution and diminish their ability to educate children in vulnerable communities.<sup>31</sup>

Catholic schools, particularly those run by congregations in Zambia, face constant financial challenges, including providing for the upkeep and expansion of educational facilities, attracting and retaining lay teachers, feeding children and supplying textbooks and basic classroom supplies. The stories of two SLDI alumnae illustrate the resource challenges that Zambian sisters face in educating children. Sister Gertrude Daka of the Daughters of the Redeemer garnered more than \$80,000 from the Zambian government to construct a building and toilets for classrooms in order to enroll more children and accommodate teachers at a school for more than 551 children in Lusaka. Sr. Rose Mainza Moonze, Religious Sisters of the Holy Spirit, raised money and in-kind donations of time and expertise from a wide variety of sources for construction of a classroom block, furniture for classrooms and fencing for the protection of the convent. The school also held events to support and sustain itself during and after construction and held poultry and vegetable sales to support its gardening project. Working in education requires much more of sisters than simply teaching students.

Other challenges include barriers to education, particularly in rural communities and for girls. World Vision Zambia cited child registration with local and national civic authorities as a major challenge to higher education and civic participation. This issue flies under the radar of many development projects and the Zambian government. Only 17 percent of children aged 0-17 have been registered in order to obtain a birth certificate.<sup>32</sup> The major obstacle to registration in rural areas is that the registration process has not been decentralized, forcing parents to travel long distances to obtain a registration document for their child. Finally, Zambia has one of the highest child marriage rates in the world. More than 42 percent of women aged 20-24 years were married by the age of 18.<sup>33</sup>



## Opportunities

Basic education and literacy is a major need, particularly in rural Zambia and among girls and women. By strengthening sisters' education efforts and community outreach at primary and secondary institutions, the Sisters Initiative could contribute to reducing dropout rates while promoting adult education and literacy in communities. Strengthening education ministries could be done in a variety of ways:

- Help congregations develop existing assets (e.g., land, current income generating projects) to provide funding for capital projects (e.g., building repairs, expanding classrooms)
- Match funds with other private foundations (e.g., Porticus Foundation, GHR, etc.) or funders (e.g., IrishAid) and endow a scholarship fund for students in need of assistance.
- Develop grants between sisters and stakeholders (e.g., Room to Read, World Vision, Ministry of Education, etc.) that provide sisters the opportunity to expand their networks and tap into the educational and technical resources of NGOs and government ministries.
- Address barriers to education, such as supporting local efforts by sisters and other stakeholders to discourage child marriage and encourage the education of girls.
- Match future HESA graduates with young women who have the potential to seek a higher education and have them mentor young women through secondary school.

There are many funding avenues that the Sisters Initiative could pursue that would strengthen sisters' educational ministries in Zambia. These efforts could build on prior investments (e.g., ASEC), and they could be integrated with funding that targets local food security and nutrition at the household and community levels.

## Maternal and Child Health

### Need

|   |                          |
|---|--------------------------|
| Maternal mortality ratio<br>(per 100,000 live births)   | 398/100,000 <sup>1</sup> |
| Lifetime risk of maternal death                         | 2.3%                     |
| Antenatal care (4+ visits)                              | 55.5%                    |
| Births attended by a skilled<br>health worker           | 64.2%                    |
| Total fertility rate                                    | 5.3 <sup>2</sup>         |
| Contraceptive prevalence rate<br>(modern & traditional) | 49%                      |

**SOURCE:** Zambia Demographic and Health Survey 2013-2014

<sup>1</sup> CI (323;474)

<sup>2</sup> The number of children who would be born per woman (or per 1,000 women) if she/they were to pass through the childbearing years bearing children according to a current schedule of age-specific fertility rates.

Zambia has made progress in maternal and child health over the last decade with committed government institutions, foreign donors, and private and public partnerships. *The Roadmap for Accelerating Reduction of Maternal, Newborn and Child Mortality, 2013-2016*—developed by the Ministry of Community Development, Mother and Child Health—provided a useful map for the Zambian government and partners as they pushed toward the Millennium Development Goals deadline in 2015. It also laid the groundwork for Zambia's efforts toward the UN Sustainable Development Goals.

One of Zambia's most significant accomplishments has been the reduction of maternal and infant mortality. The maternal mortality ratio has dropped from 591 per 100,000 live births in the 2007 Zambian Demographic and Health Survey (ZDHS) to 398 per 100,000 in the 2013-2014 ZDHS. Based on estimates, the infant mortality rate has dropped from 76 deaths per 1,000 live births in 1999 to 45 deaths per 1,000 live births in 2013.

By disaggregating the ZDHS data, it is possible to identify regional areas where more support is needed to prevent early child mortality (e.g., Eastern and Northern Provinces). The mortality rate for children under age 5 is highest in Eastern Province (115 deaths per 1,000 live births) and lowest in Copperbelt Province (63 deaths). This data, coupled with future data on the location and services that sisters' congregations provide, could be used to target interventions, network congregations and connect sisters with NGOs and potential funders.

Two key measures of maternal and infant health progress in a country with a significant rural population are the percentage of women assisted by a skilled health worker and the percentage of women who have a birth preparedness plan. The national percentage of deliveries assisted by a skilled health worker (doctor, clinical officer, nurse or midwife) has increased from 47 percent in the 2007 ZDHS to 64 percent in the 2013-2014 ZDHS. Skilled birth attendance varies widely across the country, ranging from 88.9 percentage in Lusaka Province to 45.3 percent in Northern Province. Nine in ten Zambian women have discussed a birth preparedness plan with a health-care provider. Fertility declined from 6.5 births per woman in the 1992 ZDHS to 5.3 births per woman in the 2013-14 ZDHS—a drop of just over one birth per woman in nearly two decades.

## **Role of Sisters**

Catholic sisters have a long history of providing maternal and health services in Zambia, dating back to some of the earliest missions at the turn of the 19th century. Sisters run many of the country's 37 Catholic hospitals (e.g., Sisters of Charity of Ottawa run the Muzeyi Mission Hospital in Eastern Province, and Sisters of the Holy Spirit run Monze Mission Hospital).

One of the projects most heralded by sisters in Zambia is the Catholic Relief Services (CRS) Strengthening Capacity of Women Religious in Early Childhood Development (SCORE-ECD) project, which was launched in 2014 to expand the provision of quality early childhood development (ECD) services in Zambia, Kenya and Malawi. The Conrad N. Hilton Foundation funds this project. SCORE-ECD has three strategic objectives: 1) improve Catholic sisters' technical knowledge and skills in ECD in order to deepen and expand the services their congregations provide to children ages 0-5 and their families; 2) increase the sustainability of sister-led organizations providing ECD services; and 3) strengthen connections between and among congregations providing ECD services by publicizing Catholic sisters' ECD-related work and helping sisters become more visible and involved in ECD policies and programs.<sup>34</sup>

Existing health and nutrition programs are good entry points to introduce ECD interventions. SCORE-ECD has shown that sister-led education, health and nutrition services can also be feasible starting points for potentially high-performing ECD interventions.<sup>35</sup> Fifteen congregations in Zambia have taken part in this project.

Sisters in Zambia benefitted from SCORE-ECD in several ways. First, it provided technical background and a framework for their work with young children. Second, it connected sisters who were working in the same sector and had little knowledge of what sisters in other congregations were doing in early childhood development. Third, it allowed sisters to leverage their connections and transfer children to specialized services run by other congregations. Finally, it partnered well-resourced congregations with their under-resourced counterparts.

Religious congregations have also asked the Conrad N. Hilton Fund for Sisters for support with work with women and children. The Fund has given 15 grants in this sector (tied with education/communication) for a total of \$159,300. The fund has also given 13 grants totaling \$132,400 for health care/HIV-AIDS.

## Key Players

There are many key players in maternal and child health in Zambia, and this assessment includes just a few of the major partners that the Sisters Initiative may consider working with—in addition to Catholic Relief Services—as it develops its second strategy. The key players include two government ministries: the Ministry of Community Development and Mother and Child Health and the Ministry of Health. The government works closely with Churches Health Association of Zambia (CHAZ), a local faith-based organizations, as well as other organizations.

CHAZ has 151 health institutions as members, representing 16 Catholic and Protestant denominations. The majority of these health institutions are based in rural areas and include 34 hospitals, 77 health centers and 31 community-based organizations (CBOs).<sup>36</sup> These institutions account for more than half of health services in rural areas and 35 percent of health services nationally. CHAZ works closely with the Zambian government through a signed memorandum of understanding with the Ministry of Health. The Zambian government covers 75 percent of operational costs for CHAZ institutions. The government also pays salaries for professional and non-professional health workers and provides essential medicines. The CHAZ pharmaceutical warehouse coordinates with government-owned medical repositories in the storage and distribution of essential medicines.<sup>37</sup>

The Catholic Medical Mission Board (CMMB), an international health NGO that has been operating in Zambia since 1965, has worked closely with congregations, the Zambian Episcopal Conference and CHAZ. CMMB, currently a grantee of the Sisters Initiative, has nearly 70 staff members in Zambia and works in all 10 of the country's provinces. It runs a variety of health programs, including:

- The Children and Mothers Partnerships Program (CHAMPS)
- Child protection
- Gender-based violence prevention
- HIV/AIDS prevention, care and treatment, including prevention of mother-to-child transmission
- Neonatal asphyxia
- Prevention and control of malaria
- Voluntary medical male circumcision

CMMB has strong connections with other organizations and belongs to several technical working groups at the Ministry of Health, including the Safe Motherhood and Monitoring and Evaluation technical working groups. Maternal and child health programs are a significant portion CMMB's work. Their successful Children and Mothers Partnerships Program (CHAMPS), which works to inculcate safe motherhood practices at the community level, is being expanded through a small \$25,000 grant from the Loyola Foundation to a second CHAMPS site in Mpasha. The Johnson and Johnson Company also has provided funding for CMMB's safe motherhood initiatives.

The USAID Safe Motherhood 360+ program implements high-impact interventions around the 48-hour period of labor and delivery. The program specifically addresses the three delays associated with maternal deaths: delays in seeking, reaching and receiving care. The goal of the program is to contribute to the reduction of maternal and newborn deaths by 35 percent in 16 districts. The program is expected to reach approximately 140,000 pregnant women in 400 facilities.<sup>38</sup>

University of Maryland and John Snow International are deeply involved in electronic and mobile health technologies in Zambia and are potential partners that sisters and ZAS might want to connect with to develop their national database to track the health of their congregations and ministries.

## Challenges

In our discussions with sisters in Zambia, they cited additional health-related issues around service delivery, human resource capacity and the environment.

Sisters work in remote areas where other health-care providers refuse to be based. Sisters expressed deep concern that the rural health sector is not improving, and that the Zambian government's support is limited. Health catchment areas are huge, people are referred to hospitals far from their homes, and essential medicines are frequently out of stock.

Sisters cited the need for community outreach programs and education, as well e-health mobile technology, to expand access to health services in remote communities. The M-Health Technical Working Group at the Ministry of Health could benefit from sisters' insights regarding systems interface and the challenges of using electronic record keeping, telemedicine and mobile health technology.

Access to electricity and efficient Internet connections are limited in many rural areas of Zambia, posing a major obstacle to the national health management information system. Sisters and other stakeholders involved in health care cited the need for the Zambian government to strengthen information technology systems and infrastructure throughout the country to benefit health institutions and their patients. CMMB referred to the HIV/AIDS antiretroviral therapy smart system that tracks patient compliance across the country as the gold standard that the rest of the system could use to standardize patient care and track health outcomes in both public and private health institutions.

Sisters also are concerned that there is a lot of pressure placed on them in their health-care ministries. Most sisters who have received additional training and higher education in Zambia are in the field of education, not in health care. The Catholic University in Zambia does not have a nursing degree program. Nursing degrees are only available at public universities and at government teaching hospitals.

Finally, Zambian sisters expressed the need to address environmental and hygiene issues as essential elements of their efforts to improve Zambians' health. Safe water is a cornerstone of health, and access to it is a major issue, particularly in drought-prone areas of the country (e.g., Southern Province). There are great distances between water sources, and the government and other partners are doing little to address this very serious issue. CMMB personnel also identified food security and nutrition as a top priority because it affects all other elements of family and community health.

## Opportunities

Sisters run many of the clinics and hospitals in the most malnourished provinces of Zambia. The Sisters Initiative could build upon many successful programs, such as CRS's SCORE-ECD and CMMB's CHAMPS. Maternal and child health indicators also suggest an opportunity to think outside the box and reimagine maternal and child health in a more holistic way. The Sisters Initiative could partner with ZAS, congregations and the government's rural health centers in an integrated health and food security program that aims to improve the health of children and communities through best practices (e.g., antenatal and postnatal nutrition, postpartum hemorrhage prevention, birth preparedness, antenatal care visits, immunizations, tracking developmental milestones, etc.). Building a holistic, sister-driven model of development that partners sisters with other key stakeholders in Zambia to address the root causes of childhood stunting could be the cornerstone of a funding effort in Zambia moving forward.

## Human Trafficking

### Need

Zambia is a source, transit point and destination country for men, women and children who are subjected to forced labor and trafficking for sexual purposes. Desperation to find work often puts workers in severely exploitative or forced-labor conditions.

According to a 2008 International Labour Organization (ILO) study on child trafficking in Zambia, most of Zambia's cross-border trafficking involves commerce in young women and children for sexual exploitation and domestic servitude. South Africa, in particular, is notorious as a destination country, while North America and Europe also were found to be destinations for victims of trafficking. In most of these cases, the victims were trafficked by fellow Zambians, often by people known to the victims.

Most trafficking cases in Zambia are not across international borders but rather are forms of exploitation within the country's borders, with a significant number of cases of trafficking in boys and men. The majority of trafficking occurs in Kapiri, Mposhi, Chirundu and Nakond, and involves women and children trafficked from rural areas to larger cities to work as domestic laborers, sometimes by acquaintances or members of their extended family.

The U.S. Department of State annually releases a "Trafficking in Persons Report" that categorizes countries into different "tiers" based on the extent of government action to combat human trafficking. Countries that have the highest level of compliance with the Trafficking Victims Protection Act's minimum standards for the elimination of trafficking are placed in Tier 1. Those that have made "significant efforts" to meet the standards are placed in Tier 2, and countries that are not making significant efforts to combat human trafficking are placed in Tier 3. In the 2017 report, Zambia was downgraded from Tier 2 to Tier 2 Watch List.

### Role of Sisters

The Catholic Commission for Justice and Peace of the Episcopal Conference of Malawi has called on the sisters in the ACWECA region to build a network of information through research and data collection that will convey the magnitude of the problem of human trafficking in the region.<sup>39</sup>

The Religious Sisters of Charity in Zambia, as part of their international congregation's commitment to abolish human trafficking, have engaged efforts to raise awareness of human trafficking through their Dialogue for Development (D for D) program, a peace-building initiative that aims to secure human rights through dialogue. For example, in 2012 they sponsored Zambian musician Winston Moyo to write and perform a music video called "Let Us Rise As One & Fight Human Trafficking" to bring awareness of the issue, mainly among pupils in the six schools run by Sisters of Charity and the local communities surrounding the schools.<sup>40</sup>

The Religious Sisters of Charity of Zambia have also sought to build partnerships with NGOs such as Women and Law in Southern Africa; other religious congregations through ZAS; government ministries and departments such as the Ministry of Home Affairs and the Zambia Police Force's Victims Support Unit; and UN agencies such as UNICEF and the International Organization for Migration. As the Sisters of Charity's first quarter 2014 report notes: "One significant area of building partnerships was the provision of a human trafficking training in 2012 in which all the above stakeholders participated, which has seen participants carrying on the work of prevention, especially the ZAS members." Under the D for D initiative, the congregation also worked with ZAS to conduct a workshop on human trafficking with more than 40 native chiefs to address the issue, especially with regard to raising awareness among their people.



## Key Players

The ILO study found that there are very few NGOs that prioritize the issue of trafficking, although some deal with the problem when working on other issues, such as child labor. The International Organization for Migration (IOM) has taken the lead in the work on trafficking in Zambia. Other local organizations—Tasintha, the Young Women’s Christian Association (YWCA), Kwehuna Women’s Association, Children in Distress (CINDI), Children in Need (CHIN) and Community Youth Concern (CYC)—are directly or indirectly involved in anti-human trafficking activities.

## Challenges

Zambia’s high level of poverty creates a dangerous environment for children and puts them at great risk for trafficking. Children make up almost half of the Zambian population living in extreme poverty, and almost 20 percent of all children in Zambia are either orphans or have lost one parent. The high rate of orphanhood and single parent households is primarily due to the HIV/AIDS epidemic.<sup>41</sup> It has been estimated that more than 40 percent of Zambian children are engaged in economic activity. In 2009, the ILO estimated the number of working children to be in excess of 1.2 million. According to the ILO’s report on child labor in Zambia in 2009, 65,557 five-year-olds (20 percent of this age group), 69,385 six-year-olds (23 percent) and 119,142 seven-year-olds (35 percent) were already at work in economic activity.

## Opportunities

The Sisters Initiative could support research and data collection on human trafficking. Discussions with sisters and other stakeholders in Zambia indicated that much of the information known about human trafficking is anecdotal. By developing a data system that tracks the efforts of congregations and sisters to address human trafficking, the Sisters Initiative could provide valuable, real-time information on problems that emerge across Zambia and help the Zambian government to target its anti-human trafficking efforts.

Providing funds for ZAS and/or congregations to team up with organizations that prioritize the issue of human trafficking would also enable sisters to connect their efforts to other stakeholders in the field and to raise the visibility of the human trafficking issue in Zambia. This type of support would also contribute to developing ACWECA’s regional efforts on human trafficking. In other countries, sisters have used their moral leadership to help influence policy on trafficking. Human trafficking is still an invisible issue to many Zambians. Sisters could lead the effort to build awareness of the problem and create solutions, helping them take a more prominent role in society and government.

## Entrepreneurship and Microfinance

### Need

Cultivating entrepreneurship in both sisters' congregations and in key populations, such as youth and women, is an important aspect of building sustainable livelihoods and advancing human development in Zambia. Zambia is considered a moderately good environment for entrepreneurship and microfinance. The country's overall Global Entrepreneurship and Development Index (GEDI) score is 20.5 percent. By comparison, Botswana has the highest score in Sub-Saharan Africa at 34.4 percent, and the United States has the highest score worldwide with 83.4 percent. Zambia is ranked 96th in the world and 7th in Sub-Saharan Africa for its entrepreneurial environment.<sup>42</sup>

### Role of Sisters

Sisters' work and spiritual witness provide daily inspiration to young women. Female entrepreneurship is one of the potential areas of opportunity for sisters' efforts to encourage sustainable livelihoods and gender equity. Zambia is 64th of 77 countries rated on the female entrepreneurship index (FEI) score.<sup>43</sup> Zambian sisters are constantly trying out new income-generating ideas to provide funding for their missions and congregations. Bread baking, dairy production, making communion wafers, gardening and growing moringa trees are just a few of the enterprises mentioned by sisters. Sisters understand the logistical and marketing challenges for small businesses.

### Key Players

There are several organizations actively promoting entrepreneurship in Zambia:

- Youth Entrepreneurs Association of Zambia
- Women Entrepreneurs Development Association (WEDAZ)
- Zambian Entrepreneur

USAID has recently made a big push to support young entrepreneurs through its funding. Its entrepreneurship programs are focused on promoting broad-based economic growth and reducing poverty. It directs much of its efforts on programs to nurture women and youth entrepreneurs.<sup>44</sup> The United States Embassy also offers business clinics to new entrepreneurs.

There are many players in the microfinance business in Zambia. Through its Public Service Micro Finance Company, the Zambian government supports a microfinance scheme for public sector employees in need of private loans through VisionFund Zambia, whose parent organization is World Vision. VisionFund was established in 2003 to provide small business loans with a focus on providing support to women in some of the poorest region in Zambia. This work complements World Vision's development work in the same regions.<sup>45</sup>

Microfinance schemes in Zambia include a variety of products, from small business loans to savings groups. The UK's Department for International Development (DFID) has been a major funder in this area as it encourages the expansion of community-based financial services and the financial empowerment of rural populations.<sup>46</sup> Through DFID's programs, Sister Mambwe, a former development coordinator for the Catholic Diocese of Ndola, has been actively involved in developing savings groups in her diocese.

## Challenges

The large majority of Zambia's workforce is in the agriculture and mining sectors. Men dominate both sectors. The major challenge in Zambia is how to engage women and give them the critical skills necessary to fully participate in the workforce, particularly in farming and small businesses. This challenge is tied to the obstacles facing young girls and women in achieving at least a secondary education and avoiding child marriage.

Youth unemployment is a major challenge in Zambia, with more than 10.5 percent of youth unemployed. Of those who are employed, 16.1 percent are in the formal sector and 83.9 percent are in the informal sector.<sup>47</sup> Vocational training or trade schools were cited during the in-country visit as ways of addressing the need for skilled, technical labor that moves beyond the four-year university model.

## Opportunities

The Sisters Initiative could develop education and entrepreneurship grants that target young women, or it could include young men as well. These grants could showcase sisters' existing entrepreneurial skills or build on congregations' existing small business and vocational education enterprises while providing a mentorship opportunity.

Another opportunity area would be to identify innovative sisters or congregations whose small businesses have been successful. These could connect with youth groups or associations such as the Youth Entrepreneurs Association and develop province-level trainings, with seed money for developing small youth enterprises.





# V.

## Assessment



Based on the data collected for this report, CRCC performed a SWOT analysis (strengths, weaknesses, opportunities and threats) for Zambia, focusing on the role of sisters in the five sector areas of interest to the Sisters Initiative. CRCC concludes with recommendations about how the Sisters Initiative can have a greater impact in Zambia through the second iteration of its strategy.

### ***SWOT Analysis***

Zambia is a relatively stable country, with sisters who are committed to working with its most vulnerable populations, despite their limitations. Multiple stakeholders agree on the area of largest need in Zambia: food security and the environment. While sisters do great work in their communities, their ability to effect change on a macro-level is constrained by their levels of education and lack of resources and partnerships, which prevent them from being strategic in their planning and leveraging their social capital. Figure 10 provides a summary, high-level view of these on-the-ground factors. The Sisters Initiative will need to take these strengths, weaknesses, opportunities and threats into consideration as they consider investing in Zambia.

The threats in Zambia affect the ability of sisters to do their work and may influence human development interventions that the Sisters Initiative chooses to fund. The greatest threat to any investment in Zambia, particularly in food security, will be the ongoing issues of drought and climate change. Any funding should provide internal buffers or safeguards against the consequences of dramatic shifts in the local climate. Responsible interventions in Zambia will consider environmental impacts, be sustainable and support the local ecology. The Conrad N. Hilton Foundation's Safe Water Initiative may be a source for ideas and partnership in this area.

Other factors to keep in mind when investing in Zambia include the country's national politics and the strength of the Zambian Association of Sisterhoods (ZAS). Although Zambia has historically been politically stable, the political situation recently has taken a downturn, as the current president has imprisoned his former opponent on a charge of treason and

fig. 10

# Strengths, Weaknesses, Opportunities and Threats Analysis for Zambia

| STRENGTHS        |  | WEAKNESSES |  |
|------------------|--|------------|--|
| INTERNAL FACTORS | <ul style="list-style-type: none"> <li>Political stability</li> <li>Wide geographic coverage of sisters</li> <li>Entrepreneurial environment</li> <li>Harmonious relationship between sisters and Church</li> <li>Catholic Church plays a strong institutional role in civil society</li> <li>Large number of local and international NGOs</li> </ul>  |            | <ul style="list-style-type: none"> <li>Poor infrastructure (e.g., electricity)</li> <li>Economy still heavily dependent on copper</li> <li>Inequity in congregations' access to resources</li> <li>Lack of congregational strategic planning</li> <li>ZAS is under-resourced compared to other national religious conferences in the region</li> <li>Limited involvement in ZAS by all congregations</li> <li>Rural literacy rate</li> </ul> |
| OPPORTUNITIES    |  | THREATS    |  |
| EXTERNAL FACTORS | <ul style="list-style-type: none"> <li>Support sister-led efforts to improve food security and the environment</li> <li>Develop networks between sisters, laity, NGOs and government</li> <li>Increase visibility of sisters and their work among potential partners and funders</li> <li>Increase health, safety and wellness of children</li> <li>Support organizational and human resource development among congregations and ZAS</li> </ul> |            | <ul style="list-style-type: none"> <li>Recent developments in national politics</li> <li>Drought</li> <li>Neighboring countries' politics (e.g., DRC, Zimbabwe)</li> </ul>   |

seeks to consolidate his own power. This situation should be carefully watched as the Sisters Initiative and other program areas at the Foundation currently have investments in Zambia.

Finally, ZAS is a smaller and weaker national religious association compared to organizations of sisters in neighboring Uganda or Kenya. Part of the reason for this is the low number of sisters in Zambia compared to other countries in the region. As a result, organizational development in the Zambian sisterhood is less robust. At the same time, ZAS has many talented members and a superb executive team. With the Sisters Initiative's support, it could flourish and sustain its member congregations and sisters, helping them become stronger in the process.

Zambia provides an opportunity for the Sisters Initiative and the Foundation experiment with different development and partnership models to build the capacity of sisters and their congregations and to make a significant impact on human development, particularly in food security and malnutrition. Zambia is a stable country with a smaller population than some of its neighbors. The Foundation already has a foothold in the country with investments from several program areas as well as the SDG Philanthropy Platform. Zambia could be a laboratory for developing sister-led holistic interventions aimed at systemic food security and livelihoods. Zambia is a country where the Sisters Initiative and the Foundation as a whole could have a wide-scale impact on human development.



## Recommendations

The ultimate goal of this case study is to provide a series of high-level recommendations to the Sisters Initiative and Foundation for potential funding opportunity areas. Although this case study has its limitations because of the short length of time in the field and the large scope of analysis, it does provide general guidance and potential milestones to consider over the next five-year funding period. CRCC also includes specific recommendations of opportunities for investment that should be corroborated and built upon with a country-specific strategy developed with input from a sector expert at the implementation stage. In this report, specific opportunities are intended to provide the Sisters Initiative with ideas of what is possible in Zambia. The following recommendations focus on data, organizational sustainability, formation, partnership, leadership, food security and holistic development.

## Support sisters by developing data systems to assist them in tracking their ministries and monitoring the health of their congregations.

The collection and use of data could benefit ZAS and congregations. It could allow them to be more strategic in planning and decision-making, and better understand and respond to challenges such as the retention of sisters. Documenting the impact of sisters' missions could also help raise awareness of and respect for their work among potential partners, funders, church officials and government. Finally, it will help the Sisters Initiative to understand the impact of its investments.

- Help ZAS and congregations to document and disseminate their work.
- Provide funding for a baseline census and mapping exercise.
- Engage local and international congregations in Zambia in the process of developing a long-term database to track congregational vitality and mission work.
- Develop a cross-sectoral database working group with key stakeholders both within and outside the Catholic Church (e.g., Ministry of Health, Ministry of Agriculture and Cooperatives, Ministry of Education, Ministry of Gender and Development, Self-Help Africa, Caritas, Catholic Relief Services, Musika Development Initiatives, Catholic Medical Mission Board, USAID, DFID) to get feedback on key sectoral variables that need to be tracked over the long-term. This group can also give feedback on the structure of the database and how it might feed into national systems (e.g., national health management information system).
- Support the Catholic University in Zambia, ZAS and local congregations in developing a data center and archive.

## Support ZAS and member congregations to leverage their existing assets and invest for their future.

Congregations vary greatly in the resources they have and, therefore, their ability to participate in and support ZAS. Sisters traditionally rely on the charity model to sustain their congregations and missions. Thinking beyond this model and finding new ways to supplement their incomes and charitable donations could allow sisters to make their ministries more sustainable and magnify their impact on local human development efforts. Strategic planning would be required to figure out how sisters can benefit from underutilized assets, network with outside experts, and support under-resourced congregations.

- Assist ZAS and local congregations in developing financial and human resource plans and processes that address their current reality. Enlisting the help of local laity who are professional financial planners, human resource experts and organizational development experts is one low-cost option for building sisters' capacity. Other options include connecting sisters with private sector consulting firms or educational institutions with in-house expertise (e.g., University of Zambia).
- Assist congregations in developing better income-generating missions and ensuring proper remuneration from the church, government and NGOs. ZAS has an existing relationship with Dove Chambers Legal Practitioners that could be expanded to include attorney-developed and reviewed legal documents for different congregations (e.g., MOUs, land deeds, employment contracts for sisters, etc.). ZAS could benefit from access to a local, active canon law expert for consultation and defense of congregations' human resources and physical assets.
- Create a small travel fund that could be invested for future growth so that under-resourced congregations could more actively participate in ZAS meetings.
- Conduct interviews and focus groups with under-resourced and well-resourced congregations to pinpoint their particular needs and interests.
- Support social impact investing skills, such as the skills taught in the Catholic Relief Services-led workshop after Association of Consecrated Women in Eastern and Central Africa (ACWECA) plenary in August 2017.

## Adapt a “lifetime formation” approach to building capacity into sisters, congregations and ministries.

Zambian sisters echo the concerns of sisters globally when it comes to formation needs from postulancy into old age. In particular, ZAS lacks a strong formation program for postulants, and Zambian congregations seek to support sisters who feel the pressure to leave the congregation and use their higher education to care for family. By developing a data system that captures relevant information on the health of congregations (e.g., retention), ZAS and the Sisters Initiative could focus funding on key moments in the lives of sisters when they need support to continue their vital ministries and spiritual witness. Formation efforts would help individual sisters—just as education has helped individual sisters—but by using congregations’ health as the unit of analysis, the Sisters Initiative could see the impact such efforts have on their missions.

- Support ZAS to run collective programs at Kalundu, such as formation for postulants, leadership trainings, formator training, spiritual retreats and counseling.
- Assist with congregational retirement liabilities so that sisters can access the spiritual, physical and mental care they need as they age.
- Assist congregations in becoming more financially sustainable (see previous recommendation) so that congregations can invest in ZAS and address their capacity and formation issues individually and collectively.

## Connect ZAS and congregations with local and international partners.

By reimagining partnership beyond the traditional Catholic set of partners (e.g., Caritas, Catholic Relief Services), Zambian sisters could amplify the impact of their work. Sisters would need support and encouragement in order to expand their worldview and range of potential partners. This would entail changing mindsets at the levels of ZAS, congregations, and individual sisters, and giving them the skills to navigate such partnerships. It also would require educating potential partners (e.g., NGOs, private sector organizations, government agencies) on the culture and processes of sisters and their congregations. While this process could be lengthy, it also could be ultimately beneficial, bringing together different types of expertise and creating new partnerships to address some of Zambia’s most difficult challenges.

- Develop a partnership/mentorship program connecting sisters with professionals in the private and public sectors.
- Provide resources for SLDI and HESA graduates to attend local and international meetings and join professional organizations.
- Fund national and regional meetings between NGOs and congregations that focus on specific sector issues.
- Integrate sisters into the development of grants and insist that projects enlist sisters in meaningful leadership roles and not just as service providers.
- Use bridge organizations that sisters trust (e.g., Caritas or Catholic Relief Services) to translate the arcana of the NGO world and connect them to partners outside the Catholic Church.
- Support efforts of Zambian sisters to develop relationships with different faith communities in Zambia, whether Pentecostal churches or the growing Muslim population in eastern parts of the country.

## Develop sisters' voices as technical experts, advocates and policy developers at the district, national and international levels.

One of the principle ideas to emerge from this landscape study is the need for sisters' voices to be heard beyond their congregations, ZAS and the church. Sisters are working at the frontlines of health care, education and other critical sectors. In Zambia, they provide many of the social services for rural and remote communities. They understand the daily challenges that vulnerable populations face as they struggle to survive ongoing droughts and economic hardships. One of the challenges that Zambia (and other countries in the region) faces is translating policy into action. Sisters could be key in both the development of policy through technical working groups at the ministry level and the implementation of those policies through strategic alliance with the government, NGOs, the private sector and other faith-based organizations. Sisters' insights would be a valuable part of the conversation when it comes to developing international, national and local policies and budgets that affect the communities that sisters serve.

- Help sisters gain the technical education required to be able to speak effectively at tables of influence and power.
- Support the continuing education of sisters at the Master's and Ph.D. levels, so that they gain the confidence and capacity to participate in political forums.
- Provide sisters with professional fellowships, mentorships and leadership training to educate them in how to navigate different organizational cultures and how to develop personal networks outside of their congregations and Catholic partners.
- Connect sisters with partners in NGOs, government and the private sector (see previous recommendation).

## Enable sisters to lead the way on food security and livelihood interventions at the household and community levels.

Food security and livelihoods emerged as the top issues identified by all the Zambian stakeholders interviewed by CRCC. A holistic, sister-driven approach to these challenges that incorporates agricultural practices, nutrition, health and education could make significant headway toward ensuring healthy children and families in rural Zambia. Congregations' land, which is often an underutilized asset, could support agricultural projects that also may generate additional income and make congregations and their missions more sustainable.

- Assist congregations in leveraging current human and physical assets such as land and leasable properties to meet their long-term financial goals and support food security.
- Strategically connect different government ministries (e.g., the Ministry of Agriculture and Cooperatives), private sector companies (e.g., Silverlands-Zambia) and NGOs (e.g., Musika Development Initiatives, Self Help Africa, World Vision) with congregations in priority regions of the country, for example Northern Province. These experts could help congregations assess the enterprise possibilities of their land and how these assets might help to address local issues of food security and childhood malnutrition, as well as provide the skills and resources to implement agricultural projects.
- Develop sisters expertise in this area so that they can become leaders (see previous recommendation).

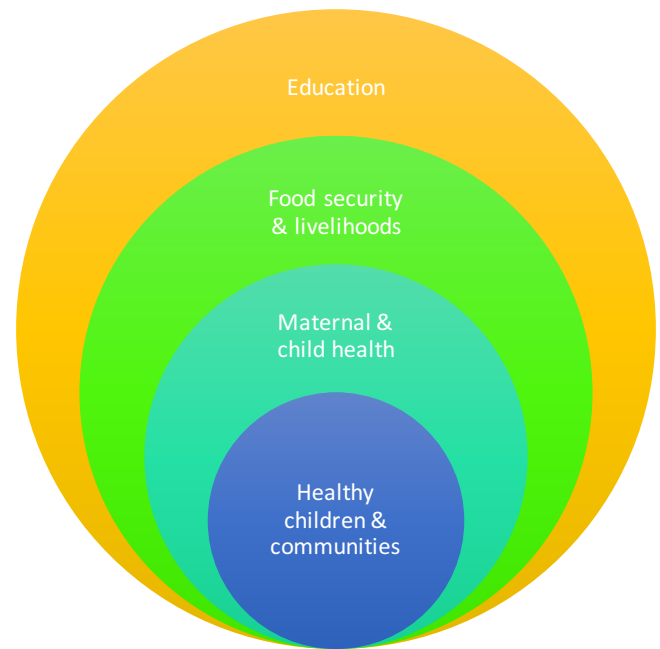
## Fund a holistic model of development that builds on prior Foundation investments and aims to nurture healthy children and communities in Zambia.

The Sisters Initiative currently supports the African Sisters Education Collaborative and Catholic Relief Services' SCORE-ECD program in Zambia, while the Foundation has other investments in the country, including with the SDG Philanthropy Platform. Zambian sisters and other stakeholders laud SCORE-ECD in particular for increasing sisters' and congregations' capacity in early childhood development (ECD) and maternal and child health and networking sisters working in this sector with each other and with other partners. Early childhood development also shows the integration of the issues the Sisters Initiative would like to address (see Figure 11). With an ultimate goal of healthy children and communities, other priorities fall into focus. The first 1,000 days of a child's life are the most critical for cognitive and physical development, and nutrition is key to that development. Food security is essential to providing proper nutrition for development, and in Zambia, literacy has proven key to the success or failure of interventions in health and food security. Holistic education, food security and livelihood interventions led by sisters in rural communities could have the added benefit of reducing childhood marriage, another priority for Zambian sisters. Zambia provides a unique opportunity for the Sisters Initiative and the Foundation to develop a holistic model of development whose main goals are intertwined.

- Develop a country-specific strategy that aligns sisters' work with the SDG Philanthropy Platform to build collaborative pathways and catalyze innovation.
- Work with other priority areas within the Foundation to address common goals. For example, share ideas around collaborative projects or partnerships between sisters and current Safe Water Initiative grantees.

*fig. 11*

## Holistic Intervention Model





## Conclusion

Zambian sisters address a wide range of social issues through their missions—from providing maternal and child health care to educating the next generation of Zambians. Sisters go to places where others refuse to serve and provide strong spiritual witness through their work. Sisters understand household and community needs because they work side-by-side with people on a daily basis. Their call to respond to the immediate needs of the most vulnerable and marginalized populations in Zambia has enabled them to build the trust of local communities. Sisters are seen as agents of change and trusted interlocutors with more powerful church and state actors. They are a powerful and influential group of women who bring hope and joy to the lives of many impoverished Zambians.

One of the shortcomings of being embedded at the micro-level and responding to the immediate needs of households and communities is a nearsightedness about larger systemic problems at the congregational, local and national levels. Sisters are great at providing food to children in their primary schools, but less effective at using their knowledge to address the root causes of the food security problem at the meso- and macro-levels.

The challenges that sisters, their congregations and their religious conferences face in Zambia are: understanding the true range and impact of their daily mission work, planning for long-term sustainability, expanding their worldview beyond the confines of their congregation and church, and connecting with other partners in the public and private sectors who can help amplify the impact of their work. All of these challenges can be met through the support of the Sisters Initiative, using a congregation's health and its ability to take on critical issues as the unit of analysis. The second iteration of the Sisters Initiative strategy could encourage data collection, strategic planning, partnership and leadership.

In order to understand how the Sisters Initiative can effectively support Zambian sisters and address major issues such as food security, it would help to first understand the range and depth of sisters' activities, as well as the financial, social and spiritual health and sustainability of their congregations. As noted, CRCC cannot suggest that this case study provides a definitive guide to funding opportunities for sisters in Zambia both because of limited time and expertise and because of the lack of data available. Especially as it turns its attention to making a difference in specific sectors, CRCC recommends the Sisters Initiative develop country-specific strategies for implementing the second iteration of its overall strategy with the help of sector experts. A data collection system and a flexible and responsive database that can grow to meet the needs of congregations also could assist both congregations and the Sisters Initiative moving forward.

By building the capacity and vitality of sisters and their congregations, the Sisters Initiative can help Zambian sisters develop and lead social change interventions that will foster healthy, nourished children and communities.

## Appendix

### ASEC Data Summary for Zambia

The following report was provided by the African Sisters Education Collaborative about its activities in Zambia.

#### Data Summary: Zambia

### 1.

#### Number of SLDI and HESA alumnae and currently enrolled sisters from Zambia:

- 170 unique alumnae who participated in Zambia workshops during Phase I, II, and III (2007-15)
- 54 unique participants in Zambia technology workshops in first year of Phase IV (2016)
- 62 Superiors from Zambia participated in the Superior workshops held in 2016
- 29 unique sisters who are serving in Zambia are enrolled in HESA, 1 of whom has graduated.

### 2.

Any data on SLDI alumnae projects in Zambia (the information on alumnae projects below also helps to answer questions 4 and 5 about generating resources and data on partnerships):

#### Sr. Eulalia Capdevila Enriquez

Comboni Missionary Sisters  
Phase III—Finance Track, Zambia

Sr. Eulalia secured:

\$211,944 from Conferenza Episcopale Italiana (CEI)

\$27,315 from Intesa San Paolo Foundation

\$21,850 from donations and fundraising

**PURPOSE.** Sr. Eulalia, the director of the project, secured a total of \$261,109 for the Mother Earth project, which promotes resilience of the local people through skills training, agriculture, environmental stewardship and sanitation improvements. The project plants moringa trees, which yield an exceptionally nutritious tree with a variety of potential uses. Studies have shown *Moringa oleifera* leaves to be an excellent source of vitamins, minerals and protein—perhaps more than any other tropical vegetable. Originally from India, it has spread now throughout Africa, helping to fight malnutrition and diseases. The project also entails the production of moringa powder, construction of a moringa factory and an office-staff house, together with a caretaker's house. A shelter for meetings, simple toilets, a borehole, a solar pump and irrigation system are already in place.

**IMPACT.** More than 6,000 moringa trees have been planted, and 100 moringa farmers are undergoing training for organic production and sustainable agriculture. In addition to the promotion of sustainable agriculture and organic production of moringa, the project reaches out to women in the rural areas (800 women per year) to promote improved nutrition, emphasizing the use of moringa trees at the household level.

The project uses renewable energy whenever possible: earth tubes for cooling the classroom, biogas for the kitchen, windmills for water supply, earth bags for constructing the walls and thatch roofs.

**PARTNERSHIP.** The project is undertaken in partnership with an Italian NGO called Guardavanti. The survey and the project proposal writing were done together. The Comboni Missionary Sisters continue fundraising through the selling of moringa powder, and they receive donations from benefactors in the UK, Italy and Spain. A moringa market research study will be soon conducted both at the national level (engaging a local consultant and expert in moringa) and European level (done by Guardavanti), if funds will allow. The project is also committed to celebrating important international events that raise awareness about environmental issues such as: Water Day, Earth Day, Tree Planting Day, etc. These events are organized in conjunction with local stakeholders such as Caritas Diocese of Mongu, Zambia Association of Sisterhoods-Mongu Branch, Concern International, Ministry of Agriculture and others.

The project also partners with Volunteer Missionary Movement from Ireland (VMM). The sisters applied for a volunteer couple to serve in the positions of Director of Logistics and Director of Formation and Moringa. In July 2015, the volunteer couple, a husband and wife, came with their two children to work for the Mother Earth project for one year. Right now, Sr. Eulalia and others are working on an extension of these positions for two more years. VMM has also contributed a total of \$6,000 (to fund office equipment, solar power back-up and treadle pumps for farmers) in addition to sponsoring the placement of the two volunteers.

**JOB CREATION.** A new sister, Sr. Ehte Shikur Kirato, has been assigned as Assistant to the Director. Sr. Ehte was mentored during ASEC training and participated in the last alumnae workshop, which was held in Lusaka in 2015. The project also employs a part-time accountant, a salesperson and a caretaker.

**MOVING FORWARD.** Sr. Eulalia and others are now considering applying to the Hilton Foundation for funding to support a second phase of the project that would entail the purchase of equipment for the moringa factory and laboratory. Sr. Eulalia is also considering the construction of a simple training center for sustainable agriculture.

#### **Sr. Gertrude Daka**

Daughters of the Redeemer, Lusaka Zambia  
Phase II—Administration Track  
Total \$80,000

- **Government of Zambia (grant)** \$80,000  
To construct a building and toilets for classrooms in order to enroll more children in the local school and accommodate teachers within the school area; three employed, 551 children and two teachers served

#### **Sr. Faustina Nsama**

Sisters of Mercy, Mansa, Zambia  
Phase II—Administration Track  
Total: \$187,000

- **Pontifical Mission Society (grant)** \$187,000  
Build children's isolation ward to nurse children with communicable diseases (2015); 10 employed, 10,000 children to be served; Community members have volunteered to assist with the construction

#### **Sr. Rose Mainza Moonze**

Religious Sisters of the Holy Spirit, Mazabuka, Zambia  
Phase II—Administration and Finance Tracks  
Total \$57,361 and numerous in-kind services

- **Toyota Zambia and Johannes (grant)** \$28,000 and **Firelight (grant)** \$12,000  
Construction and furniture for a classroom block at the James Carboy School (2014; 8 employed, 126 served)
- **Loyola Foundation (grant)** \$10,000  
To fence in the convent, allowing sisters to live in a non-threatening environment; 100 + served by the affected sisters.
- **James Carboy School (fundraising)** \$2,916  
Various events to support/sustain the school during and after completion of the current construction project
- **Local business and community members (donations)** \$4,445  
Donated money and time toward the construction of classrooms
- **Sister's Community poultry and vegetable sales (fundraising)**  
Raising chickens and gardening

### 3.

#### Zambian congregations who have SLDI or HESA alumnae or currently enrolled sisters:

ASEC is in the process of verifying the accuracy of this congregation list with the Zambia Country Director and Coordinator. Some congregations in the current list may be repeated or reported incorrectly. Therefore, this list may change once the staff review and submit a revised copy.

African Benedictine Sisters  
Bethany  
Comboni Missionary Sisters  
Daughters of Saint Paul  
Daughters of the Redeemer  
Disciples of Jesus Sisters  
Dominican Contemplative Nuns  
Dominican Missionary Sisters of the Sacred Heart of Jesus  
Dominican Nuns of the Order of Preachers  
Franciscan Missionaries of the Divine Motherhood  
Franciscan Missionary Sisters for Africa  
Franciscan Missionary Sisters of Assisi  
Franciscan Missionary Sisters of Service  
Good Shepherd Sisters  
Handmaid Sisters of the Blessed Virgin Mary  
Hospitaler Sisters of Mercy  
Kilimanjaro Sisters  
Little Servant of the Blessed Virgin Mary  
Little Servants of Mary Immaculate  
Little Sisters of Saint Francis  
Missionary Sister of Our Lady of the Holy Rosary  
Missionary Sisters of Our Lady of the Holy Redeemer  
Missionary Sisters of the Holy Family  
Missionary Sisters of the Immaculate Conception  
Missionary Sisters of The Precious Blood  
Monastery of Saint Clare  
Poor Clare  
Presentation of Blessed Virgin Mary Sisters  
Religious Sisters of the Sacred Heart of Mary  
Religious Sisters of The Holy Spirit  
Sisters of Charity  
Sisters of Charity Bartholomea Capitanio and Vincenza Gerosa  
Sisters of Charity of Ottawa  
Sisters of Charity of the Incarnate Word  
Sisters of Holy Names of Jesus and Mary  
Sisters of Mercy  
Sisters of Mercy of St Charles Borromeo  
Sisters of Saint John the Baptist  
Sisters of the Child Jesus  
Sisters of the Holy Spirit  
Sisters of The Immaculate Heart of Mary Reparatrix  
Sisters of the Sacred Heart of Jesus  
Sisters of the Sacred Hearts of Jesus and Mary  
Teresian Carmelite Missionaries  
Teresian Sisters of the Child Jesus  
Union of the Presentation of the Blessed Virgin Mary  
Verona sisters

### 4.

#### Data on resources generated by Zambian sisters because of their training:

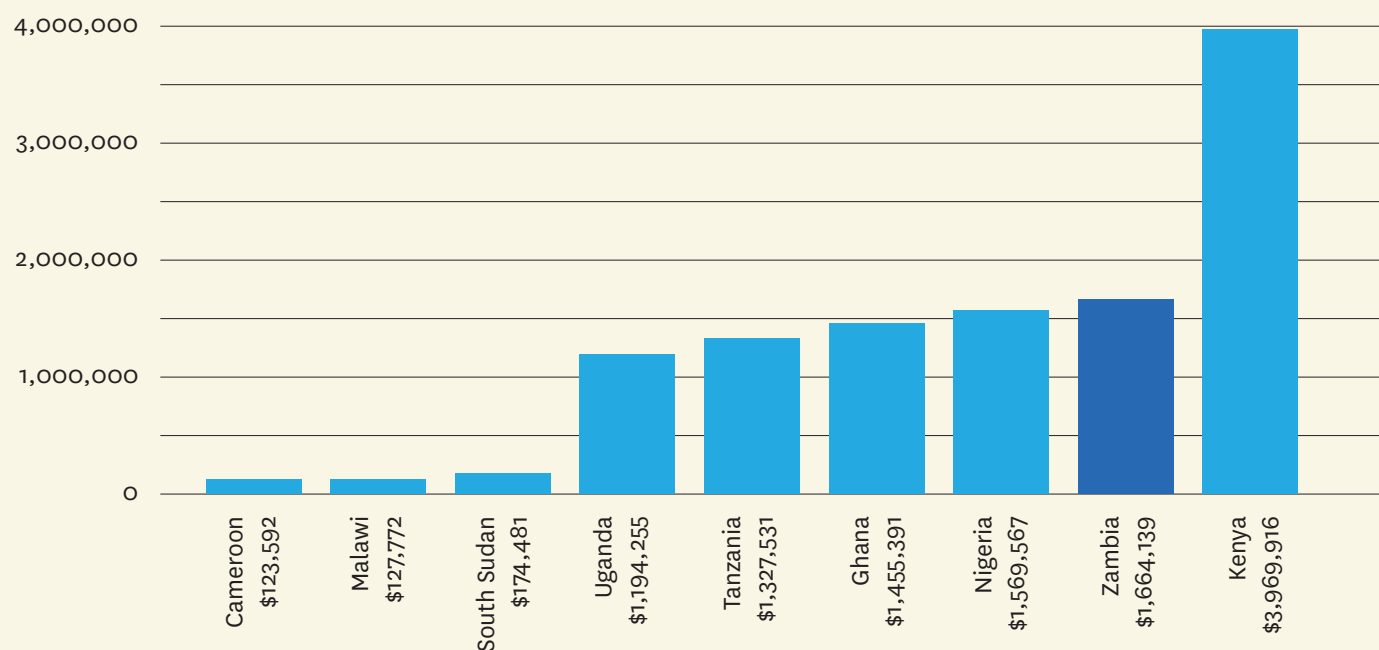
Based on an analysis of 2017 data, Zambia has the second-highest amount of funds secured by SLDI alumnae for human/social/economic development projects. The projects focus on an array of development issues, including but not limited to: education, health care, access to clean water and sanitation, income generation/skill trainings, local infrastructure improvements, agriculture, and projects focused on women and/or girls. The total amount secured by Zambian alumnae from 2012-2017 is \$1,664,139. A comparison of all the countries' funding totals appears in Figure 12. Data listed in the bullet point section below is from 2017 alumnae survey reporting, and is for Zambia alumnae:

- 27.8% (N=18) of alumnae said they received a promotion.
- Four (4) of the 18 alums (22.2%) said their income increased after SLDI. The same number (22.2%) said they developed a strategic plan for their congregation or ministry, or other organization.
- Five (5) of the 18 alums (27.8%) said they implemented a financial plan for their congregation or ministry, or other organization, and seven (six SLDI alumnae and one HESA alumna) of the 18 (38.9%) respondents said they implemented audits.
- 83.3% of alumnae (N=18) have been mentoring others, 50% of whom are mentoring staff in their ministries and 22% of whom are mentoring lay people (not their staff).
- 44.4% of alumnae said they wrote grant proposals before SLDI and 55.6% said they wrote proposals after SLDI. 45% of the proposals written before SLDI were reported as successful whereas 80% of the proposals written after SLDI were reported as successful. Two alumnae report acting as a grant-writing resource for their congregation.
- 70.6% (N=17) of alumnae report that SLDI improved their ability to fundraise, and the same number said their ability to mobilize local resource improved. 76.5% said SLDI improved their ability to ensure the sustainability of a program/project.

fig. 12

## Where is SLDI Alumnae Funding Going (2012–17)?

*Kenya has a clear lead, followed by Zambia and Nigeria*



## 5.

**Data on partnerships (e.g., government, between congregations or funders) generated because of training:**

- Please see above sections on alum projects for specific examples.
- In 2017 reporting, when asked if they have collaborated after participation in SLDI, 94.4% (N=18) of alumnae who responded to the question said they collaborated after SLDI.

A breakdown of alumnae's 2017 collaborative partners appears in the table below, which reflects new survey items added in the 2017 alumnae survey:

| <i>Collaborative Partners</i> | <i>Number of Alumnae Who Engaged in Collaboration</i> |
|-------------------------------|---|
| Fellow Sisters                | 5   |
| Government                    | 4   |
| NGOs                          | 4   |
| Foundations                   | 2   |
| Local Groups                  | 4   |
| Diocese                       | 5   |

2017 Alumnae Survey, Zambia Alumnae Collaborative Partners (N=18)



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