



## Sustainability Institute – Latin America and the Caribbean

*Founding document  
of the Sustainability Institute  
– Latin America and the Caribbean,  
October 24<sup>th</sup>, 2013.*

### Preamble

The theme “sustainability” emerged in 2007 among the Lutheran churches in Latin America and the Caribbean which are part of the Lutheran World Federation (LWF). A deep reflection among the bishops and presidents of the churches of the region faced with the challenges which the cultural, economic, social, political and religious context represented for the life and mission of the churches led them to assume the concept.

From that moment they then proposed to work with the theme of organizational sustainability in a programmatic way, beginning with the experiences and capacities of the member churches themselves, with the accompaniment of the Latin American and Caribbean (LAC) Office of the LWF.

In that same year, at their annual conference, the churches of Latin America and the Caribbean constituted the *Sustainability Program of the Church* as a tool designated to contribute to the planning, management and mobilization of resources in churches and faith communities in their participation in the Mission of God. This regional program initially identified three axes or dimensions which contribute to and are necessary for the sustainability of the churches:

- The Participatory Strategic Planning (PSP) as an organizational mechanism of processes in communities/congregations and churches;
- The identification and mobilization of gifts and resources (human, theological, economic);
- The theological reflection (missiology, ecclesiology, theology of baptism), thinking other ways of being church.



In its trajectory, the *Sustainability Program of the Church* identified and elaborated its referential framework, basing itself on the documents *Mission in Context* (LWF, 2005) and *Diakonia in Context* (LWF, 2009). This referential framework includes the following concepts: God's Mission; concept of a spiral hermeneutics; principle of participation and active protagonism; intergenerational focus; principles of responsible stewardship (mobilization of resources) and responsibility in accounting; systemic focus; critical pedagogy and mutual and experiential learning; dealing with organizational change and especially the focus of gender.



The *Sustainability Program of the Church* was organized by the following components: a) a network of liaison person<sup>1</sup> designated by the churches which generates, promotes and develops sustainability processes on a local level; b) an orientation committee which collaborates in the regional face to face gatherings; c) consultants based in the churches themselves; d) facilitators

During the development of the Program, the accompaniment strategies have been the following: a) support for the regional collective process of development of capacities in organizational sustainability, creation of a network of liaison person and carrying out five regional gatherings – from 2007 to 2013; b) support the local processes of sustainability of each church (facilitation and continuity); c) pastoral theological elaboration of the sustainability focus.

### **The emergence of the Sustainability Institute – Latin America and the Caribbean (InS)**

At the Regional Gathering of 2012, which took place in the city of Santa Cruz de la Sierra, in Bolivia, in September of 2012, the churches expressed the need to formalize the learning and capacity building processes with regard to the theme of the sustainability of the church. Based on these motivations, in the following year at the Leadership Conference of March, 2013, in the city of Montelimar in Nicaragua, the proposal was presented to create the *Sustainability Institute – Latin America and the Caribbean (InS)*, with instituting cooperation of the LWF, of the Igreja Evangélica de Confissão Luterana no Brasil [Evangelical Church of Lutheran Confession in Brazil] (IECLB) and of the Faculdades EST, having as its base this theological education institution.<sup>2</sup> The “Spirituality and Sustainability Cathedra” of this institution, which was opened in 2011, was an important previous step and can be considered as one of the precursor elements of the *InS*.

The *InS* is, therefore, an expression of the demands of the Lutheran churches of the region and was instituted by the joint action of the LWF and of the IECLB. Having as its operative branch the Faculdades EST (São Leopoldo, RS), the *InS* is a formal, academic organism with a focus on the local, regional and global dimension.

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<sup>1</sup> - Members of the Lutheran churches of Latin America and the Caribbean (men and /or women, lay people or ordained) related to the theme of the sustainability of the church, who are designated by the churches themselves to be part of the Sustainability Program (LWF/LAC) in a continuous way.

<sup>2</sup> PROGRAMA SUSTENTABILIDAD-FLM/LAD. Entrelazando producción teológica y sustentabilidad. 2013. Accessible on: [www.est.edu.br/sustentabilidad/pdfs/Entrelazando\\_Producción\\_Teologica\\_y\\_Sustentabilidad\\_Revisado\\_11\\_de\\_Abril%202013.pdf](http://www.est.edu.br/sustentabilidad/pdfs/Entrelazando_Producción_Teologica_y_Sustentabilidad_Revisado_11_de_Abril%202013.pdf)



## Concept

The concept “sustainability” has various renderings and distinct fields of application. The term “sustainable” was coined in the decade of the seventies within the framework of the environmental problem. The broadening of its application soon reached the organizational and institutional area. The idea of sustainability, in all of its areas of application, stems from the perspective of systems and organisms seeking to guarantee and project their value in time through exchanges with their environment.

In the social organizations, the organizational sustainability is understood as the capacity of an organization to maintain the social value of its work and of its existence in a durable way.<sup>3</sup> Sustainability is not an aspect only related to the financing of the organizations. The sustainability of an organization demands clarity of purpose, quality in the services rendered, accountability and the capacity to animate, lead and manage networks.

In synthesis, the possibility of an organization to maintain its social value and guarantee its existence in a durable way depends on regular access to financial resources, but, above all, rests on the quality of the organization and of its institutional project. It is about directing efforts to organizational strengthening which presuppose fomenting the capacity of coordinating permanent processes of institutional development in continuous exchanges with contexts in transformation. The process of organizational strengthening implies a focus on planning, on development of resources (human and material) and on innovation of the models of organization and management.

This comprehension has decisive implications for the forms of administering and managing the church. It is a fact that administration and management in the church are a reality and a practice since biblical times. There are indications of this in the Old as well as in the New Testament. The church in general and the Lutheran churches in Latin America in particular have developed throughout their history innumerable models of administration and management. However, considering that the contexts are constantly changing, it is necessary that the quality of these practices be qualified, seeking to assimilate a participatory planning culture, of development and mobilization of gifts and resources, besides an efficient monitoring and accompaniment of the actions themselves. Here is a clear challenge for the sustainability of congregations and churches in terms of administration and management.

However, there is a need to consider more deeply the theological dimension, since the ecclesial practices (the way in which the churches are structured and are managed) are

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<sup>3</sup> ARMANI, Domingos. Sustentabilidade. Conference which took place at EST on 07. 29.2013.



rooted in theological understandings. From the theological perspective, the Christian church has its origin in the sovereign act of God, who, through baptism and through the work of the Holy Spirit, calls his people to announce the good news of salvation, incarnated in Jesus Christ through words and actions. This theological perspective explains the origin, the present time and the mission of the church. It does not, however, explain its reality as a social reality which gathers together persons who, following the vocation of their baptism, motivate themselves and organize themselves to participate in God's mission. This reality of the church as a social organism has its own rules, dynamics and laws, which, in the necessary congruence with the foundation of values which sustains the church – demands attention. This is particularly true for those processes and procedures which govern the church with regard to its mechanisms of management and administration, its way of organizing itself, of deciding and of carrying out its ordinary activities.

Considering this trajectory, the Lutheran churches of Latin America and the Caribbean, members of the LWF, began a process of improving their capacities in sustainability. In this journey, they are intertwining the participatory strategic planning with the development of gifts and resources, with the analysis and the identification of other ways of being church, based on the theological reflection about the administration and management practices which take place in the churches themselves. The sustainability of the churches does not depend on human action. It is the Holy Spirit that guides and sustains the church. At the same time, there is a human responsibility in this task which leads to a revision of the paradigms which have modeled the Protestant churches in Latin America and in the Caribbean. This same responsibility challenges us to propose adequate paths for the new contexts, improving strategic, operative and administrative aspects and also the ministries, in a perspective which relates spirituality with management.

It is important to highlight yet that, among the ecclesial, social and theologically rooted practices most threatening to the sustainability of the churches, appears that of the gender roles attributed to men and women. In the Lutheran churches of Latin America and the Caribbean, the situation of women and men is different, unequal and unjust. To understand the center of this inequality, the emphasis on the issue of gender as a conceptual element of the referential framework demands twice the attention.

On the one side, from the point of view of management, there is an unequal distribution of work and responsibilities among men and women. The majority of the people who participate and sustain the life and mission of the churches in Latin America and in the Caribbean, including a good part of the stewardship (mobilization of resources) are the women. An attentive reading will show that the administration of the churches is strongly





based on the contribution of organized women. However, the levels of decision making (lay or ordained) are occupied, in the churches, mainly by men.

On the other side, from the point of view of theological knowledge, women and men have developed imminently critical theological perspectives and practices which introduce fundamental perspectives for thinking about the theme of the sustainability of the Church in Latin America and in the Caribbean. In this particular point, the perspective of the sustainability of the churches will consider this situation of inequality and injustice and will work for the promotion of equity, fomenting the participation and the development of capacities which make it possible to overcome this situation. Therefore, the category of gender as a transversal axes will be assumed<sup>4</sup> and will be incorporated in the debates carried out in the context of groups, social movements and in the theological reflection and production which concern themselves with this issue.

### **Context and description of the problem**

The commitment to the mission demands discernment, in prayer, of the signs of the times and a faithful reading of the contexts. To reach a contextual, holistic and effective mission, the church sees itself challenged to discern and analyze the local and national contexts, having in mind the impact which the global and regional factors exert on these local contexts.<sup>5</sup>

Understood as an instrument of qualification of the action of the churches contributing to God's Mission, the InS emerges in a context in which some paradigms which characterize and qualify the churches in Latin America are undergoing change.

- There is a gradual transformation of the ethnic churches into national churches.
- The membership of the churches are subjected to various needs and exposed to multiple crises.
- The churches grow in the impoverished and excluded sectors of society.
- The traditional way of being church is challenged by other denominations, by its own membership, by civil society and distinct theological currents within Lutheranism itself or from the Latin American theological production in general.

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<sup>4</sup> - "Gender is a category of analysis of the roles and the social relations constructed and given meaning based on the biological sex in interface with other identity markers (social class, race/ethnicity, sexuality, origin, generation, skills). The category was developed in the field of the feminist theories to understand and deconstruct the structural foundations which maintain the inequalities between men and women, men and men, women and women in the church and in society and to build proposals founded on equity and justice.

<sup>5</sup> FEDERAÇÃO LUTERANA MUNDIAL. Missão em contexto: transformação, reconciliação e empoderamento. Curitiba: Encontro, 2006, p. 11-22.



- There is a demand for theologians, lay people and ministers (pastors, catechists, missionaries and other ministries) who respond to the practical needs (including management) in their local realities.
- The skills necessary for carrying out ministerial functions do not fully match with what is taught in the centers of theological formation.
- The expectations of holistic growth (which also includes the number of members) are not always efficaciously fulfilled.
- The demands for quality as to holistic planning, community/congregational management and accounting increase in civil society as well as in the organisms of the Lutheran communion.

Although the characteristics and qualities of the churches in the region are totally diverse, due to their historical process as well as to contextual changes, they share a good number of similar challenges and perspectives. In this sharing of common challenges and perspectives, they identified the need to strengthen their capacities for planning, for project management, for financial administration, for accounting of the local faith communities/congregations and of the central administration of the churches, seeking a community/congregational management focusing on spirituality.

At the same time, one can observe occasions in which the churches, intending to overcome these weaknesses, are advised by external consultants, who, due to their formation and experience, have difficulty understanding the nature and the identity of the church. In many cases they offer inadequate instruments and processes which, many times, are contrary to the basic theological principles of the churches.

Faced with these challenges, the purpose of the InS is to accompany the churches in the development of strategic, operative and instrumental capacities which will strengthen the organizational sustainability in the respective contexts founded on the theological reflection based on their **confessional identity**.



DIVERSITIES	SIMILARITIES
Institucional Lifetime (age)	Faith Perspective / Confessional Identity
Origins and foundational characteristics	Keys and poscolonial contexts, and varios types of dependency
Funding	Struggling for justice and dignity
Leadership development	Gender Justice Processes
Ways to responde to their contexts	Planning and management difficulties; difficulties in sustaining the commitment of members
Social and economic sector in which the church is implanted	Difficulties of leadership and ministries (lay and ordained)
Institutional and membership volume	Difficulties in sharing resources and networks (local and global)
Organization and structure	Difficulties in exchanging "energies" with its context

## The purpose

The InS affirms the capacities and potentialities of the churches themselves and has as its purpose to contribute to the development of capacities in people and organizations with the goal of forming a leadership (present and future) lay and ordained (for example, councils, church councils, group leaders, diaconal agents, ministers, synod bishops and presidents) in the area of ecclesiastical management and administration, based on the specificity of the mission of the church and of its values, in the distinct levels of formation (extension, specializations, master's studies) and also in themes such as congregational management focusing on spirituality, participatory strategic planning in the church, management and implementation of projects in the church (PME), management of church councils, of congregational boards, the annual operative planning of the church, the facilitation of participatory processes in the church, accounting as a strategic management tool.





## Vision and Mission

### Vision

The Vision of the Sustainability Institute - Latin America and the Caribbean:

**To be recognized as an organization for the formation and development of capacities in the service of the churches and the faith communities who are committed to the full application of their gifts and resources to the transformation and the reconciliation of the world.**

### Mission

The Mission of the Sustainability Institute - Latin America and the Caribbean

**Contribute to the formation and development of capacities of people, congregations/communities and churches through reflection, practice and innovation in the topics of congregational management, planning and mobilization of gifts and resources.**

## Map of the Agents of the InS





## Purposes

- A. Research: investigation** – Understood as an academic activity orientated toward the systematic and organized production of new knowledge based on the study of the practices and of the situation of the churches, formatting their needs and problems and establishing investigation lines. The purpose of the research is to make the knowledge obtained return to the practices.
- Investigate and systematize the learning from the processes of sustainability of the churches of the region based on axiological, epistemological and methodological elements;
  - Deepen the study of the inter-relations between the sciences and the social technologies, their contributions and the sustainability of the churches in the region;
  - Publish academic articles, investigations and theses, besides materials in general about the theme sustainability of the church.
- B. Teaching: formation** – Formation is understood as a dynamic process which considers the relation between action and reflection as the real base of the context of learning, propitiating the necessary space for the emergence of a liberating-critical knowledge, built on epistemologies which welcome invisibilized knowledge. Based on this perspective the InS hopes to contribute to generating a critical mass of people with the capacity to influence reflection and practices of the churches and to generate networks of various types which will assure and propagate the focus on and the practices of sustainability.
- Contribute toward generating spaces which propitiate specializations and master's studies on the theme sustainability and congregational/community management focusing on spirituality.
  - Seek articulation with the centers of theological formation in the region and in the Lutheran world communion.
- C. Extension: capacity building and consultancies** – Understood as an inter-relation which presupposes a confrontation of realities the synthesis of which will introduce modifications in all the parts involved, in a path of mutual learning, extension offers a broad spectrum formation without rigid formal demands for enrollment. The focus of the extension program is aimed at the propagation of the knowledge (research and teaching) in the churches, faith communities and in civil society in general.
- To provide services of capacity building, advisories, consultancies and other extension activities for the churches and other Lutheran institutions of theological education in the region and also on an ecumenical level.



- Foment debates about the sustainability of the church and participate in forums created toward this end.
- Theologically contribute in the regional gatherings of the member churches based on the sustainability theme.
- Dialog with organized civil society and with the corporative world about the sustainability of the organizations, presenting the experience to the churches.

### Priority Themes

The priority areas of investigation and teaching of the InS will be the following:

- Theological foundation of ecclesiastical sustainability based on the Lutheran confessionality in dialog with other theologies and studies;
- Strategic planning as a tool for ecclesial and missionary development;
- Reflection about the missionary and sustainable ecclesiological models developed by distinct theological currents.
- Development of strategies for mobilization and management of human and financial resources;
- Promotion and multiplication of projects for ecclesiastical and missionary development.

### Transversal Axes

The transversal axes which accompany and are present in the perspective of the sustainability of the church are the following:

- Contextual mission (proclamation, service, work in favor of justice)<sup>6</sup>;
- Spirituality and management;
- Transcultural and intercultural focus;
- Systemic focus;
- The contribution of feminist theology and of gender studies;
- Intergenerationality (emphasis on youth) for the sustainability of the churches.

### Strategy

The InS is an institute in the Faculdades EST (São Leopoldo, RS, Brazil), instituted jointly by the LWF and the IECLB. It is conceived as a formal academic institute with a focus on the local, regional and global dimension. As a part of the Faculdades EST, the InS will count on

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<sup>6</sup> - FEDERAÇÃO LUTERANA MUNDIAL. Juntos na missão de Deus. São Leopoldo: Sinodal, 1990.



the academic freedom normal of all higher learning organizations, as prescribed in the guiding principles of any university.

The InS will work in the field of research and development of capacities (teaching and extension) faced with the challenges of sustainability, seeking alternatives to the traditional behaviors and mechanisms of organizational and institutional management. This quest includes the valorization and inclusion of women (lay, ministers, theologians) and the knowledge produced by them in the area of theology and aims to offer strategic support so that women may develop their capacities based on the sustainability focus, including the development of capacities for facilitating processes, teaching and research.

The InS will contribute with the churches to generate networks of collaboration for their sustainable management: a) network of formal knowledge between people and institutions (other study centers and churches); b) networks of information about the sustainability of the church; c) communities of professional practice; d) network of diverse specialists; e) articulation with the LAC Network of Women, Justice and Gender, LAC HIV Network and LAC Youth Network.

The InS will seek to articulate itself with other active networks in the area of the state, in civil society, in the consultancy services market as well as in the churches and in international cooperation.

The InS will maintain communication, exchange and articulation lines with centers of theological formation, especially with those of Protestant identity in Latin America and of the Lutheran world communion and institutions which share goals in relation to the theme it is charged with.

It is important to register that, in this trajectory, the churches of Latin America and of the Caribbean have been accompanied by various sister churches and organizations, such as the Evangelical Lutheran Church in America (ELCA), The Lutheran Church of Sweden, One World Mission of Bavaria and the Finnish Evangelical Lutheran Mission (FELM). Thus it is evident that considering the Lutheran communion as a body (1 Co 12) the sustainability of the churches in the region contributes to the sustainability of the Lutheran world communion.

### **Formation Methodology**

The InS bases itself on an inter and transdisciplinary methodological focus and will, preferentially, use the participative research-action method, as well as digital technologies of communication, distance mode, traditional mode (written and taped) and through



internet. These are tools which make it possible to reach the purposes of capacity building of the churches and the Christian communities/congregations in the region. The pedagogical and epistemological focus is to contribute based on a critical-liberating perspective considering the pedagogy of action-reflection-action, the epistemology of complexity (Edgar Morin), the epistemology of knowledge and of emancipation (Boaventura de Sousa Santos) and the feminist and gender epistemologies.

### Formation Matrix

In a general way the formation matrix of the InS, taking into consideration the Brazilian educational legislation, can be visualized as follows:



The pedagogical, didactic and curricular specifications of this formation proposal was developed in a specific document, entitled Formation Matrix of the Sustainability Institute Latin America and the Caribbean (Internal Document, 2013).

### Governance

The InS governance is based on the focus of an “organization based on networks”. Therefore it has the characteristics of an organic, pluricentric system. Defined by its structure, processes and purpose, it has, as a consequence, a non-bureaucratic, non-hierarchical profile.





The governance of the InS is designed as a relatively stable, horizontal articulation of interdependent institutional agents. At the same time, it is operationally autonomous and has the declared purpose of contributing to the production of community/congregational management knowledge and practices, organizational sustainability and mobilization of resources in the churches and organizations of the churches of the Lutheran communion in Latin America and the Caribbean. In this way it aims at tending to a wide spectrum of visions, ideas, plans and pre-existing models.

The governance of the InS identifies four ballast points of democratic governance of a network:

- a) The political agents which constitute it are legally and legitimately constituted and/or elected, and/or designated.
- b) These agents represent the membership, the composition and the base of the participant groups and organizations.
- c) These agents are accountable to the institutionally defined membership.
- d) They work according to the democratic rules specified in pre-established agreements and conducts.

The decision making in the distinct spaces of the InS takes place through negotiation processes which seek to reach rationality and consensus, deliberation and dialog. At the same time, one assumes the existence of possible, even if maybe avoidable, conflicts and dissensions, since one also pre-supposes the commitment and viability of prevention and resolution mechanisms of these conflicts.

In this design the governance has three dimensions:

Strategic Dimension – orientated by the determination of long term goals and plans, by the allocation of resources, limitation of the time of the beginning and end of the InS.

Dimension of Processes – orientated by the interaction with the networks with which the InS is connected to transform needs and challenges into processes of change.

Operative Dimension – orientated to place into action developed strategies and plans, to implement specific tasks, mobilize resources and evaluate the accomplished results.

Within the **strategic dimension** of the governance the determining government organ is constituted by a triumvirate made up of the LWF/LAC by delegation of the Leadership



Conference, represented by the secretary of the LAC area; IECLB represented by the Pastor/President and by the Faculdades EST, represented by its Rector. Within this conceptual framework the InS, which was instituted by the IECLB, the LWF and Faculdades EST, legally depends on the Faculdades EST and will fulfill the directives of the Brazilian legislation.

The **dimension of processes** is constituted by the interaction of the InS with the following networks:

- The Leadership Conference of the member churches of the LWF in Latin America and the Caribbean (LAC).
- The liaison persons and advisors of the Sustainability Program of the Churches of LAC.
- The LAC Network of Women and Gender Justice.
- The LAC Youth Network
- The network of organizations and study centers for the formation of ministers and leaders of the LAC churches.

The **operative dimension** of the governance is constituted by a functional work team which, according to what was established in the Reference Terms, seeks to preserve the balance of gender, intergenerationality and of ministries (ordained/non-ordained). The work team is designated by the three founding institutions and is coordinated by four coordinations.

- One co-coordinator designated by the IECLB, whose role is to be carried out by the Formation Office of the IECLB. This coordination seeks the articulation with the formation spaces of the IECLB. Currently the Catechist Master Débora R. Conrad fulfills this function.
- One co-coordinator designated by the LWF whose role is to be carried out by one of the liaison person of the IECLB in the Sustainability Program/LAC which is also tied to the Missionary Action Plan of the IECLB (PAMI). This person is charged with the coordination of the Sustainability Program and with the PAMI. Currently Miltom de Oliveira carries out this role.
- One co-coordinator designated by LWF to carry out the role of the coordinator of the Sustainability Program/LAC. This person is charged with coordinating the actions between the InS and the Sustainability Program. Gustavo Driau (IELU) currently carries out this role.



- One co-coordinator designated by the Faculdades EST which is in charge of the academic coordination of the InS. Currently P. Dr. Valério G. Schaper fills this role.

The InS foresees a phase of implantation which will extend from October 2013 to December 2016. The structures, roles and functions are valid until that moment when they will then be reviewed.

A review of the academic component of the InS will be developed during the first semester of 2015.

The dimensions, the roles and the functions of the governance of the InS will be established in the Terms of Reference in the year 2014.

### **Supervision**

The InS will be subordinate to the supervision required for all and each of the instituting organisms (EST, IECLB, LWF) and will also count on the highest international level of quality in full auditing.

### **Funding**

The funding of the InS proceeds from the following sources:

- Income for service rendered in research, teaching and extension;
- Income from external funding through projects and cooperation contracts, contracts gained with the support of local, regional and international partners as permitted by university guidelines;
- Income from public biddings of Brazilian state organisms of research fomentation and/or social-educational interventions.

### **Timeline**

This conceptual document of the InS will be valid for five years, according to the purposes laid out, at which point it should then be reviewed. The beginning of the activities of the Institute is scheduled for November of 2013.

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[The various revisions of the document include contributions and commentaries from consulted specialists]