

A large group of Catholic sisters, many wearing headsets, are seated in rows, suggesting a training or conference setting. The sisters are dressed in various styles of religious habits, including grey, black, and white. They are all looking towards the right side of the frame, indicating they are listening to a speaker or participating in a presentation. The background is filled with more sisters, creating a sense of a large-scale event.

Sisters Serving the World

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



THE CONRAD N. HILTON FOUNDATION'S CATHOLIC SISTERS INITIATIVE

Sisters Serving the World

2nd Annual Measurement, Evaluation and Learning Report

Center for Religion and Civic Culture
University of Southern California
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Introduction



The Catholic Sisters Initiative

The Conrad N. Hilton Foundation Catholic Sisters Initiative launched a five-year strategy in February 2013 to enhance the vitality of Catholic sisters and their work to advance human development around the globe. As of August 2016, the Initiative has funded 68 grants to 60 grantees, totaling more than \$90 million. It has expanded its funding and influence beyond Africa and the United States to include grantees and stakeholders in Asia, Europe, Latin America and the Caribbean.

The Sisters Initiative began at a critical time for Catholic sisters worldwide. In the United States and most of the global north, the number of sisters has been declining rapidly for decades.¹ The impact of this decline on Catholic culture and institutions is immense. Many educational institutions have closed and others are now entirely staffed by laity. Unlike their parents and grandparents, young Catholics rarely or never encounter sisters. This decline parallels a decrease in the number of people affiliated with religious institutions in many parts of the world and an expansion of educational and career opportunities for women.² In contrast, most parts of the global south, especially post-independence Africa and Asia, have experienced a rapid increase in the number of young women entering religious life.³ This increase in the number of sisters parallels an increase in the number of Catholics in these regions and the need for more Catholic institutions and services.⁴

Within this context, the Initiative's strategy addresses three central issues that it has identified as key factors behind the ability of sisters to serve their ministries in both the global south and north: membership, leadership and resources.

- 1** **Membership challenges differ in the global north and south:**
How do religious communities attract and retain new members in the global north?
How do religious communities in the global south support new members and their spiritual formation and training for ministry?
- 2** **Leadership needs are universal for sisters in the global north and south.**
How can the Initiative help sisters develop strong leadership, and the financial and organizational skills needed to support their religious communities and ministries in the future?
- 3** **Resources, which include both financial and social capital, are essential to increasing the vitality and reach of sisters and their ministries in both the north and south.**
How can the Initiative help sisters attract and steward resources for their religious communities and work?

These key factors form the current strategic framework of the Initiative. The Initiative is now more than half way through their five-year strategic plan. By 2018 the President of the Foundation has requested the staff of the Sisters Initiative to revise their strategy in light of current opportunities and realities facing sisters globally.

The Center for Religion and Civic Culture

The Conrad N. Hilton Foundation awarded the Center for Religion and Civic Culture (CRCC) at the University of Southern California a grant in 2014 to measure, evaluate and learn (MEL) about the effectiveness of the Initiative's five-year strategy in building the capacity of Catholic sisters worldwide. In its second grant year, CRCC delved more deeply into analyzing the impact of the Initiative's strategy. CRCC's insights are informed by its strong relationships and cultural knowledge of Catholic sisters and the Catholic Church, and its expertise on global religion and religious institutions. Sociocultural, demographic, financial and political factors affecting the Catholic Church, and religion as a whole, frame CRCC's analysis of the Initiative's strategy and the challenges and opportunities that sisters face.

As the Initiative matures, CRCC has documented and analyzed learnings and identified gaps and opportunities in the field. One of our initial findings was that progress on the Initiative's membership, leadership and resources goals required increased visibility and awareness of the work of sisters around the world. A related finding, the idea of fostering a vital and growing "global sisterhood," developed directly out of the work of grantees (e.g., Global Sisters Report) and the importance of fostering connections between sisters around the globe. As sisters become increasingly aware of each other's work, they are developing powerful connections and a growing sense of spiritual identity through shared experiences and knowledge. These two interrelated findings are key means of strengthening and amplifying the contribution of sisters to the advancement of human development.

Building on these early findings, CRCC's evaluation work in the second year of its grant has included mapping the growing networks created through the Initiative and identifying clusters of interests and areas of opportunity to connect organizations. CRCC, in collaboration with the Initiative's staff and other grantees, has also played an active role in fostering networks among sisters, the Catholic Church, funders and organizations with a long-term stake in sisters and their ministries.

This report documents and analyzes present and future challenges that the Initiative faces, as well as the progress the Initiative is making towards meeting the indicators of success determined by its current strategy. In the previous report, CRCC identified four gaps and opportunities in the current strategy and made strategic recommendations for addressing them within the current framework. This report provides updates on those gaps and opportunities and presents new opportunities that have risen in the past year. Finally, this report also lays out essential questions that the Foundation, its trustees and the Sisters Initiative team must answer before crafting the next iteration of the Initiative's strategy, which is due in 2018.



Second-Year MEL Activities

Based on two highly successful convenings, field site visits, hundreds of formal and informal interviews, and observation of the International Union of Superiors General (UISG) assembly in Rome, CRCC has built a strong network of connections among the Initiative's grantees, sisters and the Catholic Church. CRCC used primary data (e.g., surveys, key informant interviews, field site observation, data provided by grantees) and secondary data (grantee progress reports) to assess the progress being made toward the indicators of success in the Catholic Sisters Initiative Strategy. CRCC also used information from grantees and Initiative staff to track ongoing progress and challenges for grantees and the Initiative as a whole. By using a rich mix of qualitative and quantitative data, CRCC has crafted a more detailed picture of the impact of the Initiative on sisters and their ministries around the world.

In its 2016 work plan, CRCC set several key objectives to meet during its second year of evaluating the impact of the Initiative:

- Developing and co-hosting with the Hilton Foundation the first annual Catholic Sisters Initiative Convening in Pasadena, CA (November 2015)
- Conducting a post-convening evaluation survey and six-month follow-up survey
- Providing ongoing technical assistance to the Initiative's grantees
- Consulting with the Initiative's team
- Ongoing analysis of the strategy's indicators of success
- Analyzing the current situation of Catholic sisters in Latin America and the Caribbean
- Supporting the development and planning of the 2016 *Catholic Sisters: Champions of Sustainable Development in Africa* convening in Nairobi, Kenya

These objectives grounded CRCC's activities during the second year of its measurement, evaluation and learning grant.

The Catholic Sisters Initiative Inaugural Partner Convening (2015)

The inaugural partner convening, co-hosted by CRCC and the Foundation, took place on November 4-7, 2015 in Pasadena, California. The goals of the convening were three-fold:

- 1) **NETWORKING:** to build a network and community of shared practices among and between the key leaders involved in grants funded by the Hilton Foundation
- 2) **ONGOING LEARNING:** to help organizations better capture and institutionalize their own learning
- 3) **VISION ALIGNMENT:** to articulate a shared vision for the work of building a global sisterhood and the future direction of the Initiative

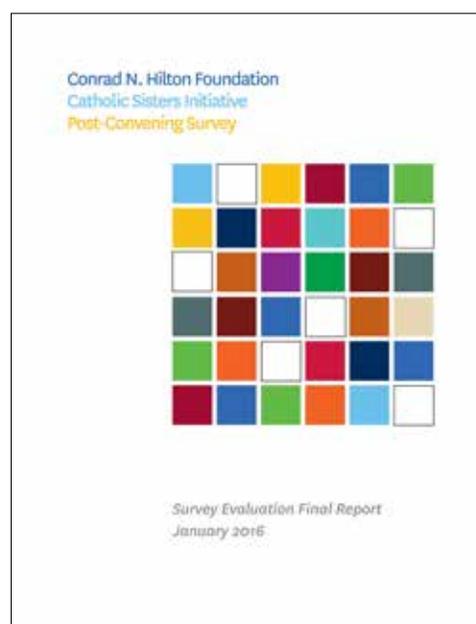
While participants represented a cross-section of the Initiative's portfolio, not all grantees were present at the convening. The convening included 37 participants, representing 30 organizations from across the globe, along with staff from the Foundation and CRCC. The convening was the first major opportunity to introduce the concept of a "global sisterhood" to grantee organizations that share the Initiative's goal of supporting sisters and their work.

CRCC helped organize the logistics of the convening and develop the objectives and program with Hilton Foundation staff. CRCC facilitated sessions and discussions during the convening, presented data on the state of Catholic sisters in the United States and worldwide, and presented a workshop on measurement and evaluation. In order to evaluate the impact of the convening and build a better understanding of the grantees, CRCC interviewed participants during the convening and developed, implemented and analyzed a post-convening survey and six-month follow-up.

Post-Convening Evaluation Survey and 6-Month Follow-Up Survey

One of the findings from the 2015 convening was that bringing together key people to exchange ideas, connect and re-energize empowers them to advance the Sisters Initiative's goals more effectively. The positive impact of the convening was made clear in CRCC's post-convening survey of all non-staff participants (administered on December 15, 2015) and the follow-up survey (administered on June 15, 2016). CRCC conducted both surveys in order to understand the effectiveness of the convening and the nature of the network formed by the participants. The surveys also allowed CRCC and the Initiative to learn more about the strength and utility of the concept of the "global sisterhood."

CRCC created network maps out of the results, determining which actors serve as conduits of connections, and the topics around which groups have coalesced. CRCC also found grantees sharing learning, resources, best practices and funding sources, as well as participating in each other's programs and creating new programs and content about sisters. Grantees have common understandings of the global sisterhood, which they used to promote inter-congregational friendship and collaboration, global thinking and a universal calling. The full results of the survey, along with recommendations for the Sisters Initiative, are in a separate report.



Technical Assistance to Grantees

Building on the first year of its grant, CRCC has provided a full spectrum of technical support services to grantees and the Foundation over this report period.

At the 2015 convening and in the survey, several grantees requested assistance with their measurement and evaluation plans. CRCC has worked with grantees such as Loyola University New Orleans and the Sisters of Mercy of the Americas. Other grantees (e.g. Giving Voice, Labouré Society) have needed more basic assistance with building the organizational capacity required to meet the objectives of their grants. The Global Sisters Report/National Catholic Reporter is working with Threespot Digital Agency to develop metrics to capture the effect of its grant on increasing awareness about Catholic sisters and their work around the globe. Because CRCC and the Initiative identified awareness as a key issue underlying all of the Initiative's indicators of success, CRCC has been involved in the conversations about creating a measurement for awareness. CRCC also provided design input for developing grants to better capture outcomes and impact (e.g., Healey International Relief Foundation, LifeNet International).

CRCC has documented grantee's project milestones through videography and photography. The products are used to understand how grantees fit within the Initiative's strategy and communicate the results of the Foundation's giving. CRCC filmed the first graduation ceremony of the Sisters Leadership Development Initiative-Mexico and interviewed participants in the program. CRCC also attended the UISG assembly, interviewing sisters and filming select plenary speeches, including Sister Rosemarie Nassif's speech about Pope Francis, the global sisterhood and the U.N. Sustainable Development Goals. Finally, CRCC continued to log, produce and capture videos documenting the impact of the African Sisters Education Collaborative (ASEC).

Because of its background in studying youth religion, CRCC served as a lead member of the vocations working group under the USC-Caruso Catholic Center grant, which aims to create models that support vocations through campus groups.

Finally, ASEC served as the local host for the 2016 convening in Nairobi, with CRCC supporting program development and facilitation.

In the process of providing technical support to grantees, it became apparent that many grantees need reassurance that their work is useful to the Initiative and that the Initiative values them as a partner in supporting the global sisterhood. It was also clear that grantees see CRCC as a "safe space" where they can ask questions about the Foundation's grant processes and future direction, as well as run ideas by CRCC staff to see if the Initiative and Foundation might be open to them. And finally, as a result of the Pasadena convening, it became apparent that grantees now see themselves as part of a larger community dedicated to supporting the growth and vitality for the global sisterhood.

Consulting with the Initiative's Team

CRCC has established an ongoing dialogue with the Initiative's team over the past two years that has included many fruitful exchanges. The teams meet at least once a month and discuss ideas via phone on a weekly basis. The teams exchange information about grantees, annual convenings, findings from the MEL, funding opportunities and future directions for the Initiative. In addition, CRCC has been able to identify opportunities to help the Foundation increase the impact of its philanthropic work. The mutuality of the relationship that the teams have developed over time has helped CRCC to understand the capacity of the Initiative's team, the evolving direction of the Foundation and the role that the Initiative and Foundation have in supporting the global sisterhood and its work to advance human development. Indeed, the positive relationship between Initiative staff and CRCC is the cornerstone of the Initiative's MEL.

Ongoing Analysis of the Strategy's Indicators of Success

As the Sisters Initiative prepares to bring its first five-year strategy to a close and write a new strategy, CRCC has analyzed the strategy's indicators of success. CRCC has sought to understand the progress the Initiative has made on the indicators set in 2013 as well as how useful and realistic those indicators are. This activity involves analyzing the portfolio, specific grants and trends in the Catholic Church and world religions. CRCC tracks major developments in the Catholic news and conducts original research. Concurrently with the MEL, CRCC has conducted a research project on Religious Competition and Creative Innovation, which explores how people manage their identities and commitments as they seek to maintain the vibrancy of their spiritual communities in the face of rapid social and cultural change. Findings about religiously unaffiliated Americans and new definitions of spiritual authority, authenticity and community reflect directly on the realities faced by Catholic sisters (see section 2).

CRCC's analysis has led it to conclude that some of the current indicators, such as increasing the number of women religious in the global north, may be unrealistic. Larger trends within the world of Catholicism and religion are too strong for the Initiative to sway, and measuring the specific impact of the Initiative on these trends would be difficult, if it is possible at all. CRCC has also concluded that the division of other indicators in the global north and south is not always useful.



Analysis of the Current Situation of Catholic Sisters in Latin America and the Caribbean

The Catholic Sisters Initiative strategy has a five-year global timeline (2013-2018) that incrementally expands the Initiative's grant-making horizon from the United States and Africa to include Latin America and Asia.

On the request of the Catholic Sisters Initiative staff, CRCC did a landscape analysis of Catholic philanthropy in Latin America and the Caribbean that included gaps and opportunities should the Foundation decide to expand in a decisive way in this region of the world. The Catholic Sisters Initiative currently has three grantees primarily working in the region (Catholic Extension, Dominican Sisters of San Jose and Medicines for Humanity).⁵

Catholicism has deep roots in Latin America, dating back to the Spanish and Portuguese conquests of the new world in the 15th and 16th centuries. Many indigenous groups adopted Catholicism and incorporated it into their own cultures. Today, it is the most Catholic region in the world, with 40 percent of the world's Catholics and 30 percent of its Catholic sisters. The election of Cardinal Jorge Mario Bergoglio of Buenos Aires as pope in 2013 was a sign of the region's importance to the church and through Pope Francis, its unique brands of Catholicism—influenced by Liberation Theology and charismatic movements—are gaining global influence. CRCC also found the region to be vastly under-resourced, with great potential for the Initiative to have a larger impact there.

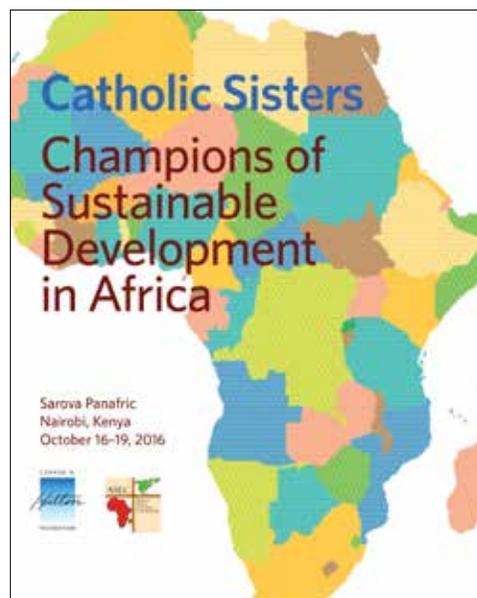
CRCC will deliver a report on the Latin America and Caribbean regions in 2017. Analysis and conclusions from that report also are incorporated into this report.

2016 African Sisters Convening

CRCC worked with the Catholic Sisters Initiative staff and the African Sisters Education Collaborative (ASEC) in developing, planning and facilitating a convening with almost 200 participants in Nairobi in October 2016. The convening, entitled “Catholic Sisters: Champions of Sustainable Development in Africa” had three goals:

- **NETWORKS:** Building a community of shared practice among African sisters, the Catholic Church, philanthropy, governments, the NGO community and other actors committed to sustainable development in Africa
- **KNOWLEDGE:** Understanding how we might better capture and communicate the impact of our work together
- **SOLIDARITY:** Articulating a shared vision and commitment to advance the United Nation's sustainable development agenda

CRCC helped develop these objectives and goals. CRCC also developed and gave a presentation on the current state of the global sisterhood, with a focus on African sisters and the Catholic Church, and facilitated convening sessions. CRCC also recorded both convening sessions and video interviews with participants. Finally, CRCC created, administered and analyzed an evaluation of the convening. CRCC will submit a separate report of the convening findings to the Foundation and ASEC in 2017.



II.

Trends and Challenges Faced by the Global Sisterhood



In order to evaluate the effectiveness of the Catholic Sisters Initiative in meeting the objectives of their strategy, it is important to understand larger trends in global religion and the Catholic Church in particular. In the previous report, CRCC shared general trends in religious affiliation, as well as histories of sisters in the United States and Africa. In this report, CRCC provides context on trends within the Catholic Church and focuses on demographic projections of the number of sisters in the next two decades. This analysis provides the context within which to understand the current Initiative’s grants and evaluate how well these grants support sisters and their work to advance human development. The next strategic plan of the Catholic Sisters Initiative must consider these trend lines to realistically assess how much it can affect vocations in the United States and where there may be opportunities globally.

Trends in the Catholic Church

A few weeks before Pope Francis arrived in the United States in September 2015, he participated in a TV broadcast that brought him in touch with Catholics across the United States. Meeting with a group of immigrants at the border, he called forth Sister Norma Pimentel and thanked her and all women religious in the United States for the work they do. “I’ll tell you one other thing. Is it appropriate for the pope to say this? I love you all very much,” he said.⁶

The moment came after the end of Vatican investigations into orders of women religious in the United States and the Leadership Conference of Women Religious. Started under Pope Benedict, the “visitations” were largely seen by American sisters and their supporters as an affront. Sisters were being accused of deviating from church teachings. But with the short “all is well here” report—just 12 pages after a five-year investigation—and his “I love you,” Francis seemed to signal that women religious are on the right path.

Indeed, CRCC has watched the institutional church align more closely with the work of Catholic sisters under Pope Francis, the first Latin American pope. At the same time, part of the reason for the “visitation” of religious orders was to understand the decline in membership of U.S. congregations. Demographics point to a church with few sisters in the

developed world by 2035. The global sisterhood will be more diverse, not only in terms of the nationalities of sisters but in the ways that women engage with the Catholic Church.

Sisters' Church

While Pope Francis' focus on mercy and social justice may have taken the institutional church in a new direction, this focus is not new for women religious.

The election of Cardinal Jorge Mario Bergoglio of Buenos Aires as pope in 2013 was a sign of the center of the church moving south. Indeed, Pope Francis has appointed a greater number of cardinals in the global south, or as he would say, the "peripheries." In power and wealth, these places may be peripheral, but in numbers they are anything but. In particular, the election of the first Latino pope recognized Latin America as the most populous Catholic region in the world, with 40 percent of Catholics globally.⁷

The elevation of a Latino pope also brought social justice to the forefront of church concerns. Though once conservative, Pope Francis has been strongly influenced by Liberation Theology, which was born out of Latin America. Liberation Theology asks believers to interpret scripture and church teachings from the perspective of the poor. During the Cold War and after, the Catholic Church tried to repress it because of its Marxist influences. Francis has re-legitimized Liberation Theology through his words and deeds.

Francis set the tone of his papacy early by taking his first trip out of Rome to Lampedusa, the "gateway to Europe" for migrants and refugees making the dangerous Mediterranean crossing from Libya to Italy. He has since repeatedly met with refugees in Rome. When he traveled to Greece, he brought 12 Syrian refugees back to Rome with him.⁸ He has also made trafficking for sex and labor a central issue of his papacy, setting an ambitious goal of eradicating "modern slavery" by 2020.⁹

With his encyclical *Laudato Si* ("On Care for our Common Home"), Francis put his moral weight behind curbing climate change and environmental destruction. He provided a spiritual argument for caring for creation, while emphasizing the disproportionate impact on the poor.¹⁰

Amoris Laetitia, his apostolic exhortation "on love in the family," reaffirmed Catholic teachings on marriage, divorce and sexuality. At the same time, it signaled a new openness to Catholics who have been divorced and remarried without an annulment, giving leeway to the local church to respond to such situations. He also emphasized the necessity of the church to accompany people and show them mercy, even if they are in "irregular situations."¹¹

Accompaniment and mercy capture the work of Catholic sisters at their best. By accompanying the "least of these among us," Catholic sisters have been able to recognize and respond to their needs.

In the U.S., sisters historically served poor European immigrant communities with hospitals and schools. Today, their role has evolved. A number of sisters are immigration lawyers, advocates and activists, defending the rights of undocumented immigrants and unaccompanied children from Central America.¹² Their concern for these immigrants harkens back to their advocacy for Latin America's poor during civil wars in which the United States took the side of brutal dictators to fend off communism to its south. In the 15 years prior to 1983, 1,500 priests, sisters and bishops were killed in Latin America for siding with the poor, famously including three American sisters and one laywoman in El Salvador.

Today, sisters also can be found at the heart of the global refugee crisis. They are in Syria, where they refuse to abandon those unwilling or unable to escape.¹³ They are serving refugees throughout the Middle East, even as some are refugees themselves.¹⁴ They are on the shores of Europe, counseling new arrivals, teaching them new languages and giving them shelter. Missionary sisters' experience abroad allowed them to recognize and respond to human trafficking in Europe.¹⁵ Well before Francis, sisters developed a global network working to combat trafficking.¹⁶

Sisters are also at the forefront of environmental issues in the church.¹⁷ Women religious in academia have shaped understandings of cosmology, crafting spiritual arguments for care of creation. They are making their grounds into nature preserves and green retreats, and teaching others how to create sustainable and economical farms. Moreover, they defend natural resources on behalf of the poor. Sisters, such as Dorothy Stang, have been martyred doing so.

Sisters' willingness to accompany people in what the church deems as "irregular" relationships—whether because they are gay, divorced or cohabitating—has led to innovative ministries that push the boundaries of the church. For instance, Sister Jeannine Gramick leads New Ways Ministry, one of the pioneering Catholic LGBT groups in the United States, and another sister has a ministry for transgender people.¹⁸

For each headline about Pope Francis' approach to Catholicism, it's likely that Catholic sisters are already addressing the issue, often anonymously. In fact, one of Pope Francis' largest headlines of the past year came out of his audience with the International Union of Superiors General (UISG). At the May 2016 meeting Pope Francis announced his plans to create a commission to study the possibility of allowing women to serve as deacons.¹⁹



Demographic and Structural Challenges

Conversations about women deacons and the future of religious life are taking place in the context of a dramatic shift of population in the Catholic Church. The Catholic population is shifting from its historical center of Europe and North America to Africa and Asia. Latin America is still the most Catholic part of the world and accounts for 30 percent of the world's Catholic sisters.²⁰ Yet the church has started to decline there in the face of competition from evangelical and Pentecostal churches, as well as disaffiliation from religion altogether.²¹

In Sub-Saharan Africa, the church is growing tremendously. From 1980 to 2012, the church has grown 238 percent. Participation in church services is also high, with 70 percent—and as high as 90 percent in Nigeria—of Catholics attending Mass weekly. (In contrast, only 20 percent of European Catholics and 24 percent of American Catholics attend Mass weekly). The number of Catholic sisters in Africa also is growing substantially, but not at the same rate as baptized Catholics.

fig. 1

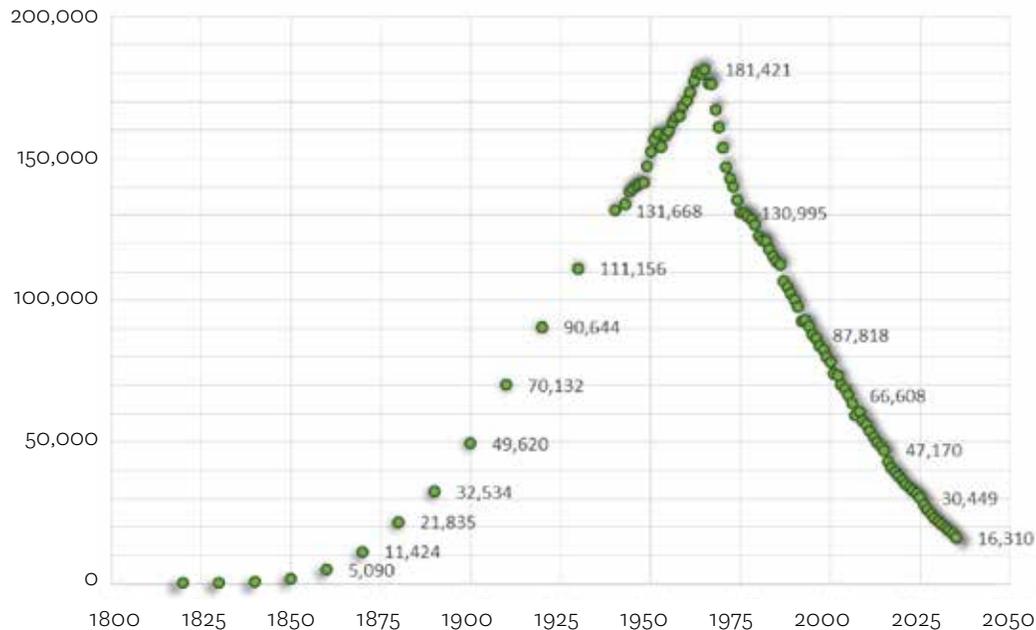
Current and Expected Age Distributions of Religious Sisters in the United States

	<i>Current</i>	<i>2025</i>	<i>2035</i>
Under Age 40	1%	< 1%	< 1%
Age 40 to 49	2%	3%	< 1%
Age 50 to 59	6%	4%	7%
Age 60 to 69	22%	9%	7%
Age 70 to 79	32%	30%	14%
Age 80 to 89	26%	37%	40%
Age 90 and older	11%	18%	31%

fig. 2

Total Number of Religious Sisters in the United States

1820–2015 and projection through 2035



The total number of religious sisters is expected to decline from 47,170 in 2015 to 30,449 in 2025 and then 16,310 in 2035. The current largest cohort of religious sisters are in their 70s (15,094 individuals). In 2025, then in their 80s, this group is expected to number 11,484. The model estimates 5,266 will survive into their 90s in 2035.

The decline in the appeal of religious life in Europe and North America cannot be denied. CRCC conducted an analysis and projection of the number of sisters in the United States. There are currently 47,170 sisters in the United States (figure 2), down from a high point of 181,421 religious sisters in 1965 even as the Catholic population has continued to rise. If the current average of 92 women professing perpetual vows for a U.S.-based religious institute each year is maintained, by 2035 there will be 16,310 sisters in the United States. This projection may be high. As the number of Catholic sisters continues to decline, there will be fewer sisters to model the vocation to young women, which CRCC and the Initiative has found to be essential to promoting vocations. It may be a stretch to say that the current rate of vocations can be maintained. Even if the number of new sisters doubled each year, there would be only 18,000 sisters in 2035. The aging

of sisters is a much greater factor than the addition of new sisters in the projection.

The reasons behind the decline in religious life are myriad, and no single explanation is complete—greater work opportunities for women, a broader trend of religious disaffiliation among young adults. This latter trend has particularly affected the Catholic Church in the United States, which has the highest rate of disaffiliation among all religions. CRCC’s research has found a shift away from institutions and traditions serving as the spiritual and moral authority and toward individual experience shaping a personally “authentic” understanding of spirituality. While the experiences of service and community appeal to many young people, they are more interested in shaping those experiences themselves rather than conforming their individuality into congregational life.

While the demographic trends in the global “north” and “south” are seemingly opposite, they are connected. Latin America can be seen as the canary in the coalmine for the global sisterhood, as it falls between the rapidly diminishing presence of sisters in the global north and the growth of orders in Africa and Asia. Vocations in Latin America have begun to slow, though not as much as in the United States or Europe. Brazil, which has the largest Catholic community in the world, has seen a 10 percent decrease in the number of its sisters from 2007 to 2014.²²

Contrary to some expectations, CRCC’s analysis of sisters in Africa does not show a negative correlation between GDP and the number of sisters. In other words, it’s not necessarily the case that fewer women join religious life as economic conditions improve. Still, there is reason to be concerned about the number of sisters in Africa. The growth rate of sisters in Africa is falling well short of the growth rate of baptized Catholics. The growth in the number of parishes and priests is not keeping pace with the growth in Catholic population as well. At the same time, “reverse mission work” moves priests and male and female religious from the developing world to Europe and North America.

Catholic sisters in Latin America and Africa worry that they will face the same issues as sisters in the global north. For international orders, the decline in vocations in Europe and the United States has meant less support for “the missions” in the developing world. Indeed, some orders have moved their motherhouses from Europe to Africa, and many orders are seeking to make their “missions” more self-sufficient. Sisters from Latin America are going on “reverse mission work” to the United States to support dioceses and their growing Hispanic populations.²³ Local orders also have to sustain themselves, and often are not compensated adequately for the work that they do for dioceses. The lack of financial support can affect an order’s ability to invest in formation and education of young women aspiring to become sisters. In Africa, the first generation of African Catholic sisters are nearing retirement, when they will require more care and will not be able to produce income for congregations.

As a religious himself, Pope Francis has shown himself to be aware of these challenges. He released a new constitution for contemplative women religious. While it does not pertain to apostolic Catholic sisters, it points to some of his concerns. He calls for monasteries to become a part of a federation, and if they want to maintain autonomy, they must have “a certain, even minimal, number of sisters, provided that the majority are not elderly, the vitality needed to practice and spread the charism, a real capacity to provide for formation and governance, dignity and quality of liturgical, fraternal and spiritual life, sign value and participation in life of the local church, self-sufficiency and a suitably appointed monastery building.”²⁴ While this move could be seen as the Vatican consolidating power, in the developing world it protects women from local bishops who establish local congregations without proper support.²⁵

Francis also warns against “the recruitment of candidates from other countries solely for the sake of ensuring the survival of a monastery.”²⁶ This points to a problem among non-contemplative congregations as well. Racism continues to plague some congregations, with young sisters from the developing world being used as labor and support for aging sisters in Europe and North America, despite the great needs in their home countries.

Just as Francis calls on contemplative nuns to root their lives in prayer and holiness, he also calls on religious sisters to continue to care for the least of these among us. A mission to advance human dignity is not necessarily guaranteed among congregations. Early in his pontificate, for instance, Francis called on European congregations to use their empty convents for refugees, and not as hotels for tourists. While some observers saw this statement as reflecting the desire of the church to have more control over congregation’s property, it also reflected his call to insular congregations to live out their missions in the world. The financial sustainability of congregations, the ability to foster vocations and ministries advancing human development are intimately connected.



The Future of Religious Life

American Catholics were enthusiastic in their welcome of Pope Francis to the United States in September 2015. Prior to his visit, 80 percent of American Catholics said that the pope understood their needs. Only 60 percent said the same of U.S. bishops.²⁷ Francis represents a Catholic Church that continues to have appeal to many people. He promotes “small c” Catholicism—a universal sense of a faith in which relationship and experience are more important than rules and doctrine. The bishops represent “big C” Catholicism to many Catholics—the institutional and all too human church, which struggles with dogma and corruption.

While the institutional nature of the church exacerbates current trends away from religion, the universal sense breathes hope into the church. This sense of Catholicism as a universal community and ethic will continue to attract women to life in the church. Despite declines in the global north, sisters will always be with us. The current shifts also open opportunities for new and creative approaches to religious life.

In 2035, CRCC’s projections show that the United States will have 16,310 Catholic sisters. Only 3,693 of these are expected to be under the age of 75 (figure 1). With such numbers, it is

inevitable that a number of congregations are going to cease to exist in the United States, while others may consolidate. Care for elderly sisters will continue to be an essential issue over the next 20 years.

With a median age of 38, the women who are joining congregations now will be in their mid-50s in 2035. The millennial generation will be solidly mid-aged. Those congregations that are attracting young women, therefore, will have vibrant communities in the prime of their working age.

Greater research is needed to understand what makes congregations vital. CRCC has found that these congregations tend to live communally (rather than in separate apartments), wear habits, serve their local community, and disproportionately attract immigrant women from Latin America and increasingly, Asia. In 2035, we expect that there will be pockets of the United States where religious life continues to flourish, while it may become virtually non-existent in other parts of the country. Some of the most vital congregations will embrace a more spirit-filled or charismatic Catholicism, which developed in response to the rise of Pentecostalism in Latin America. Because its immigrants largely come from Muslim-majority countries, Europe will see fewer pockets of vitality.

There is some indication that the current generation of women seeking a religious vocation is more interested in spirituality than social justice, at least in the United States. As the church becomes more diverse, Catholic social teachings will still have influence. Across religious and irreligious movements, though, CRCC is seeing a turn to localism—service in one’s own backyard—in the face of daunting national and global challenges. A concerted effort would need to be made to maintain the prophetic witness of women religious on major political and social issues, both in the United States and internationally.

While the growth of women religious in the developing world might not always continue to be as strong as it is right now, the global sisterhood will increasingly rely on “south to south” connections. More motherhouses will be located in middle-income countries like Mexico, Brazil, Kenya, Nigeria, India and the Philippines, rather than Italy, Germany and the United States, with implications for their financial sustainability and access to donors. Sisters from these countries currently are sent to other developing countries to serve. The missionary impulse of congregations will continue to encourage transnational connections. Even in Europe and the U.S., sisters will come from and remain connected to the global south through immigrant communities, where sisters have great potential to work on human development with vulnerable populations. The presence of sisters among immigrant communities, however, depends largely on maintaining a culture of vocations in their home countries. The increasingly diverse and global network of sisters will also influence the spirituality and theology of religious life, as African, Asian and Latin American culture influences congregations.

The possibility of women deacons could have huge implications on sisters, but the impact would vary greatly on location. The American church has embraced the male diaconate, with about 18,000 of the 44,000 deacons worldwide serving in the United States.²⁸ The U.S. church is also most likely to embrace the role of women deacons. Religious leadership in the U.S., though still patriarchal, is increasingly open to women, which may have an effect on the receptivity of the church to women deacons. If the church allows for it, many American sisters (though not all) might be deacons

by 2035. Being a deacon would allow sisters greater power within the church, allowing them access to resources and visibility. This development could make religious life more appealing to young women who are turned off by a church where women are sidelined.

At the same time, women deacons will not be accepted in many developing countries, where both the church and wider society are patriarchal, and the power that a woman might have through the diaconate might be seen as a threat. In Kenya, a number of sisters reported that African bishops would be slow to embrace such a change, even though it might ease the ministerial burden caused by the number of priests not keeping up with the growth of baptized Catholics.

The diaconate also could serve as competition for religious life. Already, many women serve as de facto pastors of churches as lay ecclesial ministers. There are nearly 40,000 lay ecclesial ministers in the U.S., 23,000 of whom are not vowed religious.²⁹ Eighty percent of lay ecclesial ministers are women, who can respond to God’s call to ministry while having a family.³⁰ With or without the diaconate, women’s role in the church will continue to expand over the next twenty years through different forms of ministry.

Besides family life, the major difference between sisters and non-consecrated ministers is their connection with a congregation and therefore a charism and mission. Lay associate programs allow women with families and outside ministries to find sustenance in the charism of a religious congregation. There are currently more than 35,000 lay associates in the United States. While that number has grown tremendously over recent decades, 71 percent are between the ages of 60 and 79.³¹ Growth will likely continue in the immediate future, particularly with Baby Boomers just beginning to retire. Many in this generation retain the idealism of their youth in the 1960s, and Catholics of this age often have fond memories of Catholic sisters. Associate programs can be a strong force for sustaining religious institutions’ charisms and human development work. In the long term, however, the growth of associate programs is not guaranteed, especially as the number of sisters and congregations drops. The vitality of such programs will require creativity and intentional recruitment.

There also is an increasing number of volunteer programs for both retired adults and young college graduates. The programs for young people often involve living in a former convent or even with sisters.³² These programs allow the vast majority of volunteers on both ends of their careers to experience religious life without committing to it. In an era in which few have lifelong careers, volunteer programs can be seen as temporary vocations and a good unto themselves, rather than a stepping-stone to either career/marriage or vowed religious life. By 2035, with some creativity, such volunteer programs could be more international and diverse—not sending middle-upper class college graduates to volunteer in American inner cities and the developing world, but allowing volunteers across cultures to serve alongside each other.

As the number of sisters declines in the U.S. and Europe, the legacy of women religious must be maintained by lay men and women who have worked with them. It will be more difficult for laypeople to pass on a charism to other laypeople, through schools, hospitals, or volunteer or associate programs.³³



Implications for the Catholic Sisters Initiative

The numbers and ages of women religious in the United States in 2035 show a grim future, but a broader vision of religious life shows that the legacy of Catholic sisters is strong. There are many channels through which this legacy can continue to affect the church and support human development. As will be detailed in several of the next sections of this report, many grants by the Hilton Foundation already are addressing the needs of the sisterhood in 2035. In crafting a new strategy, the Initiative can tap into those channels and direct its resources where it can make the most difference.

Philanthropy is unlikely to change societal trends towards religious disaffiliation, and it is difficult to measure the impact of the Sisters Initiative on vocations. For these reasons, the indicator of increasing membership in the global north is unrealistic. That said, the Initiative could embrace a broader definition of the global sisterhood that might include women deacons, lay ecclesial ministers, associates and volunteers. CRCC recommends more research into these phenomena, as well as into the parishes, campus ministries and communities where Catholicism is charismatic and vibrant and where religious congregations are attracting vocations. Insights from this research will help the Initiative better understand and shape the future of religious life.

Current trends show the interconnectedness of the global sisterhood. The Foundation already is the primary funder for Catholic sisters in many parts of the world, even in Latin America and the Caribbean, where it only has three grants. While there certainly are regional trends in religious life, many issues affect sisters worldwide. Moreover, connections between Latin America, Asia and Africa, as well as between these countries and immigrant communities in the United States (and less so Europe) are increasingly vital to supporting sisters. The Initiative has the opportunity to enable such connections with its new strategy. A scaled funding model, responding to partners' reports of the needs around the world, would allow it to remain committed to a truly global sisterhood.



The Evolving Catholic Sisters Initiative



The Initiative's portfolio has expanded rapidly over the last three years, responding to better information and learning about the needs of Catholic sisters around the globe.

As of August 2016 the portfolio totals more than \$90 million in funded grants, with 68 grants to 60 grantee partners. During this reporting period (July 2015- August 2016), the Initiative added 24 grants, including 12 new grantees (figure 3).³⁴ In staying true to the Foundation's creed of "cultivating long-term partnerships that deliver measurable results," more than half the grants were awarded to organizations that were prior grantees.

The newest batch of grants include four health care grants operating in the Caribbean (Haiti), Africa (Sierra Leone and Uganda), and Asia (India). Three research area grants were awarded to the Center for Applied Research in the Apostolate, the Durham University/Heythrop College/Margaret Beaufort Institute collaborative, and Duquesne University. Other significant clusters of grants awarded over the past year include education and leadership grants, and communications and media grants. Collectively these new grants expand the geographic coverage of the Initiative, continue key research on the vitality of congregations in Europe and Africa, and increase awareness of the global sisterhood and its work to advance human development globally.

The Sisters Initiative's learnings are reflected in its evolving understanding of the five-year strategy set in 2013. This strategy focuses on how the Foundation can help religious congregations expand their membership, develop leadership and increase resources in the global north and south. To do so, the Foundation invests in partner organizations that work across congregations of women religious, rather than simply funding individual congregations.

The Initiative's initial strategy grouped the world into two regions: global north and south (figure 4). Some grants do not fit either region, as they connect north and south (referred to as "global grants"). The strategy laid out a timeline for expansion from the United States and Africa into Latin America and Asia over a five-year period (figure 5).

In assessing the priorities of the Sisters Initiative, it is useful to note the trend lines since 2013 (figure 6). Africa has received the largest amount in grants. While the global north continues to have the largest number of grantees, grants to the global north have been declining. By comparison, relatively small amounts have been given to other categories. In 2016, no new grants were given in Asia, and grants were significantly cut back in Latin America and the Caribbean. Global grants also were cut significantly in 2016.

Meanwhile, funding in Africa continues to rise. The Initiative recognized the success of the African Sisters Education Collaborative's efforts to make higher education accessible for African sisters by awarding ASEC a \$15.3 million grant to expand their Higher Education for Sisters in Africa program in May 2016. Additionally, Healey International Relief Foundation received \$525,000 to work in Sierra Leone, and LifeNet International was awarded a \$900,000 grant to expand its existing work in central and eastern Uganda.

The continued increase in funding towards projects in Africa points to a significant grant-making shift from a global strategy to a focused regional strategy. This is in part due to the success of the Initiative's work in Africa and in part due to the team's lack of capacity to significantly expand into other regions. Currently, only one and a half program officers handle the portfolio. The team has significant contacts and experience in the global north, particularly the United States, but little experience working in other regions of the world. Because of the small program staff, there has not been the opportunity to conduct extensive field visits to develop stronger relationships with grantees or cultivate new connections and ideas about future partners and projects.

fig. 3

July 2015-August 2016 Grants

Year	Grantee	Amount
2016	National Catholic Sisters Week (Alverno College)	\$2,750,000
2016	CARA	\$240,000
2016	Sisters of St. Francis	\$45,000
2016	Medicines for Humanity	\$250,000
2016	Oblate School of Theology	\$340,000
2016	School Sisters of Notre Dame	\$225,000
2016	Sisters of the Presentation of the Blessed Virgin Mary	\$500,000
2016	LifeNet International	\$900,000
2016	Marywood/ASEC	\$15,300,000
2016	Healey International	\$525,000
2015	ACWECA	\$985,000
2015	Marywood/ ASEC	\$8,500,000
2015	Catholic Extension	\$2,000,000
2015	Catholic Health Association of India (CHAI)	\$875,000
2015	Society for the Propagation of the Faith	\$450,000
2015	Durham University/Heythrop College/Margaret Beaufort Institute	\$985,000
2015	Communicators for Women Religious	\$1,500,000
2015	USC Caruso	\$500,000
2015	Vocations Ireland	\$290,000
2015	A Nun's life Ministry	\$900,000
2015	Duquesne University	\$390,000
2015	Labouré Society	\$2,000,000
2015	Marywood/Asec	\$8,500,000
2015	NCR/GSR	\$2,980,000

fig. 4

Grantees by Region

<p>GLOBAL NORTH</p> <ul style="list-style-type: none"> Anderson Robbins A Nun's Life Ministry Catholic Extension Catholic Theological Union Catholic Volunteer Network Center for Applied Research in the Apostolate Communicators for Women Religious Council of Mother Superiors of Women Religious Duquesne University Faith in Public Life Foundations and Donors Interested in Catholic Activities Giving Voice Labouré Society Leadership Council of Women Religious Loyola Institute for Ministry Ministry Leadership Center National Catholic Sisters Week National Religious Retirement Office National Religious Vocations Conference Our Savior Parish & USC Caruso Catholic Center Religious Formation Conference Sisters of Charity Foundation Sisters of Mercy of the Americas Sisters of St. Francis Support our Aging Religious (SOAR!) Vocations Ireland 	<p>AFRICA</p> <ul style="list-style-type: none"> Association of Consecrated Women of Central and West Africa Catholic Relief Services Conrad N. Hilton Fund for Sisters DePaul University Georgetown University Institute of Reproductive Health Healey International Relief Foundation LifeNet International Marywood University/African Sisters Education Collaborative Zambia Association of Sisterhoods
	<p>ASIA</p> <ul style="list-style-type: none"> Catholic Health Association of India Jesuit School of Theology of Santa Clara University
	<p>GLOBAL</p> <ul style="list-style-type: none"> Global Sisters Report/National Catholic Reporter Holy See International Union of Superiors General Oblate School of Theology School Sisters of Notre Dame Sisters of St. Joseph of Carondelet Sisters of the Presentation of the Blessed Virgin Mary Society for the Propagation of the Faith (Global/Africa) Durham University/Heythrop College/Margaret Beaufort Institute (Europe/Africa) USC Center for Religion and Civic Culture
	<p>LATIN AMERICA AND CARIBBEAN</p> <ul style="list-style-type: none"> Catholic Extension Medicines for Humanity Dominican Sisters of Mission San Jose

fig. 5

Current Catholic Sisters Initiative Strategy Timeline

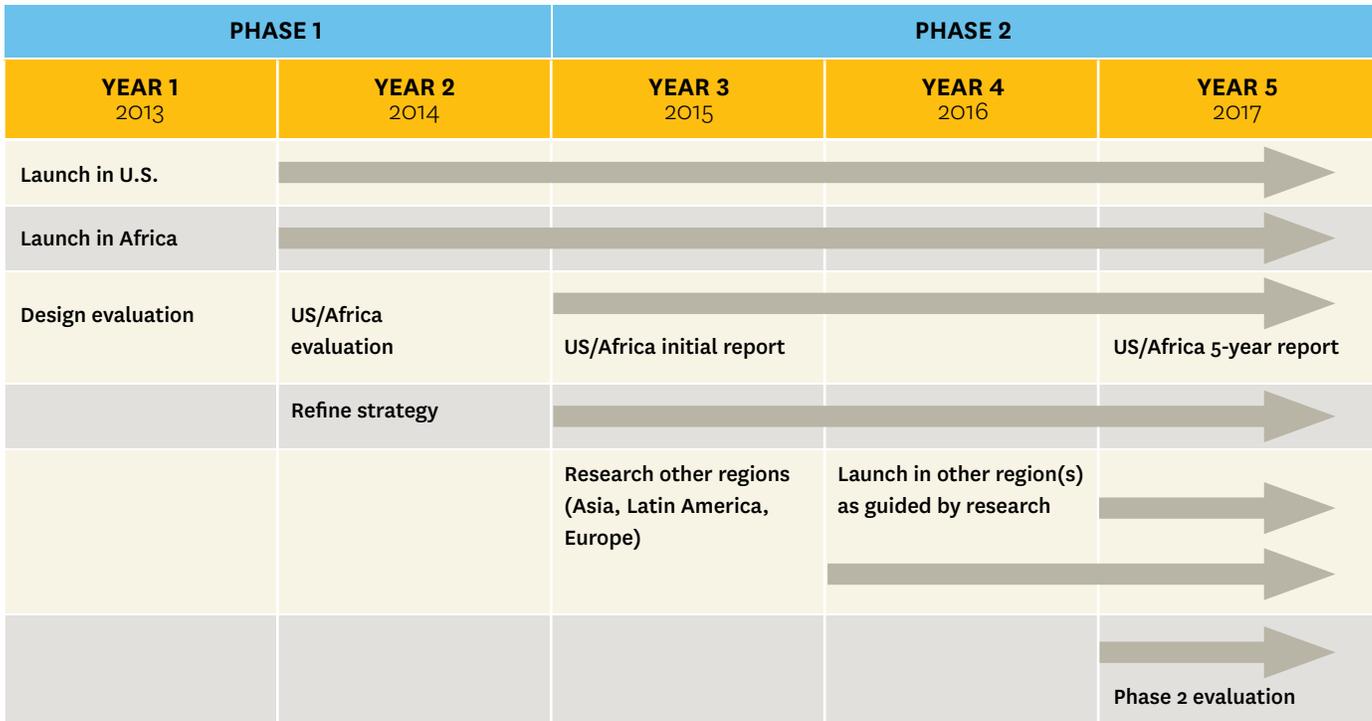
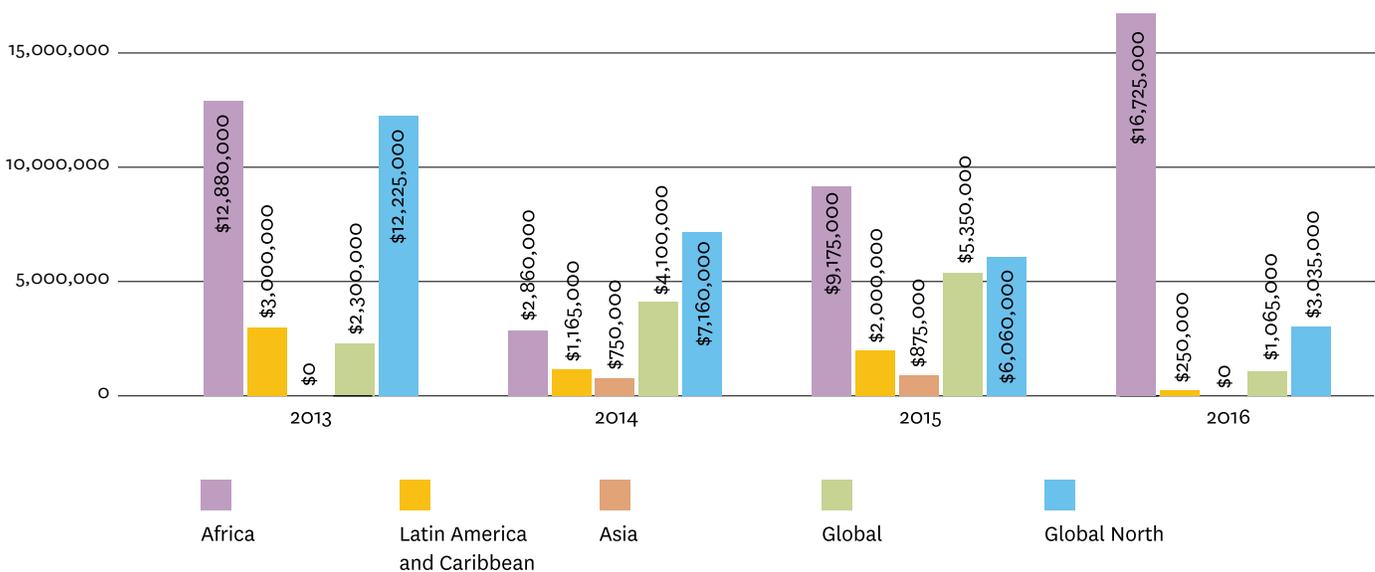


fig. 6

Annual Trends in Initiative Funding by Region





Grant Activities and Collaborative Efforts



CRCC's evaluation work in the second year of its grant focused on identifying clusters of interests and areas of opportunity to connect organizations as well as mapping the growing networks created through the Initiative.

In the following pages, CRCC will describe selected grantees whose work is particularly relevant to meeting the current strategy's indicators of success. Progress on these indicators are evaluated in Section V. Grantees are organized in the following categories:

- Strategic Development
- Research/Field-building
- Education and Leadership Development
- Communications and Media
- Finance and Fundraising
- Vocational Ministries

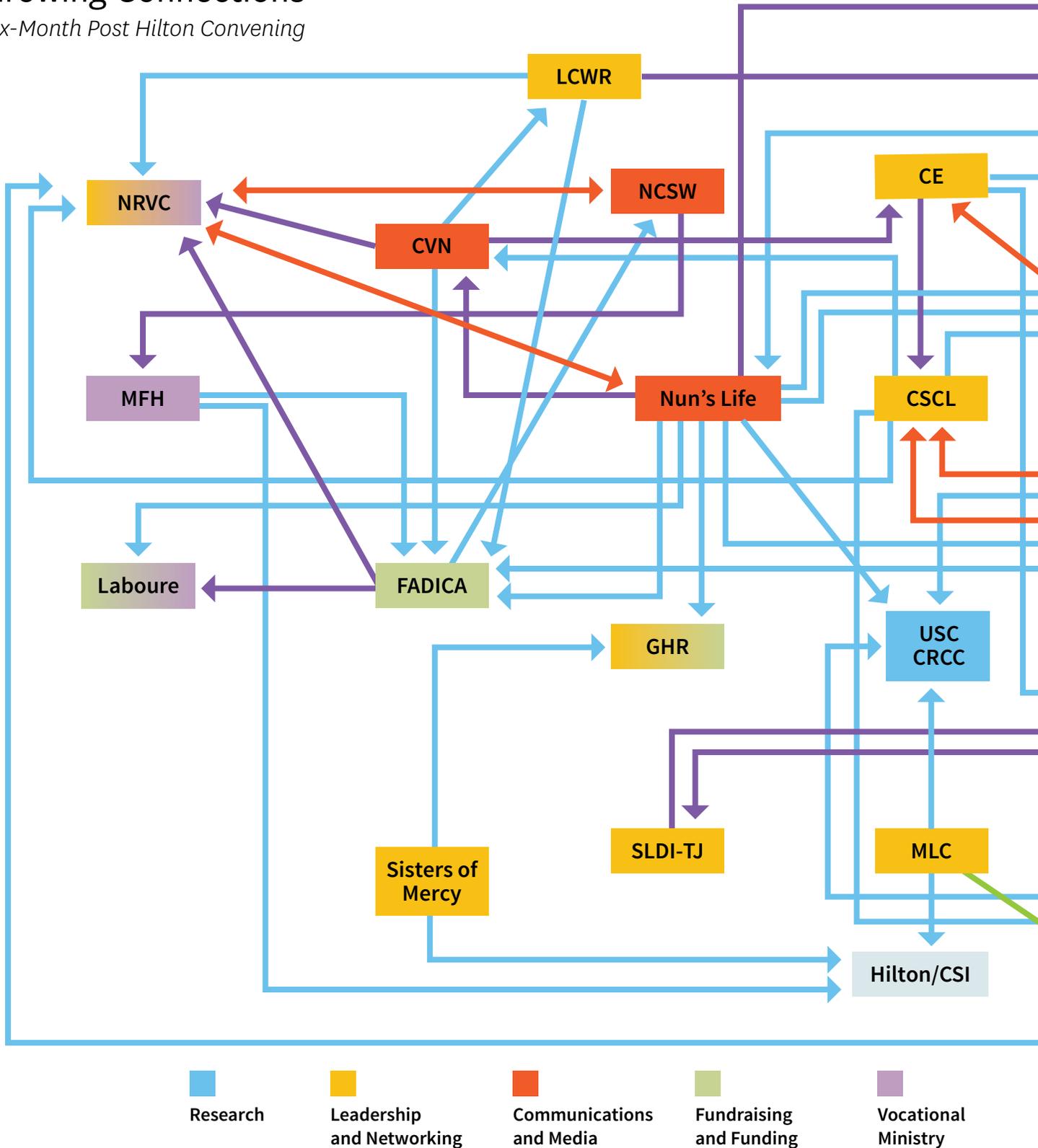
The first MEL report identified five similar categories, but in the past year, CRCC refined these categories. Education and leadership development now has two sub categories: health care grants and global grants. An "Awareness" category was eliminated because awareness cuts across many grant areas and goals. The communications and media category applies more specifically to a subset of grantees focused on this work. Finally, vocation ministries have emerged as an additional category.

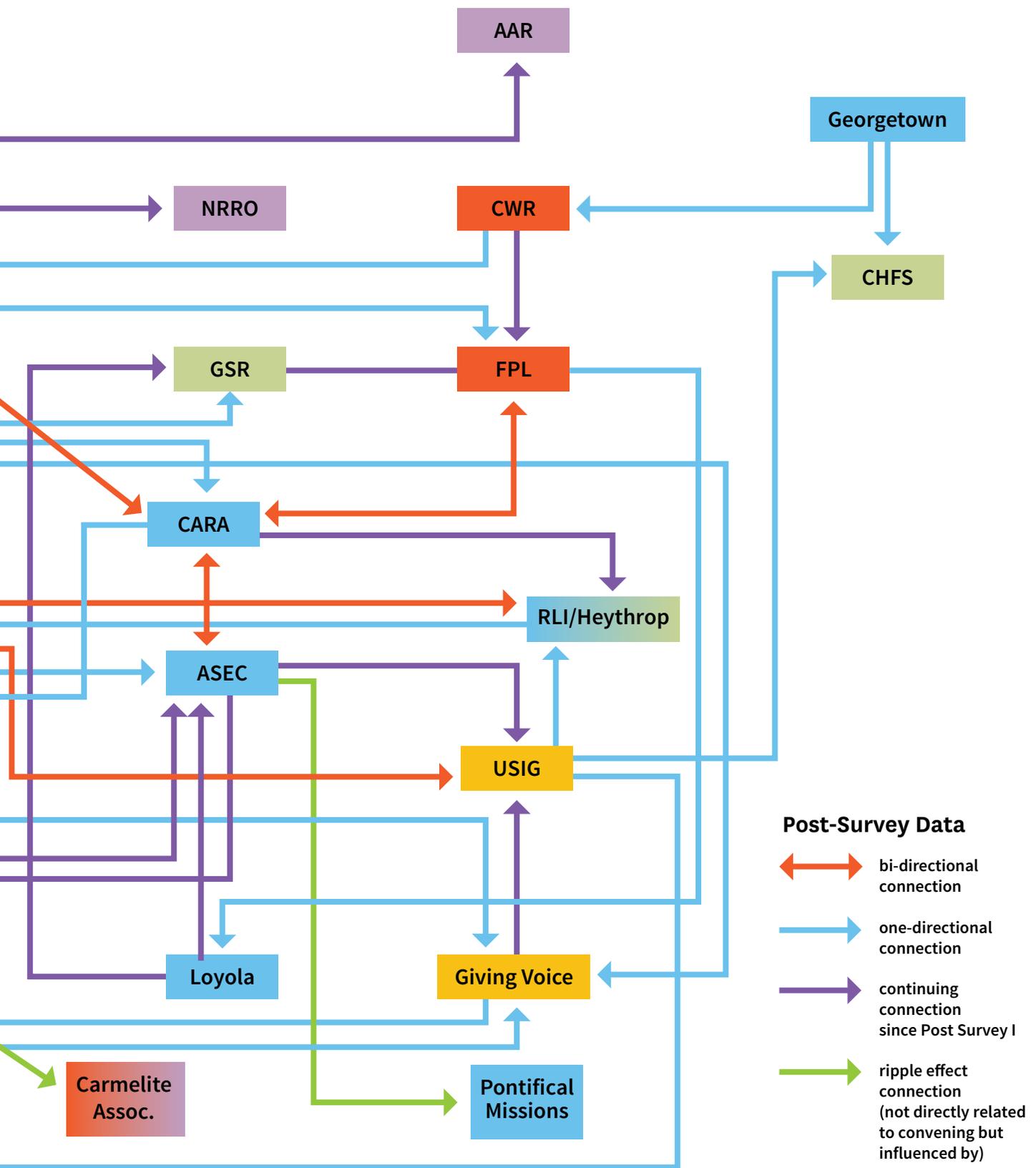
The post-convening survey and follow-up also helped CRCC create a more dynamic clustering around collaborative activities and shared information between the Initiative's grantees. Those clusterings somewhat but not completely overlap the categories in this report, as they are more focused on activities and the nature of the collaborations between groups. They are illustrated in a network map of the top two connections grantees made at the convening (figure 7). Certain actors have emerged as conduits of connections, and some working groups are already planning gatherings and activities.³⁵

fig. 7

Growing Connections

Six-Month Post Hilton Convening





Organizations shaded two colors represent both categories.



The following summaries and analysis reflect CRCC's clustering and report the successes and obstacles grantees have faced during the implementation of their grants.



Strategic Development

Since the Initiative is a pioneer in this field, it needed to develop small organizations that demonstrated the potential to fulfill an identified critical need for sisters and their congregations. Giving Voice and the Labouré Society are two organizations that illustrate the Initiative's organizational development efforts.

Giving Voice

Giving Voice was born out of the recognition that young sisters in the United States are facing multiple challenges in their vocations. In the book, *New Generations of Catholic Sisters* (Johnson, Wittberg & Gautier, 2014), the authors argue that younger sisters from Generation X and the Millennial Generation are increasingly challenged by fewer numbers of women religious in their congregations, ministry burnout, lack of institutional respect from the Catholic Church and lack of voice in their congregations. This data is supported by the interviews that CRCC has conducted with young sisters in the U.S. over the last two years.

Giving Voice's mission is to "create spaces for younger women religious to give voice to their hopes, dreams and challenges in religious life." The Initiative awarded Giving Voice, through its financial partner Catholic Theological Union, a \$1 million grant in 2014. The purpose of the grant was to develop young sister's leadership skills to prepare them for the current and future challenges that they face. One of the most critical aspects of this grant was to build the networks to connect young sisters. The grant has been successful in creating spaces, such as their national gatherings and age-based retreats (e.g., 20s and 30s retreat, 40s retreat), so that young sisters can connect. Giving Voice has also led to the creation of another small grant to its members to develop an edited book about the experiences of young sisters in the U.S.³⁶

Along with benefits of this grant came some challenges. Most significantly, Giving Voice went from a small annual budget to \$266,000 in the first year of operation, \$292,000 in year two and \$442,000 in year three. The young sisters struggled to scale up personnel and operations to match the rapid increase in funding. This year Giving Voice requested a two-year no-cost extension to fully operationalize their plans and spend out the grant.

Since the ratio of older sisters to younger sisters is typically high in most U.S. congregations, young sisters may wear several hats and rotate frequently to different congregational or mission sites. Young sisters may not have the bandwidth to dedicate a large amount of their time to a grant. Moreover, a degree in theology or biology does not necessarily translate to understanding how to manage consultants, hire personnel or navigate a fiscal relationship with another organization.

Finally, the majority of Giving Voice's membership belongs to congregations in the Leadership Council of Women Religious and not the more conservative Council of Major Superiors of Women Religious. Still, Giving Voice represents a transformative opportunity to bridge young sisters. Bringing this to life will take a great deal of time and relational connection, and may require intentional planning, development and support, without solely relying on Giving Voice's overtaxed staff. Research points to a more shared future with younger sisters as they make connections through informal channels (e.g., social media) and shared interests around communal life and spirituality.

The Labouré Society

When the Initiative first partnered with The Labouré Society, it was a small organization that had a unique fundraising model that assisted aspirants in paying down their debt, a key barrier to vocations, without the burden of paying taxes on the funds they raised. This model also gives aspirants critical fundraising and communication skills that they can use to the benefit of the congregations that they entered. The Labouré Society was awarded an initial grant of \$250,000 in 2014 to assist in their efforts to help aspirants pay down their debt and to make an initial assessment of their organizational capacity. This \$250,000 grant investment helped Labouré generate \$712,333 and assist 13 aspirants resolve their student debts.

Based on the success of the original grant and the dire need of aspirants to address their student debt issues, the Initiative awarded a \$2 million grant to The Labouré Society in 2015. This substantial investment in The Labouré Society demonstrated that the Initiative wanted to make a serious commitment to removing one of the major obstacles to its strategic indicators of success, which include increasing the number of sisters in the global north.

The grant plan called for a scaled-up expansion of Labouré's program to serve more aspirants across the United States. This plan included staff in several regions of the country that could plan regional boot camps to train aspirants and connect with local dioceses and congregations. The grant also had key objectives around collaboration with the education loan industry to streamline the servicing of aspirant education loans and diversification of Labouré's funders. The grant has been fruitful in having young women aspirants pay down their debt. Seven women have entered congregations since the start of the Initiative's grant in August 2015. Labouré has also been successful in raising awareness around the issue of student debt as an obstacle to vocations and spreading the culture of vocations in the United States.

Like Giving Voice, however, The Labouré Society has struggled with its expansion. The Labouré Society doubled the size of its budget with the Initiative's investment. In the space of six months it scaled up from four to twenty-four

staff members and had regional staff members targeting 10 metropolitan dioceses, ranging from the Archdiocese of New York City to the Diocese of Orange County. Along with its quick expansion, it continued to serve current aspirants, fundraise for the organization's future and spread awareness about its mission. The rapid scale-up of staff burned through the budget. Differences between budgeted and actual salaries could not be offset so quickly by other funding streams, either grants from other funders or income from student loan servicing.

KEY LEARNINGS

Strategic Development Grants

Both of these grants demonstrate that the Initiative's indicators of success can be hampered by organizational issues. Small organizations need to be appropriately scaled up over a suitable timeline. There are many organizations and programs that work to assist non-profits with staged scaling and management issues that can result from programmatic and organizational growth. The Initiative could enlist a partner organization to work alongside their grantees as they grow and scale, perhaps with a smaller grant for planning being completed before a larger grant for implementation can proceed. The Foundation may want to consider implementing a system for early detection, such as a contractual mechanism that requires grantees to report when there is a significant total budget variance over the course of a financial quarter.

Finally, young sisters are already deeply burdened by congregational and mission obligations, and funders must be sensitive to their commitments. Though they may be highly educated, they may not have the necessary programmatic and financial skills to manage a growing organization.

Both the Giving Voice and The Labouré Society grants demonstrate the successes and lessons learned in the dynamic and challenging environments that Initiative's grantees operate in across the world.

Research/Field-Building

When the Initiative launched in 2013, there were significant gaps in knowledge about sisters, their congregations and missions. The Initiative pioneered grants to research institutes and agencies in order to collect qualitative and quantitative data on the number of sisters in formation, the perception of sisters in the United States, the vitality of congregations in the United Kingdom, the financial obstacles to vocations, and the role of networks in building the membership, leadership and resources of sisters in their congregations around the world.

Center for Applied Research in the Apostolate (CARA)

CARA is the data center for Catholic religious life and institutions in the United States and a key research partner for the Initiative. CARA has produced invaluable reports on the state of vocations in the U.S., including the following Initiative-sponsored reports:

- 2014 Population Trends Among Religious Institutes of Women
- 2015 Population Trends Among Religious Institutes of Men
- Influence of College Experiences on Women's Vocational Discernment to Religious Life (December 2015)
- New Sisters and Brothers Professing Perpetual Vows in Religious Life: The Profession Class of 2015 (February 2016)

These reports document the demographic challenges and opportunities facing consecrated religious and the Catholic Church in the U.S. The critical information from these reports also cross-pollinates other grantees' vocation efforts. An example of this is seen in the Our Savior Parish and USC Caruso Catholic Center grant that was awarded in November 2015. The grant will develop a pilot model of campus ministry that emphasizes engagement with Catholic sisters at one private non-Catholic university (USC) and one public university (UCLA). During the initial stage of the grant, working groups of experts, including CRCC, were formed to identify campus

ministry best practices, demographic information on sisters and aspirants, and obstacles to vocations. CARA's research on women's college experiences and vocational discernment, as well as its research on population trends of women entering religious life, was essential to the working groups. CARA's research will shape the grant's pilot model and future efforts at reconfiguring campus ministries.

Thanks to the Initiative, CARA also is expanding its influence beyond the borders of the U.S. As it became clear that there is a lack of information on Catholic Sisters and their work in Africa, CARA and ASEC connected to see what assistance could be offered to support African sisters. One result of this connection was a \$240,000 grant to CARA from the Initiative in August 2016. Among other items, it builds the capacity for applied research by African sisters through a visiting scholars program at CARA.

**Durham University/Heythrop College
The Margaret Beaufort Institute
of Theology Collaborative**

The collaborative research project, “Women Religious Engaging Change: Discerning the Vitality of Female Apostolic Religious Life,” was a pre-strategy grant awarded in 2012. The aim of the first phase of the project was to create a better understanding of the contemporary landscape of consecrated female apostolic life and related indicators of vitality in the United Kingdom and Ireland. The research process was collaborative between the participating congregations and the researchers, and its findings were grouped around six prioritized themes that emerged during the study: 1. Ministry; 2. Community and formative growth; 3. Collaborative working; 4. Prayer and spirituality; 5. New forms of membership; and 6. How we are aging.

Building on the findings from the initial phase, the Initiative awarded a follow-up grant in 2015 for \$985,000. The second phase expanded the geographic scope of the project to include research on the vitality of congregations across East Africa in partnership with local congregational leaders and researchers. The second phase also built on the prior work in the United Kingdom and Ireland by examining the expectations and challenges of religious life to new entrants, including, uniquely, those who have tried out religious life and left it.

The Initiative can take away several learnings from this partnership, both in terms of the implementation of the research project in two regions, and the role of the project in supporting the growth of the global sisterhood through its connections with other Initiative grantees. The researchers have developed connections with many religious congregations in the United Kingdom and Ireland through correspondence and face-to-face meetings. Still, sisters are very reluctant to

examine the expectations and challenges of religious life, especially when it comes to sharing information on prior postulants who have left religious life. The researchers are finding it hard to engage congregations at this point in time. CRCC’s researchers are providing feedback on research questions and potentially productive ways to engage congregations around these sensitive issues.

In contrast to the United Kingdom and Ireland research, the second phase expansion into East Africa has been incredibly productive over the last year. The project has connected with the Association of Consecrated Women of Eastern and Central Africa (ACWECA), a grantee of the Initiative that also has strong ties with ASEC. The project’s primary investigators have emphasized during meetings with congregational leaders and researchers that they drive the research process and that it is locally owned.

Part of the success of the project in East Africa belongs to the connections that the primary investigators have made with other Initiative grantees at the 2015 convening in Pasadena and the 2016 convening in Nairobi. These connections are proving vital to a shared sense of mission in building the vitality of the global sisterhood through shared research, collaboration and inspiration.



Duquesne University of the Holy Spirit

In August 2015 the Initiative awarded a \$390,000 grant to Duquesne University of the Holy Spirit to develop a manual to support the use of the Life Satisfaction Scale for Apostolic Women Religious (LSSAWR) and to translate the instrument and manual into Spanish. The scale is currently the only instrument designed to assess religious life satisfaction in U.S. women's religious congregations.

The LSSAWR, developed by Sr. Maria Clara Kreis, PhD, provides information to congregations and women discerning religious life on what congregational elements provide the greatest religious life satisfaction (e.g., prayer life, community living, ministry, charism or mission). The results can be analyzed, disseminated and used to better understand what is working in religious life. This scale could also be adapted in other geographic and cultural settings and complement other ongoing research efforts supported by the Initiative (e.g., Women Religious Engaging Change: Discerning the Vitality of Female Apostolic Religious Life-Africa project).

One of CRCC's recommendations from the first report was the Initiative could take a lifetime formation approach to support sisters from the time they enter their congregations until the end of their lives. Grants such as the Duquesne University grant demonstrate a strong commitment from the Initiative to young sisters and their formation in the United States. LSSAWR also can be used to assess the satisfaction with religious life of a sister at different stages of her formation. Congregations can use the scale to assess and support a woman as she undergoes the stages of formation from entrance until her final profession. Collectively this information on postulants could be shared across congregations, supporting organizations and funders as they address the needs of postulants and help young sisters and their congregations thrive.

Anderson Robbins Research

One of the largest gaps in knowledge that the Initiative faced when it launched in 2013 was an empirical understanding of what the American public and American Catholics knew and thought about sisters. The decline in the number of sisters over the last four decades has made them disappear from educational, health and social welfare institutions, many of which they founded in the late 19th and early 20th centuries. American sisters slow "disappearance" from the public sphere had a profoundly negative effect on vocations and young women discerning religious life. Knowing a sister is a major factor compelling young women to consider religious life.³⁷

The Initiative awarded Anderson Robbins Research a \$300,000 grant in November 2014 to conduct market research on perceptions of sisters, identify which populations represent the greatest opportunity for considering religious life, and understand how the Initiative and its grantees could increase awareness of sisters in the U.S. The research results were first shared with other Initiative grantees at the November 2015 convening in Pasadena.

Several key messages came out of the market research:

- Catholic sisters are highly regarded across all age groups and religious affiliations
- Half of all participants said that they have not interacted with a Catholic Sister in the past five years. Millennials are least likely to have met a Catholic Sister
- Religious life is not being widely considered among young Catholic women today
- More than eight in ten believe the work of Catholic Sisters is important
- More than half of all Catholics wanted to learn more about sisters

This information is critical for the Initiative and its grantees in order to address membership and resource issues for sisters in the U.S. In its first report, CRCC identified the visibility of sisters among key stakeholder audiences—young women, Catholic families, the church hierarchy, non-Catholics and fellow sisters—as a major challenge to the vitality of congregations and their ministries, particularly in the global north. Religious congregations need visibility in order to attract members, sustain sisters and build a base of support for their ministries.

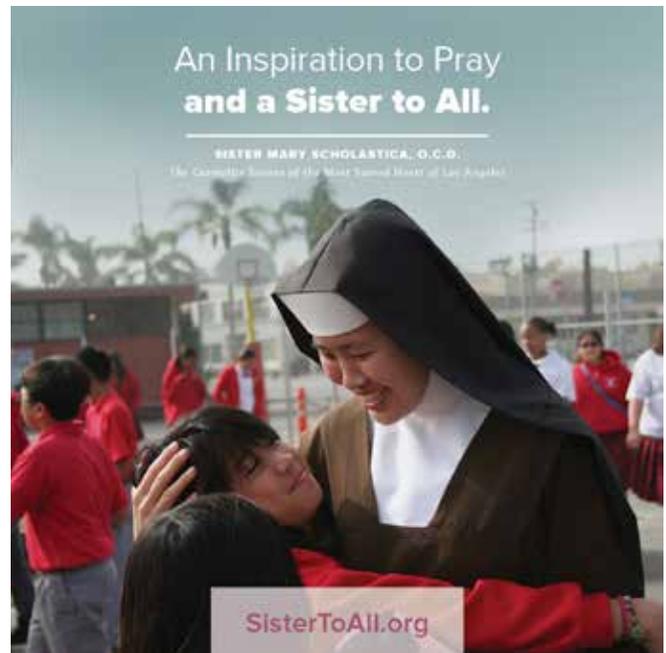
In order to more widely disseminate the findings of the Anderson Robbins market research, the Initiative engaged underground* agency to create a campaign to disseminate and share the results of the Anderson Robbins research through the Initiative’s network of grantees. The campaign, Sister To All, launched in September 2016 and resulted in more than 13,000 social media interactions (verified likes, shares, comments and retweets) with a total audience of more than 745,000 people. It was featured in *America Magazine*, *Global Sisters Report*, *Aleteia* and *Philanthropy News Digest*.

Sister To All was a good beginning to a more focused and directed media campaign about Catholic sisters. One limitation of the campaign was that it centered on sharing only the Anderson Robbins research. It was not structured in a way that enabled people to share their own stories of sisters, though it is possible some did so. Social media can create occasions for people to contribute their stories to a larger narrative. The Initiative might consider how to evolve this campaign to create space for that type of engagement.

KEY LEARNINGS

Research/Field-Building Grants

The Initiative’s research/field-building grants have helped the Initiative understand the context in which they operate and better support the global sisterhood. As described in Section II, the research points to growing vitality of Catholic sisters in the global south. Research remains critical in understanding how to best support sisters in the global north, considering the challenges there. The Initiative has already begun to shift its funding of research to the global south, where there is a dearth of data about Catholic sisters and their ministries.



Education and Leadership Development

The cornerstone of the Initiative's strategy are grants that foster sisters's leadership potential and ensure sisters have the professional skills and educational qualifications to do their mission work. The education and leadership grants form the largest grouping of grants in the Initiative's portfolio. The grants span the globe and support a large number of sisters and their congregations.

Prior to the approval of the Initiative's strategy in 2013, the Foundation recognized the importance of building the capacity of sisters and their congregations to fulfill their increasingly demanding and complex ministries. In particular, sisters in the global south needed the knowledge and tools to build self-sustaining ministries and meet the higher education and licensing requirements required in their countries.

African Sisters Education Collaborative

One of the pioneering grants that helped inform the development of the Initiative's strategy was the African Sisters Education Collaborative (ASEC) grant. ASEC was established in 1999 by four Catholic universities and their founding congregations. The mission of ASEC is "to facilitate access to education for women religious in Africa that leads to enhancement and expansion of the education, health, economic, social, environmental and spiritual services they provide."³⁸ In 2002 ASEC was awarded a \$20,000 planning grant from the Conrad N. Hilton Fund for Sisters to research the priorities of the leaders of African congregations and the availability of technology and other resources for advancing the education of sisters. A follow-up grant in 2003 funded additional research and educational workshops.

Based on the outcomes of these grants and the vision of Steve Hilton, the former president and CEO of the Foundation, the Foundation awarded ASEC a three-year \$2 million grant for the Sisters Leadership Development Initiative (SLDI) program in 2007. The SLDI program provides sisters with technology and leadership training to effectively manage and build their congregations and ministries. Since the original grant, the Foundation has continued their investment in

SLDI. The investment has paid off. SLDI has expanded to more than 10 countries in Africa and served more than 450 congregations. During SLDI Phase III (2013-2015), 861 sisters were awarded training certificates. Phase III, moreover, has been the largest phase, accounting for 54% of all sisters trained since 2007.

Since the Foundation's initial investment, ASEC's work has expanded to include the Higher Education for Sisters in Africa (HESA) program. HESA builds upon the work of SLDI by offering African sisters the opportunity to obtain a higher education degree or diploma in a field that will advance their ministerial work. During the third year of the HESA Phase I grant, 99 sisters were admitted to higher education institutions, 43 graduated, and 143 continued their study for degree and diploma programs. HESA's success led the Initiative to award ASEC a \$15.3 million grant in May 2016.³⁹ The Initiative's large investment will enable HESA to expand and give more than 858 sisters access to a higher education.

In November 2016 CRCC conducted joint site visits with ASEC evaluation staff, meeting SLDI and HESA alumnae in Kenya. During the visits CRCC research staff conducted interviews to gain a better understanding of the financial effect of the SLDI and HESA programs on sisters' congregations and their ministries. The results from this research are currently being analyzed and will be reported in next year's technical report to the Foundation.

Leadership Conference of Women Religious

The Leadership Conference of Women Religious (LCWR) received a grant from the Initiative in August 2013 for \$500,000 to support the Leadership Pathways program. "The program consists of three distinct initiatives, each designed to assist elected leaders in deepening their capacity to lead from within in a way that is transformative for themselves and for their congregations."⁴⁰

The "Initiative One" portion has engaged almost all members of LCWR through regional and congregation-level meetings and conversations. "Initiative Two" engages members interested in deepening their leadership skills through online laboratories. The current offerings under the second initiative include "Becoming the Leaders We Hope to Be: The Foundations of Transformational Leadership and Rooted in God's Mission: The Foundations of Mission-Grounded Leadership." "Initiative Three" is an online self-directed module for congregational and conference leaders interested in the intersection of emerging consciousness, the Christian tradition and religious leadership for the future.

The Leadership Pathways program assists LCWR in implementing a leadership development process for current elected leaders. The program builds their leadership skills and capacity to face the current challenges in their congregations and missions. Since fall 2015, the program has five new groups participating in the program, with 27 sisters and six mentors. To date, more than 105 LCWR members have taken at least one of the program's modules.

EDUCATION AND LEADERSHIP DEVELOPMENT

Health Grants

Sisters form the backbone of many health care systems around the world and serve some of the most marginalized and vulnerable communities through their clinics and hospitals in cities and rural areas. A recent survey conducted by ASEC found that 30 percent of the sisters surveyed serve in social service-related ministries. The congregations in this survey owned more than 118 health care centers and 35 hospitals. ASEC reaches only a segment of congregations in 10 African countries, so these numbers represent only a small fraction of sisters' health care work. The demand for sisters' compassionate, quality care has increased rapidly across sub-Saharan Africa, Asia and Latin America as public health systems are increasingly stretched to the breaking point with smaller budgets and under-resourced staff.

Since the launch of the Initiative in 2013, a cluster of grants that support sisters and their health-related ministries has organically grown out of a dire need for sisters' health care services. These grants include: The Catholic Health Association of India (CHAI), Medicines for Humanity (MFH), Georgetown University Institute of Reproductive Health, Healey International Relief Foundation (HI), and LifeNet International (LN). These grants have a dual purpose: 1) to "upskill" sisters in technical areas so they have the knowledge and skills to support their health care ministries; and, 2) increase sisters' visibility and connectedness in the public and private health care sectors so they have a seat at the table for policy and resource decisions that affect the populations that they serve. The health care grants cluster also fulfills several capacities important not only to the Initiative and Foundation, but also to the United Nations and its Sustainable Development Goals (SDGs). These grants support the work sisters do to meet the following SDGs:





Catholic Health Association of India (CHAI)

The Catholic Health Association of India (CHAI) was awarded a grant in August 2015 for \$875,000 to engage congregations in India to reposition their health ministries for the future. This repositioning includes developing an inter-congregational body to strengthen the network of congregations; operationalize a “hub and spoke” referral model in nine states; and train 230 sister nurses as “Community Health Activists.”

This grant is the first major investment the Initiative has made in India, one of the countries with the largest population of Catholics in Asia. Although India’s Catholic population (19.9 million) accounts for only a small portion of the country’s overall population (1.3 billion), it is second in size only to the Philippines in the region.⁴¹

The CHAI grant has accomplished a lot over the last year, considering the geographic and institutional obstacles it faced. CHAI facilitated three-day consultations with 13 out of the 15 originally planned congregations this year. It aims to support 45 congregations in repositioning their work by the end of the three-year project. The consultations with congregations over the last year included more than 517 senior-level sisters (i.e., major superiors, provincials and councilors). Other significant accomplishments include training two cadres (75 per cadre) of sisters as community health activists to effectively promote preventive health and complement ongoing primary health care in the communities they serve. The first cadre of sisters is already reaching more than 150 villages. Another significant result coming out of the grant this year was a national palliative care workshop that included more than 80 sister participants.⁴²

The Initiative and the Hilton Fund for Sisters commissioned an “India and Sisters” policy paper in 2016 through a consultant affiliated with the Foundation.⁴³ The paper outlined in detail the way sisters serve some of the poorest and most marginalized in India, including the Dalits, Adivasis, domestic workers and others of low status in Indian society. The Hilton Fund for Sisters is already working across India in some of the poorest states in the country. Echoing the recommendation of the “India and Sisters” paper, the Initiative could have a significant impact in India by collaborating with the Hilton Fund for Sisters and CHAI to build capacity into Indian congregations and support their work among the poorest of the poor. As the early results from CHAI, as well as the data from the Hilton Fund for Sisters illustrates, the Initiative could significantly support sisters for little cost in India.

Medicines for Humanity

Medicines for Humanity (MFH) is an organization dedicated to saving the lives of children in impoverished communities worldwide. They have worked with congregations in Latin America, the Caribbean and Africa on various child survival projects. The Initiative awarded its first grant (\$400,000) to MFH in November 2014 to build the capacity of Catholic sisters in Haiti to provide maternal and child health services to local communities. Haiti is the poorest country in the western hemisphere and its health statistics reflect years of political upheaval, natural disasters and dire poverty. Fifty-two of every 1,000 children die during their first year of life, and an average of 69 of 1,000 children will die before their fifth birthday.⁴⁴

The first MFH grant sought to implement a comprehensive training program for the Little Sisters of St. Therese of the Child Jesus and eight other congregations that work in the Haitian health care sector. Fifty sisters were certified through the Ministry of Health (MOH) to develop and manage maternal child health programs through “Training the Traditional Birth Attendant (TBA) Trainer Sessions.” One of the critical lessons learned for MFH, and for the Initiative and its future grant-making strategy, is that implementation of the cascade trainings by the sisters to train TBAs was hindered by the

limited resources and managerial experience of the sisters. Sisters needed financial support and project management training beyond the technical education provided by MFH and the Haitian Ministry of Health.

MFH used the findings from its grant and, in dialogue with the Initiative team, developed a supplementary grant application that would address the sisters’ resource and project management gaps to implement key maternal and child health components, including nutrition programs, TBA training and Integrated Management of Childhood Illness protocols in clinics or in the clinics’ catchment areas. The supplementary grant was approved for \$250,000 in August 2016. MFH’s work and its relationship with the Initiative’s team demonstrate an ideal working relationship between grantee and funder: open, honest and collaborative, with both organizations working towards a mutual goal of helping sisters save children’s lives.

Georgetown University Institute of Reproductive Health

Georgetown University’s Institute of Reproductive Health was awarded a \$750,000 grant in November 2014 to study and support cross-sector collaboration involving Catholic sisters serving in health care ministries in Agbogbloshie, a slum in Accra, Ghana, commonly referred to as “Sodom and Gomorrah” by outsiders. The grant is one of several grants that fall into more than one category as it uses original research to inform its pilot project and cross-sector collaborative model. The grant involves a wide range of partners, including participating congregations of sisters, local community leaders in Agbogbloshie, the Accra Metro Public Health Department, the Christian Health Association of Ghana, the National Catholic Health Service and Ghana’s Catholic Bishop’s conference. The ultimate goal of the grant is to craft a sustainable and scalable model of cross-sector collaboration that could be adapted and used by other sisters around the world.

To date the grant has made tremendous strides in engaging partners and ensuring that collaborative work is driven by local stakeholders and not outside researchers. Prior to the project, the Sodom and Gomorrah slum was seen as both a public health and infrastructure hazard as it was built on a lagoon and contained the world's largest dump of electronic waste.⁴⁵ Parts of the slum had already been demolished in order to widen the lagoon and prevent any further devastating floods in the city.⁴⁶ With the work of local sisters, strong community leaders, and engaged partners in the city government, city policy has changed from denying the slum was part of the city to recognizing the needs of the slum dwellers. Government officials now see Sodom and Gomorrah's residents' health and welfare as tied to the future health and sustainability of Accra as a whole. As a direct result of the collaborative work done so far, the city is currently working with sisters and local leaders to install pay-to-use latrines, a critical need identified by local leaders.

The Georgetown grant, like other grants under the health cluster, illustrates how sisters and their ministries crosscut initiatives and priority area boundaries at the Foundation. In the case of this grant, it touches on building models of cross-sector collaboration as well as safe water and waste solutions. Sisters' frontline ministries influence every aspect of the Foundation's work and set the Foundation up to be a leader in building partnerships to meet the United Nations Sustainable Development Goals.



The Healey International Relief Foundation and LifeNet International

Two recently awarded grants also fall into the education and leadership development and health care categories. The Healey International Relief Foundation was awarded \$525,000 in May 2016 to support the education and professional development of sisters in Sierra Leone to administer a pharmaceutical social enterprise. This innovative model seeks to train sisters in a series of professional roles in finance and management; biotechnology and microbiology; and logistics and production so they can run a pharmaceutical venture supported by Healey International. In turn, sisters will learn valuable skills, earn income for their congregations and missions, and produce valuable medical products needed by the local health care market ravaged by years of civil war and the recent Ebola outbreak.

LifeNet International (LN) received a \$900,000 grant from the Initiative in August 2016 that will support 22 Catholic health centers run by sisters in the central and eastern regions of Uganda. This grant will expand the capacity of congregations to provide quality-assured health care and safe newborn deliveries in sister-led health centers. The grant builds upon LifeNet's existing capacity building initiative with other faith-based clinics and hospitals in central and eastern Uganda.

Both the Healey International and LifeNet International grants will provide the Initiative further evidence over the next three years on the impact sisters are having on the health of local communities. They also could provide sisters with income generation (strengthening congregations' resources) while fulfilling Conrad Hilton's mandate to advance human development. The Healey International grant allows the Initiative to see if social investment—making an investment in a social business venture and partnering with non-profits and for-profits—is a grant-making strategy that it should expand in the coming years.

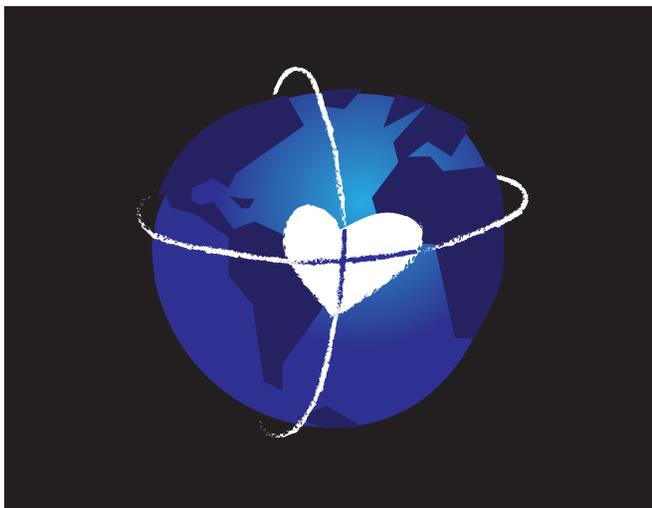
EDUCATION AND LEADERSHIP DEVELOPMENT

Global Grants

The majority of the Initiative’s grants focus on projects in specific geographic regions, but in each of the major grant categories some grants take a global approach to the challenges and opportunities that sisters face. These grantees that have a unique global perspective and can draw upon their experience and connections in different regions of the world to connect stakeholders and design solutions that tackle transnational problems. Two of these grantees are among the most connected and knowledgeable organizations on sisters: The International Union Superiors General (UISG) and the Society for the Propagation of the Faith.⁴⁷

International Union Superiors General (UISG)

UISG is a canonically recognized organization that provides a forum where leaders of women’s religious congregations can exchange information, foster networks and develop leadership skills. The organization also has connections with the Congregation for Institutes of Consecrated Life and Societies of Apostolic Life (CICLSAL), a body of the Catholic Church that governs religious life. The Initiative recognized the potential of UISG and approved a grant for \$700,000 in August 2014. The grant sought to build UISG’s capacity to support the leadership of congregations around the globe and strengthen the impact and influence of the global sisterhood.



The UISG grant has been a strong investment for the Initiative and its efforts to connect sisters globally and strengthen their leadership roles in congregations and the Catholic Church. Over the course of its grant, UISG has identified and addressed critical areas of need, including: strengthening the constellations of leaders located in each region of the world (e.g., Asia), building networks of knowledge and expertise in Canon Law, and bolstering UISG’s communication capacity.

Over the past year, UISG has raised its profile and increased the connectedness of sisters. From May 6-7, 2016, 175 Superiors General from 42 countries attended the Canon Law Workshop in Rome. The workshop aimed to build internal knowledge and capacity for sisters around Canon Law in the church so they could advocate for themselves and their missions and not rely on male clerics or religious for Canon Law expertise. UISG also supports an International Canon Law Network and Service that gives sisters access to Canon Law expertise provided by three sister consultants.

The Canon Law workshop was held in conjunction with the 2016 UISG Assembly in Rome. More than 900 Superiors General from around the globe attended the assembly to “build bonds of union and solidarity in face of the challenges facing leaders of women’s congregations around the world.”⁴⁸ Many Initiative grantee partners were invited to the meeting, including CRCC, which documented the meeting. CRCC also assisted the Initiative, UISG and ASEC in facilitating a meeting about African sisters and planning for a convening in Nairobi to discuss the role of African sisters in implementing the U.N. SDGs.

UISG plays a significant role as a connector among the Initiative’s grantees. UISG’s executive leadership and its vision have moved UISG into a unique position in the church. UISG has the ear of Pope Francis, who spoke to the assembly, and other offices of the papacy. Its leaders and their uncanny ability to navigate the political waters of the Vatican—and worldwide dioceses and religious congregations—make them an extremely valuable partner to the Initiative and its goals.

The Society for the Propagation of the Faith (SPF)

The Initiative recognized early on that in order for it to nurture a culture of vocations for women religious in a 2000-year-old conservative institution, it needed a dual grassroots and top-down approach. The Initiative identified SPF as a strong partner with a voice and influence in the Vatican and in dioceses around the world. SPF was awarded a \$450,000 grant in August 2015 to support the launch of the Missio digital fundraising platform and to pilot agricultural MBA programs in Kenya and Uganda.

The Missio crowd-fundraising platform, modeled on other crowd-fundraising sites, increases church members' access to religious congregations and their mission work, and provides an additional channel of resources to congregations. Launched in September 2015, it has published more than 95 projects, with more than 300 projects in the pipeline.⁴⁹ Approximately a third of the published and pending projects are from sisters.

The agricultural-MBA program was successfully developed and attached to the social entrepreneurship MBA at the University of the Sacred Heart, Milan, Italy. The curriculum was developed after consultation with leaders of church-run agriculture projects to identify key areas of study that would assist religious in running their projects. Programs were launched at Tangaza University College in Kenya and Uganda Martyrs University.⁵⁰ The programs have enrolled 12 women religious (eight in Kenya; four in Uganda), exceeding the goal of 10 enrolled sisters from the original proposal.

SPF is one of four Pontifical Mission Societies under the direction of the Congregation for the Evangelization of People, an office of the Roman Curia.⁵¹ SPF is uniquely positioned to help the Initiative and its grantees connect with the Vatican and its offices. The Initiative can leverage their relationship with SPF to promote the role of sisters as frontline workers and evangelizers for the Catholic Church.

KEY LEARNINGS

Education and Leadership Development Grants

Whether they focus on general leadership and management skills or specific health care skills, the Initiative's education and leadership development grants help it meet its indicators of success on leadership and resources. They also empower sisters to address the SDGs and other priority areas of the Foundation. When sisters have the necessary education and leadership skills, they are better able to create and operate ministries that meet the needs of the poor while bringing sustainable sources of income into congregations. Grants across the world have shown that investment is necessary in both leadership/project management as well as the subject expertise.

Investments in training programs across the world vary in their outputs. For instance, health care trainings in India have proven to be very cost effective, with large numbers of sisters trained at a low cost. The Initiative would benefit, however, from understanding not only how many sisters were trained, but also what the impact of being trained had on the congregation and community. CRCC, for instance, is analyzing qualitative data to better understand the impact of ASEC's trainings on the financial health of congregations.

Communications and Media

Awareness of sisters and their contributions to human development continues to be a significant issue for the Initiative. Raising awareness of sisters and their work is essential for fostering an environment for future vocations and for increasing visibility and resources for sisters' mission work. The Initiative has partnered with several organizations to address both of these purposes, many of which fall into multiple categories (such as the Society of the Propagation of the Faith's Missio project or the campaign built around the Anderson Robbins market research). CRCC narrowed this category in order to specifically address the Initiative's investment in better communications and media, which has helped raise the visibility of sisters and their work globally.

Global Sisters Report

The Global Sisters Report (GSR) is a companion website to the National Catholic Reporter (NCR), a Catholic newspaper with more than 35,000 subscribers. The Initiative first funded GSR/NCR in August 2013 as one of the pioneering grants under the Initiative's five-year strategy. The grant's key objectives were to increase awareness of sisters and their work and strengthen sisters' communication skills by developing a cadre of sister-writers. The success of the first grant in raising awareness of sisters and their missions among other sisters, aspirants and laity led the Initiative to award GSR/NCR a second grant for \$2.98 million in August 2015.

Over the past year, GSR has deepened its connections with other Initiative grantees and extended its frontline reporting from Central America with a talented group of staff and freelance reporters. GSR continues to leverage its connection with NCR to cover key events in the Catholic Church, including Pope Francis' visit to Mexico and the release of *Amoris Laetitia* (The Joy of Love), the post-synodal apostolic exhortation on marriage and family. GSR's commitment to young sisters and their future also continues through its Horizons feature that gives voice to young sisters and their stories.

The primary drive behind this phase of GSR's development is outreach. GSR has added staff, including an engagement editor to develop a social media strategy to engage with larger audiences, and another marketing staff member to increase readership. GSR is also working with Threespot, a digital agency that focuses on social change, on ways to develop metrics that capture GSR's audience for future marketing purposes and, importantly, provide a better measure of "awareness." GSR currently has more than 1.6 million website sessions, with 767,434 unique visitors. In addition, it has more than 10,000 e-newsletter subscribers, with above average open and click through rates, and robust social media engagement.

GSR stories have been picked up by other websites, including the Huffington Post, Catholic News Service, The Georgia Bulletin, The Compass, The Catholic Herald, Catholic News Agency for Africa (CANAA), All Africa, Eco Catolica (Costa Rica), The Guardian, and the Solutions Journalism Network.

GSR attended both Initiative convenings in Pasadena and Nairobi and connected with other Initiative grantees to "get the message out" about the importance of a vital and growing global sisterhood. GSR is one of the key grantees amplifying the role of sisters and their work in implementing the U.N. SDGs.



fig. 8

GSR Social Media Metrics

(since launch of the website in April 2014)

Readers

- **WEBSITE SESSIONS:** 1,679,780
- **UNIQUE VISITORS:** 767,434
- **RETURNING VISITORS:** 54 percent
- **2,133 STORIES** posted on the website, double that reported in 2015
- **541 PHOTOS**, pieces of artwork or inspirational quotes that have been shared from contributors through the Visual Life series

Email subscribers

- **10,649** to an email that digests work on GSR—a 34 percent increase since 2015 report
- **9,171** to the Horizons email
- GSR email subscribers open their mail an average of **33** percent of the time, with a click-through rate to the articles **31** percent of the time. Industry averages are 18 percent and 12 percent, respectively

Social media

- **2,000 TWITTER FOLLOWERS**, double that since the 2015 report
- **14,464 FACEBOOK PAGE LIKES**, up 11 percent since the 2015 report
- Instagram account (shared with NCR): **2,451 FOLLOWERS**
- WhatsApp group “GSR: Africa Connect”: **256 PARTICIPANTS**

National Catholic Sisters Week/ National Catholic Sisters Project

National Catholic Sisters Week (NCSW) is another pioneering grant awarded in the early days of the strategy. The Initiative awarded the first National Catholic Sisters Week grant in August 2013 to St. Catherine’s University in St. Paul, Minnesota, under the auspices of President Sr. Andrea Lee, IHM. The central idea behind the grant was an annual national celebratory week honoring the work and stories of sisters in the United States during women’s history month (March). Complementing this key objective was the development of *sisterstory.org*, a website which documents the ongoing NCSW narrative and provides an online archive for stories sisters tell to young women from a range of partner colleges and universities. Another element of the grant was the development of a religious vocations curriculum that can be integrated into existing curricula in Catholic elementary and secondary schools.

Over the course of three years, this grant has experienced some implementation challenges and opportunities. Challenges include debate over whether NCSW should have a regional and national focus, a reduced celebratory footprint in the second year of the grant, and personnel issues. Initiative and CRCC staffs met with the executive staff of NCSW during the 2015 Pasadena convening and provided useful feedback on future directions for the grant. Included in the feedback was the idea of providing small seed grants for congregations and other interested parties to plan celebratory events for the 2016 National Catholic Sisters Week. The seed grants proved to be a huge success, leading to 170 events with more than 5,000 participants during the 2016 National Catholic Sisters Week.

After consultations with the Initiative staff, the project was redesigned and renamed National Catholic Sisters Project, incorporating lessons learned and emphasizing the celebratory nature of National Catholic Sisters Week. The project extended the geographic reach of the project, with a new emphasis on young women in Latino communities. It engaged 10 dioceses around the country to plan and execute technology and social media-supported programs to attract and engage young adults at the diocesan and parish level.

Finally, it developed web-based curricula and other materials for use by teachers in K-12 Catholic schools and religious education programs.⁵²

The Initiative awarded the newly envisioned project \$2.75 million in August 2016 under a new university grant administrator, Alverno College. Sr. Andrea Lee, who is now President of Alverno College, will continue to provide oversight for the expanded national project.

Communicators for Women Religious

Although the results of the Initiative's grant to Communicators for Women Religious (CWR) are not yet available, the grant meets a significant need identified by CRCC and the Initiative: building the capacity of congregations and their communications staff. CWR, which represents those charged with communicating about women's religious congregations, initially received a small \$70,000 strategic planning grant in December 2014. The Initiative followed up with a \$1.5 million grant in November 2015 to implement the strategic plan to strengthen the capacity of the organization so that it serves as a communications hub and primary media source for sisters and their congregations. CWR emerged as an essential connector of other communications and media grantees following the Initiative's first convening.

KEY LEARNINGS

Communications and Media Grants

The Initiative has made progress in increasing both internal (among sisters and congregations) and external awareness of sisters. What is notable about all of the grants that fall under this category is that they have become valuable network hubs. The grantees act as connectors and incubators for innovative new ideas and ways to meet the challenges that sisters face in fostering vocations, strengthening formation and supporting their missions. Some of this is illustrated in the network map developed from the post convening surveys (page 24).

Still, a better measure for "awareness" is needed to fully understand the impact of such grants. For this reason, CRCC has provided assistance to GSR and Threespot as they develop their metrics.

Finances and Fundraising

Limited resources are the primary concern of most sisters and congregations. Whether it is retirement liabilities in the global north or a need for assistance to fund formation efforts or mission work in the south, sisters need better financial management skills, income generating models, and diversification of their funding sources to ensure future viability for their congregations and missions.

This category overlaps with several other categories. For instance, The Labouré Society is a development grant and a vocational ministry. In helping young women gain the skills to get rid of their debt, it also prepares them to raise and manage the funds of the congregation. The financial benefit for the congregation comes in the short term through the addition of a new sister; and in the long term those young women take on leadership within their congregation. ASEC, an education and leadership-training grant, enables sisters to apply lessons from its financial management training to managing the congregation's funds. Certificates and degree programs also help sisters make more money in their jobs, or at least make their ministries more efficient and profitable, and their salaries/allowances go back to the congregation.

Two other grantees have ongoing efforts to support U.S. congregations in their attempt to attract aspirants (NRVC/NFRVC) or assist congregations to financially plan and administer their retirement funds (National Religious Retirement Organization).

National Religious Vocations Conference/ National Fund for Catholic Religious Vocations

In line with CRCC and the Initiative's identification of student debt as a major obstacle to pursuing religious life, the National Religious Vocations Conference (NRVC) was awarded a \$2.55 million grant to create the National Fund for Catholic Religious Vocations (NFCRV) that addresses student debt and other barriers for young people interested in entering religious life. Congregations that are members of NVRC can apply for funds to service the student loan debt of their candidates. Over this reporting period NFCRV awarded three women's religious congregations \$49,986 to assist candidates to enter their congregations. The Fund hopes to pay out a total of \$354,978.80 in grants to qualifying congregations over the next decade.⁵³

National Religious Retirement Organization

The National Religious Retirement Organization (NRRO) is an office under the United States Conference of Catholic Bishops (USCCB) that administers the annual appeal for the Retirement Fund for Religious. It also educates congregations and supports them in their care for retired members. A 2016 Mercer Human Resources Consulting study commissioned by NRRO found that by 2034, religious congregations (for women and men) will face a combined retirement deficit of more than \$9.8 billion.⁵⁴ Many religious only received small stipends for their services and were not eligible for Social Security until the laws were changed in 1972. Members were only then able to enter the Social Security system if their congregations made back contributions to Social Security.⁵⁵

In light of the financial crisis facing many U.S. congregations, the Initiative awarded NRRO a \$2.5 million grant in November 2013 to provide technical support to help congregations reduce their retirement debts and to assist them in providing care for their retired sisters. One major outcome of the grant was that 80% of the 74 institutes that participated in the NRRO Planning and Implementation process showed improvement in their retirement funding in the period from 2009 to 2015.

KEY LEARNINGS

Finance and Fundraising Grants

This category of grants is critical to the vitality of congregations in the United States. In the last technical report CRCC recommended that the Initiative adapt a “lifetime approach” to supporting sisters, from their entrance to their retirement. Congregations need assistance handling the high student debt level that many aspirants carry, as well as supporting sisters in their retirement years.



Vocational Ministry

The vocational ministry grants cover a wide range of grantees that focus their efforts on supporting vocations to religious life. Select grantees have already been discussed (e.g., Giving voice).

Council of Major Superiors of Women Religious

The Council of Major Superiors of Women Religious (CMSWR) is one of two national religious conferences for women religious in the United States. Pope John Paul II canonically approved CMSWR in 1992. The Initiative partnered with CMSWR in August 2014 with a \$1.35 million grant to support CMSWR's Year of Consecrated Life activities, as well as to increase contacts and relationships with sisters and inspire more vocations to religious life. CMSWR has been active in engaging young women through this grant.

In collaboration with the U.S. Conference of Catholic Bishops, the Conference of Major Superiors of Men and Leadership Council of Women Religious, CMSWR created an annual "Days with Religious" program to increase interaction with aspirants and aid them in discerning their call to religious life. The three "Days with Religious" events (Open House Day, Serve with Religious Day, Pray with Religious Day) involved more than 172 congregations of women religious and reached more than 150,000 people.

CMSWR hosted GIVEN 2016, a week-long Catholic Young Women's Leadership Forum that had more than 300 participants. Ninety-three percent of survey respondents who attended plan to stay in contact with religious sisters by phone, email, visiting or other means; 69% of attendee respondents either became more open to religious life because of their interaction with sisters at GIVEN or were already open to religious life.

Our Savior Parish and the University of Southern California Caruso Catholic Center

One of the key vocational gaps identified by CRCC and other grantees over the past three years of the Initiative was the lack of engagement and vocational discernment between young college women and sisters. This gap was even more pronounced at public and private, non-Catholic universities and colleges. In response to this opportunity, the Initiative awarded the USC Caruso Center a \$500,000 grant in November 2015 to pilot a model of campus ministry that emphasizes engagement with Catholic sisters on two college campuses, USC and UCLA. Over the past year Caruso has worked with national experts and stakeholders, many of whom are also Initiative grantees, to establish a foundation of knowledge regarding campus ministry programs, vocation obstacles, and what is attracting young women to religious life today. CRCC has played an active role in one of the working groups for this grant.

KEY LEARNINGS

Vocational Ministries

Vocations to religious life involve a woman's decision to commit to a congregation for a lifetime. Sisters will say that they do not "recruit" new members, but that the Holy Spirit inspires young women to make that decision. That said, young women are more likely to be open to religious life if they have personal relationships with sisters. Like the communications and media grants, the vocational ministry grants aim to increase awareness of Catholic sisters. Rather than creating awareness through media, however, they do so by bringing young women and sisters together in person (NCSW falls under both categories).

The process of nurturing vocations is a long-term one, and few results can be seen from such efforts now. The Labouré Society enables women who are already interested in becoming sisters to join congregations and does not necessarily generate new vocations. The demographic trends discussed in Section II indicate that the Initiative is unlikely to make significant progress on reversing the decline in vocations in the global north.

Conclusion

All of the Initiative's grants, whether analyzed individually, clustered together in shared areas of interest, or as a collective whole, provide a rich vein of knowledge that the Initiative can tap as it evolves its strategy to meet the needs of sisters in the 21st century. The Foundation can build the next iteration of the Catholic Sisters Initiative strategy on the knowledge gained from working with grantees and sisters over the past three years. The new strategy provides an opportunity for the Foundation and the Initiative team to seize on opportunities identified by the MEL project, develop new metrics and invest in areas that support the future growth and vitality of the global sisterhood.

V.

Indicators of Success: 2016 Report Card



The Initiative has a series of indicators of success to measure progress towards meeting its strategic goals in the areas of membership, leadership and resources in the global north and south. In the global north, the Initiative wants to increase the number of women who enter religious life, the number of qualified leaders under the age of 60 and increase the percentage of congregations that are more than 60% funded in retirement liabilities. In the global south, the Initiative aims to increase the number of sisters with postsecondary credentials, the percentage of sisters with leadership training in leadership positions and the number of congregations engaging in effective financial planning.

The indicators of success are goalposts for the Initiative's strategy and ideally data from all grantees should inform progress towards at least one of the indicators. Since the previous report, limited outputs, short-term outcomes and intermediate outcomes have become available from grantees to assess progress and obstacles in the way of meeting the Initiative's goals.



Global South

The three indicators of success for the global south are in various stages of development based on the age of grants and available monitoring and evaluation data. The most robust indicator is the one focused on sisters with post-secondary credentials. Sisters are pursuing degrees in a variety of areas, including health care, finance, project management, law and agricultural studies.

We have only preliminary data on the other two indicators: 1) a higher percentage of sisters with leadership training that assume leadership positions; and, 2) more congregations engaged in effective financial planning. More data will be available as grants mature, and we are able to measure longer-term outcomes of the Initiative's projects. For example, CRCC recently interviewed SLDI and HESA alumnae in Kenya on the influence of their training on congregational finances and resource stewardship. A full analysis will be produced in next year's report.

Nevertheless, we can offer some tentative numbers as of August 2016 (the reporting period for this report), acknowledging that many of these grants are still in process. Hence, it is important to recognize that there will be additional "product" from many of these grants beyond what is reflected below.

MEMBERSHIP

More sisters with post-secondary credentials that prepare them for ministry

The Foundation is the largest global funder of higher education for sisters. The Initiative has invested a large portion of its portfolio in educating sisters, with the largest share of its resources going to Africa. Post-secondary credentials under this measure cover a wide range of training, from formal degree and diploma programs at local Catholic universities to focused technical education recognized by national governments. The differences in training create a wide range in the costs per sister trained. As more sisters require higher levels of education to conduct their ministries, the cost of investment per sister will rise.

Measuring progress for this indicator is the easiest among the set of strategic indicators, but the number of sisters with credentials does not fully capture the effect of sisters' education on their ministries. The next iteration of the Initiative's strategy could strive to understand the long-term effect of these educational efforts on sisters and their ministries by funding post-project evaluations. The indicators could also dictate the priorities of the Initiative, such as whether medical, leadership or theological training best meet the Initiative's goals.

Global South **MEMBERSHIP**

More sisters with post secondary credentials that prepare them for ministry

ORGANIZATION	RESULTS
<p>Sisters Leadership Development Initiative (SLDI) <i>Phase III — Africa</i> GRANT: \$4.5 million</p>	SLDI Phase III (2013-2015): 861 sisters awarded certificates
<p>Higher Education for African Sisters (HESA) GRANT: \$3.85 million</p>	HESA Phase I (Year 3: July 2015-July 1, 2016): 99 admitted, 43 graduated, 143 retained for degree and diploma programs
<p>Sisters Leadership Development Initiative (SLDI) <i>Tijuana, Mexico</i> GRANT: \$750,000</p>	SLDI Cohort I (2014-2015): 20 sisters awarded certificates; 20 sisters enrolled for cohort II
<p>Medicines for Humanity (MFH) — Haiti GRANT: \$400,000</p>	TBA training program (2014-2015): 50 sisters awarded training of trainers certificates from the Ministry of Health
<p>Catholic Health Association of India (CHAI) GRANT: \$875,000</p>	National palliative care workshop (2016): 80 sisters participated in the advanced palliative care training; 150 sisters (75 per cadre) trained as Community Health Activists to provide preventive health care and complementary primary care
<p>Women of Wisdom and Action Initiative — Asia GRANT: \$750,000</p>	7 sisters awarded degrees (2014-2016) including 3 advanced degrees, 4 sisters currently enrolled in the Sophia House program at the Jesuit School of Theology at Santa Clara University
<p>Catholic Extension Society — Latin America/USA GRANT: \$3 million</p>	34 sisters from Latin American congregations serving in U.S. dioceses trained at the Mexican American Catholic College and are now participating in ongoing pastoral ministry courses offered through Barry University. In January 2017 the sisters will take classes at Boston College's Woods College of Advancing Studies in fundraising and management skills.
<p>Sisters of St. Joseph of Carondelet — Global GRANT: \$830,000</p>	25 sisters from 14 countries completed a 12-hour post-secondary credential in May 2016 on cultural diversity to assist congregations in cultivating a more welcoming and hospitable environment for new sisters and candidates to religious life from diverse ethnic and cultural backgrounds. 25 more sisters from 12 countries are scheduled for the training at the end of October 2016.

LEADERSHIP

High percentage of sisters with leadership training assume leadership positions

There is limited data to inform the Initiative about the progress being made towards increasing sisters' leadership roles inside and outside their congregations. ASEC's alumnae surveys provide evidence of progress, but this is the only data available on this Indicator. Further evaluation needs to be done not only with ASEC alumnae, but also with beneficiaries of other Initiative grants (e.g., Dominican Sisters of Mission San Jose and the SLDI-Mexico program) to better understand the short- and long-term effects of leadership training on sisters' future leadership prospects.

RESOURCES

More congregations engage in effective financial planning

There is little information to measure progress on this indicator beyond the data from SLDI alumnae mentees on the benefits of training on congregational finances and financial planning. To augment the limited data and understand the role of Initiative-sponsored education and training, CRCC conducted interviews with 25 Kenyan alumnae of SLDI (23) and HESA (2) in November 2016 on the effects of their training and education on their congregations financial planning. Results from the analysis of these interviews will be published in CRCC's 2017 technical report.

Global South LEADERSHIP

High percentage of sisters with leadership training assume leadership positions

Sisters Leadership Development Initiative (SLDI)

Phase III — Africa

GRANT: \$4.5 million

- 85 SLDI alumnae are currently pursuing diplomas or bachelor degrees through HESA
- SLDI alumnae have mentored more than 20,974 mentees including sisters, co-workers and people they serve in their daily work
- 360 SLDI alumnae received a promotion during this phase
- 394 SLDI alumnae were asked to participate in leadership activities during this phase

Global South RESOURCES

More congregations engage in effective financial planning

Sisters Leadership Development Initiative (SLDI)

Phase III — Africa

GRANT: \$4.5 million

- Benefits to Congregation or Ministry as a Result of Mentoring (N=156)
- Better personnel management: 49.4%
- Ability to help more people in your ministry: 46.8%
- New financial policies or more people in ministry: 19.9%
- New or improved strategic plan: 15.4%
- New or improved long-term financial plan: 5.8%



Global North

A large portion of the funding for projects in the global north has been placed in two buckets: nurturing a culture of vocations to consecrated religious life and raising awareness about sisters and their work. Raising awareness of sisters originally was part of the indicator for increasing membership in the global north, but awareness undergirds all of the indicators, both in the global north and south. Little data is currently available to indicate success in increasing membership of congregations. Data is also not available for creating leaders under age 60.

More data is available for meeting the retirement needs of congregations. The needs are great. Congregations face a heavy retirement burden, and this has an impact on their ability to attract and retain young sisters. CRCC fields calls on an almost weekly basis from congregations desperate for funding to rehabilitate their buildings or support an aging population of sisters. These sisters are largely invisible to the dioceses and Catholic institutions that they served faithfully for many years.

In summarizing the impact of grant focused on the global north, it is once again important to state that many of these grants are in process.

MEMBERSHIP

More women enter religious life

The Labouré Society and the National Religious Vocations Conference/National Fund for Catholic Religious Vocations are two grantees that support women entering religious life by servicing their student debt. The total number of women supported (10) to enter their congregations during the reporting period is significant, considering an average of 92 women per year since 2010 have made their final vows.⁵⁶ One of the concerns with the existing data available from grantees is the amount of investment needed to foster vocations and entrance into religious life. Beyond the two grantees that directly address student debt, other grants raise awareness of sisters and their work (e.g. Global Sisters Report, National Catholic Sisters Week) in the hope of fostering a culture of vocations that encourages young women to discern religious life, if they feel a call. There is no direct way to measure how the grantees contribute to women entering religious life, making this indicator an unrealistic measure of the success of the Initiative.

Global North MEMBERSHIP

More women enter religious life

Labouré Society

GRANT: \$2 million

- Seven women have entered religious congregations since the start of this grant in 2015

Nation Religious Vocations Conference/ National Fund for Religious Vocations

\$2.55 million

- Three congregations were awarded funds to offset student loan liabilities: Sisters of Sts. Cyril & Methodius (\$8,200); Sisters, Servants of Immaculate Heart of Mary (\$12,046); Parish Visitors of Mary Immaculate (\$29,740)

LEADERSHIP

More qualified leaders under 60

The three grants that focus exclusively on young sisters and their leadership skills in the global north center on building networks of support (e.g., Giving Voice) and raising the voice of young sisters (e.g., Global Sisters Report, Sisters of St. Francis). The one grant that focuses on leadership pathways (LCWR) for sisters in the global north does not report data for the number of sisters under the age of 60 but aggregates all data for “new leaders,” which includes sisters over the age of 60. None of these grants directly speak to the number of qualified leaders under the age of 60 created through their programs.

Global North LEADERSHIP

More qualified leaders under 60

Giving Voice

GRANT: \$1 million

- Two annual retreats held in 2016 for sisters in their 20s, 30s and 40s
- May 2016, 18 sisters from across the U.S. gathered in St. Louis to learn and practice the PeerSpirit Circle Process. They will take the skills learned into future events for Giving Voice, communities and ministries.

Global Sisters Report – Phase II

\$2.98 million

- 9171 subscribers to the Horizons email, an ongoing section of the Global Sisters Report allowing younger sisters to reflect on their lives, ministries, spirituality and world.

Sisters of St. Francis

GRANT: \$45,000

- Young sisters are currently producing a book of contemporary scholarship and reflection addressing the concerns of next-generation Catholic sisters from an intercultural and interdisciplinary perspective.

RESOURCES

Higher percentage of congregations are above 60% fully funded in terms of retirement liabilities

The Initiative has made some progress to reduce the number of congregations facing serious retirement liabilities. Through the NRRO grant, around 10% of women’s congregations in the United States have seen a significant reduction in their retirement liabilities. Assisting congregations in planning and funding the retirement of their members is critical in honoring the work of older sisters and reducing the economic burden on younger sisters.

Global North RESOURCES

Higher percentage of congregations are above 60% fully funded in terms of retirement liabilities

National Religious Retirement Organization

GRANT: \$2.5 million

- 80% (N=74) of institutes that participated in the NRRO process showed improvement in their retirement funding in the period from 2009 to 2015.
- 32% (N=334) of institutes that did not participate in the NRRO process showed improvement in their retirement funding in the period from 2009 to 2015.
- Average reduction in unfunded past service liability for participating institutes was 32%; for non-participating institutes it was 27%.
- Median reduction in unfunded past service liability for participating institutes was 27%; for non-participating institutes it was 17%.
- 110 participants representing 52 religious institutes registered for the March 2016 workshop. Participants represented 44 institutes of women religious and 8 institutes of men religious. 88 participants were religious; 22 participants were lay employees.



Conclusion

The indicators determined by the 2013 strategy are an imperfect measure of the Initiative's efforts, and there are numerous caveats to the above "report card." First, an evaluation of the indicators is only as useful as the data reported by the grantees. CRCC is in the process of filling in some context through its own research and case studies. The writing of a second strategy, however, opens the possibility of crafting indicators that can be measured by grantees, and includes not only outputs (e.g., number of sisters trained) but also the impact (e.g., what sisters are doing with new leadership skills).

The original set of indicators also does not include an indicator on "awareness," though it is a cornerstone in building a vital global sisterhood that can advance human development. Increasing the awareness of sisters and their work both internally (among sisters) and externally (among non-sisters) is fundamental to all of these indicators, whether in the global south or north. Awareness is crucial to new vocations, supporting the membership goals of the Initiative's strategy; it helps congregations learn from each other, building their leadership capabilities; and it brings new resources to congregations and their ministries. Some major grantees (e.g., National Catholic Sisters Week, Global Sisters Report, A Nun's Life Ministry, National Religious Vocations Conference) make significant contributions to the advancement of the Initiative even though their work falls outside the current set of indicators. The Initiative, CRCC and Global Sisters Report have been working with a social change agency over the last year to find better metrics to capture "awareness."

Finally, the indicators do not capture the network developed around the "global sisterhood." The Initiative has taken a leading role in connecting a disparate group of congregations, funders, religious conferences, academic research centers, nonprofit organizations and members of the ecclesiastical church, from parish priests to Vatican officials. The Initiative has brought together progressive and conservative Catholics. Through key informant interviews, field site visits and surveys over the last two years, CRCC has documented the networks that have developed because of the Initiative and its idea of the "global sisterhood."

VI.

Gaps, Opportunities and Strategic Recommendations



The Catholic Sisters Initiative has made significant strides on the goals of its current 5-year strategy. It also has increased internal and external awareness of sisters and their work, and helped build a global sisterhood working to advance human development.

As the MEL partner, one of CRCC's essential roles has been to provide strategic consultation and insight to the Sisters Initiative team. In last year's report, CRCC focused on four gaps and opportunities and made strategic recommendations based on those areas. The following pages will revisit these areas and summarize recommendations made throughout this report.



If people do not see sisters, they are less likely to become or support a sister.

OPPORTUNITY

Elevate awareness as a central part of the Sisters Initiative’s strategy.

UPDATE: The Sisters Initiative team has embraced the concept of awareness as a key issue underlying all the goals of its strategy. Grantees from the first convening also have embraced its importance, reporting in post convening surveys that they pay more attention to communications efforts. Although it has not crafted a communications strategy for itself, the Initiative launched quarterly emails to grantees to promote awareness within the portfolio. It also created the #SistertoAll campaign to spread awareness of the Anderson Robbins research among the general public. The International Union of Superiors General (UISG) reported unprecedented interest from media organizations in the past year.

The last report highlighted the lack of information about religious life as undermining the awareness of sisters. In particular, it detailed the difficulty in tracking the number of sisters and number of women in formation because there is no central information source. *The Annuario Statisticum Ecclesiae* (Statistical Yearbook of the Church), published every two years by the Vatican Press, does not include disaggregated information about women in formation. Additionally, awareness requires understanding the scope and impact of the mission work that congregations undertake. Interest in information about mission work presents an opportunity to push beyond the realms of the Catholic world to other arenas of shared interest. With the Nairobi convening, the Sisters Initiative started creating more awareness around sisters’ roles in the implementations of the United



Nations Sustainable Development Goals (SDGs). As noted in the discussion of their grant, Global Sisters Report has also become a proponent of sisters and the SDGs. The SDGs provide a framework through which to study the work of sisters, create a more complete picture of that work and to share this knowledge with the world.

The Initiative can continue to build awareness of Catholic sisters and their work by helping generate, capture and share new knowledge, data and tools. They can do so through strategic research-field building and communications and media grants. It can also develop its relationship with the Foundation’s communications team in order to better communicate within and beyond its network. Finally, awareness could become a foundational concept in its second strategy.

GAP 2

If the Catholic Church hierarchy does not demonstrate that it values the work of sisters, then sisters will not flourish.

OPPORTUNITY

Leverage the Sisters Initiative's influence within the church hierarchy to create more visible and tangible support for sisters.

UPDATE: The Initiative has continued to invest in the International Union of Superiors General, which has been a key connection to the Vatican, and participated in UISG's assembly in Rome. The grant to the Society for the Propagation of the Faith also has helped build support for sisters within the institutional church. The Initiative strategically invited church officials to participate in the Nairobi convening, as well. Although the funding relationship with Foundations and Donors Interested in Catholic Activities (FADICA) has ended, this remains a potential channel for leveraging the Initiative's influence on behalf of sisters.

The Latin America and Caribbean region presents opportunities for the Initiative to connect with more conservative Catholic family foundations that are primary funders in the region and leverage those relationships to create more support for sisters. Just like in the United States and Africa, CRCC's examination of this region confirmed sisters' concerns about diocesan control and oversight. The patriarchal culture of the Latin American church and society presents a significant roadblock for sisters.

The challenge is enormous, but the Initiative can continue to chip away at the roadblocks to sisters by empowering them as leaders and being their advocates at the highest level of the church. As stated in the last report, the most significant area of opportunity for the Initiative may be identifying what will motivate the parish priest or diocesan bishop to better support sisters.

GAP 3

If sisters do not have networks of support for themselves, they may face burnout or dropout.

OPPORTUNITY

Adapt a "lifetime formation" approach and foster supportive networks of sisters.

UPDATE: Sisters and their congregations need financial, technical and spiritual support from the church, the communities they serve and funders. This support needs to be balanced across the lifetime of a sister from the time she enters (e.g., servicing student debt), through her early formation and vows (e.g., providing emotional and spiritual resources, supporting the congregation's formation staff), her mission work (e.g., leadership development and technical skills), and finally her retirement (e.g., management of congregation retirement funds, paying down retirement liabilities).

The Initiative has made strides over the past three years in helping sisters and congregations create an enabling environment for discerning a religious vocation, handling student debt and building sisters' capacity through higher education and specialized training. Moving forward the Initiative has the opportunity to provide additional assistance to the National Religious Retirement Organization, Supporting our Aging Religious (SOAR!) and other groups. Congregations in other regions need funding to support additional entrants and provide for them during their initial formation.



The Initiative also has the opportunity to develop the supportive network around Catholic sisters by expanding the notion of the global sisterhood. With fewer sisters in the global north, young sisters increasingly will wear multiple hats, serving in leadership in their own congregations and inter-congregational organizations (e.g. LCWR, CMSWR, Giving Voice) at the same time as working in ministries. Such sisters will need to be supported in ways that help alleviate—and not add to—that workload. By expanding the Initiative’s notion of the global sisterhood to include women deacons, associates, lay ecclesial ministers and volunteers, the Initiative ultimately can support Catholic sisters. It would be important, however, to ensure that such grantees are benefiting sisters, particularly due to the lack of support for sisters in the hierarchy. The Initiative already has grants (e.g. Catholic Volunteer Network, Ministry Leadership Center) that empower non-consecrated women (and men) to work alongside sisters. Support for non-consecrated partners has been difficult to justify under the current strategy. Recognizing sisters’ need for lifetime formation and supportive networks through a wider notion of the global sisterhood could enable the Sisters Initiative more flexibility in supporting Conrad Hilton’s goal of supporting sisters as they advance human development.

If Catholic sisters do not listen to the cultural sensibilities of different generations and populations, the global sisterhood suffers.

OPPORTUNITY

Incorporate a more nuanced view of geographic and cultural similarities and differences into the Sisters Initiative strategy.

UPDATE: At both the convening in Pasadena and the convening in Nairobi, Catholic sisters and Initiative grantees embraced the idea of a global sisterhood that works together to advance human development. Sister Rosemarie Nassif was able to share the idea with more than 900 Superiors General at the UISG assembly in Rome.

As the idea has spread, so too has it become clearer just how interconnected congregations in the global north and south are. The global sisterhood is akin to a living, breathing body. When one part is ailing, it affects the entire system. The Catholic Church is a global entity (in religious terms referred to as the living body of Christ), and sisters reflect that connectedness. The decline of congregations in Europe has a direct impact on the financial sustainability of congregations in Africa, for instance. International orders that once fully supported work in “the missions” currently are in the process of pulling back support. Meanwhile, African sisters are concerned that with little support from their diocese (see Gap 2), they will end up like their European sisters, strained by caring for aging sisters and unable to maintain a sustainable level of vocations. Reverse missions also draw sisters from the south to serve in Europe and the United States. As a country of immigrants, the United States can expect to see a more diverse sisterhood, both through reverse missions and new vocations. Both, however, require maintaining a strong culture of vocations in the places where Catholic immigrants come from, particularly Latin America and Asia.

The global relationships are not limited to north-south relations. The Initiative could foster the south-south connections beginning to flourish between sisters, their congregations and mission work. Sisters from India, for instance, are working in Kenya. The Religious Conference of Brazil has sent sisters from Brazil to Mozambique to work with local dioceses on poverty alleviation projects, and sisters from Mexico have been sent to Cuba to support the rebuilding of congregations and their mission work in the nation.

The crafting of a new 5-year strategy offers the Initiative an opportunity to elevate the global sisterhood as a more explicit and central goal. This might mean doing away with the divisions between the global north and south. The Initiative might choose to focus significant resources in one region, but if the Initiative wants to foster a global sisterhood, it would be wise not to completely neglect the other regions, particularly because the Hilton Foundation is the leading philanthropic force for sisters. A scaled approach to funding might be called for in the next iteration of the Sisters Initiative strategy, where one region is given priority with a certain percentage of funding that could be adjusted based on annual results and need. Other regions would be given a predetermined share of funding that could also be adjusted annually based on evaluation feedback.

The capacity of the Initiative's team to handle the current portfolio and significant expansion into other regions of the world is a significant obstacle to expanding and fulfilling the geographic scope of the strategy. Currently one senior program officer handles the majority of the portfolio with some support from a program officer who also splits her time between the Initiative and the Catholic Education portfolio. CRCC reiterates its recommendation from the first report that the Foundation build the capacity of the Initiative's team if it wants to meet the global objectives set out in the 2013 strategy. New program officers with experience in international development could assist the current staff in supporting grantees and developing new grants. Program staff also need greater discretionary use of travel funds, so program staff could visit field sites during a project, develop stronger relationships with grantees and cultivate new connections and ideas about future grantees and projects.

Additional Opportunities

CRCC's work in the past year has revealed additional opportunities for the Hilton Foundation.

Hilton as “Communication Hub”

While the previous year's gaps and opportunities focuses on the importance of awareness and the global sisterhood broadly, the Initiative's first convening particularly highlighted the growing network of grantees and partners. The convening surveys revealed that fostering personal connections between grantees helps create a shared sense of community and mission, and develop collaborative projects that leverage collective resources.

The Initiative can continue its efforts to be a communications hub for its large portfolio of grantees. As previously mentioned, during the past year the Initiative's team has developed a quarterly email newsletter that it sends to grantees and partners to share stories and information. Currently, grantees are already meeting online, and Communicators for Women Religious is planning a convening of communications-related groups.

The Initiative can work to help and support such grassroots efforts, particularly by bringing smaller groups together through convenings and small meetings. In addition to the newsletter, the Initiative can provide an online space where grantees can communicate directly with one another and share resources and content.

Stronger Collaboration with the Conrad N. Hilton Fund for Sisters

The Hilton Fund for Sisters represents a treasure trove of information, both historical and immediate, about the work of sisters in the developing world. Most of the data generated by the Fund, however, is under-excavated and not used to inform the strategy of the Fund itself, let alone to share with entities beyond the board and staff. When they are shared at all, knowledge and insights are shared informally between the board and staff, and to some degree between the Fund and the Conrad N. Hilton Foundation's Catholic Sisters Initiative. Personal relationships and informal conversation have enabled this in the past. This potential for knowledge building and sharing could position the Fund as a critical partner in understanding and supporting Catholic Sisters beyond the impact of the grants themselves.

The Initiative could leverage its relationship with the Fund by supporting a research and evaluation project on the impact of the Fund over time. Such a project could generate a better understanding of the Fund's grant-making, the human development work of sisters, emerging trends and ongoing issues that could use greater attention beyond the scope of the Fund's capacities. This project would likely identify areas for strategic investment by the Initiative and the Fund. This project, if it proved useful, could be institutionalized with a staff position charged with developing organizational learning at the Fund and creating potential partnerships with outside agencies. A project and perhaps a program officer position focused on developing the body of knowledge for the Fund could yield useful intelligence to the initiative. For example, if sisters are requesting money for resources related to farming, the Initiative might explore ways to add farming technical assistance to leadership and skills related training programs serving sisters in those regions. As the Initiative moves to understand and articulate the work of sisters as they relate to the Sustainable Development Goals, this project and ensuing position could be charged with gathering data on the sisters' efforts.



VII.

The Path Forward



Over the next year, the Catholic Sisters Initiative will be tasked with developing the second iteration of its strategy, which is due in 2018. Two factors will play an important role in the development of “Strategy 2.0.” First, the Foundation has a new President, Peter Laugharn, and as is customary, the appointment of new leadership presents an opportunity to examine a foundation’s priorities and commitments. Second, the Sisters Initiative is midway in its five-year strategy; this, also, creates an opportunity to assess what has been successful and what new priorities might guide future grant-making. The gaps and opportunities in the previous section address lessons from the previous strategy that might influence the development of the second strategy.

Before the Initiative can determine the specific content of the new strategy and set realistic, measurable indicators of success, the Foundation must address questions related to priorities and donor intent. In this concluding section, CRCC identifies 10 sets of questions that need to be addressed by the Foundation. As the MEL partner, CRCC does not take a position on these questions and issues. Rather, these are questions that need to be faced in clear and transparent conversations between the leadership of the Foundation and the staff of the Sisters Initiative.

QUESTION 1

All trend lines indicate a continuing decline in the number of sisters in the global north, including the United States. The question is whether the Foundation can substantially move the needle in attracting young women to join and remain in religious orders. As previously indicated, on average only 92 women have been taking final vows for each of the last few years. The number of women religious in the United States has fallen from 181,421 in 1965 to 47,170 currently, and is projected to drop to 16,310 by 2035. To date, the Initiative has attempted to remove some of the barriers that might counter this decline—such as lack of awareness and school debt. Can the Foundation successfully challenge demographic trends and at what cost?

QUESTION 2

Given the difficulty of attracting young women to the religious life, the question remains—in light of donor intent—whether the Foundation has a moral responsibility to assist aging sisters, especially given the state of many congregations' retirement funds. In 2015, 32% of sisters in the U.S. were in their 70s, 26% were in their 80s, and 11% were 90 or older. The burden of caring for elderly sisters is one of the disincentives for young women joining congregations since much of their time and energy is given to assisting aging sisters. This is an area where the Initiative has given several grants with considerable success—helping congregations navigate the difficult terrain of caring for elderly sisters, making decisions about consolidation with other religious orders and dealing with legal challenges related to property and its use. What is the Foundation's role in supporting aging sisters in the global north?

QUESTION 3

The question needs to be asked whether Conrad Hilton, were he still living, continue to have a narrow definition of assisting sisters, given the demographic trends that have occurred in the last 50 years. Or, as a businessman, would he consider new opportunities for his charitable investments related to the religious calling of women? The President of the Foundation and the Trustees need to answer this question, not Initiative staff. If a more flexible definition of the global sisterhood were forthcoming, there would be opportunities to include lay vocations as part of the Initiative's strategy, which is an area where the Foundation could potentially have a significant impact. However, such an expansion in the definition of the global sisterhood depends on clarification of donor intent.

QUESTION 4

It appears that the leadership of the Foundation is highly committed to being a partner with the United Nations in addressing the 17 Sustainable Development Goals by 2030. If this is the case, then the Sisters Initiative needs to ask which goals it can address in a strategic manner and how. Initial consideration was given to this issue in the October convening of the Initiative in Nairobi. Full implementation might require augmenting funding with grants that focus on technical assistance related to agriculture, healthcare, climate change policies, etc., as well as greater coordination with other areas of the Foundation's grant-making related to health, water, homelessness, etc. It might also involve partnerships with non-Catholic organizations, especially related to specific SDGs.

QUESTION 5

If addressing the U.N.'s Sustainable Development Goals is a priority, should the Foundation focus on a particular region of the world, or even specific countries within that region, or should it broaden its influence across the global sisterhood? The Initiative has already made substantial investments in Africa, particularly the 10 countries where ASEC operates. Latin America and the Caribbean have 40 percent of the world's Catholics and 30 percent of its sisters. There are also large numbers of sisters in parts of Asia, such as India, where they operate a number of hospitals, clinics and schools.

QUESTION 6

The Initiative's global and regional priorities also raise organizational questions. With only one and a half program officers managing 60 grantees, the capacity of the Sisters Initiative team has limited the extent of its global reach. How will the Foundation support the Initiative's team's efforts to address global and/or regional needs? For example, should the Foundation have regional offices in some of the areas of greatest need? Should it increase the number of grants to intermediary organizations that it knows can handle the funds, such as ASEC, so that those organizations can manage a cluster of grants with more hands-on interaction? These questions become more urgent with the anticipated doubling of assets of the Conrad N. Hilton Foundation.

QUESTION 7

How can the Foundation continue to play a catalytic role in working with the 700,000+ sisters around the globe? Are there databases, digital technology, evaluation strategies, communication vehicles, etc. that would enhance the vision and effectiveness of the global sisterhood? For example, how can best practice models related to the SDGs be shared with sisters and the people they serve? How can the work of sisters be better documented for strategic planning purposes by congregations? How can sisters share their experiences about what they are learning and doing in more direct and tangible ways, breaking down barriers between the global north and south?

QUESTION 8

How can the Catholic Sisters Initiative work with the Fund for Sisters in a more integrated way given the fact that both programs are funded by the same donor? The upcoming year is an opportune time for deep level conversations to occur since the Fund for Sisters has a new executive director and the Sisters Initiative will be working on a revised strategic planning document.

QUESTION 9

It is apparent that many grantees do not have sophisticated ways of evaluating their impact. Reports to the Foundation tend to list activities associated with their grant, such as conferences or programs, rather than assessing the actual impact of these activities. As grants conclude over the next few years, how will Initiative staff make judgments regarding renewal of such grants? How are they to consider the lack of alignment between some grants and the first strategy's set of indicators, which do not capture the evolving portfolio? The lack of clear, realistic indicators poses challenges to the creation and implementation of a revised strategy. How can the Foundation build both internal and external capacity for measurement, evaluation and learning?

QUESTION 10

The realignment of the strategy and some organizations' inability to demonstrate results is bound to lead to changes in what organizations receive grants. At the same time, the Foundation has emerged as the primary funder of sisters globally and serves as a primary connector within the network of organizations that support the global sisterhood. To what extent does the Foundation want to maintain this role, and how does it do so while potentially changing its funding relationship with many key players in the Catholic world?

As a MEL partner, CRCC does not take a position on any of the foregoing questions. In this report, CRCC has provided context with which to understand the work of the Sisters Initiative and evaluated its effectiveness in meeting the goals outlined in the current strategy. The ten sets of questions outlined above are intended to assist the Foundation and the Initiative as they work together in developing a revised strategy for 2018. CRCC looks forward to continuing to support the Foundation's efforts to help Catholic sisters as they advance human development.

Notes

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CRCC TEAM

Hebah Farrag

Richard Flory

Nalika Gajaweera

Brie Loskota

Tarra McNally

Donald E. Miller

Megan Sweas

INTERNS

Grace Gregory

Helen Hyesoo Lee

CONSULTANTS

Tobin Belzer, evaluator

Margi Denton, graphic designer

Daniela Hinsch, video editor

Cover by Donald E. Miller

USC Dornsife
*Center for Religion
and Civic Culture*

Center for Religion and Civic Culture
University of Southern California
Los Angeles, CA 90089-0520

PHONE (213) 743-1624

FAX (213) 743-1644

EMAIL crcc@usc.edu