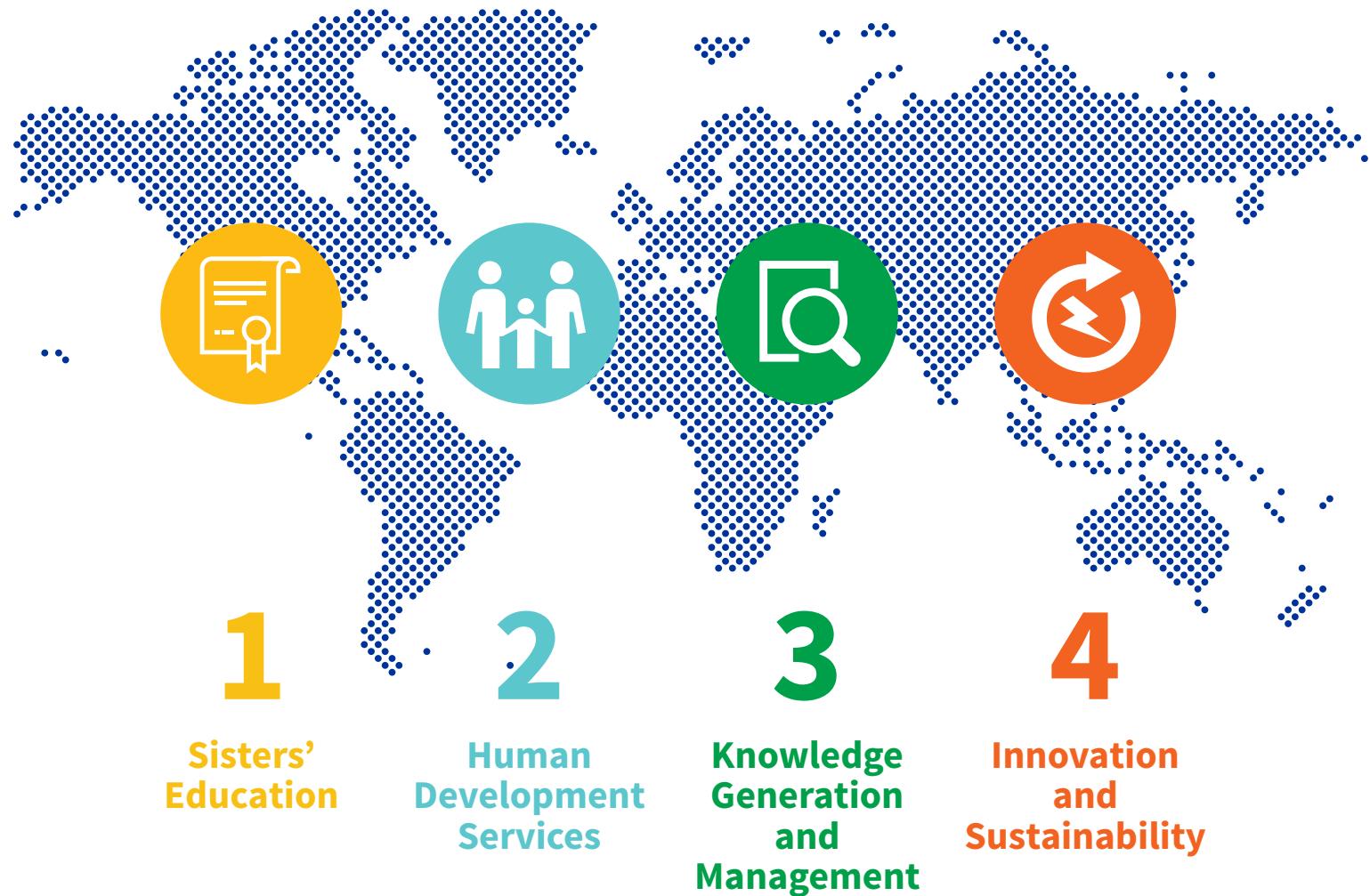


Conrad N. Hilton Foundation  
Catholic Sisters Strategic Initiative

# Strategy 2018–2022



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

— Last will and testament of Conrad N. Hilton



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# Executive Summary



Since its inception in 1944, the Conrad N. Hilton Foundation has remained committed to improving the lives and ministries of Catholic sisters. Conrad N. Hilton's will specified that he wished to *"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."*

In 2013, the Hilton Foundation inaugurated the first Catholic Sisters Strategic Initiative strategy, which focused on building the internal capacity of Catholic sisters' congregations to improve membership, leadership and resource outcomes. Over the past five years, the team has cultivated strong relationships with grantees, external partners and across departments at the Foundation. The Catholic Sisters Strategic Initiative has achieved a number of successes, including a significant increase in the number of sisters with post-secondary credentials, who are now prepared to take on expanded ministry and leadership roles. The Catholic Sisters Strategic Initiative looks forward to building upon this work with the design and execution of its 2018-2023 grantmaking strategy.

This strategic plan provides direction for the next five years; however, the vision is long term. The 2030 vision for the initiative is for Catholic sisters to become recognized as global leaders in the provision of sustainable human development services, while remaining grounded in the vitality of their spiritual witness. Catholic sisters are already vital actors and frontline workforces serving in the most difficult and dangerous places to address social and economic inequities facing people from diverse religious backgrounds. By 2030, the Catholic Sisters Strategic Initiative aims to increase the capacity of sisters to meaningfully address poverty, and elevate the recognition of sisters as moral leaders and voices of change in the global effort to relieve human suffering. The vitality of Catholic sisters can be the energy that fuels human development.

The goal of the Catholic Sisters Strategic Initiative is to reinforce and support two synergistic elements of Catholic sisters: 1) the vitality, strength and sustainability of their congregations and conferences, and 2) the reach and effectiveness of their human development ministries which are the outcome of that vitality. These two elements—internal strength and external service—are mutually reinforcing and inseparable. The initiative seeks to

reinforce each, thereby increasing the sustained positive impact of sisters on human development around the globe.

The Catholic Sisters Strategic Initiative will work toward that goal with investments in four intersecting portfolios: Sisters' Education; Human Development Services; Knowledge Generation and Management; and Innovation—all of which individually and collectively build vitality and enable critical services to reach disadvantaged and vulnerable people. Each portfolio has a specific objective:

- **SISTERS' EDUCATION.** Increase the financial and human resources capacity needed to sustain congregations of sisters, their services and the organizations they are serving.
- **HUMAN DEVELOPMENT SERVICES.** Expand services to disadvantaged and vulnerable youth and young adults aged 15-25 and their families. Focus areas include: education, food security, healthcare, human trafficking and youth entrepreneurship.
- **KNOWLEDGE.** Research, gather, apply and disseminate information to improve practices of congregations and leadership conferences, expand and improve the quality of human development services, and increase collaborative partnerships.
- **INNOVATION.** Create sustainable solutions to challenges to the vitality of sisters' organizations and the sustainability of their human development services.

Each portfolio has specific objectives, priority activities and measurable indicators of success. The content of each portfolio reflects the Foundation's Philanthropic Approach. The Catholic Sisters Strategic Initiative will continue to emphasize strengthening internal **systems** and institutional capacity of sisters' organizations through education, growing financial capital, and improving the skills needed to provide quality ministries. Cultivating and disseminating **knowledge** across and between sisters, their organizations and the ecosystem of development organizations is crucial both for capacity-building and for expanding the scale of programs and the number of people served. Finally, all portfolios drive toward **solutions**, in organizational capacity, sustainability, and in services that truly make a measurable difference to the well-being of youth and their families.

Partnership and collaboration are the key approaches that the Catholic Sisters Strategic Initiative will use to maximize impact. By working directly with congregations or clusters of congregations, leadership conferences and the Congregation for Institutes of Consecrated Life and Societies of Apostolic Life (CICLSAL), the Catholic Sisters Strategic Initiative will be able to bridge gaps and create networks across geographies and ideologies. By supporting the provision of human development services, the Catholic Sisters Strategic Initiative will emphasize collaboration with a range of stakeholders from the public, nonprofit and private sectors, as well as the Vatican's Dicastery for Promoting Integral Human Development. Actively seeking new partnerships will create opportunities for sisters to be recognized as global advocates for disadvantaged people, and position them within the ecosystem of humanitarian organizations. By raising the profile of sisters through highlighting their unique assets, sisters will earn recognition as approachable partners of choice, who are also committed to achieving the UN Sustainable Development Goals.

The Catholic Sisters Strategic Initiative's partnership with the Center for Religion and Civic Culture (CRCC) at the University of Southern California, has produced a robust body of knowledge on Catholic sisters and sisters' organizations globally. This partnership, focused on monitoring, evaluation and learning, will continue to enable the Catholic Sisters Strategic Initiative to learn, share and collaborate more effectively. Some of the key lessons learned that are addressed in this strategy include: 1) the need to increase the visibility of sisters' work with lay people; 2) the need to increase awareness of the work and commitment of sisters; and 3) the need to develop the capacity of sisters and their networks of support.



# Introduction to the Strategy

As a philanthropist, Conrad N. Hilton had a long history of supporting the good works and ministries of Catholic sisters. The Sisters of Loretto, who taught him catechism in New Mexico, were the initial recipients of his generosity, but other congregations soon followed. As a reflection of Conrad Hilton's own priorities, and in keeping with the stipulations of his last will and testament, the Conrad N. Hilton Foundation has awarded grants supporting the work of Catholic sisters for 74 years.

In 2013, the Hilton Foundation inaugurated the Catholic Sisters Strategic Initiative with a five-year strategy that focused on building the internal capacity of Catholic sisters' congregations to improve leadership and membership outcomes, to strengthen collaboration among congregations, and to increase public awareness about the work of Catholic sisters. The first phase of strategic grantmaking has underscored the importance of education and training in improving the operations of, and collaboration among, Catholic sisters' congregations, as well as the importance of communications, collaboration and networking as key elements to the success of sisters in their ministries.

The intention of this document is to outline the second five-year strategy that will guide the grantmaking of the Catholic Sisters Strategic Initiative from 2018-2022.

This new strategy was informed by qualitative and quantitative feedback from the Center for Religion and Civic Culture (CRCC), the Monitoring, Evaluation and Learning (MEL) partner for the Sisters Initiative. These lessons demonstrated the importance of improving sisters' and grantees' ability to collect and analyze data, monitor progress, report challenges, and measure impact.

Finally, this strategy is anchored in the value of sisters and women religious within the Catholic Church as stated by Pope Francis. In a 2015 address by Pope Francis during the Year of Consecrated Life, His Holiness issued a call to women religious to "be in the forefront of responding to the great challenge facing us in this new millennium: to make the Church the home and the school of communion, to care and support those in the margins."<sup>1</sup> This strategy highlights how sisters, through their presence and focus on human development work, can bear prophetic witness through their vocations.

## Phase I: Accomplishments and Lessons Learned of the First Five Years

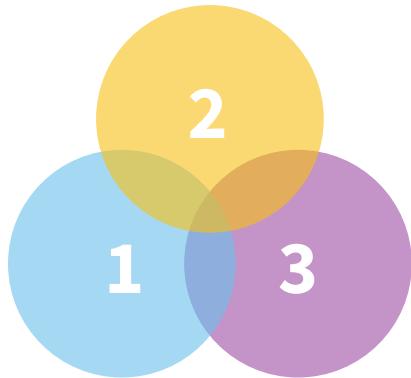
The objectives of the first five years of work were divided geographically and focused on three dimensions:

	Global South	Global North
Membership	Increase number of sisters with postsecondary credentials	Increase number of women who enter religious life
Leadership	High percentage of sisters with leadership training assume leadership positions	Increase number of qualified leaders under 60
Resources	More congregations engage in effective financial planning	Higher percentage of congregations are more than 60 percent funded in retirement liability

<sup>1</sup> Apostolic letter of His Holiness Pope Francis to All Consecrated People on the Occasion of the Year of Consecrated Life.  
[https://w2.vatican.va/content/francesco/en/apost\\_letters/documents/papa-francesco\\_lettera-ap\\_20141121\\_lettera-consacrati.html#\\_ftn5](https://w2.vatican.va/content/francesco/en/apost_letters/documents/papa-francesco_lettera-ap_20141121_lettera-consacrati.html#_ftn5)

## **Key Achievements by Objectives**

CRCC's MEL report on the first five years of the Catholic Sisters Strategic Initiative showed positive results in all three areas:



### **MEMBERSHIP**

Increased numbers of sisters earned post-secondary credentials to prepare them for ministry and to take up leadership roles. In many countries, such educational levels are becoming part of government regulatory requirements for service providers. This has resulted in:

- 1,858 post-secondary credentials
- 1,314 in-service trainings
- 641 sisters currently enrolled in a degree program
- 184 sisters who graduated with a degree

In the Global North, the Foundation supported membership expansion through reporting on the human development services of sisters through the National Catholic Reporter's Global Sisters Report. The Foundation also funded research to understand public perceptions of sisters and their ministries, and supported a variety of outreach efforts such as the "From Service to Sisterhood" program through the Catholic Volunteer Network, as well as the establishment of National Catholic Sisters Week. The National Fund for Catholic Religious Vocations and the Laboure Society helped 21 young women aspiring to join congregations by relieving their student debt, which is a significant barrier to entering religious life. In addition, several grantees encouraged approximately 400 women on the path of discernment to consider religious life through engaging events or retreats.



## LEADERSHIP

In the Global South, the percentage of sisters with leadership training who assume leadership positions internally in their congregations and externally in their ministries, has increased dramatically. Since 2013, 20,974 mentees benefited from one-on-one mentorship. Based on surveys from the African Sisters Education Collaborative (ASEC) alumnae, sisters who participated in the Sisters Leadership Development Initiative (SLDI) benefitted significantly from their training. For example:

- In Phase Three of the program, 39 percent of participants received a promotion and 36 percent asked to participate in other leadership activities.
- In Phase Four, 82 percent received a leadership role/promotion in her ministry and 53 percent received a leadership role/promotion outside her ministry.

In the Global North, the Catholic Sisters Strategic Initiative supported leadership learning and networking for sisters under the age of 60. For example, one leadership program supported 183 sisters trained in leadership skills. The Catholic Sisters Strategic Initiative also facilitated six retreats and one national convening for younger sisters.



## RESOURCES

In the Global South, the Foundation supported programming to increase the use of business and financial planning in congregations, worked to strengthen national leadership associations of sisters, and expanded skills and knowledge in specific sectors of service provision (e.g. agriculture) to mobilize resources. The same ASEC alumnae surveys indicate that congregations with SLDI alumnae have benefitted from greater financial planning. For example:

- In Phase 3 of the program, 17 percent of sisters implemented both a strategic plan and a financial plan for their congregations; 13 percent of sisters implemented a strategic plan only and 15 percent of sisters implemented a financial plan.
- In Phase 4, 36 percent of sisters implemented a strategic plan and 35 percent of sisters implemented a financial plan.

In the Global North, the Foundation demonstrated that increased knowledge and skills can improve retirement funding. For example, 10 percent of U.S. women's congregations significantly reduced their retirement liabilities.

## **The Unique Strengths and Needs of Catholic Sisters**

Catholic sisters are selfless leaders who serve disadvantaged and vulnerable people. They are trusted community-based leaders who solve complex social problems. Sisters have been at the forefront of building health care systems and social services throughout North America for generations. Their ministries are at the heart of human development efforts delivered in some of the most challenging contexts in the world. With a global presence, and with growing numbers of sisters in Asia and Africa, sisters are uniquely positioned to be among the most trusted and effective leaders in meeting the needs of the world's most vulnerable communities. In order to leverage their unique position, sisters must overcome capacity-related challenges, including the financial complexity of an aging population (currently a major concern in the Global North, and a growing concern across the globe).

There is a nearly universal need for: 1) improved and lifelong formation, 2) support to bridge cultural and intergenerational differences within and between sisters, 3) education and capacity training in governance and management within congregations as well as national and regional leadership associations.

## **Landscape Overview and Future Directions that Underpin Strategy**

The strategy development process began by commissioning a “Future Directions” paper, for which over 200 stakeholders were engaged in more than 40 focus groups, meetings and interviews throughout the United States, Italy, Kenya, Uganda, Nigeria, Tanzania and Zambia. This research laid the groundwork for how best to allocate the Foundation’s philanthropic resources over the next five years.

The selection of priority areas is based upon the results of the landscape analysis, and lessons learned during the first five years of the Catholic Sisters Strategic Initiative.

## **A Shared Vision for 2030**

Given this landscape, the 2030 vision for the Catholic Sisters Strategic Initiative is that Catholic sisters become recognized as global leaders in sustainable human development grounded in the vitality of their services and spiritual witness. This approach requires strong organizations that can plan and implement human resources, financial and service strategies, deliver high-quality services that can become best-in-class global models for other organizations, and participation in global human development networks — both Catholic and non-sectarian. Such networks include the Vatican’s Dicastery for the Promotion of Integral Human Development, the Congregation for Institutes of Consecrated Life and Societies of Apostolic Life (CICLSAL) and stakeholders representing the range of public and private organizations engaged in promoting and achieving the Sustainable Development Goals.



## Theory of Change

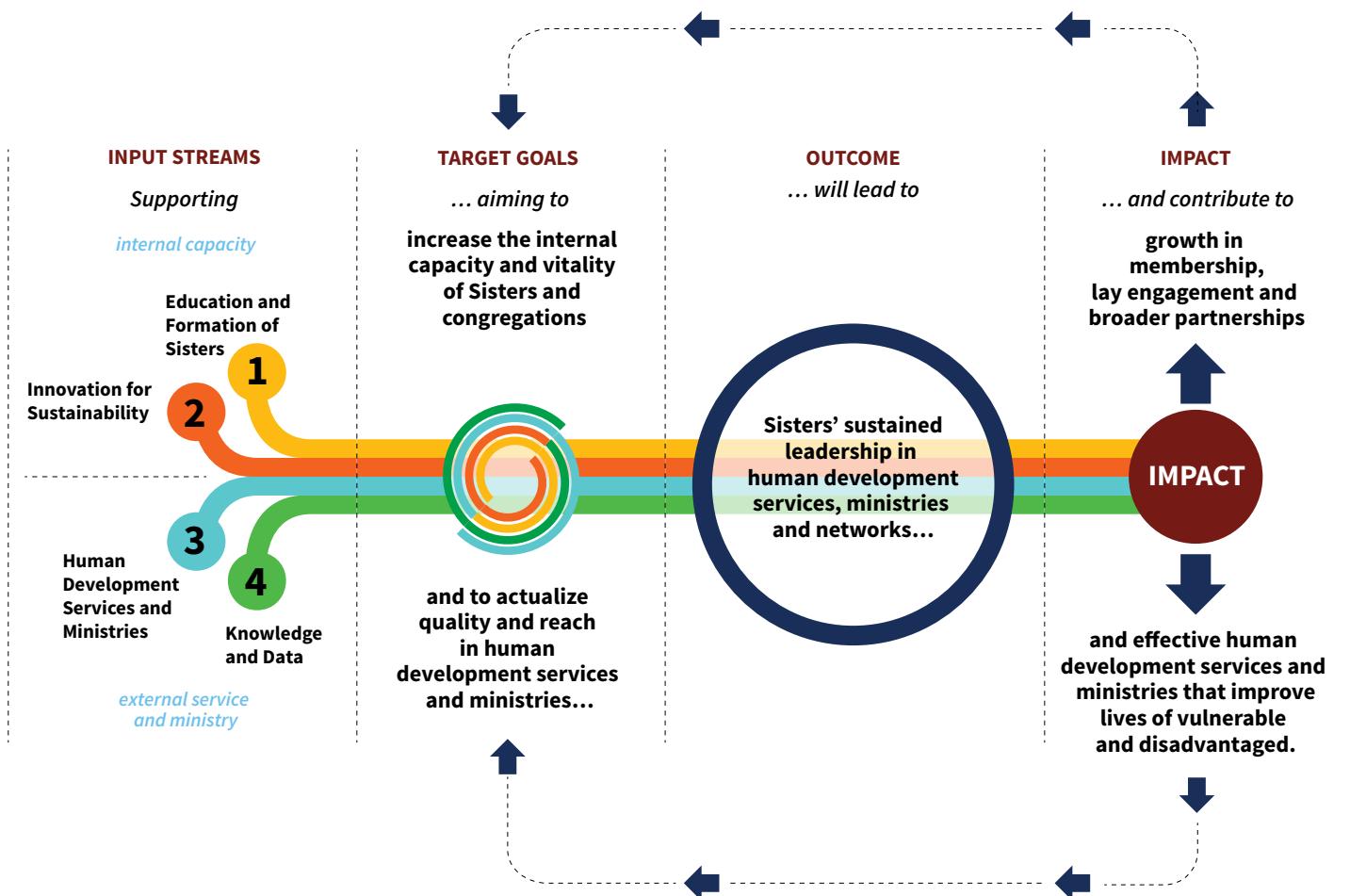
The strategy represents an interplay between the theory of change that underpins the new direction and the Foundation's Philanthropic Approach.

The theory of change underlying the Catholic Sisters Strategic Initiative posits that the strength and vitality of sisters' internal systems and organizations will enable them to be publicly recognized, respected leaders for those who are vulnerable and disadvantaged. This leadership, in turn, will reinforce both sisters' organizations and the scope and effectiveness of their ministries.

These two elements—internal strength of organization and external strength of ministry—are synergistic and inseparable. Together, they enable the kind of leadership that brings the uniqueness of sisters as moral voices to human development. That leadership and visibility of sisters, their congregations and their leadership conferences can be a force to increase membership and reinforce the vitality of their communities.

CATHOLIC SISTERS INITIATIVE

# Theory of Change



## Aligning the Theory of Change with the Foundation's Philanthropic Approach

The Catholic Sisters Strategic Initiative has gathered extensive quantitative and qualitative baseline data that will build upon existing data collected by partners such as the International Union of Superiors General (UISG), ASEC, the Center for Applied Research in Apostolate (CARA), leadership conferences of major superiors, and other

coordinating organizations. As the Initiative's baseline of evidence continues to be built, the three primary foci of the Foundation's philanthropic approach remain constant themes in the strategy. They set the framework for activities in each of the portfolios, with each constituting a different mix or emphasis of the three dimensions. This will ensure that the programmatic directions taken by the grantmaking team are guided by the baseline data and align with the Foundation's approach as outlined below.

CONRAD N. HILTON FOUNDATION

# Philanthropic Approach





- 1) **PROGRAMMATIC SOLUTIONS.** Developing solutions to the core sustainability and vitality challenges of sisters' organizations is crucial, so that their leadership and service can reliably and effectively advance measurable improvements in human development problems, both within nations and globally.
- 2) **SYSTEMS STRENGTHENING.** The systems lens is two-fold, internal to sisters' organizations and external to human development organizations:
  - a. **INTERNAL.** Strengthen the internal systems of sisters' congregations and their organizations (management, education, formation, professional preparedness, data acquisition and management for decision-making, financial planning, strategic/long-term planning, asset management, and financial skills) to enable sustainability and to make sisters reliable partners in the larger eco-systems of public and private human development institutions;
  - b. **EXTERNAL.** Support the work of the sisters within those external ecosystems in ways that generate sisters' leadership and moral voice for solutions. This ecosystem includes sisters' collaboration with other faith communities, government, civic groups, NGOs, local communities in which they

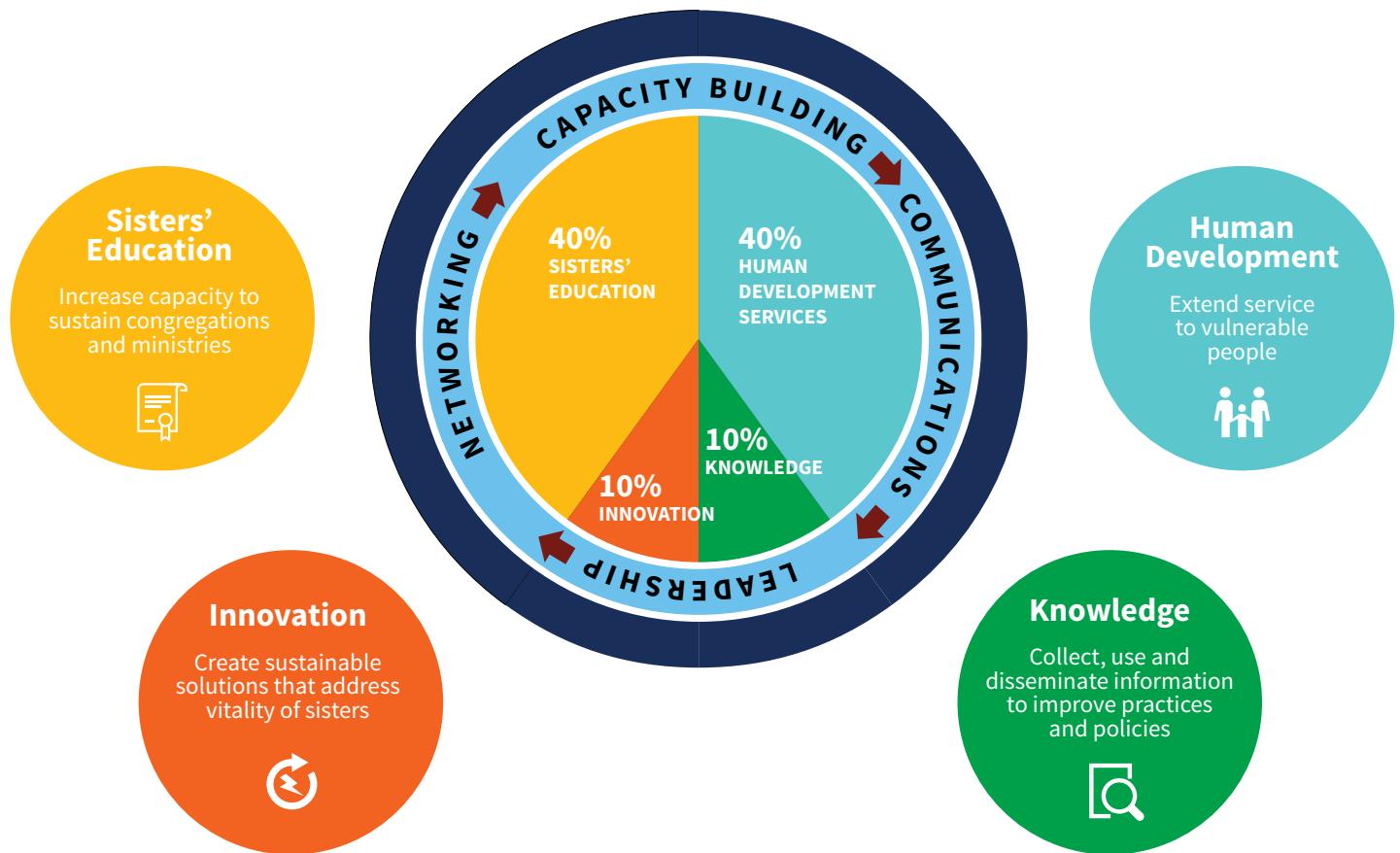
live and work, and the private sector as well as within the larger Catholic Church.

- 3) **KNOWLEDGE DEVELOPMENT.** There are two directions for knowledge flow—internally within sisters' organizations, as well as between those organizations and the larger development community. The Catholic Sisters Strategic Initiative will increase data and knowledge about sisters' organizations and approaches to human development within these organizations to contribute both to informed decision-making and sharing best practices. The Catholic Sisters Strategic Initiative will also increase knowledge about the capacity of sisters' organizations in the larger human development organizational ecology, thereby feeding back into opportunities for leadership in human development solutions.

The Catholic Sisters Strategic Initiative will employ interrelated channels in the philanthropic approach—grantmaking, learning, collaboration, and communications and advocacy—throughout its work.

In summary, the theory of change sets the goals for the Catholic Sisters Strategic Initiative. The Foundation's philanthropic approach guides objectives for grant design, and those grants will be structured to maximize various combinations of the tools outlined in the approach.

# Four Portfolios



## Portfolio Structure

To implement the vision for 2030, the five-year strategy organizes this work into four portfolios:

- **SISTERS' EDUCATION**, which includes all aspects of education and training that build capacity for sustained leadership in communities, nations and the world. This includes education and collaboration on best practices in managing and financing sisters' communities as they age; adapting to the growing intercultural nature of congregations; strengthening lifelong formation at all ages and points of religious life; and technical education in support of sisters' ministries to ensure effectiveness of service delivery.
- **HUMAN DEVELOPMENT SERVICES**, which are specifically focused on vulnerable and underprivileged young people aged 15–25 and their families in service areas in which sisters have particular strength: education, health, and social and economic well-being. Young women who are at risk of poverty, and therefore exploitation, will be of particular focus.
- **KNOWLEDGE**, which includes data collection and dissemination, as well as systems to ensure the continuous use of data in decision-making, and long-term research and analysis to provide a strong base for future strategy.
- **INNOVATION**, which is focused on a select long-term, high-risk investments, including non-grant forms of social finance, which might develop globally applicable solutions to common financial and human resources sustainability problems of sisters' organizations and ministries.

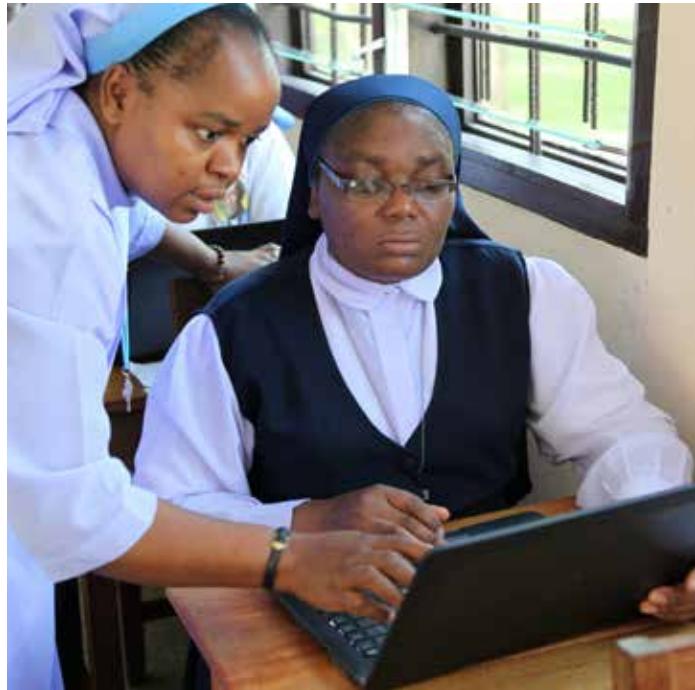


Communications, leadership, networking and capacity building will be common elements of work within portfolios, as well as across portfolios. Through an established learning cycle looking at sisters' organizational strength, work, knowledge and sustainable pathways forward, the value and impact of the Catholic Sisters Strategic Initiative is greater than the sum of its parts.

The Catholic Sisters Strategic Initiative will be operational over five years, but will also look ahead to the long term, building capacity for organizational and ministry sustainability. These global portfolios will reach and create networks among sisters and programs across the world.

The strategy specifies expected results for each portfolio, the “what” of performance. The way in which these results will be achieved, the “how” of performance, will be determined by the nature of the work of sisters that is funded through the grantmaking. This “how” will be defined for each grant, with clear reporting against both specific grant approaches (e.g., student academic improvement in one grant and consistent school attendance by at-risk girls in another) and common portfolio metrics (numbers of children educated) across different approaches. The MEL assessment plan will set out the data capture mechanisms for both specific and common measures, as well as the approach to setting baseline data.

# Sisters' Education



## Summary of Context

Building the capabilities of sisters through education will ensure that adequate assets are developed and that their leadership capabilities are enhanced. Through communication and networking, leadership of sisters will be made visible globally. This increased capability and amplified visibility will lead to greater absorptive capacity of grantee partners so that Foundation grants can have greater impact. It is essential to develop a systems-based approach to education and capacity-building. There are many things that precede the usefulness of resource development of a congregation. To be effective leaders in human development over the long term, sisters, their congregations and leadership conferences must overcome several shortfalls.

First, there is a need to strengthen collaboration and knowledge-sharing among religious congregations and local communities. Sisters are global, and a process for learning best practices across generations of sisters and across geographic boundaries is needed. In the last century, missionaries from the North went to South; today, missionaries are coming from South to the North. Since over 4,000 international sisters are living in the U.S., strengthening collaboration among these sisters is important. Second, strengthening formal education is critical. In some instances (such as in Africa, as noted previously), the vast majority of sisters lack access to higher education. In other instances, changing government regulations now requires professional credentials in more and more areas of service provision, making continuing education and certification mandatory. Third, most congregations need support in financing, human resources, and strategic planning and project management skills, which are essential to ensuring long-term organizational and ministry sustainability. Finally, improvement in the quality of life-long formation of sisters is key. The holistic well-being of sisters, in terms of both physical wellness and spiritual health, is essential to the effectiveness of their work. The vitality of sisters is linked to the degree to which sisters are happy, healthy and fulfilled. That vitality is essential to their provision of human development services in some of the world's most difficult situations.

## **Goal**

The goal of the education portfolio is to increase the financial and human resources capacity needed to sustain congregations and conferences of women religious, their services and their organizations.

## **Approach**

The Foundation will drive toward this goal by allocating resources to the development of, and strengthened internal capacity to sustain, the internal systems that support leadership of sisters and their organizations. This will represent 40 percent of grant resources.

The Catholic Sisters Strategic Initiative will collaborate with other funders in this space to avoid duplication of programs and leverage collective efforts. The approach will focus on capacity-building to ensure that congregations and conferences, and indeed, sisters themselves, are reliable partners, leaders and moral voices in human development.

The capacity-building approach will include:

- Increased educational qualifications of sisters (academic degrees, certification/diplomas, skill-based professional development).
- Increased managerial competencies of lay partners, especially where aging congregations are passing on the institutions and service structures to lay leaders.
- Life-long formation programs focused on both physical and spiritual well-being to ensure ministry sustainability, and membership vitality and expansion.
- Improved human resource management, asset management and financial development of congregations of congregations for vitality and sustainability.
- Strengthened global collaboration among sisters' organizations for the sharing of best practices.
- Increased numbers of sisters in leadership roles in global human development.
- Mentoring, alumni networks and proactive communication to ensure that the Sisters Initiative's investments in its grantees reach a much broader set of organizations.



## **Focus**

Geographically, the education portfolio casts a larger net than other portfolios because it works through regional and national leadership conferences of women religious and the UISG, which will in turn enable global learning and collaboration, though certain regions require a different focus. For example, merging congregations and conferences is important in geographic areas with aging sister populations, such as the Global North. An emphasis on tailoring educational initiatives that focus on an evolving skillset across the life course is crucial. Conversely, in Africa and the developing world, where there is rapid growth, emphasis will be on the educational needs of younger and middle-aged sisters, even as the lessons of managing aging congregations are brought forward to enable preparation for this inevitable future.

Organizationally, the Foundation will focus on organizations that network across congregations and leadership conferences to ensure a broad scope. Particularly in Africa, the Catholic Sisters Strategic Initiative will focus on building and strengthening leadership conferences and large organizations so that they can be financially effective and strengthened through their member congregations. The Catholic Sisters Strategic Initiative will collaborate with organizations that can reach large numbers of sisters from various congregations for capacity building in leadership, formation, education and specific human development skill training.

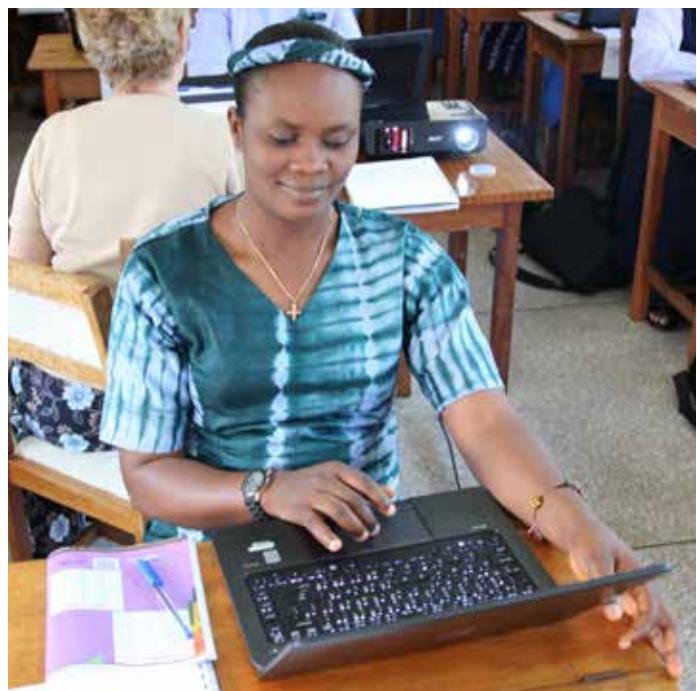
Grantmaking will focus on:

### ***Formal Education***

- Expansion of access to post-secondary and higher education (including mentor and alumni networks).
- Skill and knowledge enhancement related to key areas of human development in alignment with the Human Development portfolio's substantive focus on youth.

### ***Leadership and Organizational Strength***

- Leadership training, to include that of international sisters and missionary sisters resident in U.S. congregations and conferences.
- Skill-building and sharing of best practices in management and finance of congregations and conferences, especially where issues of aging, mergers or, alternatively, rapid growth put stress on financial and human resource sustainability.
- Initial and continuing formation programs that strengthen both congregations and conferences in their support of lifelong spiritual formation of sisters now and for future generations.
- All other types of training linked to objectives and initiatives in the other three Catholic Sisters Strategic Initiative grantmaking portfolios.



## **Key Activities**

### ***Build Sisters' Educational Capacity***

- Build the workforce of congregations in varied educational fields by providing post-secondary credentials, access to technology and leadership development training
- Build the technical and organizational capacity of Catholic sisters and congregations to enable increased quality and effectiveness in service delivery in their communities

### ***Strengthen Leadership and Organizational Management Capacity***

- Strengthen congregations' planning and evaluation of their human, financial and capital resources
- Develop reliable monitoring, evaluation and reporting mechanisms to inform planning and decision-making in congregations and organizations that drive accountability
- Strengthening the human resources and technical capacity of congregations (and conferences) to formulate financial plans, policies and implementations
- Build on knowledge of congregations currently in the merger process and extend those skills to other congregations facing this need, capturing the best practices for use by congregations globally in the future
- Build and strengthen continuing formation programs for sisters and lay associates to ensure quality, health and well-being for the sustained implementation of their human development work, and sustained membership recruitment
- Strengthen the collaboration among congregations and conferences for purposes of learning

## **Results**

The ultimate outcome of the education portfolio is the quality and sustainability of services that sisters provide. The desired result of the Catholic Sisters Strategic Initiative is for 300,000 lives to be improved via the increased capacity of sisters, contributing to the transformation of individuals and communities.

### ***Expanded Formal Education***

- 500 congregations have benefited from post-secondary training
- 800 sisters have completed degrees
- 600 sisters are in the process of completing their degrees

### ***Expanded Leadership and Organizational Management Capacity***

- At least 2,000 sisters have completed training for capacity-building in financial management, strategic planning, organizational management, anti-human trafficking initiatives, canon law, intercultural/intergenerational competence and healthcare training (this figure is based on the number of sisters educated during Phase I of the Catholic Sisters Strategic Initiative; the extrapolation is an estimate of the number of sisters to be educated; as data is improved through the knowledge portfolio outlined below, this estimate may be revised)
- 40 congregations have strengthened their internal systems in all aspects of systems improvement to include strategic planning, financial planning, human resources, management, communications and lifelong formation
- 100 congregations that are moving through the improvement process have strengthened a subset of the above organizational elements
- 400 sisters have completed formation or formators' training, and continuing formation programs or continuing formation and sabbatical programs
- 15 congregations have completed a financial restructuring or merger and 10 additional conferences have benefited from this process

# Human Development Services



## **Summary of Context**

Catholic sisters are global leaders of sustainable human development grounded in the vitality of their spiritual witness. Their reach is enormous. For example, a single, global community of Catholic sisters, The Daughters of Charity, provides services to nearly 900,000 people each year. As a second example, Catholic sisters educate over 4.3 million children every year in Africa.

Strong, sustainable and skilled Catholic sisters' organizations that are spiritually well-formed, are better able to develop, lead and implement human development services. The visibility of their commitment, and the leadership and impact of their work, can strengthen their relationships with communities and women who are considering the option of religious life. Catholic sisters are seen as trusted actors in health care, social services and education but their role as leaders in these sectors needs to be amplified in secular spaces. Increased visibility of their leadership will enable relationships with the non-Catholic world and facilitate widespread acceptance of and collaboration with sisters' ministries.

## **Goal**

The goal is to expand services provided by Catholic sisters to disadvantaged and vulnerable youth and young adults between the ages of 15 and 25 and their families to improve their economic security and prevent victimization through tragedies such as human trafficking and early marriage.

## **Approach**

The Sisters Initiative will take a proactive, directed approach to grantmaking in this area. This will represent 40 percent of grant resources.

Human development sectors of focus will be pre-selected by the Catholic Sisters Strategic Initiative. The Catholic Sisters Strategic Initiative, its partners, and its expert consultants will seek out grantees who have the potential to develop and demonstrate impact at scale. Special attention will be paid to work that builds on Catholic sisters' leadership in creating a future in the "second decade" of the lives of young people.

## CATHOLIC SISTERS INITIATIVE Focus Countries



The Catholic Sisters Strategic Initiative will develop effective models of collaborative funding to support sisters' work in human development. This will include working closely with other international or domestic programming within the Foundation, where there is clear alignment and the ability to learn from, and contribute to, the understanding of best practices. Collaboration with the Conrad N. Hilton Fund for Sisters will be especially key, both in terms of data sharing and potential co-funding opportunities. The Catholic Sisters Strategic Initiative will also include collaboration with other funders where leverage and alignment are clear.

Finally, investing in a strategic communications plan and media relations will raise the visibility of sisters' ministries and open leadership opportunities for sisters as recognized experts at the forefront of human development.

### Focus

The Catholic Sisters Strategic Initiative will focus its human development services portfolio through three lenses so that limited resources can be allocated for clearly identified purposes and results. The grantmaking focus of each lens will be two-pronged, addressing both sisters' internal capacity to deliver human development services and the service provision itself. This portfolio brings together internal and external work.

Geographically, the Catholic Sisters Strategic Initiative's human development services portfolio is a global effort, with a particular focus on Mexico, Haiti, the U.S., Europe, India and 11 countries in Africa.<sup>2</sup> The map above displays the human development focus of the Catholic Sisters Strategic Initiative. The work in other portfolios, and

<sup>2</sup> The Initiative is already working in these countries - Ghana, Kenya, Cameroon, Nigeria, Uganda, Tanzania, Malawi, Zambia, Lesotho, South Sudan, Sierra Leone

indeed the learnings from the human development portfolio, will be truly global, open to and ultimately affecting sisters in every country of the world.

In all cases, the focus of work will be highly targeted at the substantive problems defined below.

Second, organizationally, the Catholic Sisters Strategic Initiative will limit its grantees and partners to those who have:

- Human resources capacity to enable service deepening or expansion without creating implementation challenges. The work in the human development portfolio seeks to directly benefit individuals and families living in poverty, and grantee selection will favor congregations and leadership conferences that have the capacity to reach large numbers of people.
- Resource capacity to build on, but not become dependent on, the Catholic Sisters Strategic Initiative's support.
- Fiscal systems capable of managing grant resources. Grants will be sizable enough to have an impact on complex problems; therefore, fiscal management will be critical.
- Similarly, a level of project management capacity necessary to enable implementation as well as the management of outcome metrics that meet the needs of the Catholic Sisters Strategic Initiative.
- Ability to collaborate/co-implement as part of a larger human development system to address the systemic issues affecting the target demographic as noted below.
- Capacity to intentionally collaborate in a specific country or region.

Over time, as the education portfolio increases sisters' managerial skills to strengthen their congregations, we will identify new prospective grantees that have increased capacity to be brought into the human development services portfolio. Initial grantees will be those who have the capacity to be collaborative, effective partners both for the ministry work and for the measurement of impacts and outcomes.

Third, substantively, the Catholic Sisters Strategic Initiative will focus its human development work on the

intersection of two considerations: demographics and services.

The work will focus on a population group, youth and young adults between 15-25 years of age, with greater emphasis on the earlier years of this age range. The upper range of this age group extends into the 20s because of their vulnerability to poverty and early parenthood. School retention rates are low among this group, as many must work to meet family income needs, or have early marriages to satisfy social or economic requirements. In this way, young adults become part of the global wave of migration to seek more immediate resources for their families.

The focus will be on the areas of strength of Catholic sisters, their congregations and/or organizations in meeting the needs of these young people. These needs are reflected in many ways. For example, child marriage continues to be a major challenge, with 39 percent of girls in African countries being married off before age 18. Between 2011 and 2020, it is estimated that 140 million girls will become child brides.<sup>3</sup> Families are increasingly displaced, with 65 million forcibly displaced persons worldwide, 22.5 million refugees, and 10 million stateless persons.<sup>4</sup> The core areas where sisters work are:

- |  |  |
|--|--|
| <ul style="list-style-type: none"><li>■ <i>Education</i></li><li>■ <i>Food security</i></li><li>■ <i>Health care</i></li></ul> | <ul style="list-style-type: none"><li>■ <i>Human trafficking</i></li><li>■ <i>Youth entrepreneurship</i></li></ul> |
|--|--|

This focus will also align with the Vatican's Dicastery for Promoting Integral Human Development, which in 2016 combined the work of four Pontifical Councils into an integrated focus on the marginalized, the sick, the poor and migrants. The focus on youth and young adults is also aligned with the Vatican's Dicastery for the Laity, Family and Life, the United Nations Agenda and Sustainable Development Goals (SDGs), and the culture of Catholic sisters globally. These frameworks will enable the human development services portfolio to intersect both the work within and outside of church structures. This represents a platform for sisters' human development leadership in a variety of organizational networks.

Specifically, regarding the SDGs, these sectors of focus are particularly reflected in elements of Goals 1, 2, 3, 4, 5 and 8.<sup>5</sup> Women, children and the broader families to

which they belong are key stakeholders in these goals and this cross-sectoral portfolio. For example, the promotion of inclusive economic growth, which helps sustain families (Goal 8), is also vital to achieving gender equality for women and girls (Goal 5). This may also help improve the well-being of women, children and families (Goal 3), and alleviate hunger and address food security (Goal 2). By addressing these six goals from the perspective of women, youth and families, there is an opportunity to advance multiple, intersecting development efforts aimed at the world's most vulnerable people to truly achieve a holistic and sustainable form of human development.

The rationale for this demographic and sectoral focus is several-fold.

- **NEED.** This age group is often forgotten in the programming for the welfare of children. Many organizations and programs focus on young children, particularly under the age of five. Few focus on late adolescence and early adulthood. Yet, it is in early adulthood that the lack of continued education, training and support create personal and family crises that, in turn, leave children vulnerable to lack of food security and exploitation. Moreover, it is for this age group that political upheaval leads to cross-border migration and refugee status, which can create vulnerability to human trafficking. For these young people, Catholic sisters are often the only havens.
- **SISTERS' PROGRAM ASSETS.** Catholic sisters' assets in meeting the needs of children and young adults emphasize their strengths and experience working in education systems, health care provision, and individual and family security and well-being. While education, health, nutrition and family stability are all core areas of program expertise of Catholic sisters, they are often not integrated into a constellation of services focused on a target demographic.
- **LEVERAGE.** There is potential for program and financial leverage. The Catholic Sisters Strategic Initiative's focus could easily complement the work of other foundations on issues of women and children and on specific sectors (such as human trafficking, education or employment). For example, UNICEF has articulated

an interest in this age group, and strengthening sisters' knowledge and work could prove attractive. Similarly, the Bill & Melinda Gates Foundation's recent increased investment in women and girls may provide partnership opportunities for sisters' enhanced capacity to reach young women in this age group.

- **LEADERSHIP.** This focus provides an open opportunity for leadership by Catholic sisters in the ecosystem of development organizations, nationally and globally, where this substantive focus is often lacking. There is a wide gap in human development areas upon which Catholic sisters can write their leadership and raise their voices. The models and lessons learned from sisters can be of unique value to the human development community and thus provide a platform for lifting the moral voices of sisters on child endangerment issues. In turn, that leadership opportunity will increase the visibility of sisters' congregations and conferences in unique ways that can also contribute to their membership potential and hence to their vitality and financial sustainability.

The approach will emphasize, and require, service coordination of its grantees. The human development services portfolio will encourage grantees to revolve a set of integrated services around this age group to drive them to vitality and financial sustainability. Rather than a "silo" approach, the Catholic Sisters Strategic Initiative will encourage approaches that build on and integrate combinations of programmatic strengths in such areas as education, health care, skills training and entrepreneurship to ensure a holistic approach to strengthening the future of youth and families. Combinations may differ by setting (e.g., rural vs. urban), by culture or by country.<sup>6</sup>

<sup>3</sup> August 2017 interview with Jean Gough, Country Director of the United Nations Children's Fund

<sup>4</sup> United Nations High Commission for Refugees.

<sup>5</sup> For more on the SDGs and this portfolio see Addendum 2.

<sup>6</sup> Similarly, measures of performance will be common across approaches for some portfolio indicators and specific to approaches to enable the capture of data that reflects the variety of particular methods of reaching more general goals.

All grantmaking in this portfolio will begin with clear baseline assessments and place a premium on evaluation to ensure that the impact of sisters' ministries is clearly documented and can be broadly disseminated. It will also ensure that this partnership opens channels for advocacy at local and national levels, and in the media on critical issues addressed in the grantmaking.

## **Key Activities**

### ***Build Capacity of Systems and Reach Vulnerable and Disadvantaged***

- Conduct an inventory of individual congregations' service delivery capacity in the focused areas seeking those that have the capacity to reach youth and families at scale; identify and mobilize the most effective partners.
- Craft grant partnerships with clear and specific outcomes both for strengthening the ministerial capacity of sisters' organizations themselves and for the desired youth and young adult programmatic outcomes.
- Align with education and knowledge portfolios to improve sisters' skills in relevant program and program management areas.
- Determine needs for capacity-building in Catholic education within the Archdiocese of Los Angeles, and among sisters engaged in education in Los Angeles, which can form the backbone of a grant-making strategy.

### ***Create an Enabling Environment for Solutions***

- Explore new and innovative financing mechanisms, including but not limited to social impact investing to support the scale of congregations, conferences, and non-governmental organizations in service delivery.
- Use a re-granting mechanism through larger conferences to broadcast lessons learned and best practice replication to smaller congregations.

### ***Harness and Disseminate Knowledge***

- Spread knowledge of effective programming across a broad range of congregations and conferences globally.

- Build capacity of congregations and sisters' institutions to conduct research and support for monitoring and evaluation of these focus areas.
- Strengthen technical knowledge of sisters, their organizations, and partners on the collection, analysis, and use of program statistics for mapping and decision-making.
- Strengthen international networks of Catholic sisters to amplify sisters' work and voices in the area of youth and young adults.
- Improve educational outcomes for children of low-income families within the Los Angeles Catholic school system and among sisters engaged in education services.
- Enable Catholic schools to develop innovative programs that will enhance the operational vitality of schools and can be replicated in other dioceses.

## **Results**

### ***Youth and Young Adults' Economic Empowerment***

- Advocacy and support of policies at local and national levels, particularly on the issues sisters interact with most frequently, such as education, human trafficking, health, food security and issues affecting women, girls and people on the move.
- 300,000 youth and young adults reached by sisters' ministries through human development grantmaking.
- 5,000 children of low income families served by Catholic education in the Los Angeles area.
- Public and private resources have been leveraged to support sisters' human development work in education and other youth service sectors.
- Eight of 10 congregational or confederation members are leading a human development initiative at the local, national or global level focused on youth and young adults.

### ***Best-in-Class Program Skills and Management***

- 10 congregations with improved service provision skills and capacity for meeting the needs of youth and young adults, relative to a baseline of capability established in the first year of the five-year strategy period.

## **Knowledge Leverage and Dissemination**

- 500 additional congregations reached with best-in-class knowledge about youth and young adult program approaches, working through the Sisters Initiative annual convening and other NGO networks.
- Increased public perception that sisters are leaders of human development.
- Increased public knowledge about human trafficking, health, education and entrepreneurship regarding youth.

- Research publication and dissemination.
- The MEL partner has developed a plan for outcomes/impact assessment of the effectiveness of Catholic education and the operational vitality of Catholic schools. This timeframe may extend beyond the life of particular grants.

## **Collaboration with the Conrad N. Hilton Fund for Sisters**

The Foundation and the Conrad N. Hilton Fund for Sisters (Fund for Sisters) share a unique history, each born from the vision of Conrad Hilton to support Catholic sisters. There is a natural link between the work of the Sisters Initiative and the Fund for Sisters in their shared efforts to tackle human development issues. Where possible, intentional collaboration will be a natural way for both organizations to have a greater transformative impact on the communities they serve. Each organization is unique and takes a different approach to grantmaking. The Foundation is a strategic grantmaker, with strengths in systems-based approaches and a long-term perspective on problem-solving. The Fund for Sisters is a responsive grantmaker, and its strengths are its knowledge of work at the grassroots level, its expansive network of grantees, and its extensive data on congregations' ministries and capacity. The collaboration of these two parties have much to offer each other and the global community of Catholic sisters they serve.

### **Goal**

The multifaceted goals for the Foundation's Catholic Sisters Strategic Initiative and Fund for Sisters collaboration are to:

- Identify and structure opportunities to collectively address relevant human development problems
- Improve efficiency in assessing and identifying potential grantees and projects that best align with the goals of both organizations
- Strengthen data collection practices and share best practices across global cohorts of sisters
- Leverage convening power for greater impact in their work

### **Approach**

The Foundation's Catholic Sisters Strategic Initiative and the Fund for Sisters will continue to operate independently to execute their respective grantmaking mandates, goals and objectives. Both initiatives will augment their respective mandates in three ways: 1) identifying staff to support collaboration; 2) providing resources for grantee inquiries; and 3) identifying cohorts of grantees with similar programs to be gathered into potential program collaboration. This approach will be key to achieving collaboration in three activity areas the Sisters Initiative will carry out to achieve our goals. These areas are: 1) leveraging programs; 2) achieving efficiency; and 3) identifying opportunities for scale.



## Catholic Education in Los Angeles

### Context

The Foundation has long supported Catholic education in the Archdiocese of Los Angeles largely through tuition support for low-income students to attend Catholic schools. The Catholic education program is integrated into the Catholic Sisters Strategic Initiative and will shift to support improvements in the social, family and educational conditions within which disadvantaged students live and study. The Hilton Foundation has long taken this holistic approach to the broad ranging benefits of Catholic education and it is for this reason that it is housed in the human development portfolio. These are important factors for students, impacting both their immediate performance in Catholic schools but also their long-term approach to continued education and educational success.

The family, social and economic context of disadvantaged children in school is a very broad, nearly boundless problem. Problems of parental language, literacy, health, family stability, homelessness, substance use, domestic violence—to name a few—all impact children and their ability to focus on school and be supported in their learning. Interviews indicate that these students are pressed for resources; few Catholic schools have the internal capacity to provide “wrap-around” services to vulnerable students. Success in the classroom and longer-term educational success are deeply rooted in addressing this context. Tuition support is the necessary place to begin; the new strategy posits that it is not necessarily the place to end.

With its strategic emphasis on core problems of human development, the Catholic Sisters Strategic Initiative will adjust the traditional tuition-based approach to Catholic education in the Archdiocese of

Los Angeles to include support for services to parents and families to strengthen learning environments for students.

### **Goal**

Expand the ability of Catholic schools to support educational success among disadvantaged children and their families

### **Approach**

The Catholic education program will be placed within the Catholic Sisters Strategic Initiative's human development portfolio, reflecting the focus on the core barriers to learning and the relationship between education and the human development of disadvantaged youth. The program will enable attendance by disadvantaged children at Catholic elementary schools both through tuition support and through supportive social, educational and counseling services for students and their families necessary to improve educational outcomes and educational future.

So as not to place greater burdens on schools, nor encumber internal budgets with added payroll costs, the approach will experiment with utilizing Catholic sisters as "circuit riders," a central resource pool of providers of that wrap-around support to schools.

Existing grantees could be included in the program to the extent that their needs and educational approaches align with the new directions. The Catholic Sisters Strategic Initiative will also reach out to possible co-funders in the Catholic education space, keeping them updated on the strategy and its implementation to seek parallel funding to expand resources for the approach.

### **Landscape Analysis Forthcoming**

A more in-depth landscape analysis of this portfolio is forthcoming in the fall of 2018.

### **Tuition Support**

The program will continue to provide tuition support for a cohort of Catholic elementary schools serving significant groups of disadvantaged children, defined both regarding incomes and regarding individual learning conditions such as differently-abled children. The level of resources available will determine the number of schools in the program.

### **Support Services**

Support services may include literacy programs for parents or other caretakers; parenting classes or counseling; health and nutrition education for families; immigration counseling and referral to legal services; and deepened capacity for referrals to public or other nonprofit resources specific to substance use counseling. The program will seek out qualified sisters to provide a pool of such services and assist congregations of sisters with training to increase support service skills.

### **Outcomes**

About students, the focus is both on school measures and on measures of the students' capacity to continue to grow and learn as their education progresses beyond the tuition support of the Foundation's program. Performance measures for students in the program will include improvements in school attendance, educational performance, social behaviors, self-confidence, and other measures of social and emotional maturity.

The Catholic Sisters Strategic Initiative recognizes the enormity of the contextual challenges facing disadvantaged youth in their home and school settings. Outcome expectations must be specific and realistic for a cohort of families within the scope of the Foundation's resources. With regard to parents and families, the Catholic Sisters Strategic Initiative will work with its MEL partner to determine a strategy for measuring pre- and post-family capacity to support their students. Improvements might include increased family literacy, frequency of family reading, and consistent use of external counseling resources or programs.

# Knowledge Generation and Management



## Summary of Context

Many Catholic sisters and their respective organizations and congregations, especially in the developing world, require adequate tools and techniques to gather the accurate data needed to underpin strategy and change management. Creating this baseline is fundamental to both the strategy for strengthening the internal capacity of sisters' organizations, to developing greater external ministry impact, to establishing a strong external leadership role in human development. Strengthening data and knowledge systems will be important for congregations, particularly those that are sunsetting. The historical value that each congregation leaves behind will be important for the sustainability of congregations in the future. Moreover, strengthened data will be essential to the continuous refinement of the Catholic Sisters Strategic Initiative. This approach will provide the opportunity for greater field-building activities and the identification of emerging issues and trends facing sisters globally.

## Goal

The goal of the knowledge portfolio is to enable sisters to collect data, apply knowledge and disseminate information; to improve the practices and policies of congregations, and national and regional leadership conferences; and to increase external knowledge of their work in ways that enable partnership with lay people and organizations.

## Approach

The knowledge portfolio will represent 10 percent of grant resources. Work on building and disseminating knowledge both of sisters' organizations and the future of their ministries will be global, addressing important dimensions both of sustainability in the face of an aging population and of growth in the face of rising membership.

The approach to building knowledge is two-fold, with a short-term focus on data, skills and knowledge dissemination, and a long-term focus on selected opportunities for longitudinal research that will dramatically increase our understanding of trends in the vitality of

sisters' organizations and the impact of their human development work. For example, given that religious life is now centered in Latin America, Africa and Asia, there is a need to understand the newer facets of indigenous founders and charisms of religious life in the Global South.

The short-term approach will consist of three domains. First, training in data acquisition, storage and use will overlap with the education portfolio. Second, mapping of sisters and their organizations through both qualitative and quantitative data collection in Africa will enable a better understanding of the scale and scope of sisters' work that will contribute to knowledge in general, but also inform the human development portfolio. This will be complemented by a data capture effort for those congregations merging or sunsetting their work to ensure that the historical record is complete. Finally, two prototype data centers will be created for continuous data tracking in two countries, while data systems (systems that enable data discovery, data delivery and analysis) and skills continue to be built within congregations. Measures will be taken to encourage and incentivize collaboration. The prototype database will be rolled out to other countries and will grow over time.

As the data systems and skills come online, the approach will support proactive dissemination of the data internally among congregations and externally in the human development ecosystem. Proactive dissemination will reinforce knowledge about the capacities and work of Catholic sisters, as well as model data platform capabilities for potential partner organizations.

In a parallel effort to create long-term knowledge, the approach will be to commission one or more 10-15-year studies of representative congregations or ministry areas to improve our understanding of the most important factors in the growth or decline of sisters' congregations, the effects of generational change, and the quantitative scope of their human development role. This research will be a critical element in defining the areas of emphasis for the Catholic Sisters Strategic Initiative in coming decades.

## **Focus**

The geographic focus of the short-term work will be highly focused on two countries in Africa, with some added attention to improving data in the U.S. and internationally via UISG. This will be regarding the ministries in which Catholic sisters serve and how adaptability in some congregations has led to growth and vitality that might be adapted in others.

## **Key Activities**

### ***Build Capacity of Knowledge and Information Systems***

- Create and improve data systems to build the capacity of sisters and their congregations on data gathering and management
- Develop congregational and partner performance monitoring and evaluation plans to demonstrate proven and favorable models of programs implemented in all the Sisters Initiative portfolios

### ***Collect and Map Information and Research***

- Develop and implement integrated country congregational census processes
- Improve in-country mapping of Catholic sisters, congregations and ministry sites

### ***Spread Knowledge and Lessons Learned***

- Disseminate best practices, lessons, and evidence through publications, convenings and other knowledge-sharing platforms
- Build reliable and replicable plans with the Global Sisters Report to increase the visibility of Catholic sisters' work

## Results

### ***Increased Data and Knowledge Capacity and Availability***

- 22 sisters have been trained as data trainers (two people per conference in 11 conferences in Africa and at the UISG).
- 20 data systems, skills and capacities of Catholic sisters, their membership and organizations, and their ministries have been created and improved.
- A total of two data centers for Catholic sisters have been piloted in two countries in Africa.
- An integrated in-country congregational census process and mapping of sisters and their ministries in five countries have been developed.
- Support for umbrella leadership conferences of major superiors and partner organizations. Each conference will have at least one staff member or manager trained in data collection and data analysis.

### ***Broad Knowledge Dissemination***

- 15 analytical papers and results have been published in peer-reviewed journals.
- 10 communications and media strategies are in play targeted at disseminating the data and research to bring greater attention to Catholic sisters and their work.
- At least one longitudinal study is in progress to track entrance, formation, growth, and decline of congregations, conferences and vocations, with a focus on testing the theory of change and assessing the effect of investments in capacity and programs on congregation and conference stability, program quality and impact.





# Innovation and Sustainability



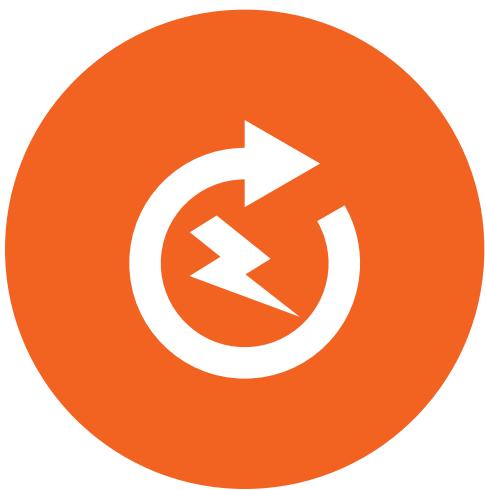
## Summary of Context

Many sisters' organizations face systemic challenges to their livelihoods and retirement plans that threaten the sustainability of their ministries. In some cases, sisters and congregations have addressed these systemic problems with innovative solutions (e.g., a social enterprise to both pursue ministry and increase financial sustainability). However, these models are not widespread due to weak networks and systems, and high risk related to new models. Hence, many congregations are not knowledgeable about the existence of alternative models of financing and managing their assets to sustain their congregations.

Guidance on how to implement these high-risk models is tenuous. Many complex problems do not have clear solutions (e.g., making scholarship funding sustainable, funding the costs of aging). Therefore, the Initiative has identified the need for innovation in the form of investment in ambitious experiments with the potential for high payoff. Such investments may also come with high risk, may be modeled on success in other areas (e.g., private commerce, banking or the nonprofit sector), or could require non-grant financial strategies such as program-related investments, revolving funds, or micro-financing to support revenue-producing social enterprises that will contribute to sustainability. These innovation examples apply to sisters' congregations, as well as their ministries.

## Goal

The goal of the innovation fund is to address systemic challenges that threaten the livelihoods of sisters, congregations, and organizations by creating solutions that will enable strong, sustainable and self-sufficient sisters' organizations with high-quality ministries.



## **Approach**

The focus of the innovation portfolio is on producing solutions to *systemic* organizational challenges that will help congregations endure. For example, a more sustainable financial model for aggregating resources for sisters' higher education may be sought, or a social business model for using real estate assets to produce revenue to sustain their human development services may also be explored. Of course, other portfolios will engage in innovative programming on an *activity* level. For example, an innovative activity that contributes to the achievement of the objectives in the human development portfolio may be funded, such as new training that teaches families how to keep young women in school.

The innovation portfolio will represent 10 percent of the Catholic Sisters Strategic Initiative resources.

Catholic Sisters Strategic Initiative will blend directed (i.e. pre-selected) and open-market (i.e. broad calls for best-in-class ideas) approaches to make the fund's resource decisions. The request for proposals will not be limited to sisters' organizations, but solutions do need to be tailored to sisters' unique set of challenges. Based on analysis during the first five years of the Catholic Sisters Strategic Initiative, the team has identified several core problems that require solutions, including:

- Financial sustainability of an aging congregation
- Sustainable finance for continuing education needs, including revolving fund models
- Ministry sustainability, including enterprise models
- Congregation revenue models
- Use of capital assets (e.g., land) for sustainable community development

These are broad problem areas. The advice of subject matter experts (e.g. financial planning experts, insurance executives, successful enterprise founders, and capital management experts) will be needed to identify innovative activities, select the best approach to gather best-in-class ideas, and structure experiments. Hence, the Catholic Sisters Strategic Initiative will organize and utilize external panels of experts to refine the focus of innovation investments and serve as advisors in judging proposals

for "game-changing" innovation in these areas. This approach will ensure that innovation portfolio investments take advantage of deep expertise, without having to significantly rely on internal staff to do so.

## **Focus**

The geographic focus of this portfolio is global. One criterion for the problem selection and structured solutions experiment is that innovative solutions be potentially applicable to a large number of organizations. Therefore, the innovation portfolio will remain geographically agnostic, and the premium will be placed on innovations that can be adapted to a variety of contexts.

The substance focus will be problems that represent core organizational impediments to the sustained vitality of sisters' organizations, with a preference for problems that are shared globally or that will be shared globally over time.

The organizational focus will be on those congregations, federations, or associations with the capacity to bear the managerial weight of innovation. These are likely to be larger, historically older organizations.



## Key Activities

### *Landscape Analysis and Solutions Selection*

- Identify four to six possible areas for financial or educational innovation investment
- Complete landscape analysis and scope possible initiatives
- Develop and convene one or more outside expert advisory groups around the most promising areas to gain perspective and advice on how to structure innovation and assess based on previous or aligned experience

### *Implementation*

- Develop the scope of two projects with this expert guidance
- Undertake the investment, either by pre-selection or through best-in-class ideas related to program development to advance solutions

### *Measure and Monitor Lessons Learned*

- Continually communicate with confederations globally on the progress of information obtained and lessons learned to ensure constant awareness at the forefront of experimentation
- Regularly meet with peer funders to share progress and lessons learned

## Results

This is a decadal effort that will be seeded in the next five years. The initial one to two years will require opportunity, due diligence and initiative in design. Start-up in the ensuing three years will likely begin to produce evidence of effectiveness, but will not afford a full measurement of impact.

Assessment in the Innovation portfolio will target two lines of inquiry: 1) the progress of the innovation itself in leading to a sustainable solution to the problem selected, and 2) the process by which the Sisters Initiative selects and manages such innovative problem-solving to ensure that subsequent rounds of innovation build out from these initial learnings. Assessment of the innovation portfolio will meet the following criteria:

- Solutions presented must address problems that are core to a congregation's viability and service excellence.
- Solutions are based on as much evidence and best practice information as is available, acknowledging that this evidence may come from other sectors.
- Innovation fund grantees demonstrate definitive results over the course of a defined period—positive or negative.





# Cross-Cutting Portfolio Activities

In alignment with the Foundation's philanthropic approach, each portfolio places emphasis on collaboration, communications and networking within and across portfolios. There are several barriers to collaboration that curtail these efforts to network, collaborate and communicate effectively, including language and cultural differences, trust issues with outside organizations, the rural vs. urban divide, access to technology and educational differences. The effectiveness of the approaches laid out in the portfolios will also need to be assessed across portfolios. The following section provides preliminary thinking about the dimensions of that assessment.



## COLLABORATION

- Based on congregation and service mapping, service provision linkages established through the various activities of the portfolios
- The spread of models for service, capacity-building or finance from one congregation to others
- The Catholic Sisters Strategic Initiative leverage of funding sources, or co-funding, that addresses more than one organizational or human development problem in multiple places
- Collaboration and cross-regional learning, trust-building and increased cultural understanding between conferences in the Global North and Global South or congregations from both geographic regions to solve particular issues named in the portfolios
- Data sharing across funders and congregations, and among elements of the portfolios, through the data platforms developed in the knowledge portfolio
- An emphasis on transportation and alternative forms of communication technologies to mitigate the barriers to collaboration sisters face in remote areas

From a measurement viewpoint, and based on an initial baseline assessment, collaboration will result in:

- Increased attendance at cross-regional conferences
- Co-funding of multiple portfolio initiatives
- Data and data analysis, and publications that reflect multiple regions
- At least five models from one location that are being applied in other geographic locations

## COMMUNICATIONS

- Multiple strengths and assets of sisters' organizations and services covered in varying media
- Growth of sisters' public leadership and profile that creates visibility for the human development work and their moral voice
- Multiple leadership roles in the broader public regarding youth and family well-being
- Knowledge and data developed serving as the underpinning for new and innovative approaches to core congregation needs

From a measurement point of view, with the absolute increases reflecting a baseline assessment, communications efforts should result in:

- Increased press coverage (broadcast, print and social media) of sisters' work
- Increased media coverage of sisters as advocacy voices
- Increased public recognition and understanding of the work of Catholic sisters

## NETWORKING

- A greater breadth of geographic participation in conferences, webinars and other learning gatherings
- Establish a baseline for sisters' participation in government and NGO forums on human development, particularly where the sponsorship is secular
- Greater flows of sisters for site visits between geographic areas to learn and apply "what works," e.g., between impoverished rural areas in the U.S. and Africa; between training programs in slums of India and those of Kenya; or between formators, so that strategies of congregations attracting young women are shared with those having difficulty in other regions

From a measurement point of view, this emphasis on networking should increase:

- Number of sisters from multiple geographic areas participating in convenings
- Number of sisters participating in NGO human development or data networks
- Number of sisters taking active leadership roles in NGO networks
- Number of formation initiatives that reflect adaptation of models from other congregations or geographies

# Measurement, Evaluation and Learning

The key to the success of this strategy is our ability to track, learn from, and respond to challenges and learning opportunities as they arise throughout the five-year program cycle. The Foundation has identified the use of MEL as a core tenet of effective grantmaking and adaptation to issues as they arise in the field. Therefore, we will continue to work with our MEL partner to evaluate the effectiveness of our grantmaking strategy throughout the five-year period. We will track our contributions to our short-term objectives that address the long-arc challenges to the vitality of Catholic sisters as they advance human development.

The role of our MEL partner is also to highlight models of success to stakeholders, identify gaps in knowledge, and explore opportunity areas for funding, as well as to cultivate and engage with best learning practices among grantees. Particular emphasis will be placed on addressing barriers to effective MEL activities. Some of these barriers include empowering sisters to collect, report and analyze their data and providing greater access to technology to enable data collection, evaluation and ultimately greater learning among sisters.

The Catholic Sisters Strategic Initiative team will continue to test and reevaluate its assumptions, reflect on lessons learned, and be flexible with the approach. The work will influence the field with the dissemination of learning materials that can address problems that arise so that sisters' organizations can design and deliver better services. Success in the implementation of this strategy will require proximity of staff to focus areas/countries to ensure successful implementation and effective partner support.



The Conrad N. Hilton Foundation  
**Catholic Sisters Initiative**  
*In Transition*



3rd Annual  
Measurement, Evaluation  
and Learning Report

# Conclusion



In the 2018-2022 program cycle, the Catholic Sisters Strategic Initiative will amplify and build on existing efforts and complement them with new undertakings. The work will balance a focus on the internal systems that build sisters' organizations and capacity with their work in external ecosystems. This is the link between internal capacity and human development ministry. The Catholic Sisters Strategic Initiative will also build knowledge and evidence with attention to data collection and research, particularly as it relates to building a baseline of data for this work. The Catholic Sisters Strategic Initiative will focus on demonstrating programming solutions by undertaking a portfolio that enables innovative investments to solve problems, such as sustainable finance, that are shared by sisters' organizations around the world. Communications, advocacy, research, leadership and collaboration will be cross-cutting functions across the four portfolios.

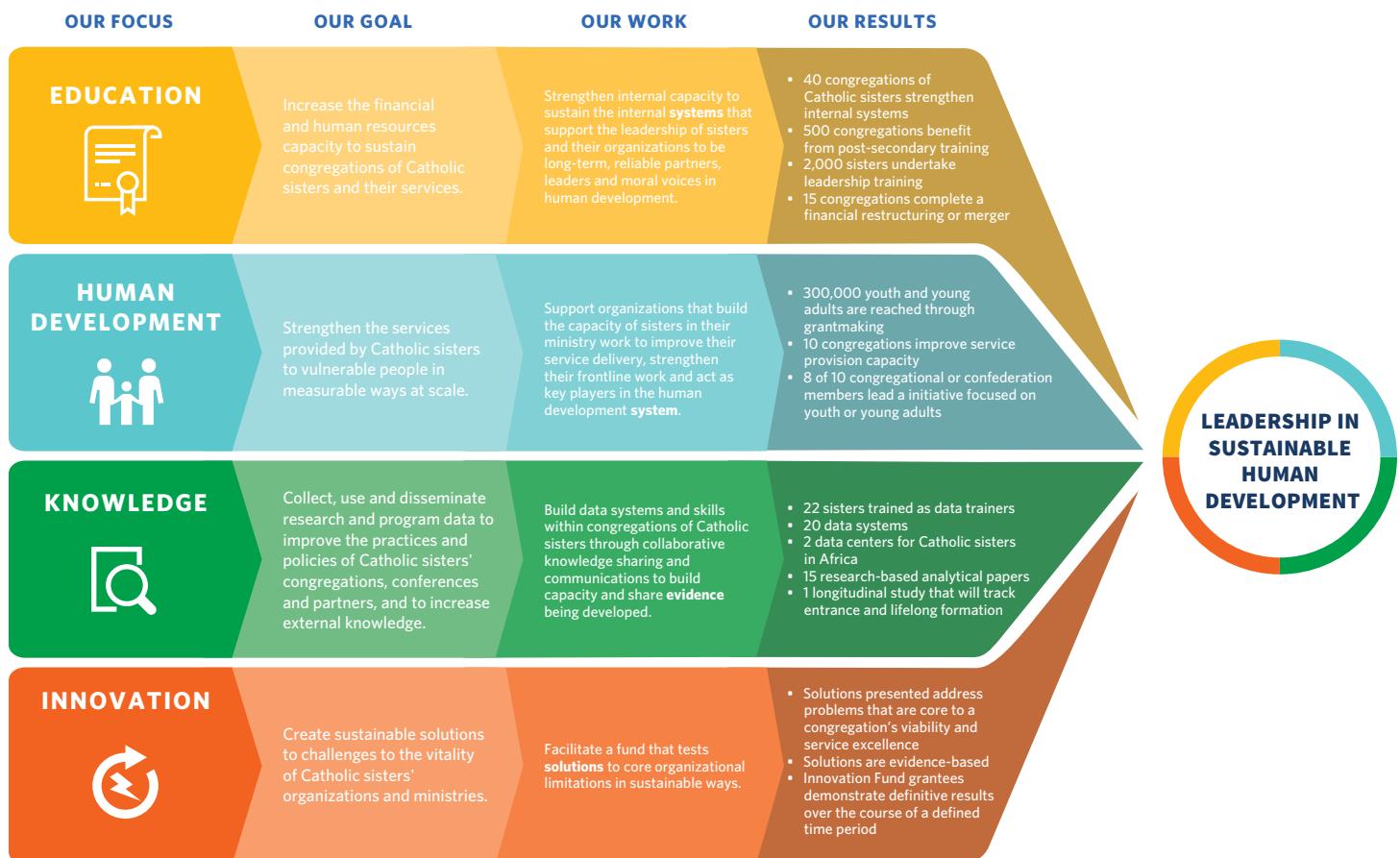
We are witnessing a changing landscape for the Catholic faith through the leadership of Pope Francis.

Since his appointment, the shift in the Dicastery for Promoting Integral Human Development presents an important opportunity to increase the awareness of Catholic sisters as leaders in this changing global landscape of faith. The fact that, in the last forty years, the number of Catholics in Africa increased by 238 percent is an indicator that we must harness the trust and unique role that sisters play in their communities to advance this work among the most vulnerable. The Foundation recognizes the alignment of our common vision with the Catholic sisters and we see them as crucial actors and beneficiaries of the global promise to end poverty by 2030 and beyond. The Catholic Sisters Strategic Initiative will work in partnership with a range of stakeholders from the public and private sectors. We look forward to building bridges with and across these networks while redefining leadership for sisters engaged in sustainable human development work that is grounded in the vitality of their spiritual witness.

# 2018-2022 Catholic Sisters Strategy Summary

## 2018-2022 Catholic Sisters Strategy

Our vision is for Catholic sisters to become recognized as global leaders in sustainable human development, grounded in the vitality of their services and spiritual witness.



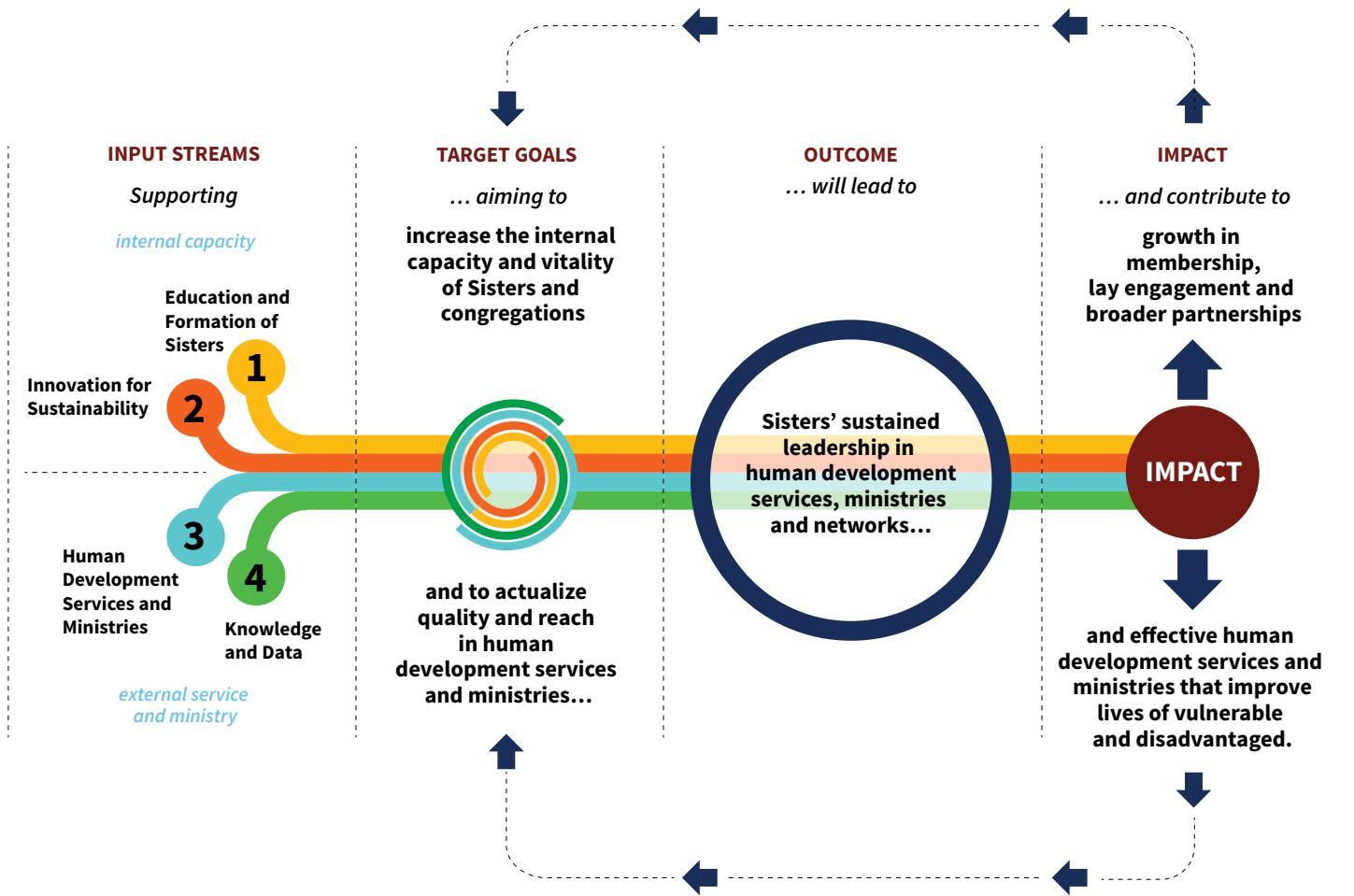
Since our inception, the Conrad N. Hilton Foundation has remained committed to improving the lives and ministries of Catholic sisters. Sisters are selfless leaders and often serve in the most difficult and remote places where needs are deepest. They are well-positioned to be vital actors and front-line workers in the global promise to end poverty by 2030 and beyond—a component of the Sustainable Development Goals’ (SDGs) universal call to make significant, positive change for people and our planet.

Monitoring, evaluation and learning within this initiative has set a path to help realize this future. The Foundation has produced a rich body of knowledge on Catholic sisters globally, created in partnership with the Center for Religion and Civic Culture at the University of Southern California. This research identifies opportunities to develop the capacity of sisters and their networks of support, and to heighten the visibility of sisters’ work with a public audience.

The goal of our strategy is to reinforce and support two synergistic elements of Catholic sisters: 1) the vitality, strength and sustainability of their congregations and conferences, and 2) the reach and effectiveness of their human development ministries which are the outcome of that vitality. The Foundation will continue to support sisters through education, formation and organizational support. Previous work to strengthen the global sisterhood will be complemented with new undertakings to support sisters in their role as resourceful, efficient leaders in sustainable human development. Our strategy brings sisters’ services into partnership with public and private organizations that share their mission to serve disadvantaged people from all backgrounds—building bridges within and across these networks and amplifying sisters’ leadership in the global community.



## Theory of Change





## Sisters' Education

The Foundation will expand sisters' access to post-secondary and higher education. We seek to increase sisters' organizational strength via leadership training, sharing best practices for management and financial planning of Catholic sisters' congregations and conferences, and lifelong formation programs.



## Human Development

With emphasis on Africa, Mexico and the United States, the Foundation will strengthen services for vulnerable and underprivileged youth (age 15-25) and their families through areas in which sisters have particular expertise: education, food security, healthcare, human trafficking and youth entrepreneurship. Prioritizing work performed in measurable ways and at scale will demonstrate that such services can improve the condition of these people.



## Knowledge

The Foundation's approach will be two-fold:

- Shorter-term focus on training, skill-building and dissemination of best practices for data acquisition, storage and use.
- Longer-term focus on longitudinal research that will dramatically increase understanding of trends in the vitality of sisters' organizations and the impact of their human development work.



## Innovation

The Foundation will invest in select long-term, ambitious experiments with the potential for high payoff: developing globally-applicable solutions to common financial and human resources sustainability issues of sisters' organizations. This process will include landscape analysis to identify promising answers, support for implementation and communication of lessons learned.

## ADDENDUM 2

### The SDGs and targets relevant to the Human Development Portfolio

#### GOAL 1.

##### **End poverty in all its forms everywhere**

TARGET 1.4: Ensure that men and women, in particular the poor and the vulnerable, have equal rights to economic resources, as well as access to basic services, ownership and control over land and other forms of property, inheritance, natural resources, appropriate new technology and financial services, including microfinance

TARGET 1.6: Create sound policy frameworks at the national, regional and international levels, based on pro-poor and gender-sensitive development strategies, to support accelerated investment in poverty eradication actions



#### GOAL 2.

##### **End hunger, achieve food security and improved nutrition and promote sustainable agriculture**

TARGET 2.3: By 2030, double the agricultural productivity and incomes of small-scale food producers, in particular women, indigenous peoples, family farmers, pastoralists and fishers, including through secure and equal access to land, other productive resources and inputs, knowledge, financial services, markets and opportunities for value addition and non-farm employment



#### GOAL 3.

##### **Ensure healthy lives and promote well-being for all at all ages**

TARGET 3.1: By 2030, reduce the global maternal mortality ratio to less than 70 per 100,000 live births

TARGET 3.3: By 2030, end the epidemics of AIDS, tuberculosis, malaria and neglected tropical diseases and combat hepatitis, water-borne diseases and other communicable diseases



#### GOAL 4.

##### **Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all**

TARGET 4.1: By 2030, ensure that all girls and boys complete free, equitable and quality primary and secondary education leading to relevant and effective learning outcomes

TARGET 4.6: By 2030, ensure that all youth and a substantial proportion of adults, both men and women, achieve literacy and numeracy



## **GOAL 5.**

### **Achieve gender equality and empower all women and girls**

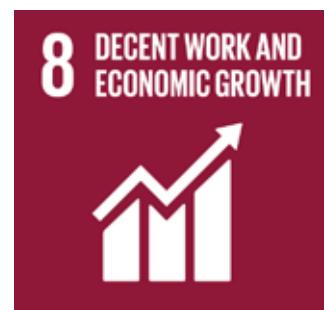


TARGET 5.2 Eliminate all forms of violence against all women and girls in the public and private spheres, including trafficking and sexual and other types of exploitation

TARGET 5.3: Eliminate all harmful practices, such as child, early and forced marriage and female genital mutilation

## **GOAL 8.**

### **Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all**



TARGET 8.3: Promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage the formalization and growth of micro-, small- and medium-sized enterprises, including through access to financial services

TARGET 8.6: By 2020, substantially reduce the proportion of youth not in employment, education or training

## **DEFINING HUMAN DEVELOPMENT**

Human development is about enlarging freedoms so that all human beings can pursue choices that they value. Such freedoms have two fundamental aspects—freedom of well-being, represented by functioning and capabilities, and freedom of agency, represented by voice and autonomy... Human development implies that people must influence the processes that shape their lives. In all this, economic growth is an important means to human development, but not the end. Human development is the development of the people through building human capabilities, by the people through active participation in the processes that shape their lives and for the people by improving their lives.

— United Nations Human Development Report 2016



*Photography by:*  
Catholic Extension  
Carmelite Sisters of the Most Sacred Heart of Los Angeles  
Donald E. Miller  
John Pham, TruStudios



CONRAD N.



FOUNDATION

30440 Agoura Rd.  
Agoura Hills, CA 91301