

# Executive Summary

The Conrad N. Hilton Foundation

# Catholic Sisters Initiative In Transition



3rd Annual  
Measurement, Evaluation  
and Learning Report

Center for Religion and Civic Culture  
University of Southern California  
April 2018

## WATCH

CRCC's videos illustrate themes  
in the MEL report. Watch them at  
<http://bit.ly/sistervideos>

# Introduction

The Conrad N. Hilton Foundation’s Catholic Sisters Initiative launched a five-year strategy in February 2013 to enhance the vitality of Catholic sisters around the world and to build their capacity to carry out ministries to the vulnerable and the poor. The Initiative aims to support efforts to attract, form and retain **members**, develop their **leadership** skills and help them take advantage of the financial and social **resources** available to them.

The Foundation awarded the Center for Religion and Civic Culture (CRCC) at the University of Southern California a grant in 2014 to evaluate the effectiveness of the Sisters Initiative’s first strategy. In its third MEL report, CRCC provides a cumulative look at the Sisters Initiative’s progress toward its indicators of success to date, as well as what it has learned since its launch. Over the past five years, the Sisters Initiative’s investments involved building a new field and adapting to a shifting global context. The report’s theme of transition applies not only to the Sisters Initiative as it develops the next iteration of its strategy, but also to the global Catholic Church and religious life. In its first five years, the Sisters Initiative necessarily devoted significant resources to gathering basic information and establishing relationships. As it moves forward, it is poised to incorporate what it has learned over the past five years into its future directions.

## Indicators of success

	<i>Global South</i>	<i>Global North</i>
<b>MEMBERSHIP</b>	Increase number of sisters with postsecondary credentials	Increase number of women who enter religious life
<b>LEADERSHIP</b>	High percentage of sisters with leadership training assume leadership positions	Increase number of qualified leaders under 60
<b>RESOURCES</b>	More congregations engage in effective financial planning	Higher percentage of congregations are more than 60 percent funded in retirement liability

# Trends and Challenges

**IN THIS CUMULATIVE MEL REPORT,** CRCC summarizes its foundational understanding of the Catholic and global context in which the Catholic Sisters Initiative operates. Building on previous findings in MEL reports and research CRCC conducted over the past year, this knowledge has been essential in the evaluation of the Sisters Initiative’s strategy and has helped the Sisters Initiative team think critically about how to direct its philanthropy. The Sisters Initiative’s transition to its next stage reflects a growing understanding of the changes underway within culture and religion.

## ***Trends***

The report describes the demographic shift from the global north to the global south in religion, the Catholic Church and religious life. The Catholic Church and sisters have seen significant growth in parts of Africa and Asia, while religious disaffiliation is a significant challenge to vocations in the US. Globalization, the digital revolution and the rise of networks and decline of bureaucracies have changed how people relate to religious institutions. CRCC also presents its paradigm of “reimagined communities”—groups that are responding to these global trends and helping people find meaning, community and identity both within and outside of traditional religious organizations. The qualities of these groups can be seen in CRCC’s exploratory study of four vital congregations of women religious. These four Southern California communities also show the international nature of religious life today, with more sisters coming from immigrant communities and serving in different parts of the world.

The election of Pope Francis as the first Latin American pope (shortly after the Foundation’s board of directors approved the Sisters Initiative strategy) represented a significant shift in the Catholic Church. In the past five years, he has brought a renewed emphasis on the Church’s prophetic social message and the importance of mercy, service and humility, both in papal statements and in his reform of the Roman curia. These changes have brought the official Church in alignment with the work of Catholic sisters around the globe, though they are not universally accepted. Sisters’ evangelical and social justice culture continues to be challenged in more conservative corners of the Church, even as Francis has elevated sisters as the face of the Church in their role as spiritual witnesses serving the vulnerable on the “peripheries.”

Sisters’ and the Catholic Church’s approach to “integral human development” is reflected in the international community’s 2030 Agenda for Sustainable Development. The United Nations adopted 17 Sustainable Development Goals (SDGs) in September 2015 with the aim of ending poverty, fighting inequality and protecting the environment. The Hilton Foundation has taken a leadership role within the philanthropic world to support the UN SDGs. CRCC’s case studies on three African countries show the complexity of implementing a strategy and measuring the impact of sisters on a particular goal, due to the interconnectedness of issues and the varying development priorities across countries. Nonetheless, Catholic sisters see the UN SDGs as relevant and translatable to the Church’s holistic model of development and are excited to advance them in their local contexts.

## Challenges for Sisters

In the face of the trends in religion, the Church and the world, sisters face a number of challenges, described in detail in the full report:

### Financial Sustainability

Key to the vitality of congregations, financial sustainability is a global issue. Sisters face common challenges of raising money, being undercompensated for their work, balancing congregational needs with needs of ministries, and creating sustainable sources of income.

### Human Resources Management

In the face of demand for their ministries, congregational leaders often do not have the skills to plan and manage personnel, resulting in low morale and less effective ministries. Across sub-Saharan Africa, leaders may lack training, while in the US, fewer sisters are available to manage congregations and ministries.

### Generational Differences

Human resources management exacerbates intergenerational tensions fed by differences in education, experiences and culture. Sisters at all stages of life need recognition for their skills and knowledge, and support as they navigate a rapidly changing Church and world.

### Lifetime Formation

Sisters' tireless commitment to serving the poor cannot be taken for granted. Personal and spiritual development—from postulancy through middle age and retirement—are essential to nurturing the deep spirituality that motivates their work.

### Interculturality

As the Church becomes more diverse and interconnected globally, sisters are working to ensure that members of different cultures enrich each other. The vestiges of colonialism and racism still plague both the Church and religious congregations, and cultural differences can discourage vocations.

### Networking

Collaboration among congregations allows for the efficient and effective use of resources. Together, congregations can respond to common challenges such as formation, create innovative ministries, and form coalitions that push for systemic change. Congregations can have greater impact when they extend their networks to include both Catholic and secular entities.

### Lack of Data and Research

Information currently available about both sisters' lives and their ministries is not comprehensive. Data can provide congregations, organizations that work with sisters and the Sisters Initiative with opportunities for greater learning, innovation and leadership.

As detailed in the full report, the Sisters Initiative has taken steps to address each of these challenges, while it has built a new field around supporting the vitality of sisters and enhancing their capacity to serve vulnerable communities. A significant part of its work over the past five years has involved building relationships with a wide spectrum of stakeholders and learning about the changing Catholic culture and its hierarchy. In doing so, it has built greater knowledge about sisters, their ministries and the organizations that support them, and elevated their leadership, particularly within the Church. Each of the challenges outlined in the MEL report, however, will continue to affect sisters globally. By bringing its relationships and knowledge into the next iteration of its strategy, the Sisters Initiative will be better able to help sisters as they advance human development.

# The Evolving Catholic Sisters Initiative

**THE CATHOLIC SISTERS INITIATIVE** has awarded 92 grants to 62 organizations, totaling \$105 million in funding since its launch in 2013. The full MEL report documents how the work of each grantee fits into the 2013 strategy's six indicators of success, which reflect major gaps identified in a landscape analysis of the needs of sisters in the global north and south.

In this executive summary, CRCC provides a cumulative analysis of progress on the six indicators, to date. The numbers under each indicator represent CRCC's best efforts to summarize different types of data across multiple grantees over the past five years. Data reported by grantees were often incomplete or irrelevant to the indicators of success, and typically focused on outputs rather than outcomes. Some grants are ongoing.

The Sisters Initiative has evolved as it developed partnerships and built its base of knowledge about the needs of Catholic sisters and their congregations around the world. The indicators of success incorporate 24 of the 62 grantee organizations. Grantees whose work does not fit neatly into the indicators of success are listed under three "other" categories, along with the metrics that they provided as a measure of success.

## Global North MEMBERSHIP

More women enter religious life

It is unclear whether the Sisters Initiative's investments have affected the baseline number of women who become sisters every year because most grantees do not provide data on new vocations. Two grantees helped aspirants join orders by relieving their debt, a significant barrier to religious life, while other grantees encouraged women on the path of discernment.

- 21 aspirants got rid of debt and joined order
- ~400 women discerning religious life reached through conversations or retreats
- 2,300 Irish women logged into vocation match

## Global North LEADERSHIP

More qualified leaders under 60

Slight progress has been made through one leadership program, a support organization for younger sisters, and a book project that documents areas in which younger sisters in the United States continue to need support.

- 183 sisters trained
- 6 retreats and 1 national gathering for younger sisters
- Publication of *In Our Own Words: Religious Life in a Changing World*

## Global North RESOURCES

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

Modest progress has been made toward assisting congregations in managing and funding their retirement liabilities. CRCC will be working on a landscape study of the challenges of aging and funding retirement in women's religious congregation in the summer of 2018.

- 10% of US women's congregations significantly reduced retirement liabilities
- Increased giving to Support Our Aging Religious (SOAR!)

## Global South MEMBERSHIP

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

The largest and most successful portion of the Sisters Initiative's portfolio, the membership area includes a broad range of grantees that support sisters' educational programs, from advanced degrees to in-service trainings.

- 1,858 certificates
- 1,314 in-service training
- 641 currently enrolled in a degree program
- 184 graduated with degree

Note: Does not include African Sisters Education Collaborative (ASEC) data prior to 2013

## Global South LEADERSHIP

High percentage of sisters with leadership training assume leadership positions

Data come solely from ASEC's alumnae surveys, which indicate that participants in the Sisters Leadership Development Initiative (SLDI) have gained leadership.

### **SLDI Phase III Participants**

(N=386)

- 39% received a promotion
- 36% asked to participate in other leadership activities

### **SLDI Phase IV Participants**

(to date, N=255)

- 82% received a leadership role/promotion in her ministry
- 53% Received a leadership role/promotion outside her ministry

Note: For both leadership and resources, CRCC is using ASEC survey data from the final year of SLDI Phase III, which ran from 2013 to 2015, and the most recent year of the ongoing Phase IV (2017). Questions were phrased differently between surveys. N is the total number of respondents to each question.

## Global South RESOURCES

More congregations engage in effective financial planning

Data come solely from ASEC's alumnae surveys, which indicate that SLDI has led to greater financial planning for alumnae congregations.

### **SLDI Phase III Participants**

(N=343)

- 17% Implemented both a strategic plan and financial plan for their congregation

- 13% Implemented a strategic plan

- 15% Implemented a financial plan

### **SLDI Phase IV Participants**

- 36% Implemented a strategic plan

- 35% Implemented a financial plan



## Other Grantees

### RELATIONSHIP AND ORGANIZATIONAL CAPACITY-BUILDING GRANTS

The Sisters Initiative identified and influenced key organizations that could effect change and help support sisters. Metrics vary widely, but include:

- Year of Consecrated Life activities
- Support for national and regional associations
- Leadership opportunities for sisters (not fitting global south/north indicators)
- Publications on sisters, laity
- Increased capacity of organizations serving sisters

### AWARENESS GRANTS

Evolved out of the global north indicator, these grants also affect sisters' ability to mobilize resources, exercise leadership and connect globally. Metrics vary—from the number of events held to the reach of websites and social media—and do not capture the impact of awareness. Some highlights include:

- More than 1 million website visitors and more than 3.5 million page views at Global Sisters Report
- More than 100 National Catholic Sister Week events held through mini-grants
- Communications training
- Podcasts and videos

### RESEARCH GRANTS

Grants addressed the lack of information on women religious, forming the foundation of the MEL process and the next iteration of the Sisters Initiative strategy.

Highlights include:

- Public opinion polling about Catholic sisters in the US
- Data collection about US and African sisters
- Studies of vitality in religious life
- Development and translation of life satisfaction survey
- A model of cross-sector collaboration with sisters, resulting in sanitation improvements in a slum area

The Sisters Initiative has made some progress in meeting the indicators of success for the 2013 strategy, especially in educating sisters and assisting congregations in managing their retirement liabilities. However, poorly developed indicators and the lack of relevant grantee reporting hindered greater progress on these indicators—as well as CRCC's ability to report on such progress.

With its indicators of success, the Sisters Initiative was trying to build a bridge while crossing it. The indicators present a challenge in that they are not tied to a clear theory of change; are not specific enough in terms of their definitions and parameters of measurable change (e.g., what is a high percentage of sisters and what type of leadership positions qualify in the global south indicator?); and are based on problematic assumptions around attribution (e.g., cause and effect around vocations). The Sisters Initiative team's implementation also led to a lack of data relevant to the indicators. Grantees shared spotty data or outputs rather than the outcomes or the larger impact of their work. Some of the indicators only have data from one grantee, and many highly valued grantees did not provide metrics that fit any of the indicators of success. Because the evaluation of the larger strategy is enhanced by data from individual grantees, their capacity to gather and report data is an important building block for future grant making.



In its attempt to fulfill the broader mission of its strategy, the Sisters Initiative identified new needs and adapted to them, even if these adaptations do not neatly fit within the indicators of success. The Sisters Initiative can bring the lessons of the past five years into the next iteration of its strategy by creating specific, well defined indicators—grounded in an overall theory of change—and requiring that grantees capture and share information relevant to those indicators. Nonetheless, the initial \$105 million investment in sisters developed a more tightly connected and aware global sisterhood that now stands much stronger and better equipped to meet the challenges it faces in providing spiritual witness to the world and serving the vulnerable and poor.

## Gaps, Opportunities and Strategic Recommendations

CRCC provides updates on the previous report’s four gaps and opportunities:

<i>Gap</i>	<i>Opportunity</i>	<i>Update</i>
<b>GAP 1:</b> If people do not see sisters, they are less likely to become or support a sister.	Elevate awareness as a central part of the Sisters Initiative strategy.	Raising the profile of sisters within and outside of the Church was perhaps the greatest, if unquantifiable, outcome of the strategy. The need to track awareness and its impact remains.
<b>GAP 2:</b> If the Catholic Church hierarchy does not demonstrate that it values the work of sisters, then sisters will not flourish.	Leverage the Sisters Initiative’s influence within the Church hierarchy to create more visible and tangible support for sisters.	Initiative has been strategic in engaging Church hierarchy and partners in Rome and in local contexts, but the need to cultivate support for sisters in the Church continues.
<b>GAP 3:</b> If sisters do not have networks of support for themselves, they may face burnout, dropout.	Adapt a “lifetime formation” approach and foster supportive networks of sisters.	Initiative made significant investments under “membership.” Future work could target key points in a sister’s lifetime, with opportunities for cross-congregational programs.
<b>GAP 4:</b> If Catholic sisters do not listen to the cultural sensibilities of different generations and populations, the global sisterhood suffers.	Incorporate a more nuanced view of geographic and cultural similarities and differences into the Sisters Initiative strategy.	Initiative’s future direction addresses global needs of sisters. Initiative will have to consider where and how it works, and how it disseminates information to effect change more broadly.

Both on operational issues and larger issues presented in the gaps and opportunities, it is clear that the Catholic Sisters Initiative has taken what it has learned during the past five years seriously and is working to incorporate these learnings into its future direction.

# Moving Forward

**WITH THE CATHOLIC SISTERS INITIATIVE** at an important stage of transition, CRCC's cumulative MEL report concludes with a discussion of how the Sisters Initiative can move forward in alignment with the Hilton Foundation's Philanthropic Approach, which focuses on solutions, systems and knowledge development.

Future grants must be based on a well-developed theory of change that addresses the answers to these questions: What are the assets of sisters? How can the Foundation maximize these assets? What evaluation measures and strategies can be built into the structure of grants so that the impact of the Foundation's philanthropy is well documented? How can information gained from its grant making be disseminated appropriately?

The Sisters Initiative will need to support sisters—through formation, education and organizational support—so that they can use their leadership to enact solutions and address issues at a systemic level. Part of knowledge development is creating structures at the Foundation level that will enable the Sisters Initiative to document the impact of their grant making. The Foundation also can play an important, catalytic role by building the capacity of congregations to think systemically about, document and share the impact of their work.

Along with senior management of the Foundation, the Sisters Initiative will need to determine the issues it can strategically address and the geographical locations where it can address them to make effective use of Foundation money.

This time of transition is an exciting moment, filled with great promise and possibility. Conrad Hilton saw sisters' value in improving the lives of vulnerable people, making certain that no one is left behind. What he did not foresee were the changing demographics of sisters, although as an astute businessman, he would have adapted his vision to take account of these changes. What is unchanging is sisters' belief in transcendent values, their commitment to consecrated life and their dedication to worship and service.

*“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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