



Measurement, Evaluation and Learning Report for the Conrad N. Hilton Foundation's Catholic Sisters Initiative Strategy

Center for Religion and Civic Culture
University of Southern California
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Introduction

The Conrad N. Hilton Foundation Catholic Sisters Initiative launched a five-year strategy in February 2013 to enhance the vitality of Catholic sisters and their work to advance human development around the globe. It 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 measure, evaluate and learn (MEL) about the effectiveness of the Initiative's five-year strategy. CRCC's second MEL report captures learning about the context in which the Foundation operates. It attempts to measure progress on the Sisters Initiative's indicators of success and evaluate its portfolio and current strategy. It concludes with a look forward at the second iteration of the Sisters Initiative strategy, due in 2018, with questions for the Foundation to answer before setting its new course.

Indicators of success

| | <i>Global South</i> | <i>Global North</i> |
|-------------------|---|--|
| 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 |

Trends and Challenges

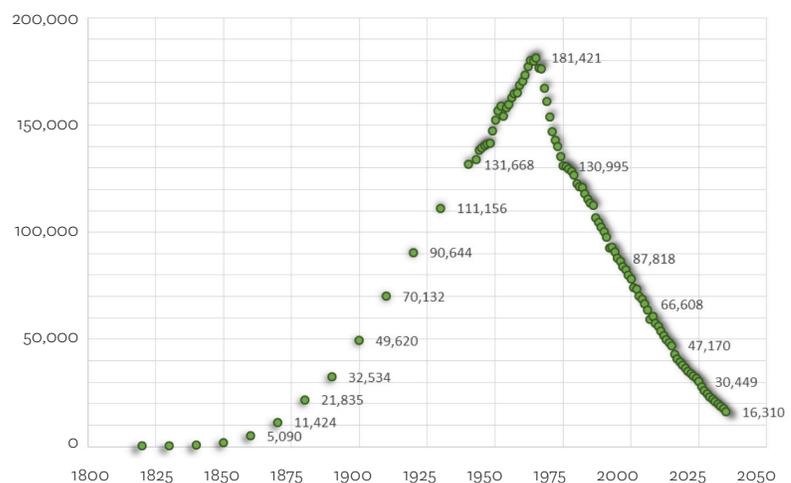
The Catholic Sisters Initiative began at a critical time for Catholic sisters worldwide, and understanding current trends can help the Foundation direct its giving to have the greatest impact. Under Pope Francis, the institutional Catholic Church has aligned more closely with the work of Catholic sisters around works of mercy and social justice. As the first Latin American pope, Francis' pontificate also symbolizes the center of the church moving to the global south. This shift in authority reflects the demographic trends described in depth in the report:

NORTH AMERICA. In the global north, the number of sisters has been declining for decades. By 2035, projections show there will be 16,310 sisters in the United States, with fewer than 4,000 of these under the age of 70.

SOUTH AMERICA. Latin America is the most Catholic part of the world, with 40 percent of Catholics globally and 30 percent of Catholic sisters, yet the Catholic population and vocations have begun to fall.

AFRICA. The church has grown 238 percent in Sub-Saharan Africa from 1980 to 2012. The numbers of African Catholic sisters, priests and parishes have all grown substantially, but have not kept up with the growth of baptized Catholics.

Religious Sisters in the United States 1820–2035



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

CRCC also explores two trends within the church with implications for the Sisters Initiative. First, while the global north and south seem to be headed in opposite directions, their futures are intertwined, as both resources and sisters themselves are transferred between countries. The financial sustainability of congregations, their ability to foster vocations and their work to advance human development are intimately connected across the world.

Second, Catholic women in the global north are finding new ways of living out their faith, and Pope Francis has opened the discussion about the possibility of ordaining women deacons. Lay associates, lay ecclesial ministers, full-time volunteers (post-collegiate or post-retirement), laity who work with sisters and women deacons could all provide either competition to or support for congregations of women religious, especially as their numbers are projected to decline in the global north.

Implications for the Sisters Initiative

Philanthropy is unlikely to change societal trends towards religious disaffiliation in the global north, and it is difficult to measure the impact of the Sisters Initiative on vocations. As the primary funder of Catholic sisters in many parts of the world, the Foundation can help sisters navigate this period and ensure that sisters have the resources that allow them to remain vital and continue their human development work around the globe. CRCC also recommends research into places where Catholicism is charismatic and vibrant and congregations are attracting vocations to better understand how the Initiative can shape the future of religious life.



Grant Activities and Collaborative Efforts

As of August 2016, the Initiative has funded 68 grants to 60 grantees, totaling more than \$90 million. It has expanded its funding and influence beyond Africa and the United States to include grantees and stakeholders in Asia, Europe, Latin America and the Caribbean, as well as some “global grants” that connect north and south. Africa still receives the largest amount in grants, while global north grants have declined since 2013, pointing to a shift from a global grant-making strategy to a focused regional strategy.

CRCC has mapped the growing network created through the initiative and clustered grantees into six overlapping categories. Doing so reveals important learnings for the Catholic Sisters Initiative:

Strategic development grants help build organizations to address unmet needs. The Initiative’s ability to meet its indicators of success can be hampered by organizational issues, including the size of grant, the scaling of the organization and the capacity of sisters running the organization.

Research/field-building grants help the Initiative understand the context in which they operate and better support the global sisterhood. There is still a dearth of data about sisters and their ministries in the global south.

The cornerstone of the Initiative’s strategy, **education and leadership development** grants have shown that investment is needed in both leadership/project management skills and subject expertise, such as health care. Investments in training programs vary in their outputs, and more data is needed to better understand the impact of training on the congregation and the wider community.

Communications and media grantees have become valuable network hubs, as connectors and incubators for innovative new ideas. “Awareness” still lacks a measure to understand the impact of such grants, and it is not captured in the current strategy.

Finance and fundraising grants address a primary concern of most sisters and congregations in the global north and south: the lack of resources. A “lifetime approach” to supporting sisters, from entrance to retirement, particularly applies with financial assistance.

The process of nurturing vocations is a long-term one, which sisters believe to be influenced by the Holy Spirit. The data show little success of **vocational ministry** grants in cultivating new vocations. The demographic trends indicate the Initiative is unlikely to make significant progress on reversing the decline in vocations in the global north.

The second iteration of the Sisters Initiative strategy, due in 2018, provides an opportunity for the Foundation and the Initiative team to seize on opportunities identified by the MEL project, develop new metrics and invest in areas that support the future growth and vitality of the global sisterhood.

Indicators of Success: 2016 Report Card

CRCC provides “report cards” for each of the six indicators of success, with limited data from grantees. The indicators of success are in various stages of development.

Global South MEMBERSHIP

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

The Foundation is the largest global funder of higher education for sisters. The various programs have a wide range in the costs per sister trained. The number of sisters with credentials does not fully capture the impact of sisters’ education on their ministries.

Across Grantees:

- 956 earned certificates
- 264 trained
- 86 admitted to degree programs
- 50 graduated with degree/diploma
- 148 retained for degree/diploma programs

Global South LEADERSHIP

High percentage of sisters with leadership training assume leadership positions

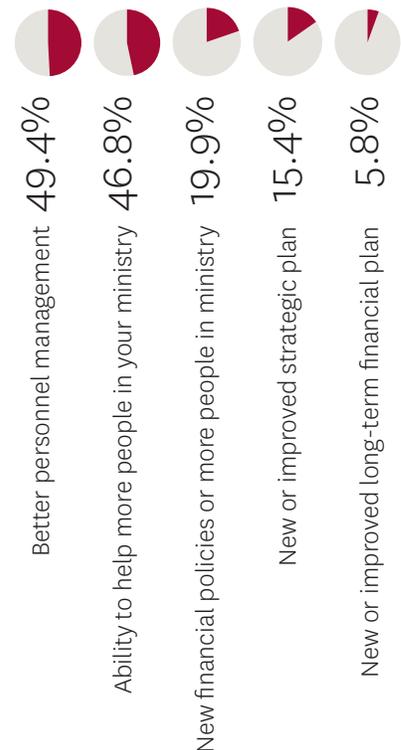
Beyond ASEC’s alumnae surveys, there is limited data to inform the Initiative about the progress being made towards increasing sisters’ leadership roles inside and outside their congregations.

- 20,974 people mentored by SLDI alumnae
- 360 SLDI alumnae promoted
- 394 SLDI alumnae asked to participate in leadership activities
- 85 SLDI alumnae pursuing diploma/degree

Global South RESOURCES

More congregations engage in effective financial planning

Nearly half of ASEC SLDI alumnae report better personnel management and ability to help more people, with a fifth reporting new financial policies. There is little other information on progress on this indicator beyond ASEC’s surveys.



**Global North
MEMBERSHIP**

More women enter religious life

Two grants addressing student loan liabilities have allowed 10 women to enter congregations. This number is significant, considering only an average of 92 women per year since 2010 have made their final vows. There is no direct way to measure how the grantees that raise awareness of sisters contribute to women entering religious life, making this indicator an unrealistic measure of the Initiative.

**Global North
LEADERSHIP**

More qualified leaders under 60

Grants work on building networks of support for and raising the voices of young sisters. None of the four grants working in this area directly speak to the number of qualified leaders under the age of 60 created through their programs.

**Global North
RESOURCES**

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

Through the NRRO grant, around 10% of women's congregations in the United States have seen a significant reduction in their retirement liabilities. Assisting congregations in planning and funding the retirement of their members is critical in honoring the work of older sisters and reducing the economic burden on younger sisters.

Conclusion

The indicators determined by the 2013 strategy are an imperfect measure of the Initiative's efforts. An evaluation of the indicators is only as useful as the framing of the indicators and the data reported by grantees. The second iteration of the Sisters Initiative strategy could include realistic metrics that can be measured by grantees and used to determine the impact of grants on set targets.

The original set of indicators also does not include an indicator on "awareness," though it is a cornerstone in building a vital global sisterhood that can advance human development. Some major grantees (e.g., National Catholic Sisters Week, Global Sisters Report, A Nun's Life Ministry, National Religious Vocations Conference) make significant contributions to the Initiative even though their work falls outside the current set of indicators. By including metrics that take "awareness" into account, the second iteration of the strategy would measure the full impact of the Initiative's investment.

Finally, the indicators do not capture the network developed around "global sisterhood." The Initiative has taken a leading role in connecting a disparate group of congregations, funders, religious conferences, academic research centers, nonprofit organizations and members of the ecclesiastic church, from parish priests to Vatican officials. The second iteration of the strategy could capture the Initiative's network development and its amplifying effect on the work of sisters to advance human development.

Gaps, Opportunities and Strategic Recommendations

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

| Gap | Opportunity | Update |
|---|---|---|
| <p>GAP 1: If people do not see sisters, they are less likely to become or support a sister.</p> | <p>Elevate awareness as a central part of the Sisters Initiative strategy.</p> | <p>Initiative and grantees recognize the need for awareness. The U.N. SDGs emerged as an opportunity to promote sisters.</p> |
| <p>GAP 2: If the Catholic Church hierarchy does not demonstrate that it values the work of sisters, then sisters will not flourish.</p> | <p>Leverage the Sisters Initiative’s influence within the church hierarchy to create more visible and tangible support for sisters.</p> | <p>Initiative has fostered relationships within the hierarchy. Significant obstacles remain at parish and diocesan levels around the world.</p> |
| <p>GAP 3: If sisters do not have networks of support for themselves, they may face burnout, dropout.</p> | <p>Adapt a “lifetime formation” approach and foster supportive networks of sisters.</p> | <p>Need for support across sisters’ lifetimes emerged as an issue across global north and south. There is an opportunity to provide support through non-consecrated men and women.</p> |
| <p>GAP 4: If Catholic sisters do not listen to the cultural sensibilities of different generations and populations, the global sisterhood suffers.</p> | <p>Incorporate a more nuanced view of geographic and cultural similarities and differences into the Sisters Initiative strategy.</p> | <p>Initiative and partners have embraced the “global sisterhood.” It has become clear that factors affecting congregations’ vitality are interconnected globally, with opportunities among immigrant populations and south-south connections.</p> |

Two additional opportunity have emerged that relate to how the Sisters Initiative operates:

1 The Hilton Foundation could serve as a “communication hub” for groups supporting sisters

2 The Sisters Initiative could have greater collaboration with the Conrad N. Hilton Fund for Sisters

Moving Forward

With the second iteration of the Sisters Initiative strategy due in 2018, CRCC identified ten questions for the Foundation, its trustees and the staff of the Sisters Initiative to address as it determines how it can best support sisters and help them advance human development. In short, these questions are:

1. Considering the decline in the number of sisters in the global north, can the Foundation successfully challenge demographic trends and at what cost?
2. What is the Foundation's role in supporting aging sisters in the global north?
3. How would Conrad Hilton approach assisting sisters in light of the demographic trends of the past 50 years? Would he consider new opportunities for his charitable investments related to the religious calling of women?
4. If the leadership of the Foundation is highly committed to being a partner with the United Nations in addressing the United Nations Sustainable Development Goals by 2030, which goals can the Sisters Initiative address in a strategic manner and how?
5. If addressing the U.N. Sustainable Development Goals is a priority, should the Foundation focus on a particular region of the world, or even specific countries within that region, or should it broaden its influence across the global sisterhood?
6. Considering the limited capacity of the Sisters Initiative team, how will the Foundation support the Initiative's efforts to address global and/or regional needs?
7. How can the Foundation continue to play a catalytic role in working with the 700,000+ sisters around the globe?
8. How can the Catholic Sisters Initiative work with the Fund for Sisters in a more integrated way, given the fact that both programs are funded by the same donor?
9. How will Initiative staff make judgments regarding renewal of grants, considering lack of data or alignment with the first strategy's set of indicators? How can the Foundation build both internal and external capacity for measurement, evaluation and learning?
10. To what extent and how does the Foundation want to maintain its role as the primary funder and connector within the global sisterhood, even as funding relationships with key players in the Catholic world change?

As a MEL partner, CRCC does not take a position on the questions. In the full report, CRCC provides context to understand the work of the Sisters Initiative and evaluated its effectiveness in meeting the goals outlined in the current strategy. CRCC looks forward to continuing to support the Foundation's efforts to help Catholic sisters as they advance human development.

“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



USCDornsife
*Center for Religion
and Civic Culture*

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

PHONE (213) 743-1624

FAX (213) 743-1644

EMAIL crcc@usc.edu